POLARIS
INTEGRATED LIBRARY SYSTEM

What's New in Polaris® 4.0

This document summarizes what's new and different in Polaris 4.0, as of build 4.0.337 (general release). For detailed information, see Polaris 4.0 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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This document is written for Polaris 4.0.337 (general release).

Contents

Polaris 4.0 Requirements

Important:
Review all licensing issues and requirements whenever you install any Microsoft products. Current Microsoft Service Packs and Windows updates must be applied to all server and workstation system software before you upgrade.

Polaris 4.0 works with the operating systems listed below. Additional required support software is installed automatically from the Polaris Windows Component Update application.

Polaris Servers

- Windows Server 2008 64-bit (Standard, Enterprise, Datacenter Editions)
- Windows Server 2008 R2 64-bit (Standard, Enterprise, Datacenter Editions)

Polaris Database

- Microsoft SQL Server 2008 64-bit
- Microsoft SQL Server 2008 R2 64-bit

Polaris Workstations

- Windows XP 32-bit
    - Professional Edition
    - RAM: 512MB minimum/1GB recommended
- Windows Vista 32-bit
    - Business, Ultimate, Enterprise Editions
    - RAM: 1GB minimum/2GB recommended
- Windows Vista 64-bit
    - Business, Ultimate, Enterprise Editions
    - RAM: 1GB minimum/2GB recommended
- Windows 7 32-bit
    - Professional, Ultimate, Enterprise Editions
    - RAM: 1GB minimum/2GB recommended
- Windows 7 64-bit
    - Professional, Ultimate, Enterprise Editions
    - RAM: 1GB minimum/2GB recommended

Upgrades

You can upgrade to Polaris 4.0 from Polaris 3.6.282 or later. Customers using Polaris 3.5 must upgrade to 3.6.282 or later before installing Polaris 4.0.

Administration

This section summarizes the Polaris Administration settings that support Polaris 4.0 features, and describes general new features in Polaris Administration.

New and Modified Parameters, Profiles, and Tables

The table lists the new and modified parameters, profiles, and tables that support Polaris 4.0. For more information about new features, see the other sections of this document as listed in the table and Polaris 4.0 online Help (administration topics).

Important:
The following profiles have been moved from the PowerPAC tab to the PAC tab in Polaris Administration:
Hours of operation: Display (replaces PowerPAC profile **Navigation: Hours**)
Search: Sub-sort-by-title
Title Display: Configure

Profiles/Parameters/ Tables	*Purpose*	*Default*	*Level*	*More Info*
Acquisitions/Serials Profiles				
Acq Fund droplist setup (modified profile)	The branches and funds that display in line item segments can be limited to those branches for which the selector has been granted the new branch-level permission **Selection List Line Item Segments: Create, modify, delete.**	N/A	System, Library, Branch, Staff member	"Selection List Enhancements" on page 32
EDI Invoice Defaults (modified profile)	Added a check box to prevent the automatic creation of EDI invoices for partial shipments.	Unchecked	System, Library, Branch	"Options Added to the EDI Invoice Defaults Profile" on page 26
	Added a check box to load or not load header charges if present on the EDI invoice,	Checked - Load supplier header charges	System, Library, Branch	"Options Added to the EDI Invoice Defaults Profile" on page 26
	Added a check box to update or not update on-order items when the linked purchase order line item is received automatically.	Unchecked - Update on-order item circulation status	System, Library, Branch	"Options Added to the EDI Invoice Defaults Profile" on page 26

Profiles/Parameters/ Tables	*Purpose*	*Default*	*Level*	*More Info*
Cataloging Profiles				
$9 Cleanup Utility	Specify the 949, 970 or other tags to delete automatically after processing is done and a $9 has been inserted in the tag.	None	System	"Automatically Remove Processed 852, 948, 949 or 970 Tags" on page 40
Check headings immediately after bib replace	If set to Yes, the headings are checked as soon as a bibliographic record replaces one or more bibliographic records.	Yes	System, Library, Branch, Staff	"Replace Bibliographic Records" on page 53
PAC Profiles				
Enriched data	New NoveList option - NoveList Plus customer check box	No (not checked)	System, Library, Branch	"NoveList Plus Setting" on page 166
	New ChiliFresh option - Cover Images sub-tab	No (not checked)	System, Library, Branch	"ChiliFresh Cover Images" on page 163
Hours of operation: Display	Controls whether the hours table is displayed on the Hours page of Polaris PowerPAC and Mobile PAC.	Yes	System, Library, Branch	"Hours of Operation Message in PAC" on page 156
Hours of operation message	Set up a message to be displayed on the Hours page (Polaris PowerPAC and Mobile PAC).	None specified	System, Library, Branch	"Hours of Operation Message in PAC" on page 156
Item availability: Display due date in detailed item status	Displays the due date in item availability information when you choose to display detailed item status.	Yes	System, Library, Branch	"Suppressing the Due Date in Item Availability" on page 147
Patrons can remove reading history	Determines whether a patron can remove items from the reading history in the PAC patron account.	No	System, Library, Branch	"Removing Items from Reading Histories" on page 118
Patron Access Options - Update Info tabbed page	Separate options for PAC updates to address, notification method, e-mail address (with optional verification block), phone number (with optional verification block).	Various	System, Library, Branch	"Updating Account Information from PAC" on page 158
Search: Sub-sort-by-title	Specifies whether search results for many types of searches and sort orders are automatically subsorted by title.	No (unchanged)	System, Library, Branch (unchanged)	Moved from PowerPAC profiles tab to PAC profiles tab

Profiles/Parameters/ Tables	*Purpose*	*Default*	*Level*	*More Info*
Suppress availability and requests	Specifies types of material (TOMs) for which request and availability options should be suppressed from PAC	Various	System, Library, Branch	"Suppressing Request and Availability Features in PAC" on page 142
Title Display: Configure	Controls which data elements are displayed in Polaris PowerPAC brief, expanded, and full views for a title in the search results set, and in ActivePAC Brief Record and Full Record views.	Unchanged	System, Library, Branch (unchanged)	Moved from PowerPAC profiles tab to PAC profiles tab
Title Display: Configure (Brief Title Display)	New options - Former Title (780 selected subfields) and Later Title (785 selected subfields) fields.	Yes	System, Library, Branch	"Former Title and Later Title in PowerPAC Brief Title Display" on page 146
PowerPAC Profiles				
Bookmarking & Sharing: Enable	Enable social bookmarking for titles in PowerPAC search results.	No	System, Library, Branch	"Social Bookmarking for PAC Search Results" on page 133
Bookmarking & Sharing: User name for AddThis analytics	Specify AddThis user name for social bookmarking analytics.	None	System, Library, Branch	"Social Bookmarking for PAC Search Results" on page 133
In-house access definitions: Setup	Specify how to determine whether a workstation is in-house	Use In-House IP Addresses table and registered workstations	System, Library, Branch	"Defining In-House Access" on page 151
Item availability: "Text it"	From PowerPAC search results, send an item call number by text message.	Yes	System, Library, Branch	"Send a Call Number by Text Message (Text It)" on page 148
Navigation: Hours	Specifies whether patrons can view the Library Hours page in Polaris PowerPAC.	Yes (unchanged)	System, Library, Branch (unchanged)	Replaces PowerPAC profile **Hours of operation: Display**. See "Hours of Operation Message in PAC" on page 156.
Patron inactivity timeout	Sets a period of inactivity after which a logged-in patron at a library workstation is automatically logged out. Applies to in-house workstations only.	Not enabled	System, Library, Branch	"Patron Inactivity Timeout at Library Workstations" on page 152
Mobile PAC Profiles (see "Mobile PAC" **on page 131**)				
Ask Us: Require login	Specifies that the user must log in to use the Ask Us feature; if set to No, user may send question as "guest"	Yes	System, Library, Branch	
Branch switching: Enable	Allows user to change connection organization	Yes	System, Library, Branch	

Profiles/Parameters/ Tables	*Purpose*	*Default*	*Level*	*More Info*
Mobile PAC Analytics	Enables Google Analytics or custom JavaScript analytics to track usage statistics	No	System, Library, Branch	
Navigation: Ask us	Provides Ask Us link to send question to the library	Yes	System, Library, Branch	
Navigation: Fines & Fees	Provides access to Fines & Fees page of patron account	Yes	System, Library, Branch	
Navigation: Items out	Provides access to Items Out page of patron account	Yes	System, Library, Branch	
Navigation: Patron account	Provides access to patron account	Yes	System, Library, Branch	
Navigation: Requests	Provides access to Requests page of patron account	Yes	System, Library, Branch	
Navigation: Web site URL	Specifies destination for the Full Site link on the Mobile PAC home page, typically your library Web site.	[not defined]	System, Library, Branch	
New and Popular Titles	Enables and specifies categories for new and popular titles searches	All enabled	System, Library, Branch	
Remember me: Enable	Places the Remember me check box on the log-in screen. When the patron checks this box, the user name or barcode is preserved from session to session by a cookie on the device, so that the next time the patron connects to Mobile PAC and chooses to log in, the information is already filled in. The patron must always enter the password, and can choose to clear the Remember me check box.	Yes	System	
Patron Services Profiles				
Enable patron preferences - renamed Patron can enable/disable reading history	Specifies if the patron can stop or start a reading history from the PAC patron account. If the setting is Yes, the option is available in the Contact Information and Preferences section of the PAC patron account.	Not enabled	System, Library, Branch	"Enable Patron Preferences Profile Renamed" on page 120
Staff Client Profiles				

Profiles/Parameters/ Tables	*Purpose*	*Default*	*Level*	*More Info*
Client/server date/time discrepancy check: Enable	Enforces time setting consistency checking.	Yes	System, Library, Branch, Workstation	"Client/Server Consistency in Locale and Time" on page 13
Client/server date/time discrepancy beyond built-in 5 minute window (minutes)	If you enable the time discrepancy check, the system allows a five-minute discrepancy between client and server time settings. If you want to add more time to the allowable five minutes, specify the number of additional minutes (0-999).	0	System, Library, Branch, Workstation	"Client/Server Consistency in Locale and Time" on page 13
Client/server date/time discrepancy warning message	If you enable the discrepancy check, this message is displayed at staff client log-in when the discrepancy between client and server time settings exceeds the system's five-minute margin but is less than any additional minutes you have set.	Warning: Client time setting is more than 5 minutes different from server setting.	System, Library, Branch	"Client/Server Consistency in Locale and Time" on page 13
Client/server date/time discrepancy violation message	If you enable the discrepancy check, this message is displayed at staff client log-in when the discrepancy between client and server time settings exceeds the system's five-minute margin plus any additional minutes you have set. The log-in fails.	Log-in failure! Client time setting discrepancy with the server setting is beyond the configured threshold!	System, Library, Branch	"Client/Server Consistency in Locale and Time" on page 13
Locale settings between the client and server must match	If this profile is set to Yes and the client and server settings do not match, the staff client log-in fails and a message regarding the locale settings is displayed.	Yes	System, Library, Branch, Workstation	"Client/Server Consistency in Locale and Time" on page 13
Receipt printer control codes	New option - Auto-cut control code for Epson TM series printer	Not enabled	System	"Epson TM Series Receipt Printer - Auto-Cut Control Code" on page 130
Utilities: Web browser default URL	Specifies the default Web page for the staff client Utilities-Web Browser option.	http://polarislibrary.com	System, Library, Branch	"Default Page for Staff Client Web Browser" on page 18
Patron Services Parameters				
Check-in: Receipt options	Specify information fields for check-in receipt	Item barcode, title, author, material type, call number, patron's limited barcode	System, Library, Branch	"Check-In Receipt Printing" on page 128

Profiles/Parameters/ Tables	*Purpose*	*Default*	*Level*	*More Info*
Consortium circulation	New option - Governing library for lost item recovery	Transacting branch	System	"Lost Item Charges" on page 86
Lost item charge options	Consolidates existing lost item parameters and includes new option - Lost item: Charge overdue when returned	N/A	System, Library, Branch	"Lost Item Charges" on page 86
Lost item recovery options	Includes new option on Lost-and-paid recovery tabbed page - Charge overdue fine	N/A	System, Library, Branch	"Lost Item Charges" on page 86
Outreach title rating enabled	Enable reader ratings for Outreach Services patrons	No	System, Library, Branch	"Outreach Services - Reader Ratings" on page 109
Outreach title rating	Set up the rating scale for Outreach Services reader ratings	None defined	System	"Outreach Services - Reader Ratings" on page 109
ORS packing list	Define header and rating line text for Outreach Services packing list	None defined	System, Library, Branch	"Outreach Services - Reader Ratings" on page 109
ORS automatically print packing list	Determines whether a packing list is automatically printed when items are checked out to Outreach Services patrons	No	System, Library, Branch	"Outreach Services - Reader Ratings" on page 109
ORS: Prompt for update during normal check-out	Displays a prompt to update the next service date for an active ORS patron during normal check out	Yes	System, Library, Branch	"Update Service Date for ORS Patrons from Normal Check Out" on page 116
ORS reading history	Set reading history limits for Outreach Services patrons	3 years, 1000 titles	System, Library, Branch	"Reading History Limits for Outreach Services Patrons" on page 118
Patron message text: Configure	Set up and translate predefined messages for posting to patron accounts	None	System, Library, Branch	"Posting Messages to Patron Accounts" on page 103
Patron message text: Expiration period	Set an automatic expiration period for messages posted to patron accounts	14 days	System, Library, Branch	"Posting Messages to Patron Accounts" on page 103
Remove patron ID from circ transactions	Enable purging of patron identification information and set a term for purging	Not enabled	System, Library, Branch	"Removing Patron IDs from Circ Transactions" on page 123
Notification Parameters				

Profiles/Parameters/ Tables	*Purpose*	*Default*	*Level*	*More Info*
Notification options	Dialog box redesigned; new options for text message notices	Various	System, Library, Branch	“Changes to Notification Setup” on page 98 “Text Message Notification” on page 92
PAC Parameters				
SSL: Enable: Mobile PAC	Enables site-wide secure Socket Layer for Mobile PAC (uses https)	No	Server	“Mobile PAC” on page 131
URL of the Mobile PAC’s root	The address the user enters to connect to your Mobile PAC catalog, or the address to which the user is automatically re-directed when she connects to your PowerPAC from a mobile device.	http://[localhost]/mobile	Server	“Mobile PAC” on page 131
Request Parameters				
Borrow by mail	Licensed feature (no additional cost). Set up Borrow by Mail request processing.	N/A	System, Library, Branch	“Borrow by Mail” on page 62
Holds options - Requests tabbed page	Default pickup branch selections changed	N/A	System, Library, Branch	“Default Pickup Branch for PAC Requests” on page 80
Holds options - Staff & PAC tabbed page	New option: Enable request status “Out”. Enables this request status and displays requests with this status in staff client and PAC patron account.	Not enabled	System, Library, Branch	“Request Status of Out” on page 76
Holds options - Staff & PAC tabbed page	New option: PAC display contact info. Displays contact info and update link on PAC request confirmation page.	Not enabled	System, Library, Branch	“Display Contact Information on PAC Hold Request Page” on page 78
Holds options - Staff & PAC tabbed page	New option: PAC block for patron verification. Blocks hold requests from PAC when there is a verification block on the patron record.	Not enabled	System, Library, Branch	“Blocking Hold Requests for Patron Data Verification” on page 80
Cataloging Parameters				

Profiles/Parameters/ Tables	*Purpose*	*Default*	*Level*	*More Info*
Mark embedded holdings tag as processed	When bibliographic records are imported, and item records are created from embedded holdings tags, a $9 will be inserted in the tag. This flags the tag so that a utility can be run to remove it.	Yes	System	"Automatically Remove Processed 852, 948, 949 or 970 Tags" on page 40
Auto-suggest feature enabled	If set to **Yes**, automatic suggestions appear in the Find Tool for phrase and keyword searches for bibliographic, item, authority, and patron records.	Yes	System	"Automatic Suggestions for Keyword and Phrase Searches" on page 14
Bibliographic records replace: Maximum allowed in one operation	Limits the number of records that can be replaced at once.	50 (limit 999)	System	"Replace Bibliographic Records" on page 53
SelfCheck Unit Parameters				
Polaris ExpressCheck: Blocking conditions	Includes new option on Patron Blocks tabbed page to block transactions by patrons registered at a different branch.	Not enabled (does not block)	System, Library, Branch	"Limit to Registered Patrons" on page 171
Polaris ExpressCheck: Enable	New option: Prompt for checkout receipt. Makes printed receipt optional.	Not enabled	System, Library, Branch	"Prompt for Receipt" on page 172
Collection agency block: Patron is blocked	Block SIP self-check transactions if patron has collection agency block	Yes	System, Library, Branch	"Collection Agency Blocks" on page 168
Database Tables				
Hold Request Statuses	Sets display names for standard hold request status descriptions	Standard status descriptions are used	System	"Hold Request Status Descriptions" on page 81
Mobile Phone Carriers	Specifies mobile phone service carriers for selection in staff client and PAC	N/A	System	"Text Message Notification" on page 92

New or Modified Permissions

Acquisitions

The existing Acquisitions permission **Create, modify, delete 'own' SL line segments** was removed, and all users who previously had this permission will automatically get the new branch-level permission **Selection list line item segments: Create, modify, delete**. See "Selection List Enhancements" on page 32.

The new Acquisitions permission **Receive Shipment: Allow,** available at the system level, can be granted to staff who receive shipments but may not have access to purchase orders or invoices. With this permission, along with the **Access Acquisitions: Allow** permission, staff members can use the Receive Shipment workform to enter a barcode for the physical item in the shipment, which checks in the item and receives the purchase order line item segment. See "Receive Shelf-Ready Items" on page 21.

The new Acquisitions permission **Process EDI invoices: Allow** can be granted to staff who have the task of reconciling invoice line items where the number of copies received for one or more line items does not match the number of copies ordered for one or more purchase order line items. See "Options Added to the EDI Invoice Defaults Profile" on page 26.

Cataloging

The following new Cataloging permissions allow staff members to suppress warning messages when deleting multiple cataloging records:

Note:
Equivalent circulation permissions were added to suppress warning messages when deleting patron records. See "Circulation" on page 11.

- **Suppress warnings for breakable links when deleting multiple bibliographic records: Allow**
- **Suppress warnings for breakable links when deleting multiple item records: Allow**
- **Suppress warnings for unbreakable links and other stopping conditions, when deleting multiple bibliographic records: Allow**
- **Suppress warnings for unbreakable links and other stopping conditions, when deleting multiple item records: Allow**

For more information on how users with these permissions can suppress warning messages, see "Suppress Warning Messages When Deleting Multiple Records" on page 19.

Circulation

The new system-level Circulation permissions **Suppress warnings for unbreakable links and other stopping conditions, when deleting multiple patron records: Allow** and **Suppress warnings for breakable links when deleting multiple patron records: Allow** are required to suppress the warning messages that appear when deleting multiple patron records. See "Suppress Warning Messages When Deleting Multiple Records" on page 19.

The new organization-level Circulation permission **Hold requests: Modify PAC display note** is required to add a PAC display note on the Hold Request workform - Notes view. The note is displayed in the PAC patron account. By default the permission is granted to the Administrator group only. See "PAC Display Note for Hold Requests" on page 74.

The new organizational-level Circulation permission **Post patron message: Allow** is required to post a message to a patron account or modify the message (Patron Services workform - Notes view). The organizational-level Circulation permission **Delete patron message: Allow** is required to delete a message posted to a patron account. By default these permissions are granted to the Administrator group only. See "Posting Messages to Patron Accounts" on page 103.

A new Circulation permission, **Patron Status: Modify reader services** controls the ability to make changes on the Patron Status workform - Reader Services view. For example, this permission is necessary to check or uncheck the Outreach Services option for the patron. The new permission is available at the branch level and applies to that organization's patron records. The permission is granted to all staff at upgrade. See "Modify Patron Status Workform - Reader Services View" on page 109.

Two new organizational-level Circulation permissions control the ability to remove items from patron reading histories:

- **Reading history: Remove non-ORS patron history entries: Allow**
- **Reading history: Remove ORS patron history entries: Allow**

See "Removing Items from Reading Histories" on page 118.

Staff members require the organizational-level Circulation permission **Modify ORS patron ratings: Allow** to add or modify reader ratings for Outreach Services patrons. See "Outreach Services - Reader Ratings" on page 109.

Staff members must have the new system-level Circulation permission **ORS: Link from bibliographic record: Allow** to display a list of Outreach Services patrons from a bibliographic record whose reading histories include items linked to the bibliographic record. By default, the permission setting is assigned to the Administrator group only. See "Link from Bib Record to Outreach Services Patrons" on page 114.

System Administration

The new system-level database table **Mobile Phone Carriers** specifies the mobile phone carriers available for selection in the Patron Registration workform and when patrons register or update their account information from the PAC. You need the new system-level System Administration permission **Modify mobile phone carriers: Allow** to work with this table. By default the permission is granted to the Administrator group only.

A new database table **Hold Request Statuses** specifies descriptions for the standard hold request statuses that are displayed in the staff client and PAC. See "Hold Request Status Descriptions" on page 81. You need the new system-level System Administration permission **Modify hold status table: Allow** to work with this table. By default the permission is granted to the Administrator group only.

Polaris as a Z39.50 Target - PO Line Items in PAC Target

As in previous versions of Polaris, you can offer your Polaris database as a remote target to other sites with Z39.50 clients. This feature allows material vendors, for example, to search your database for bibliographic records when creating your shelf-ready items. The target **[DatabaseName.]PAC** returns bibliographic records including all holdings (imported and manually created) set to display in PAC in the results list.

In the Polaris 4.0 **[DatabaseName.]PAC** target, if an item is linked to a Purchase Order (PO) line item, Polaris fabricates a subfield $e for the 852 tag that contains the PO line item ID and PO line item segment number, separated by a hyphen. This feature accommodates vendors who cannot use enriched EDI to obtain this information, which they need to provide full MARC records with embedded holdings for shelf-ready cataloging.

Note:
This change is also available in Polaris 3.5.487 and 3.6.302.

For more information about the Polaris database as a Z39.50 target, see "Polaris Database as a Remote Target" in the *Polaris Administration Guide* or the equivalent topic in staff client online Help.

Staff Client - General

The following changes have been made for general staff client operations.

Client/Server Consistency in Locale and Time

Using new Staff Client profiles, you can now ensure consistency in date and currency formats, as well as the time recorded for logs and transactions.

Matching Client and Server Locale Settings

To enforce consistency in date and currency formats, you can have the system check that the server and client workstation are set to the same locale (for example, United States or Canada). Set the Staff Client profile **Locale settings between the client and server must match** to **Yes** (default value). If this profile is set to **Yes** and the client and server settings do not match, the staff client log-in fails and a message regarding the locale settings is displayed. The profile is available at the system, library, branch, and workstation levels.

Matching Client and Server Time Stamps

Transaction time stamps are derived from both the server and the staff client. If the time setting is different on these computers, you may notice discrepancies in logs and transactions. Using new Staff Client profiles in Polaris Administration, you can now enable an automatic date/time discrepancy check, set the limit of allowable discrepancy, and prevent client log-in when the range is exceeded. This check takes place after the locale setting check described above, if you have enabled that option.

- **Client/server date/time discrepancy check: Enable** - Set this profile to **Yes** (default value) to activate the check. The profile is available at the system, library, branch, and workstation levels.
- **Client/server date/time discrepancy beyond built-in 5 minute window (minutes)** - If you enable the discrepancy check, the system allows a five-minute discrepancy between client and server time settings. If you want to add more time to the allowable five minutes, specify the number of additional minutes (0-999, default 0). The profile is available at the system, library, branch, and workstation levels.
- **Client/server date/time discrepancy warning message** - If you enable the discrepancy check, this message is displayed at staff client log-in when the discrepancy between client and server time settings exceeds the system's five-minute margin but is less than any additional minutes you have set. Use this profile to specify the message text. The default

message is **Warning: Client time setting is more than 5 minutes different from server setting.** The profile is available at the system, library, and branch levels.

- **Client/server date/time discrepancy violation message** - If you enable the discrepancy check, this message is displayed at staff client log-in when the discrepancy between client and server time settings exceeds the system's five-minute margin plus any additional minutes you have set. The log-in fails. Use this profile to specify the message text. The default message text is **Log-in failure! Client time setting discrepancy with the server setting is beyond the configured threshold!** The profile is available at the system, library, and branch levels.

Clearing Object Locks

When the staff client closes unexpectedly, any open records and workforms (objects) are locked from use. In previous versions of Polaris, a Polaris administrator had to clear the locks from the Object Locks table in Polaris Administration to free the objects for use. In Polaris 4.0, when the user logs back in to the staff client, that user's object locks are automatically cleared.

Polaris Find Tool Enhancements

The Find Tool now has an auto-suggest feature for keyword and phrase searches for patron, item, bibliographic, and authority records when certain access points are selected. When you change the access point, the search type remains if it can be used with the new access point. You can now bring up the bibliographic record Find Tool from anywhere in the Polaris application by pressing **F12**.

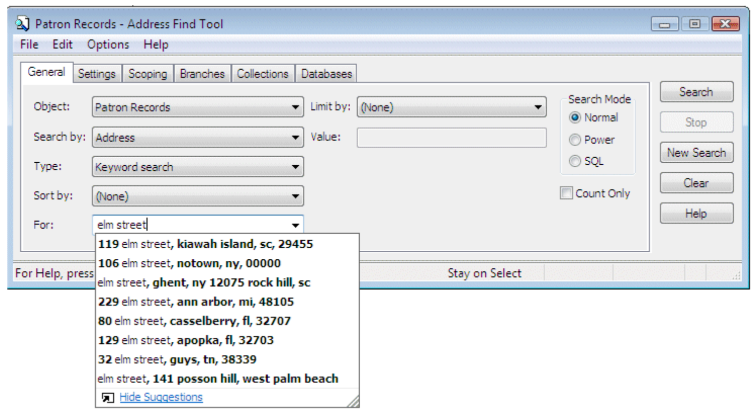
Automatic Suggestions for Keyword and Phrase Searches

If the new system-level Polaris Administration Cataloging parameter **Auto-suggest feature enabled** is set to **Yes**, automatic suggestions appear as you type when you do a keyword or phrase search for patron, bibliographic, item, or authority records using certain access points. This parameter also controls whether automatic suggestions appear in the PAC. See "Automatic Search Suggestions in PAC" on page 132.

When you select a suggested phrase or keyword, the Find Tool results list displays the records that have this keyword or phrase. You can turn off automatic suggestions by clicking **Hide Suggestions**. To show suggestions when they are hidden, click on the right side of the text entry box.

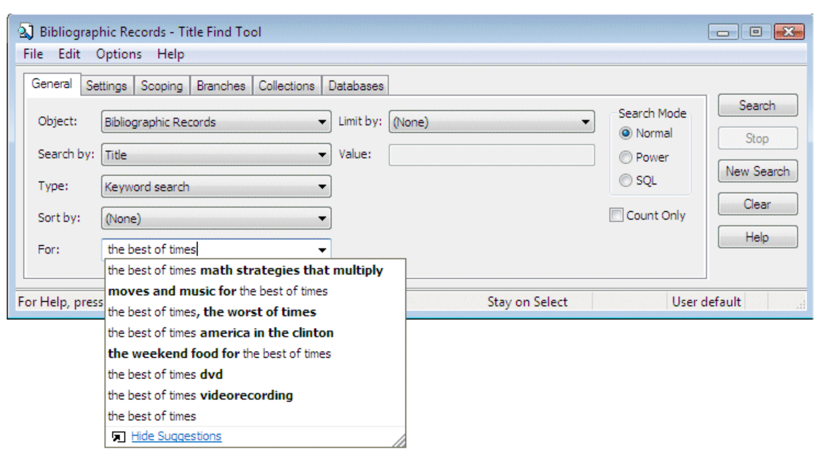
When you do a keyword or phrase search for a patron using any of the following access points, a list of suggestions appears automatically as you type:

- Address (StreetOne, StreetTwo, City, State, PostalCode-ZipPlusFour)
- Email Address
- Name (First, Middle Last)
- Name (Last, First Middle)



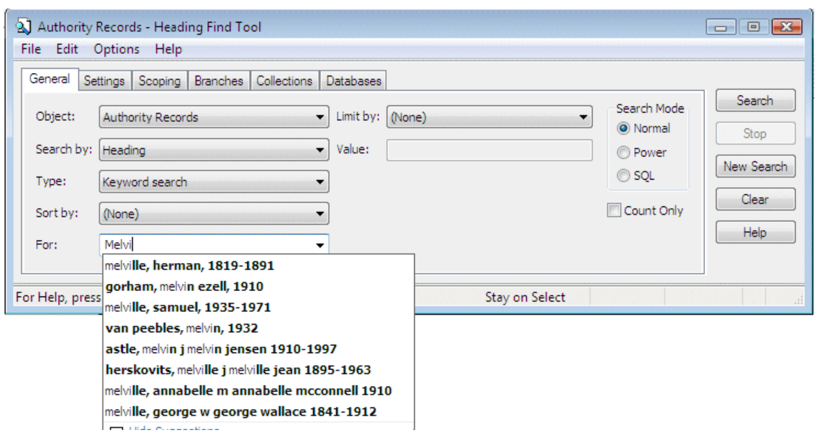
When you do a keyword or phrase search for a bibliographic or item record using any of the following access points, a list of suggestions appears automatically as you type:

- Author
- General notes
- Genre
- Publisher
- Subject
- Title



When you do a keyword or phrase search for an authority record using any of the following access points, a list of suggestions appears automatically as you type:

- Heading
- All keyword fields
- Conference name
- Corporate name
- Genre/Form subject
- Geographic name
- LC children's subject
- LC subject
- Name
- Personal name
- Subdivision heading
- Topic term
- Tracing/Reference



Retain Search Type When Changing Access Points

If you have selected an access point and a search type, but then decide to change the access point, the search type is retained (if you can use the search type with the access point). For example, if the search type is **Keyword** and the access point is **Author**, you can change the access point to **Title** and the search type will be retained because both access points support keyword searching.

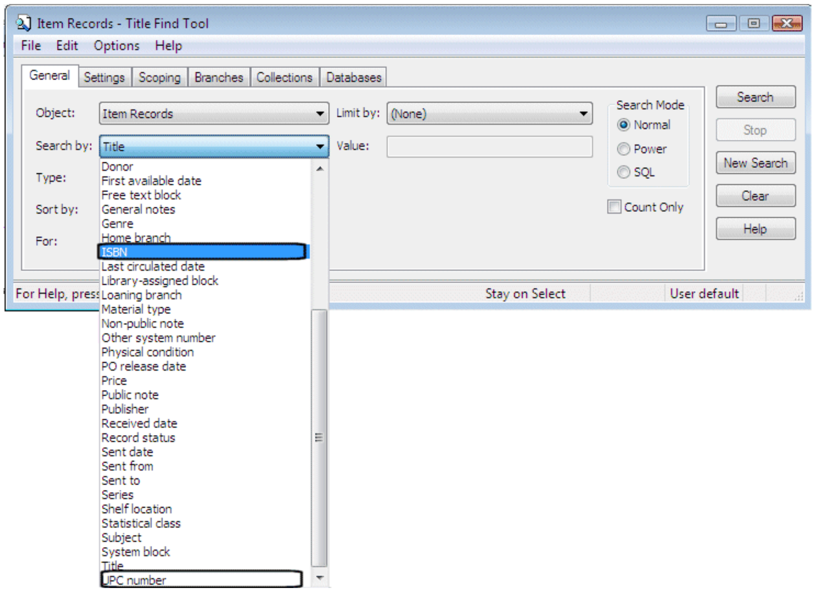
Shortcut to the Find Tool for Bibliographic Records

When the cursor's focus is in the Polaris staff client application, you can press the **F12** function key to open the Find Tool with **Bibliographic Records** selected in the **Object** box.

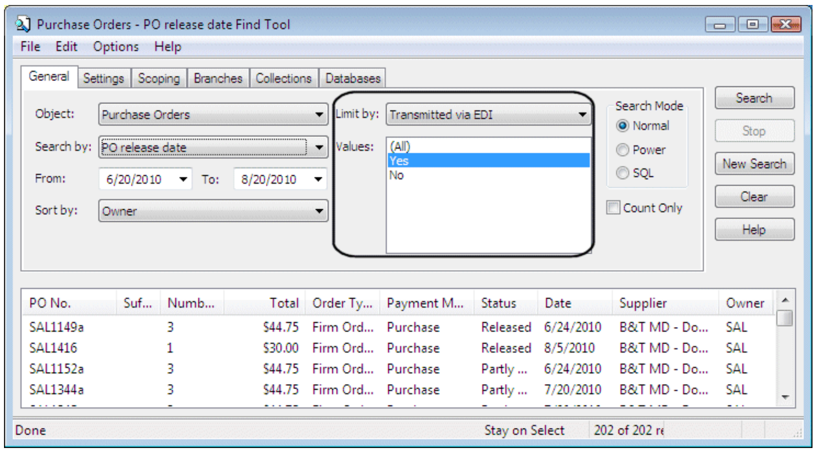
Additional Access Points for Item Records and Purchase Orders

You can now select the following new access points in the **By** box in the Polaris Find Tool when you are doing exact match (explicit) and keyword searches for item records:

- ISBN of the item record's linked bibliographic record
- UPC of the item record's linked bibliographic record



When you search for purchase orders, you can now limit the search to return only purchase orders that have been transmitted (or have not been transmitted) via EDI. Select **Transmitted via EDI** in the **Limit by** box and the value of **Yes** or **No** in the **Limit by** value box.

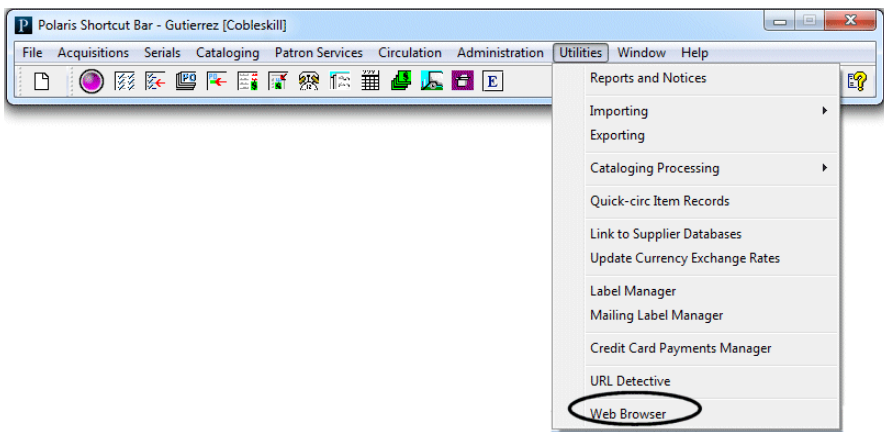


Additional Access Point for Staff Member Records

You can now search for staff member records by **Staff member ID** as well as by **Staff member name**. In addition, the **Staff member name** field now accepts numeric characters, so you can use this access point if your staff member names include numeric characters.

Default Page for Staff Client Web Browser

Using the new Staff Client profile **Utilities: Web browser default** in Polaris Administration, you can now specify whether the **Web Browser** option appears on the Utilities menu in the Polaris Shortcut Bar, and the default opening page for the Web browser when the option is selected.



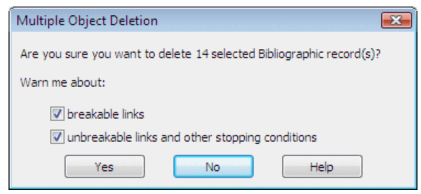
Double-click the profile and type the Web address (maximum 255 characters). The Web address must begin with **http://**. The default value is **http://polarislibrary.com**

If no address is specified in the profile, the **Web Browser** option is unavailable (gray) on the Utilities menu.

The profile is available at the system, library, and branch levels. The system uses the setting for the user's logged-in branch.

Suppress Warning Messages When Deleting Multiple Records

When you select multiple item, bibliographic, or patron records from a list (Find Tool results, list box, or record set), right-click and select **Delete**, the Multiple Object Deletion dialog box now appears. If you have the appropriate permissions, you can prevent the system from pausing and warning you about links or other blocking conditions. You can choose to suppress all messages or only certain types of messages. New permissions allow users to suppress these warning messages. See "New or Modified Permissions" on page 10.



You can select the check box to display the warning messages, or clear the check box so the warning does not appear.

- If both the **breakable links** and **unbreakable links and other stopping conditions** check boxes are unchecked, the deletion process starts at the top of the list and does not pause to put up warning messages for records with breakable or unbreakable links. The records without links or with breakable links are deleted, and the records with unbreakable links are skipped.
- If both the **breakable links** and **unbreakable links and other stopping conditions** check boxes are checked, the deletion process starts at the top of the list and pauses with a warning message every time a record is encountered that has breakable links or unbreakable links.
- If the **breakable links** check box is checked, but the **unbreakable links and other stopping conditions** box is not checked, the deletion process starts at the top of the list and pauses with a warning message every time it encounters records with breakable links. It skips records that cannot be deleted, but no warning message appears.
- If the **breakable links** check box is not checked, but the **unbreakable links or other stopping conditions** box is checked, the deletion process starts at the top of the list and pauses with a warning message every time it encounters records with unbreakable links or other blocking conditions that prevent their deletion. Records with breakable links are deleted, but no warning message appears.

Added Shortcut Keys for Printing Serials and Item Labels

You can now print single labels by pressing **Ctrl+Alt+L** and multiple labels by pressing **Ctrl+Alt+M** from the following workforms:

- Item Record
- Issue Record
- Part Record
- Subscription Check In
- Standing Order Check In

Acquisitions

The following changes were made in the Acquisitions subsystem and the Polaris Administration settings for Acquisitions for Polaris 4.0.

Note:
In addition to the changes to the Acquisitions subsystem, if a supplier provides shelf-ready cataloging for item records but cannot receive enriched EDI orders, you can provide the purchase order line item segment number when suppliers do a remote search of the Polaris database via Z39.50. See "Polaris as a Z39.50 Target - PO Line Items in PAC Target" on page 12.

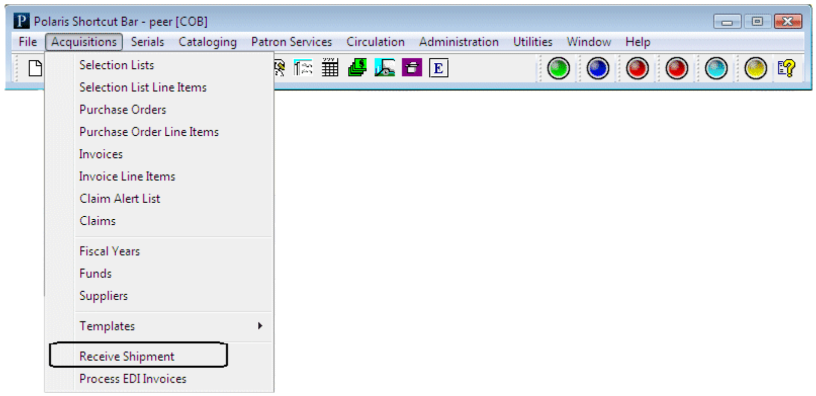
Receive Shelf-Ready Items

If your library sends enriched EDI orders and receives shipments of shelf-ready barcoded materials, you can use the new Receive Shipment workform to update the circulation status of **On-order** items to **In** and receive the linked purchase order line item segments. To use this workform, you need only two Acquisitions permissions: **Access Acquisitions: Allow** and **Receive Shipment: Allow**.

In Polaris, you release the purchase order, generate on-order item records, and transmit the purchase order via Enriched EDI. The vendor supplies full MARC records with embedded holdings data, and the library imports these records using an import profile designed specifically for Enriched EDI. The on-order items are updated with barcodes and other information from the embedded holdings data, making them shelf-ready items.

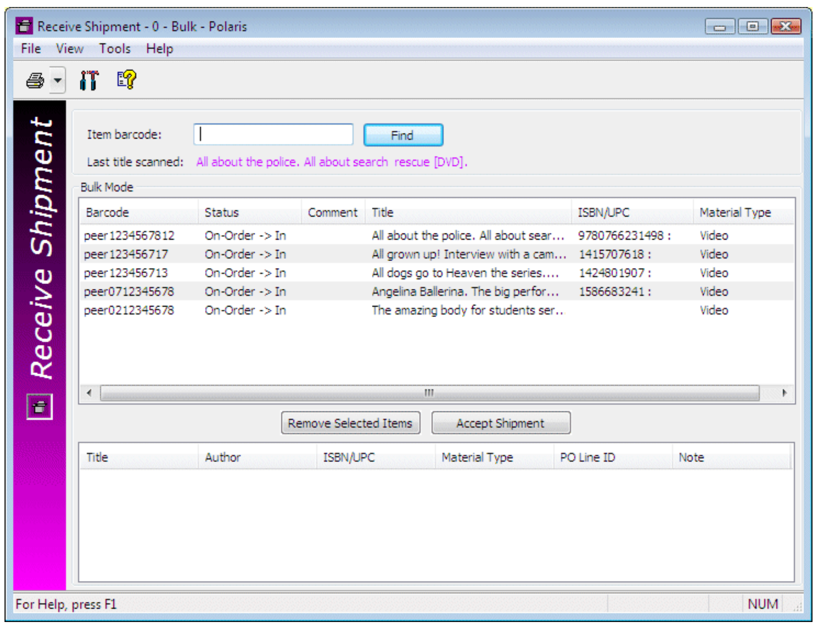
To check in a shelf-ready item using this workform, there must be a matching on-order item record in the system, and it must have a barcode. If the user enters the barcode on the Receive Shipment workform and no matching item record is found, or no matching purchase order line item is found, an error message appears.

To access the Receive Shipment workform, press **Alt A + S**, click  on the Polaris Shortcut Bar, or select **Acquisitions, Receive Shipment**.



Tip:
The Receive Shipment workform uses the same column settings as the Check In workform - Bulk view, except the patron column does not appear on the Receive Shipment workform. These columns are set in the Patron Services parameter **Check-in listview options** in Polaris Administration.

When you scan or type the barcode of the first item in the **Item barcode** box on the Receive Shipment workform, the matching on-order item record appears in the list, if it is found. You can click **Find** to search for the item record, but it must have a barcode to be checked in on this workform. The title of the last item scanned appears under the **Item barcode** box so that you can keep track of which items have already been scanned.



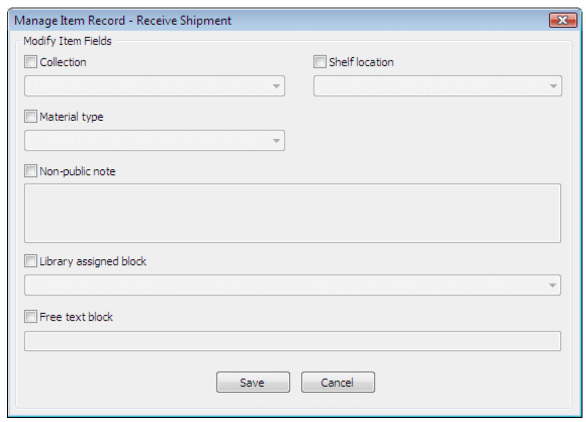
As the items are scanned and checked in, if there are hold requests or items that belong at another branch, holds slips or in-transit slips are printed. Depending on your library's settings in Polaris Administration, you may also see messages alerting you that an item has holds, or that it should go to another branch. If a holds or in-transit message appears, click **OK** to acknowledge the message, and continue scanning items.

Note:
To print holds slips or in-transit slips from the Receive Shipment workform, you need to set up the Receipt/Slip options. You need to do this only once. Select **Tools, Options** and select the options on the **Receipt/Slip** tab.

Once an item is scanned and appears in the list, you can select the item, and right-click to do tasks with the item such as placing a hold request or linking to another record.

If you have checked in an item in error, you can select it and click the **Remove Selected Items** button. This does not undo the check in process, and a message alerts you that the item was checked in, but may not have been received in Acquisitions. All items that have been checked in but whose linked purchase order line are not received will appear on an Acquisitions report. See “Shelf Ready Items Not Received in Acquisitions Report” on page 25.

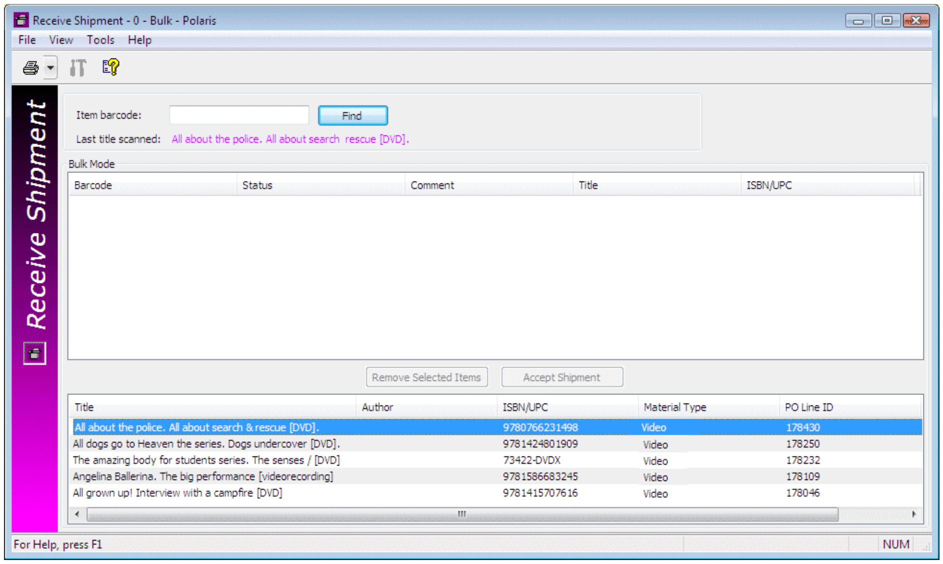
To modify an item record, select the item and select **Tools, Manage Item** or click . The Manage Item Record dialog box appears where you can change the item’s collection, material type, non-public note, library assigned block, free text block, or shelf location.



Existing circulation permissions control what item data can be modified using this dialog box. For example, a staff member would require the **Manage item dialogs: Modify shelf location** permission to change an item’s shelf location using the Manage Item dialog box. For more information, see “Circulation and Patron Services Workflow Permissions” in the *Polaris Patron Services Administration Guide* or the equivalent topic in staff client online Help.

After all the barcodes for all the items in the shipment have been scanned or entered, click the **Accept Shipment** button. This moves all the items to the bottom portion of the workform and receives the linked purchase order line item segments.

Tip:
It is important to check in all items in the shipment in the top portion of the workform before clicking the **Accept Shipment** button. This reduces the number of purchase order line item segments that are split into two segments—one for the copies received, and one for the copies still on-order.



A log is saved in the database when the shipment is received. You can run the Receive Shipment Log report to check these logs.

Receive Shipment Log Report

The new Acquisitions report Receive Shipment Log shows the items that were checked in using the Receive Shipment workform for the time period and organizations you select. To generate this report, select **Utilities**, **Reports and Notices**, **Acquisitions Reports**, **Receive Shipment Log**. In the Report Parameters window, specify the date range and the organizations where the items were checked in. If multiple branches or **All** (the entire system) is selected, the report will be organized by the branch where the items were checked in using the Receive Shipment workform. If a single branch is selected, the report will show check in and receipt information for items checked in using the Receive Shipment workform at the selected branch. For each branch listed, the Receive Shipment Log report includes the following information:

- **Purchase order line item segment receipt information**
  - Purchase order number and suffix
  - Title and author
  - Purchase order line ID number and Segment ID number
  - Fund
  - Quantity ordered/Quantity received
- **Comments** - A note appears if a line item segment was split because fewer copies were received than ordered.
- **Item check in information**
  - Date and time the item was checked in using the Receive Shipment workform
  - Workstation name where the check in was done, and user name of the staff member doing the check in

- Item’s barcode, title, author, ISBN/UPC, item ID, assigned branch abbreviation

Receive Shipment Log

PO# / Suffix	Title / Author / ISBN (UPC)	POLI ID / # / Seg #	Fund	Qty Ord / Rec	Check-In Date-Time / Workstation / User	Item ID / Barcode / Branch
	/ / 73424-DVDX					
peer March 30 YA	The amazing body for students series. Bones & muscles / / 73425-DVDX	178208 / 290 / 1	Adult Fiction	1 / 1 Rec	5/4/2010 10:52:24 AM / Peer-VS / peer	9373448 / peer12345677 / COB
peer March 30 YA	The adventures of Ociee Nash [videorecording] / / 024543199878	178176 / 258 / 1	Adult Fiction	1 / 1 Rec	4/5/2010 1:09:38 PM / Peer-VS / peer	9373418 / peer123456712 / COB
peer March 30 YA	Angelina Ballerina. The big performance [videorecording] / / 1586683241 :	178109 / 191 / 1	Adult Fiction	1 / 1 Rec	5/4/2010 10:37:22 AM / Peer-VS / peer	9373351 / peer0712345678 / COB
peer March 30 YA	Angelina ballerina. Meet Angelina [DVD] / / 1571329463 :	177939 / 21 / 1	Adult Fiction	1 / 1 Rec	4/5/2010 1:09:38 PM / Peer-VS / peer	9373183 / peer0512345678 / COB
peer March 30 YA	Anastasia [DVD] / / 024543229131	178436 / 518 / 1	Adult Fiction	1 / 1 Rec	4/5/2010 1:09:38 PM / Peer-VS / peer	9373676 / peer0312345678 / COB
peer March 30 YA	All grown up! Interview with a campfire [DVD] / / 1415707618 :	178046 / 128 / 1	Adult Fiction	1 / 1 Rec	5/4/2010 10:37:22 AM / Peer-VS / peer	9373290 / peer123456717 / COB
peer March 30 YA	All dogs go to Heaven the series. Dogs undercover [DVD]. / / 1424801907 :	178250 / 332 / 1	Adult Fiction	1 / 1 Rec	5/4/2010 10:37:22 AM / Peer-VS / peer	9373490 / peer123456713 / COB

Shelf Ready Items Not Received in Acquisitions Report

The Shelf Ready Items Not Received in Acquisitions report shows purchase order line items that have not been updated to Received but have linked items that have already been checked in. Purchase order line items appear on this report if a user has checked in shelf-ready items but removed them from the Receive Shipment workform before receiving them in Acquisitions.

For the organization(s) selected in the report parameters, the report lists any purchase order line item segment whose status is not equal to Pending, Canceled, Closed, Currently Received or Received and whose linked Items have any circulation status except On-Order.

Shelf Ready Items Not Received in Acquisitions

SAL734 A40.02	The singularity of Shakespeare, and other essays / Muir, Kenneth. / 0064950182 :	177861 / 5 / 1	On Order	9372898 /	Duane Branch - Schenectady County Public Library (DUA)	In-Transit	3/18/2010 8:22:41 AM
SAL735 a40.02	Franco Harris. / Kowet, Don. / 0698107780 :	177862 / 1 / 1	Pending Claim	9372915 /	Southern Adirondack Library System (SAL)	In	3/18/2010 8:52:57 AM
SAL735 a40.02	Harrison's principles of internal medicine. / Harrison, Tinsley Randolph, 1900- / 0070072612	177863 / 2 / 1	Pending Claim	9372916 /	Mohawk Valley Library System (MVL)	In-Transit	3/18/2010 8:53:32 AM
SAL736 A40.02	Leprechauns never lie / Balian, Lorna. / 0687371104 :	177864 / 1 / 1	On Order	9372917 /	Mohawk Valley Library System (MVL)	In-Transit	3/18/2010 8:59:30 AM
SAL737 A40.02	The Irish : sinners, saints, gamblers, gentry, priests, Maoists, rebels, Tories, Orangemen, dippers, heroes, villains, and other proud natives of the fabled isle / O'Hanlon, Thomas J. / 0060132388 :	177865 / 1 / 1	On Order	9372918 / 39876000009629	Mohawk Valley Library System (MVL)	Shipped	3/18/2010 9:05:46 AM
SAL739 A40.02	Regent Square / Bramble, Forbes, 1939- / 0698108361 :	177870 / 2 / 1	On Order	9372933 /	Southern Adirondack Library System (SAL)	Held	3/18/2010 11:05:59 AM
SAL740 a40.02	Reactions to the French Revolution, [by] Richard Cobb. / Cobb, Richard, 1917- / 0192121871	177871 / 1 / 1	Pending Claim	9372934 / SAL740-1	Mohawk Valley Library System (MVL)	Shipped	3/18/2010 10:40:01 AM
SAL741 a40.02	The purchase of order : stories / Adams, Gail Galloway. / 0820310409 (alk. paper)	177872 / 1 / 1	Pending Claim	9372935 /	Mohawk Valley Library System (MVL)	In-Transit	3/18/2010 11:07:35 AM
SAL765 kec	Humor and eloquence in public speaking / Hegarty, Edward J. / 0134478967 :	178552 / 2 / 3	Pending Claim	9374085 / SAL765b	Stillwater Public Library (STI)	In	5/4/2010 12:10:33 PM
SAL866a	Edward or Jacob? / / 9780545248426 : PAP	178792 / 2 / 1	Pending Claim	9374404 / sal866d	Karen Branch 3 (Library 5) (CG)	In	5/4/2010 12:09:07 PM
SAL866a	Edward or Jacob? / / 9780545248426 : PAP	178792 / 2 / 2	Pending Claim	9374405 / sal866e	Karen Branch 4 (Library 5) (CW)	In-Transit	5/4/2010 12:08:33 PM

Options Added to the EDI Invoice Defaults Profile

The following new check box options are available in the EDI Invoice Defaults profile in Polaris Administration:

- **Hold partial shipment invoices** - Prevent or allow EDI automatic invoices for partial shipments.
- **Load header charges** - Prevent or allow automatic loading of header charges with a single header fund.
- **Update on-order item circulation status** - Prevent or allow the automatic circulation status update of all linked on-order items.

Hold partial shipment invoices

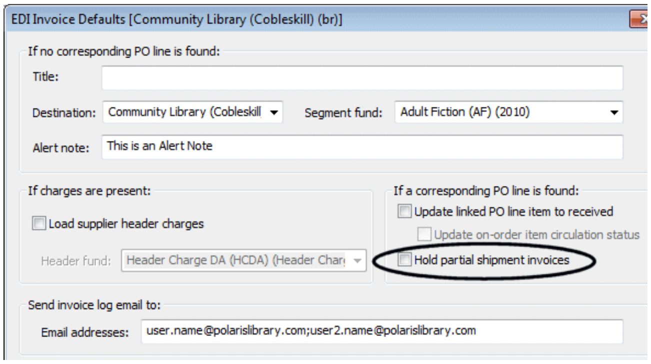
EDI invoice files are retrieved from the vendor's FTP site by the Polaris EDIAgent utility, and these files are used to generate EDI invoice records in Polaris. Before Polaris 4.0, all EDI invoices were created automatically as soon as they were retrieved from the vendor's site, whether the shipment was complete or partial. If any line items on the invoice had a quantity that did not match the quantity ordered, the line items were not linked to the original purchase order line item, and they were flagged with a red exclamation mark.

Tip:
If your library is not experiencing problems with EDI invoices where the quantity sent does not match the quantity ordered, you can continue to have all your EDI invoices created automatically.

You can now set an option in the EDI Invoice Defaults profile to prevent an EDI invoice from being created automatically if the number of copies sent does not equal the number of copies ordered in at least one invoice line item. The EDI invoices where all copies are supplied as ordered will continue to be created automatically. If you choose to hold partial shipment invoices, you can generate them separately using the Process EDI Invoices workform. See "Process EDI Invoices Workform" on page 29.

Note
The EDI Invoice Defaults profile also includes new options for supplier header charges and on-order items. See "Load supplier header charges" on page 27.

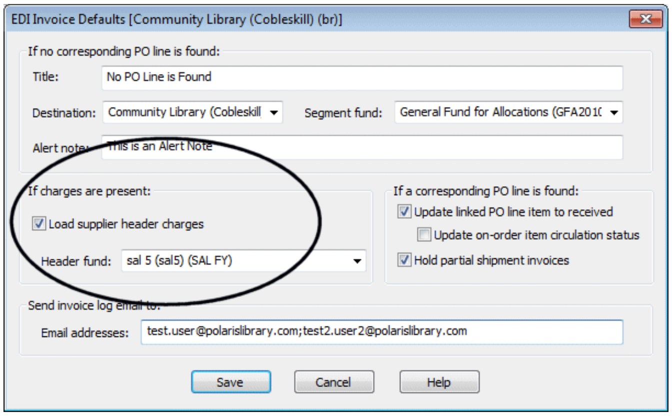
When you select the existing **EDI Invoice Defaults** profile, the dialog box now has a new **Hold partial shipment invoices** check box. When this box is checked, EDI invoices will not be created automatically if the quantity sent does not equal the quantity ordered on any of its line items. As a default, this box is unchecked.



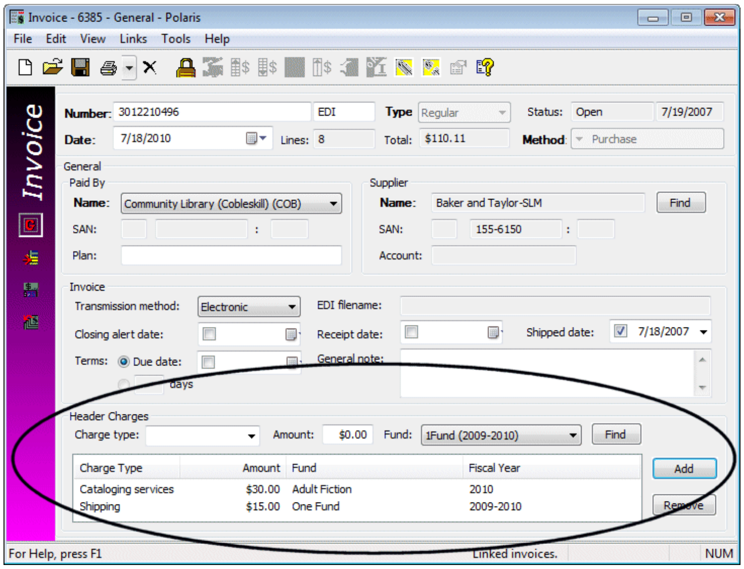
If the **Update linked purchase order line items to Received** box is checked and the **Hold partial shipment invoices** box is also checked, the linked purchase order line items will be updated to Received automatically when the quantities received and the quantities ordered match. When the quantity received does not match the quantity ordered, the invoice can be generated using the Process EDI Invoices workform, and the linked purchase order line items are updated to Received when the invoices are generated.

Load supplier header charges

You now have the option on the EDI Invoice Defaults dialog box to choose whether to load header charges on EDI invoices automatically. If you want any charges for the invoice as a whole, such as shipping charges, to be loaded automatically to the EDI invoice, make sure the **Load supplier header charges** box is checked, and select the fund to use for these charges. If you do not want header charges to be loaded automatically because you may not want to use the same fund for all header charges, uncheck the **Load supplier header charges** box.

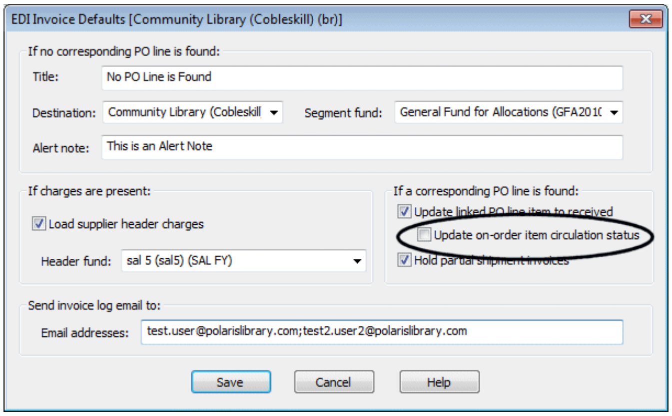


When the shipment arrives, you can record the header charges listed on the packing slip in the Invoice workform, and select a specific fund to use for each header charge type. Or, you can distribute a charge across invoice lines.



Update on-order item circulation status

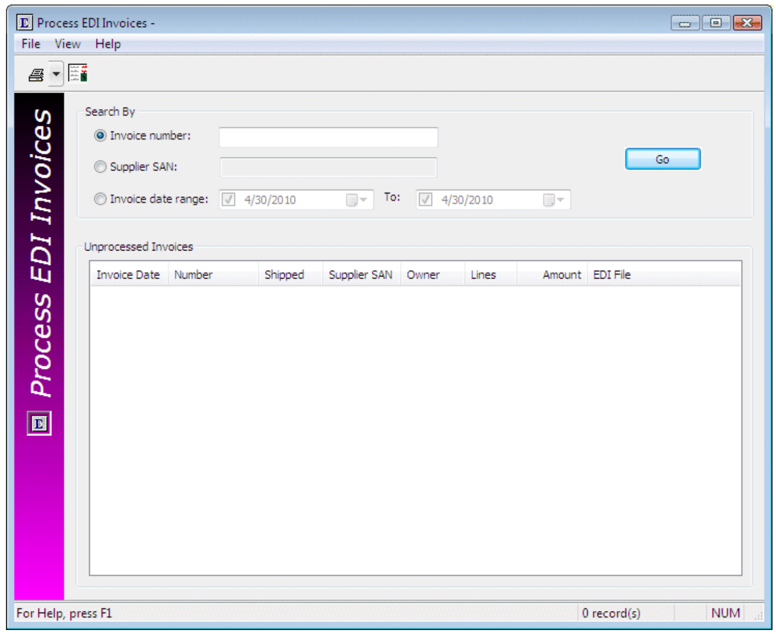
The EDI Invoice Defaults profile has a new option to update the circulation status of linked on-order items when the purchase order is received, or leave the items on-order. If you select the **Update linked PO line item to received** check box, you can select the **Update on-order item circulation status** to update the circulation status of the linked on-order item records to in-process. Or, you can leave the **Update on-order item circulation status** box unchecked if you want the linked on-order item records to remain on-order until the shipment is received.



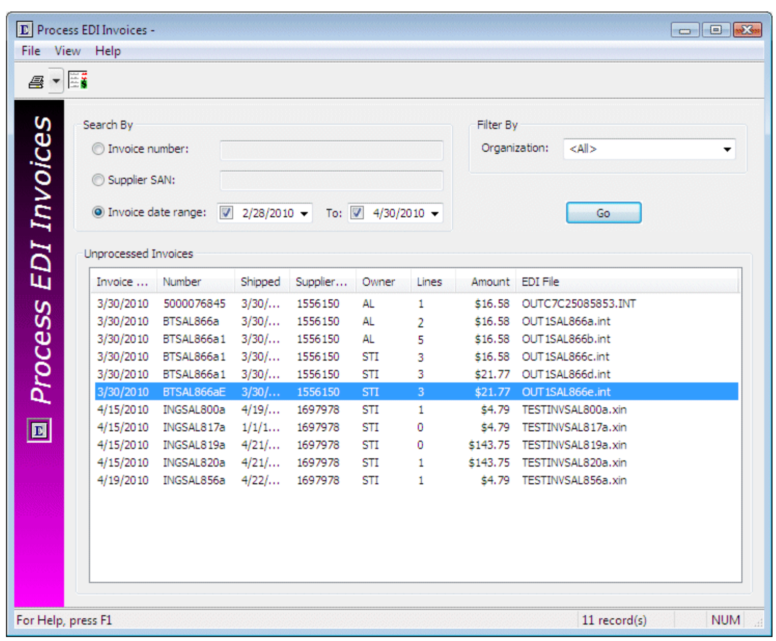
Process EDI Invoices Workform

EDI invoices appear in the new Process EDI Invoices workform only if they represent partial shipments, and the new check box **Hold partial shipment invoices** on the EDI Invoice Defaults profile is selected. See "Options Added to the EDI Invoice Defaults Profile" on page 26. To open the Process EDI Invoices workform, select the Acquisitions menu option **Process EDI Invoices**, click E on the toolbar, or press the **Alt A + E** keyboard combination.

Tip:
You need the new Acquisitions permission **Process EDI Invoices: Allow** to access and use this workform.



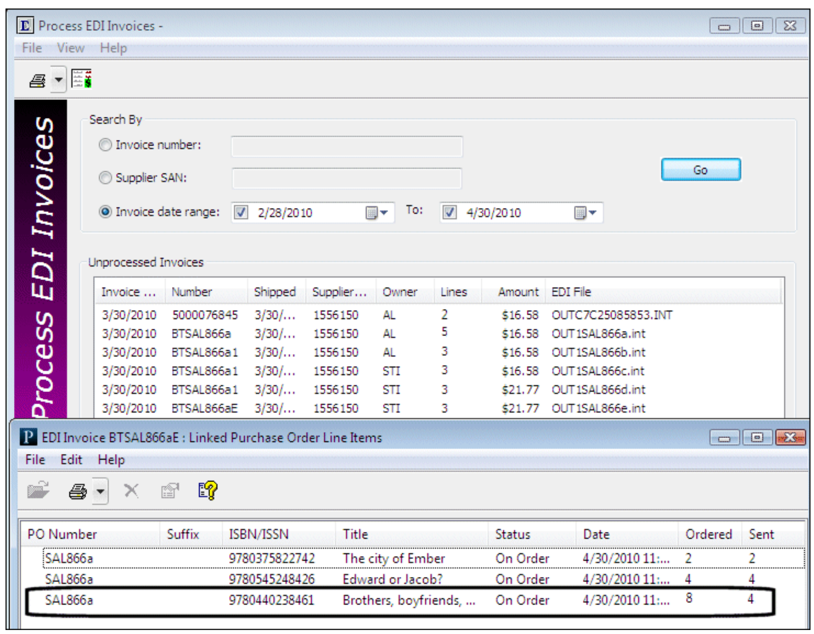
To search for the ungenerated EDI invoices, enter the invoice number, supplier SAN, or date range and click **Go**. You can also filter the list by selecting the organization. The invoice or invoices are listed.



Tip:
The workform is resizable, and the workform columns can be sorted by clicking on a column heading.

When you select an invoice or invoices and select the option to generate the invoices on the **File** menu or click on the toolbar, a message appears asking if you are sure you want to generate the invoice. If you select **Yes**, the system looks at the first purchase order line item ID in the invoice, takes the quantity the vendor indicated was shipped, starts in the first purchase order line item segment, and links the segment to the invoice line item. If an invoice line quantity remains, the system continues to the next purchase order line item segment and continues to link the purchase order line item segments to the invoice line item. If an uneven quantity still remains, the segment quantity will be split, with some copies received and others still on-order.

To see the linked purchase order line items, right-click an invoice listed in this workform. If there is only one linked purchase order line item, the Purchase Order Line Item workform appears. If there are multiple purchase order line items, they appear in a list box. For at least one of these purchase order line items, the number of copies sent does not equal the number of copies ordered. You can double-click a purchase order line item in the list to open it in the Purchase Order Line Item workform.



New Error/Warning Message on EDI Invoice Log

A new message appears on the EDI invoice log when the number of copies sent does not match the number of copies ordered, and the **Hold partial shipments invoices** box is checked on the EDI Invoice Defaults profile.

Previous message:

> **The POLI# [X] on PO#[PO#Suffix#] is not linked to INLI# [X] on INV# [XXXXXXX] Suffix = EDI because the quantity sent did not equal what was ordered. An unlinked INLI was created.**

New message:

> **INLI# [X] on INV# [XXXXX] Suffix = EDI is not been generated and linked to POLI# [X] on PO#[PO#Suffix#] because the quantity sent did not equal what was ordered and EDI SA Profile Hold partial shipment invoices is enabled. This invoice line can be processed using the Acquisitions Process EDI Invoices workform.**

Selection List Enhancements

The following changes were made to make selection lists more flexible and to accommodate centralized and decentralized selecting workflows. In addition, changes to selection list permissions allow administrators to grant narrow permissions to some selectors so they can access selection lists but only add copies for their own branch, while granting full selection list permissions to selectors who can create selection lists, add titles, and make decisions regarding selections.

Branch-Level Selection List Line Item Segment Permission

The Acquisitions permission **Create, modify, delete 'own' SL line segments** was removed and all users who previously had this permission will automatically get the new branch-level permission **Selection list line item segments: Create, modify, delete**.

The new **Selection list line item segments: Create, modify, delete** permission allows users to make changes at the selection list line item segment level for the branch at which the permission was set. If selectors have no other selection list permissions other than this new permission and **Selection Lists: Access**, they will not be able to add titles to the selection list or to make changes to the selection list as a whole. Users who already have all the selection list permissions set at the Library level (**Access, Approve/Reject, Create, Modify, Delete**) do not need this new permission because they can make changes to selection lists at the header level, line item level, and segment levels.

Multiple User Access to Same Selection List Line Item

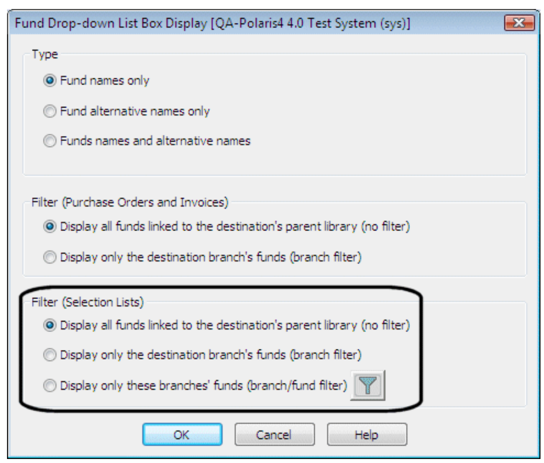
More than one user can add, modify, or delete selection list line item segments in the same selection list line item at the same time. Any staff member who has the new branch-level permission **Selection List Line Item Segments: Create, modify, delete** can work with selection list line item segments for the branch at which the permission was set. The changes are saved in the order in which they are made.

Administration Profile to Filter Funds and Branches

The Polaris Administration Acquisitions profile **Acq fund droplist setup** was changed so that now administrators can specify which branches and funds will appear in selection list line item segments for a specific user. For each selector, the administrator can select the branches and the specific funds associated with the selected branches.

When the selector opens a selection list line item, the funds that appear in the Funds list in the segments depend on the settings in the profile, along with the branch-level permission **Selection list line item segments: Create, modify, delete**. If branches and funds are selected in the user's profile, but the user has not been granted permission to use the segments for the branch, the user will see fewer funds than those selected in the profile. Therefore, the set of branches and funds selected in the user's profile should not exceed the branches for which the user has the permission **Selection list line item segments: Create, modify, delete**.

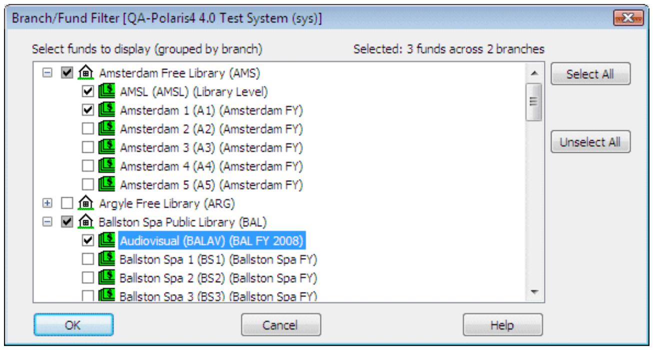
When you select the **Acq fund droplist setup** profile, the Fund Drop-down List Box Display dialog box appears.



You can select one of the following options for filtering funds in selection lists:

- **Display all funds linked to the destination's parent library (no filter)**
- **Display only the destination branch's funds (branch filter)**
- **Display only these branches' funds (branch/fund filter)**

If you select **Display only these branches' funds**, you can click the tree (filter) icon to display a tree view where you can select branches and specific funds under these branches.



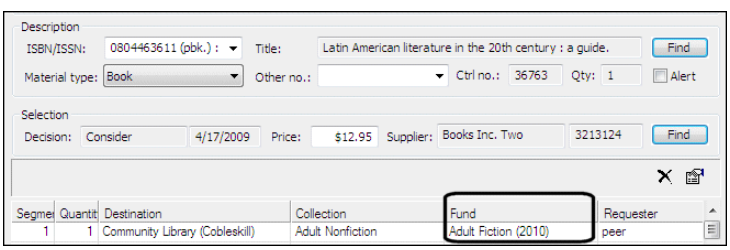
You can select multiple branches and select specific funds under those branches. Or, you can select a single branch and select specific funds for that branch. For funds selected in this window to display in a selection list line item segment, the selector must also have the branch-level permission **Selection list line item segments: Create, modify, delete**.

Note:
If the filter and permissions have been set to allow the selector to work with funds for multiple branches, the **Fund** list in each selection list line item segment will still show only the funds for the branch selected in the **Destination** box.

Fiscal Year Rollover Includes Funds in Selection Lists

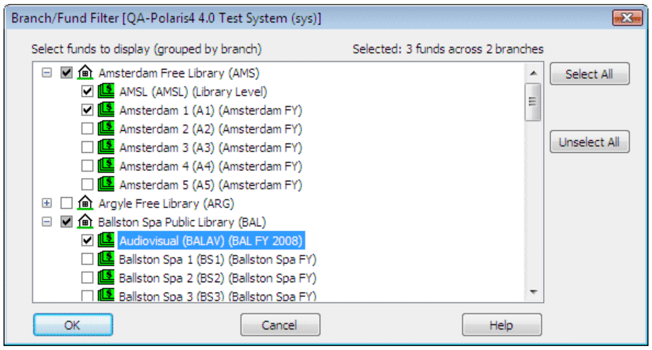
You can now roll over funds in open selection lists regardless of the status of the selection list line items. If you choose to roll over funds to the new fiscal year, the funds linked to selection list line item segments will be closed, and the segments will be linked to the funds in the new fiscal year.

Note:
Funds in selection lists with a status of Closed will not be rolled over. If you need to reuse a closed selection list after the fiscal year rollover, reopen it before rolling over the current fiscal year.

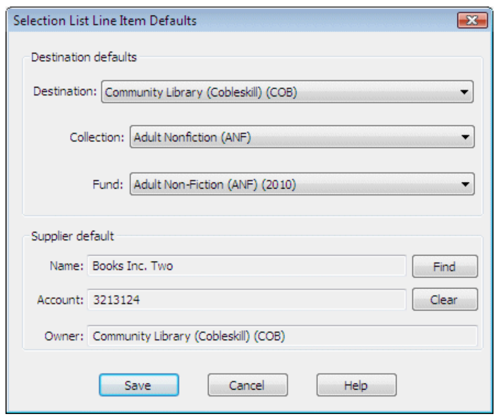


In addition, the old funds selected in the following Polaris Administration Acquisitions profiles will be closed and replaced by the corresponding new funds in the new fiscal year:

- **Acq fund droplist setup -** If specific funds are selected to display in selection lists for selectors, the corresponding new funds will display in the selection lists after the fiscal year rollover.



- **Selection list line item defaults -** If a fund is selected in the Selection List Line Item Defaults dialog box, the corresponding fund will be selected in this dialog box after the fiscal year rollover.



Holds for On-Order Multi-Volume Sets

This new development is for libraries that send enriched EDI orders and receive shelf-ready items from their suppliers. If a patron places a hold on a multi-volume set when it is still on-order, the system will convert the hold at the bibliographic level to a hold for the first volume in the series when the order arrives.

When a patron places a hold on an on-order multi-volume set, for example on the television series *ER - The Complete 13th season*, the hold is placed at the bibliographic level. The set actually contains multiple volumes (six DVDs in the ER season example) and each volume requires a separate barcoded item record. By moving the hold request from the bibliographic record to the first volume in the set, the patron can get the first (or lowest) volume in the series.

The library creates the order with one line item for the entire season of the TV series, and the library may order more than one copy of this series for various branches. A brief bibliographic record represents the entire season, with one purchase order line item segment ID for each copy of the set. When the purchase order is released, one on-order item is generated per ordered quantity.

Then the library sends the order to the supplier via enriched EDI. For each copy of the series, the supplier sends multiple shelf-ready barcoded volumes or discs (for example, for each copy of *ER - The Complete 13th season*, the supplier would send six separate DVDs).

In addition to the physical copies of the set, the supplier provides a full bibliographic record for the set, with 949 tags for each branch's copy of every disc. So, if the library ordered a copy of *ER - The Complete 13th season* for five branches, the bibliographic record would include 30 different 949 tags (six DVDs for each of the five branches).

Before this change, when the full MARC record was imported using the Enriched EDI Orders profile, the system attempted to match the purchase order line item segment ID (in $e) in each 949 tag with an on-order item so that the on-order items could be updated to final, barcoded item records. However, only one on-order item was created for each copy of the set, so the system was updating that one on-order item with the data in the first 949 tag, and the remainder of the item records created from the 949 tags were saved as provisional. As a result, the holds were often attached to the wrong item record since they were originally placed at the bibliographic record level, and no volume data was in the volume field of the item record.

The import process was changed so that if the **Update items (enriched EDI)** option is selected in the import profile, any shelf-ready holdings (949) tag that has both a purchase order line item segment ID in $e and a volume designation in $v will create a final item record, even if there is no matching on-order item. The new final item records are linked to the purchase order line item segment found in the $e, and they are listed as final records in the import report.

When the item records are created from the embedded holdings data, the holds that were placed at the title level when the series was ordered are attached to the linked items with the lowest volume number.

Added EDI Order Acknowledgments for Two Suppliers

You can now receive Purchase Order Acknowledgments from AudioGo (formerly known as BBC Audiobooks America) SAN: 858-7701 and Recorded Books SAN: 111-3984.

The acknowledgment descriptions for AudioGo (ACK01) are:

- AC -Item accepted and shipped
- IR - Item rejected
- IB - Item backordered

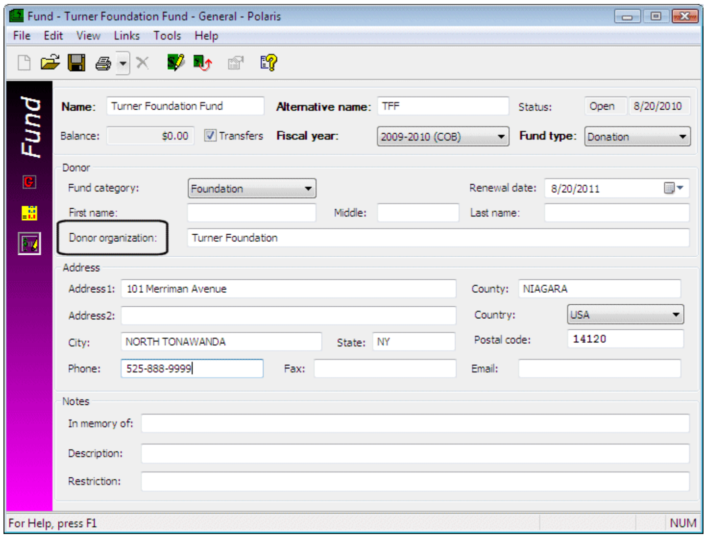
Note:
Order acknowledgments from AudioGo may take a little longer to receive than acknowledgments from other suppliers.

The order acknowledgment description for Recorded Books (ACK01) is:

- IA - Item Accepted

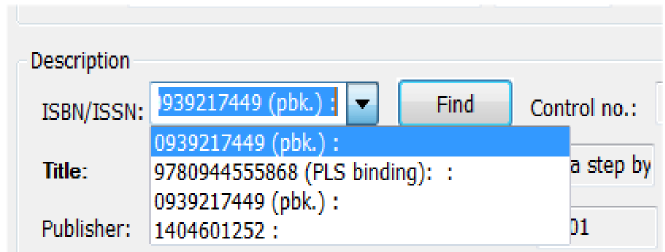
Fund Corporate Name Label Changed to Donor Organization

For Fund records with a Fund type of Donation, the **Corporate Name** label was changed to **Donor Organization**.



Multiple ISBN/UPC in PO Lines

If a bibliographic record has multiple ISBNs or multiple UPCs, the most-recently added ISBN (and associated price), or the most-recently added UPC displays in a purchase order line item or selection list line item. This ensures that the correct format of the title is ordered.



Before this change, when a duplicate bibliographic record was imported from a supplier, and the profile was set to retain the 020 or 024 tag, the incoming record was overlaid, and the retained tag was added to the existing record at the end of the existing record's 020 or 024 tags. When the bibliographic record was bulk-added to a selection list or purchase order, if the linked bibliographic record had multiple ISBNs or UPCs, the numbers were listed in the same order in the purchase order or selection list line item. This meant that users had to open each line item with multiple ISBNs or UPCs and make sure they were ordering correct format.

Fund Reports

We added a total to the current Fund Summary report and a new report called the Fund Hierarchy Report.

Totals Added to the Fund Summary Report

The Fund Summary report now includes the following totals for the selected fiscal year:

- **Total Budgeted**
- **Total Encumbered**
- **Total Expended**
- **Total Available**
- **Total Used(%)**

If your library does centralized ordering, you can select the fiscal year for the central processing organization, and all the funds linked to the fiscal year will be listed with the totals for each fund. If your library does decentralized ordering, you can select the fiscal year, and the report will be grouped by organization (branch) with the branch funds listed under each branch.

New Fund Hierarchy Report

You can now run a new report that shows the fund hierarchy (similar to the Fund Explorer view), with subfunds displayed under the top-level funds. If your library orders centrally, you can select the fiscal year for the central processing organization, and the report will display all the top-level funds with the subfunds under them. If your library orders decentrally, you can select the fiscal year for a branch, and all the top-level funds linked to the fiscal year will be listed with their subfunds under them. For each top-level fund listed, the totals include all the amounts for the subfunds added together.

Cataloging

Polaris 4.0 offers the following changes in the Cataloging subsystem.

Automatically Remove Processed 852, 948, 949 or 970 Tags

You can use a new cleanup utility to remove 852, 948, 949, or 970 tags from bibliographic records when the tags have already been used to create item records from embedded holdings during the import process, or to create purchase order or selection list line item segments during the bulk-add process. If your library uses other tags for embedded holdings, contact your Polaris Site Manager to have these tags added to utility.

The $9 is inserted into bibliographic records’ 970 tags when they are processed if the existing Polaris Administration Acquisitions parameter **Bulk add to PO/SL: Mark 970 data as processed** is set to **Yes**. A date indicates when the 970 tag was processed to create the purchase order or selection list line item segment.

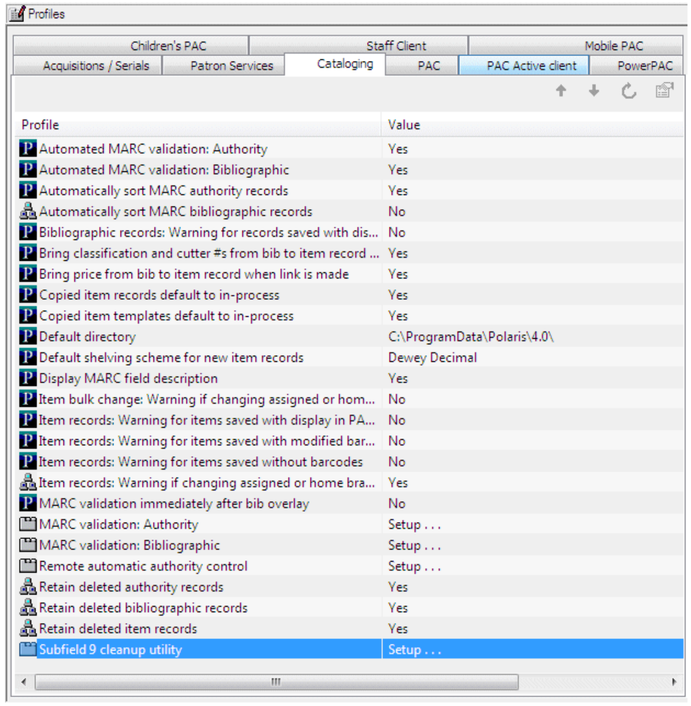
Example:
Tag: 970 ‡fJuv/YA Bks‡lNIS‡p$6.99‡q1‡9Processed Dec 8 2008 11:10AM

In Polaris 4.0, a similar Cataloging parameter **Mark embedded holdings tags as processed** has been added. When this new parameter is set to **Yes**, a $9 will be inserted in the embedded holdings tags in bibliographic records when the records are imported and item records are created automatically from the embedded holdings data. A date indicates when the item record was created.

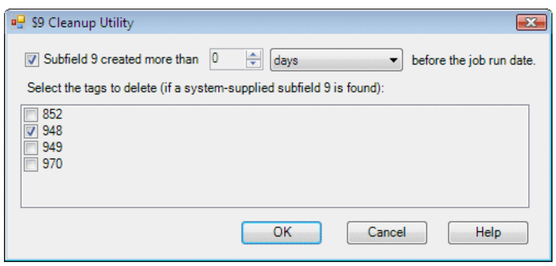
Example:
Tag: 852 1 ‡bNF‡aTuHS‡h371.26 TEN‡p33412000408987‡0$11.95$9Item created Jan 21 2010 2:37 PM

The $9 is inserted in the 852 tag or another embedded holdings tag in imported bibliographic records only when item records are created automatically from embedded holdings data. This means the bibliographic records must be imported using an import profile where the Items tab has **Build item records Using embedded holdings fields only** or **Using all available holdings/ item fields** selected. If the option **Using templates/default data only** is selected on the Items tab in the import profile, no $9 is inserted in the bibliographic records.

Use the new system-level Polaris Administration Cataloging profile **Subfield 9 Cleanup Utility** to specify which tags the utility should delete if a $9 is found.



Double-click the profile to open the $9 Cleanup Utility dialog box.



Before selecting the tags to delete, select the check box next to **$9 subfield date is more than ___ _____ before the job run date**, type a number, and select **Days, Months** or **Years** to specify the time period (relative to the date the job is run) for which you want to scan for the presence of a $9.

Note:
If you want to check other tags that are not included in this profile, contact your Polaris Site Manager.

After you set up the profile, the cleanup utility scans bibliographic records for a subfield 9 in the tag or tags you selected. If a subfield 9 is found, the date the tag was processed is checked. This is the **Processed** date (for 970 tags) or the **Item created** date (for 852 and other embedded holdings tags). If the date in the $9 is more than the number of days, weeks, months, or years before the date the job is run, the entire tag is removed from the record. In addition, the tag is unindexed, the tag sequence in the bibliographic record is adjusted, the bibliographic record's modification date is updated, and the transaction is logged.

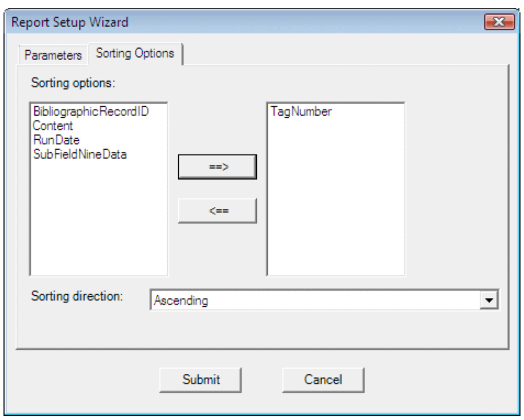
Note:
Because no $9 subfields were added to embedded holdings tags before this release, embedded holdings tags will not be removed if they were used to create item records before this change was installed. However, if you set the profile to remove 970 tags that were processed, they will be removed because the $9 is already being added when bibliographic records are bulk added to selection lists or purchase orders.

The utility runs nightly unless it is disabled, and generates a log that includes the date and time the utility ran, information about the profile settings, and the tags that were removed. You can run the Subfield 9 Utility Log report to see information on the tags that were deleted for a time period the utility was run. See "Subfield 9 Utility Log Report" on page 42.

In addition, the **MARC Validation: Bibliographic** profile was changed to validate the $9 when it is in an 852 tag. The default settings are: Required=blank, Validate=yes, Repeatable=yes, Obsolete=blank. The 970 field already has a validation rule for $9.

Subfield 9 Utility Log Report

To run the Subfield 9 Utility Report, select **Utilities, Reports and Notices, Cataloging Reports** from the Polaris Shortcut Bar. Then, on the Parameters tab, select the **Begin date** and **End date** for the range that the utility was run. On the Sorting Options tab, select the sorting options and click the right arrow to include them. The report columns will be sorted in the order in which they appear in the list on the right side of the Sorting Options tab. Then, select **Ascending** or **Descending**, and click **Submit**.



The report includes the dates the utility was run; profile settings in the **$9 Cleanup Utility** profile at the time the utility was run; and the bibliographic control number, tag number and content of each tag that was removed.

In addition, the statistics section of the report displays the total number of bibliographic records that were modified, the number of tags of each tag number that were removed, and the total number of tags removed.

Subfield 9 utility log for 2/23/2009 4:55:00 PM to 2/23/2010 11:59:00 PM

Run overview:

Run Date	Options	Start Time	End Time	# Bibs	# Tags
2/9/2010	Subfield 9 utility not enabled.	01:45.01 AM	01:45.01 AM	0	0
2/23/2010	Subfield 9 utility enabled. Candidate tags will be removed that contain a date earlier than 40 months ago. Tags to process: 970	03:43.25 PM	03:58.31 PM	4810	8867
Total				**4810**	**8867**

Tag summary

Date	970
2/23/2010	8867
Total	8867

Utility Detail:

Run date	Bib record ID	Tag	Ind 1	Ind 2	Subfield 9 content	Other content
2/23/2010	1541	970			Processed Aug 1 2006 12:55PM	‡cJF ‡fJuv/YA Bks ‡INIS ‡p$8.99 ‡q1
2/23/2010	1808	970			Processed Jun 29 2006 11:46AM	‡cJPBK ‡fJuv/YA Bks ‡ISCP ‡p$6.99 ‡q2

Importing

The import profiles were changed to prevent item records from being created with circulation statuses not allowed for new items. In addition, when you save an import profile, it no longer closes automatically.

Disallow Certain Circ Statuses for New Item Records

Only certain circulation statuses are allowed in new item records created from embedded holdings data. If the **Build item records Using embedded holdings fields only** or **Using all available holdings/item fields** is selected, the value in the circ status field of the embedded holdings tag must be one of the following statuses:

- In
- Bindery
- In-Process
- In-Repair
- Missing
- On-Order
- Unavailable
- Withdrawn

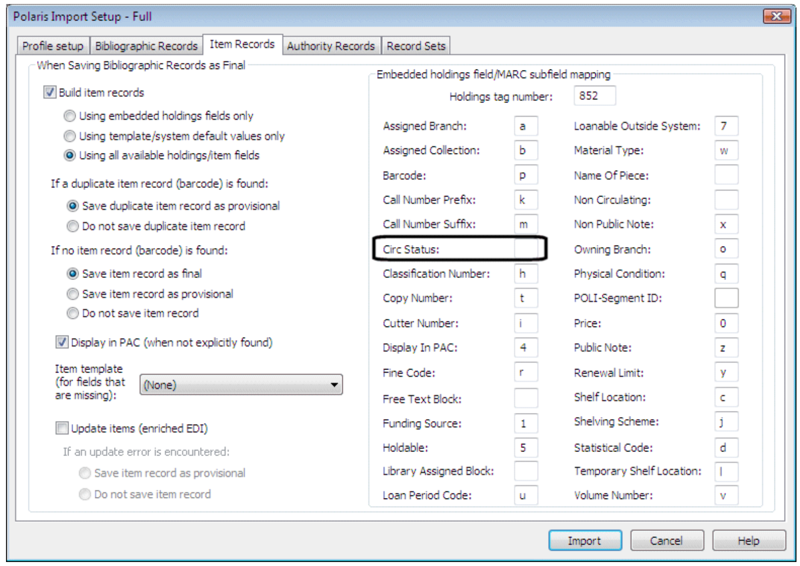
If the value in the circ status field of the embedded holdings tag is something other than one of these values, it is an error; the item will be created but it will use the template or default circ status and a warning will appear in the import report:

> **Warning: circ status found in embedded holdings tag is not allowed during import; template or default value used instead.**

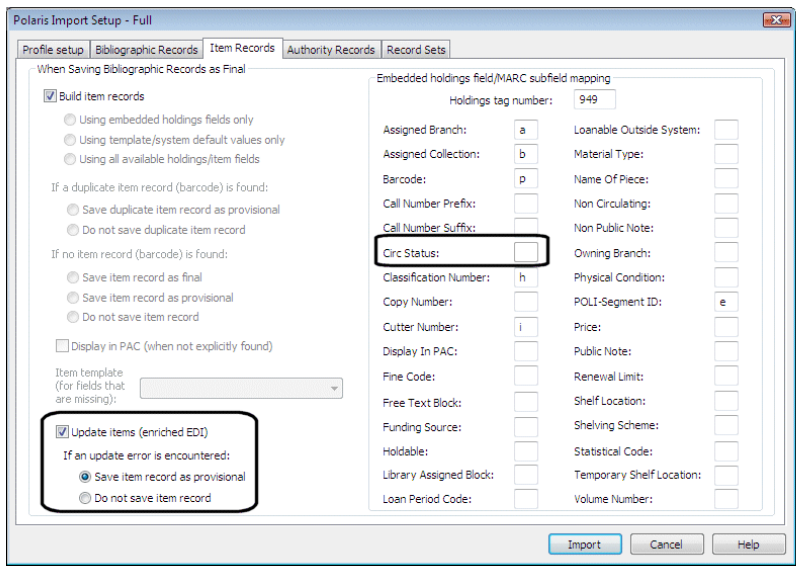
If no item template is selected for fields that are missing, a value of **In** is assigned to the circ status of the item being created.

If you opt to use the template/system values only (and not use the embedded holdings data), you will see no change because only certain values are allowed in the template.

In addition, the field label **Item status** on the Item Records tab of the Import profile window was changed to **Circ Status** on the import profile to match the equivalent label on the Item Record workform.



Also, if **Update items (enriched EDI)** is checked, the user cannot enter a **Circ Status** value because a status of on-order is already assigned. If the **Update items (enriched EDI)** box is not checked, you can enter a value in the circ status.



Save No Longer Closes an Import Profile

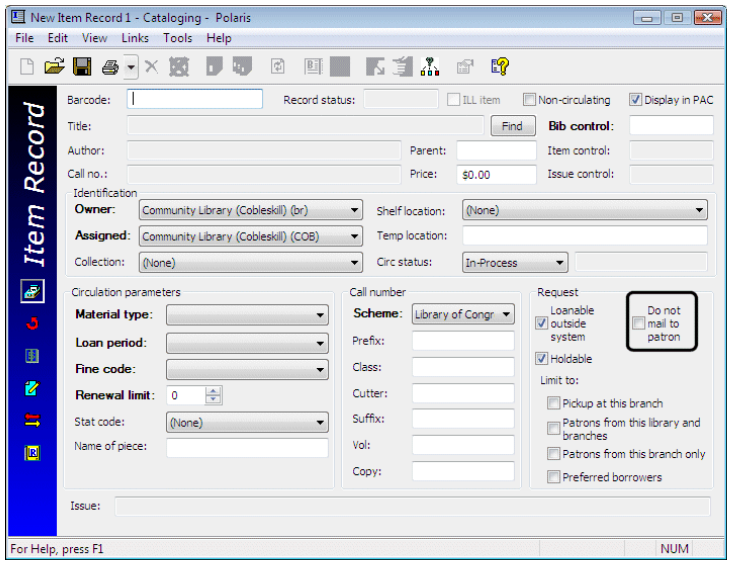
When you save a profile, it no longer closes immediately. After you save a profile, click **Close** to close it.

Updates to Item Records

The following changes were made to the Item Record workform.

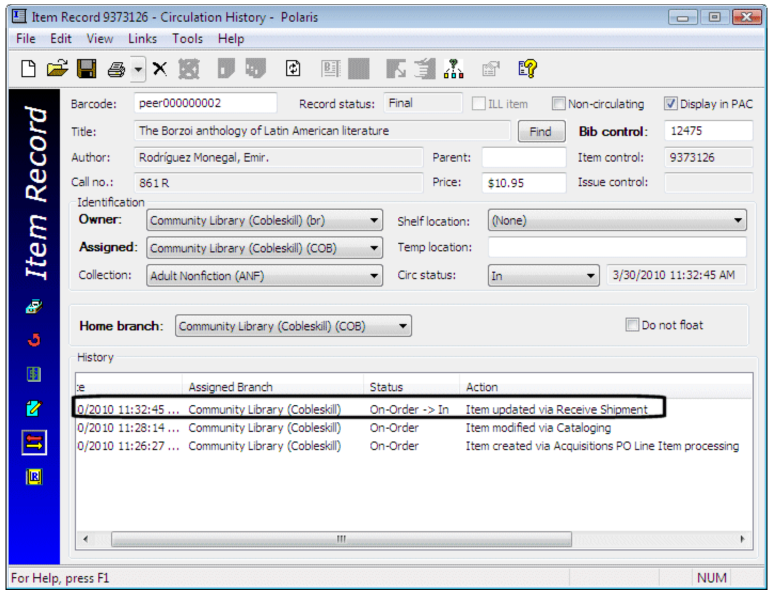
Preventing Borrow by Mail

The Item Record workform now has a **Do not mail to patron** box. If this option is checked, the item cannot be circulated to patrons by mail. See “Borrow by Mail” on page 62.



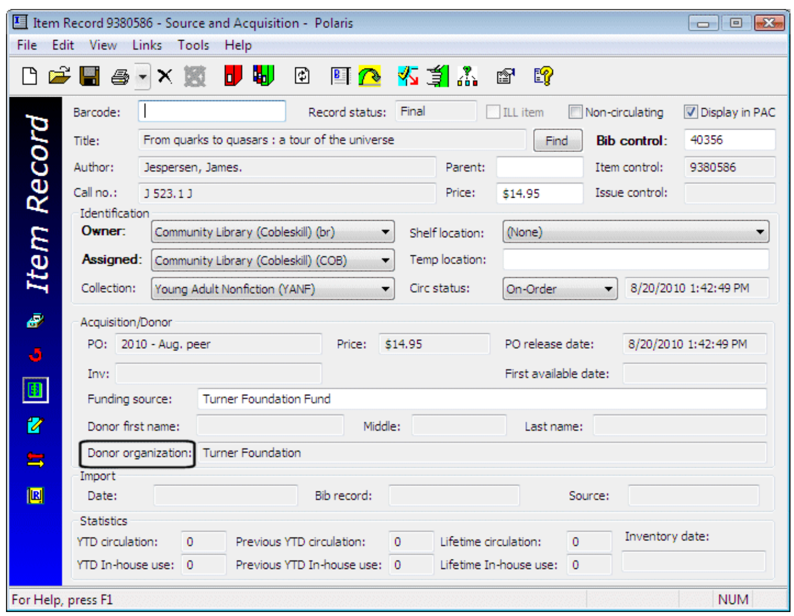
New Action for Circulation History

If an item was checked in via the Receive Shipment workform, a notation appears in the Item Record workform, Circulation History view. See “Receive Shelf-Ready Items” on page 21.



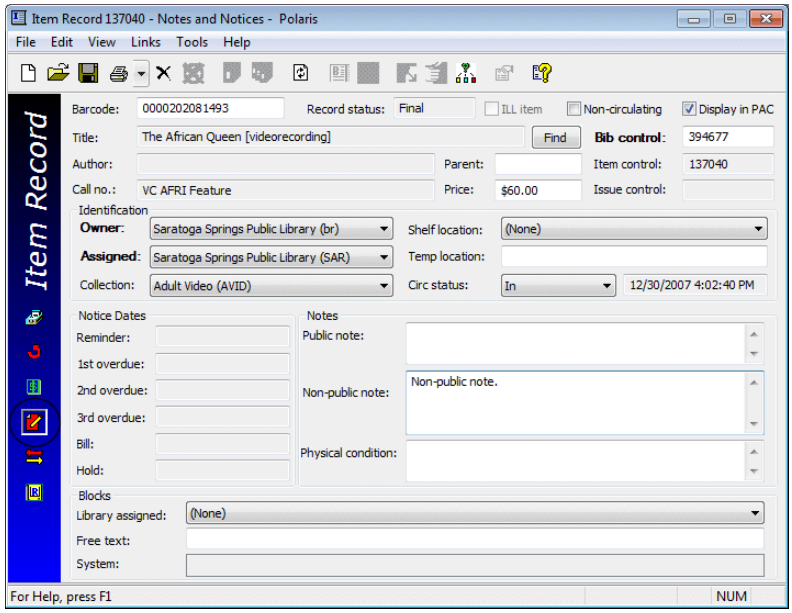
Corporate Name Label Changed to Donor Organization

On the Item Record workform's Source and Acquisition view, the label **Donor corporation** was changed to **Donor organization**. The donor organization's name appears in this box if the item record is linked to a purchase order line item segment that used a donation fund with an organization name.



Red Notes and Notices View Icon Indicates Non-Public Notes

Now, if an item record has blocks or non-public notes, the Notes and Notices view icon is red. Previously, the icon was red only if there were blocks.



New Option on Bibliographic Record Links Menu

The Bibliographic Record workform has a new option on the **Links** menu to link to an outreach services patron if the patron's reading history includes items linked to that bibliographic record. See "Link from Bib Record to Outreach Services Patrons" on page 114.

Updates for MARC Records

Polaris 4.0 includes the MARC Updates No. 10, No. 11, and No. 12. For complete information on these updates, go to the updates on the Library of Congress, MARC Standards Web site:

http://www.loc.gov/marc/bibliographic/bdapndxg.html

MARC Update No. 10 - Bibliographic Records

Polaris 4.0 includes the MARC Update No. 10 except for three new fields intended to support RDA and replace the current MARC field 245$h (General Material Designation). These fields are not included in Polaris 4.0 because of potential implications for display, indexing, and MARC Type of Material (TOM) processing: 336 (Content Type), 337 (Media Type) and 338 (Carrier Type). However, they have been added to the Bibliographic Validation table with the default set to **Yes** (validate).

MARC Update No. 11 - Bibliographic Records

Polaris 4.0 includes the following MARC Update No. 11 for bibliographic records. The Polaris Type of Material (TOM) definitions for AudioEBooks and EBooks now allow a value of **o** (online) for the form of item.

New Form of Item Values

- **o** - Online
- **q** - Direct electronic
- **s** - Electronic - This code is used as a generic code for any form of electronic resource. Codes o and q may be used to separately identify online and direct electronic resources.

Changes to Polaris TOM Definitions

- AudioEBooks - The 008/23 condition was changed to AND 008/23=s ***Or*** **o**.
- EBooks - The 006/06 condition was changed to AND 006/06=s ***Or*** **o**.
- EBooks - The 008/23 condition was changed to AND 008/23=s ***Or*** **o**.

Authority Control for Local Subject Headings

Polaris now offers authority control for some local subject headings. To use this service, the library must place local subject headings in 690 or 691 fields and use subfields similar to those specified in the MARC format for bibliographic 600, 650, and 651 fields.

If you implement authority control for local headings, the system attempts to match the local headings in bibliographic records with authority records as follows:

- **690 Subject Heading - Local Topical Subject** field with a second indicator value of '7' (source specified in subfield 2) is matched against authority records containing a 190 tag and a 008/11 value of 'z' (other).
- **691 Subject Heading - Local Geographic Name** field with a second indicator value of '7' (source specified in subfield 2) is matched against authority records containing a 191 tag and an 008/11 value of 'z' (other).

If a match is found and all other existing conditions for authority linking on non-local headings are met, a link is established between the bibliographic heading and the matching authority record.

Note:
Authority control happens only if the 690 or 691 tags have a second indicator of 7. If another indicator value is present, authority control is not performed on these tags. In addition, if 690 or 691 tags have a second indicator of 7, but you do not want authority control performed on these tags, the authority control table must be adjusted. Contact your Polaris Site Manager or Polaris Implementation Manager if you need a modification to this table.

Bibliographic Record Tag	*Indicator*	*Subfield*	*Authority Record Tags*	*Position/Subfield Value*
690	**Ind2=7** (Source specified in subfield $2)	**abcdfgklmnopqrstvxyz**	**190**	**abcdfgklmnopqrstvxyz**
			008	**position 11** (Subject heading system) = **Z** (other)
691	**Ind2=7** (Source specified in subfield $2)	**avxyz**	**191**	**avxyz**
			008	**position 11** (Subject heading system) = **Z** (other)

In addition, links are automatically established between authority records as follows:

- **590 See Also From Tracing - Local Topical Term** is matched against an authority record's 190 tag.
- **591 See Also From Tracing - Local Geographic Name** is matched against an authority record's 191 tag.

Authority Tag	Subfield	Authority Tag	Subfield
590	avxyz	190	avxyz
591	avxyz	191	avxyz

Authority Control After the Polaris 4.0 Upgrade

When your site upgrades to Polaris 4.0, authority control on 690 and 691 tags happens immediately for any records that are online (or imported with authority control). To perform authority control on local tags in existing records, a complete re-indexing is necessary. Contact your Polaris Site Manager or Polaris Implementation Manager. A fee may be charged for the re-indexing.

Data Analysis & Cleanup

Important:
If you send records out to an authority control vendor, and you want to maintain your local tags, contract your Polaris Site Manager or Polaris Implementation Manager so that your local authority records can be saved and reloaded once the authority cleanup project is complete.

Before implementing authority control on local subject headings, we recommend that the following data analysis and cleanup functions be performed on your existing records:

Note:
Depending on the state of your existing data, Polaris Library Systems may charge a fee for this data analysis and cleanup.

Bibliographic Records - 690 and 691 fields

- List all the values for IND1 and IND2, and the total number of records for each
- List all the subfield codes, and the total number of records for each
- If needed, change the IND2 to 7 (source specified in subfield 2, and add a subfield 2 with the value 'local')

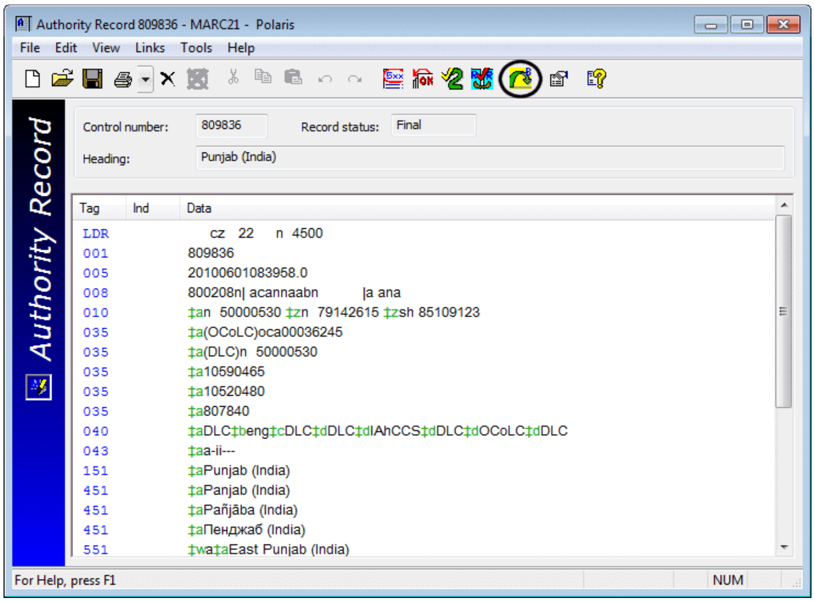
Authority Records - 190 and 191 fields

- List all the values found for 008 positions 09, 10, 11, 12, 14, 15, 16, 17
- If needed, change the 008 positions to the following values (if they are accurate in the context of the record):

- 09 (Kind of record) values = 'a' or 'f'
- 11 (Subject heading system/thesaurus) for local headings, value = 'z'
- 15 (Heading use-subject added entry) for local subject headings, value = 'a'

New Icon for Linked Bibs on Authority Record Workform

You can now see bibliographic records linked to an authority record by clicking on an icon in the Authority Record workform's toolbar.



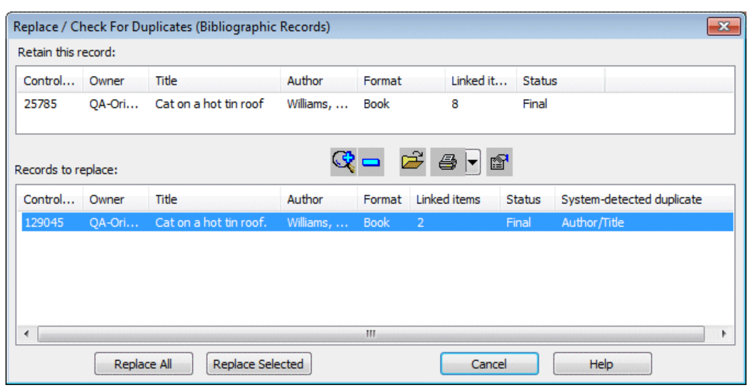
Replace Bibliographic Records

You can now replace a bibliographic record with another record even if the records are not determined to be duplicates. In addition, you can select multiple records, a record set, or multiple record sets and replace all the records with a bibliographic record. The records you select for replacement do not need to meet the rules for duplicate detection or have anything in common with the record being retained, but they must be either final or provisional. If the record being retained is provisional, it is saved as final when it replaces the other records.

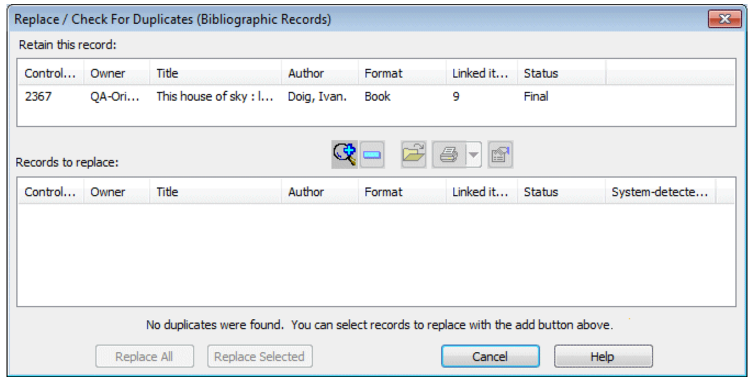
The records are replaced, not merged, but the tags listed in the Bibliographic Overlay Retention policy table are retained from the replaced records and added to the retained record. In addition, all links to item records, hold requests and other records are transferred from the replaced records to the record replacing them.

The Replace/Check Duplicates Dialog Box

On the Bibliographic Record workform, when you select **Tools, Replace/ Check for duplicates**, click [button] or press **Ctrl+I**, a new Replace/Check for Duplicates dialog box appears where you can evaluate duplicates, if they are listed, or add records that you want to replace with the record displayed in the workform. The top portion of the dialog box (under **Retain this record**) displays the information about the record to be retained. If existing duplicates are detected according to the current rules in the Bibliographic Deduplication database table, they are listed in the **Records to replace** list, and a column shows the rule group that was used to determine the duplicate.



If no duplicates are detected, the Replace/Check for Duplicates dialog box appears with the message: **No duplicates were found. You can select records to replace with the add button above.**



Finding Records to Replace

To replace records that are not listed as duplicates, click to find and add bibliographic records or bibliographic record sets to this dialog box. If you select record sets to search by, the record set type is limited to **bibliographic**. If you select a record set or record sets, all the bibliographic records in the record sets appear in the list.

For each bibliographic record in the list, the list displays the following information in columns, which can be sorted by clicking on the column header:

- Control Number
- Owner
- Title
- Author
- Format
- Linked Items
- Status
- System-detected duplicate (if the record is determined to be a duplicate, the rule group is displayed)

If you want to open the record set, right-click and select **Open**.

> **Note:**
> If bibliographic records are already on the replace list and the user selects them again, a message lists the number of duplicates that were found and not added to the list. If multiple records were selected and not all are duplicates, the remaining records are added to the Replace list.

You can double-click on a record in the **Records to replace** list to open it.

To remove records from the list, select the record or records to remove and click .

Replacing the Records

When all the records to be replaced are in the list, you can click **Replace all** if you are sure you want to replace all the records listed with the record displayed in the Bibliographic Record workform. Or, you can select specific records to replace, then click **Replace selected**.

A message box appears. Click **Yes** to replace the selected records or click **Cancel** to cancel the replacement. The bibliographic record workform stays open during the replacement process.

Results of the Bibliographic Record Replacement

Links transferred to the retained record - When the record or records are replaced, all the following links are transferred from the replaced records to the retained record:

- Hold requests
- Item records
- Item templates
- Authority records
- Selection list line items
- Selection lists
- Purchase order line items
- Purchase orders
- Invoice line items
- Invoices
- Serial holdings records
- Standing order parts
- Subscription records
- Record sets

In addition, the 001s of the replaced records are converted to 035 tags and placed into the retained record (035 ## $a).

Retained tags from replaced records - Any tags that are specified for retention in the Bibliographic Retention Tags policy table in Polaris Administration are copied to the retained record.

Authority Control on Retained Record

If the new Polaris Administration setting **Check headings immediately after bib replace** is enabled, and a heading problem is detected, the Check heading assistant dialog box opens and you can clean up any issues that need to be resolved.

Circulation Counts in Retained Bibliographic Record

The circulation counts for the linked item records accumulate in the retained bibliographic record as follows:

- **FirstAvailableDate** - The system finds the earliest first available date out of all the replaced records and the retained record and uses that date in the retained record.
- **LifetimeCircCount** - All the lifetime circulation counts are added together and saved in the retained record.
- **LifetimeInHouseUseCount** - All the in-house use counts are added together and saved in the retained record.

Transaction Logging

The following transactions are logged when records are replaced:

- A **bib record modified** transaction is logged for the record being retained.
- A **bib record deleted** or **bib record marked for deletion** transaction is logged for the replaced records.

Polaris Administration Settings

- **New Cataloging parameter** - The new **Bibliographic record replace: Maximum allowed in one operation** parameter limits the number of records that can be replaced at once. This parameter is available at the system level only. The default is 50 and the limit is 999 records.
- **New Cataloging profile** - If the new **Check headings immediately after bib replace** profile is set to **Yes**, the headings are checked on the retained bibliographic record as soon as the records are replaced, and the Check Headings Assistant dialog box appears immediately if there are problems with any of the headings. This profile is available at the system, library, branch, and staff levels.
- **Existing Cataloging profile** - If the existing **MARC validation immediately after bib replace** profile is set to **Yes**, the retained record is checked for proper MARC format.

If both the **Check headings immediately after bib replace** and **MARC validation immediately after bib replace** profiles are set to **Yes**, the headings are checked first, then the MARC validation.

Permissions for Replacing Bibliographic Records

The user must have permission to delete any of the records that are being replaced as well as the permission to modify the record being retained. The delete permission is checked when the record is replaced, not when the record is added to the list of records to be replaced.

Cataloging Reports

The following Item report was added:

Collection Disposition by Material Type Report - You can select the branches to include in the report and group the data by branch or collection. The report shows the number and percentage of items currently on the shelf (or otherwise considered available), items out (unavailable but accounted for), or not accounted for (lost, missing). It shows a sum total for each branch and a grand total for all branches selected. If the report is grouped by collection, it is broken down by collection and shows the totals for each collection for all selected branches. The count is broken out by the material type within the collection.

The following Cataloging reports were renamed:

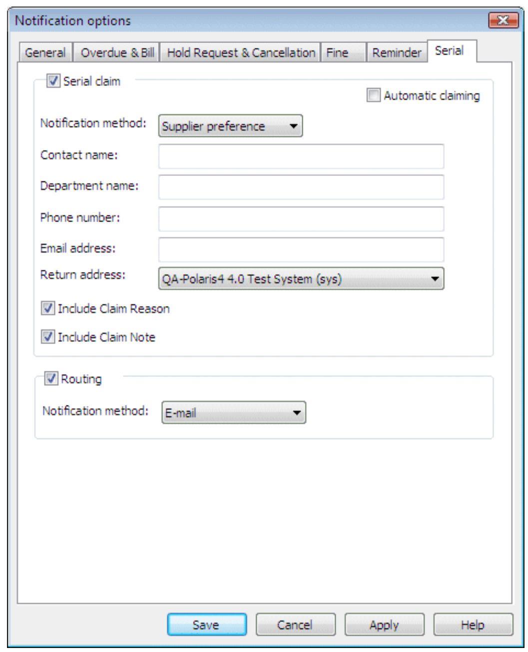
- The Item report **Classification Number List** has been renamed **Call Number List**.
- The Bibliographic report **Last Copy Discarded** has been renamed **Bib Records with No Linked Items**.

Serials

The following changes were made to Polaris Serials.

Claiming and Routing Notice Options Grouped Together

The Claiming and Routing notices options are now all on one tab in the Notification Options dialog box. See "Changes to Notification Setup" on page 98 for more changes to notification.

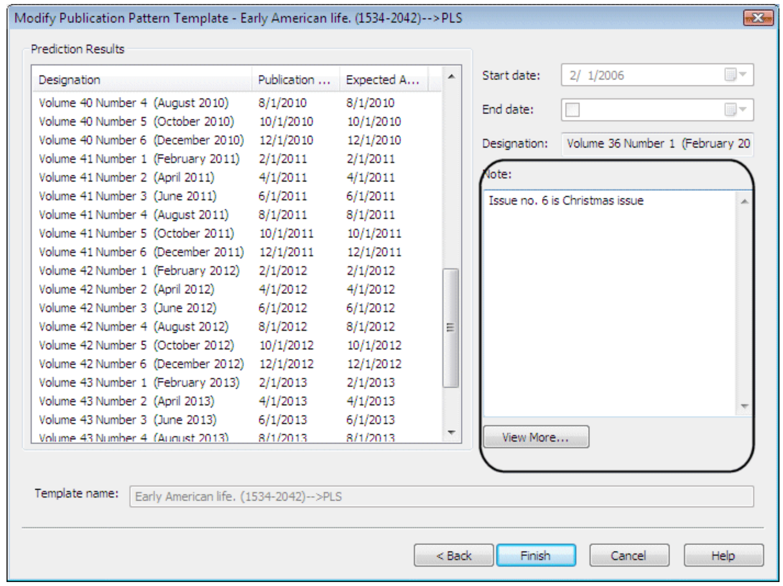


Polaris Serials Publication Pattern Templates Changes

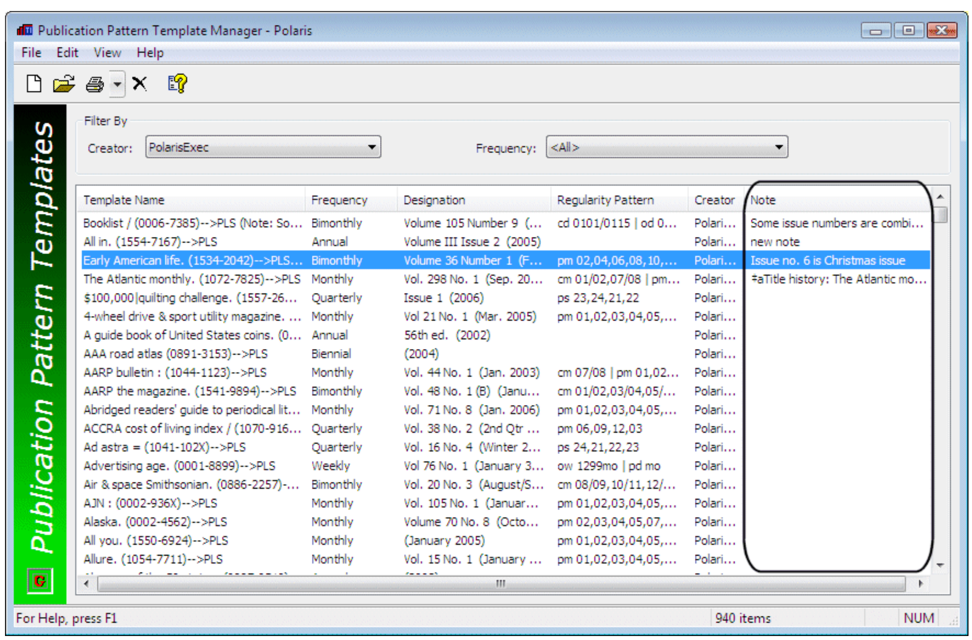
Polaris Library Systems now offers 1114 Serials Publication Pattern Templates, including over 100 international publications. In addition to the full set of templates, you can now purchase just the updated templates, which will not override your existing Polaris templates.

Added Note Field to Serials Publication Pattern Templates

When you create a new publication pattern template or modify an existing template, you can enter a note on the Prediction Results window. For example, you use the **Note** box to explain why the template uses a certain enumeration or chronology or why issues must be combined at check in. You can enter up to 512 characters in the **Note** box.



This note will appear in a Note column in the Publication Pattern Template Manager and in the list of templates in the Serial Holdings Record.



In addition, when you select **Save as template** on a publication pattern's Prediction results page, the **Note** box appears where you can enter a note and save it in the template.

Change the Serial Holdings Record's Title

You can now change the bibliographic record that is linked to a serial holdings record if you have made an error in selecting the bibliographic record. From the Serial Holdings Record, click **Find** and search for another bibliographic record.

If there are retained issues/parts and serial item records, they will all get the new title, and they will display in the PAC with the new title. Therefore, it is important that you use this method only when you have made an error in selecting the bibliographic record, not when a publisher changes the title of the publication.

In cases where there is an actual title change, it is preferable to close the pattern on the existing serial holdings record, which deletes any issues that have not been received. Then, select **File, New, Copy** to create a new serial holdings record with the same publication pattern as the old title, and link to the new bibliographic record. If the publication pattern has not changed, you can then generate issues from the existing pattern, and check in issues for the new title.

This method ensures that any retained issues and items from the old serial holdings record keep the link to the old bibliographic record and display in the PAC under the old title. Any subsequent retained issues and items will display in the PAC under the new title.

You can opt to include the 780 (Preceding entry or Former Title) and 785 (Succeeding entry or Later Title) fields in the PowerPAC brief display. Subfields o, r, u, w, x, y, z, 4, 6, 7, and 8 are suppressed from the brief title display but are retained in the full title display. See "Former Title and Later Title in PowerPAC Brief Title Display" on page 146.

Chronology Date in Serial Issue/Part Record

Previously, the chronology date was only an internal date used for the display order of issues or parts in the PAC. Now this date displays in the Issue and Part workforms, and it is calculated so that added issues or parts display in the PAC.

The chronology date always displays as **MM/DD/YYYY** format, whether or not all three levels of chronology are defined in the publication pattern. The chronology date uses the year selected in the first level of chronology (if it is selected), or the current year if the year is not selected. If the month and day are not defined, the chronology date uses the month and day from the publication pattern's start date.

Patron Services/Circulation

Polaris 4.0 includes the following improvements in patron services and circulation.

Borrow by Mail

Polaris Borrow by Mail features allow staff members to request library materials for patrons and have the requested materials delivered by mail. A patron can also select the Borrow by Mail feature when placing a request from the PAC if the patron's branch enables this option. Libraries can restrict Borrow by Mail options by patron code, establish a fee for the service, and allow exceptions to the fee for some patrons, such as homebound (Outreach Services) patrons. Polaris Borrow by Mail is available by license. There is no additional cost, but Borrow by Mail features are available only if the license is activated.

Within a library system or consortium, one or more branches are designated as Borrow by Mail processing centers in Polaris Administration. Processing centers may be actual branches or virtual organizations set up for this specific purpose. When a Borrow by Mail request is placed, the pickup location defaults to a designated processing center, and the item is routed to this location by normal holds routing procedures. Alternatively, a branch may handle both normal and Borrow by Mail requests by establishing itself as a processing location. In this case, an optional message alerts staff to a Borrow by Mail request when the item is trapped at circulation.

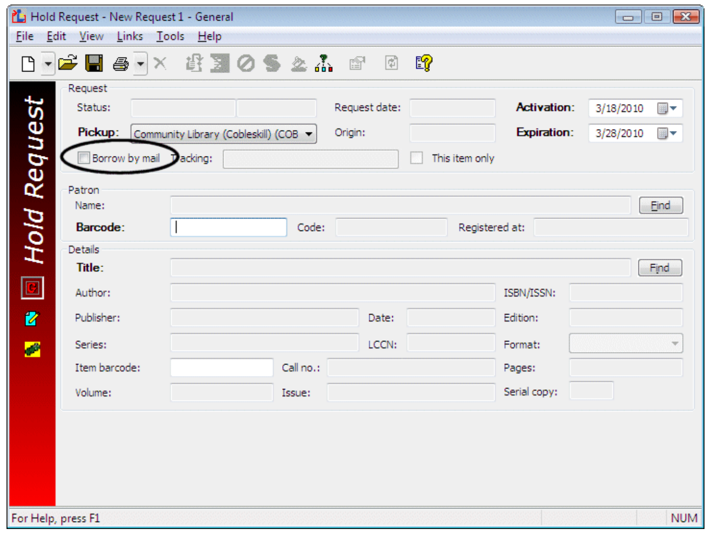
After a Borrow by Mail item is trapped and checked out to the requesting patron, it is placed in a packet with an accompanying letter, mailing label, and return address label. The item is then shipped to the patron, and a tracking number can be entered in the Hold Request workform.

Because you may need to track and troubleshoot delivery after check-out, the request record must remain available after the item has been checked out and until it returns. A new request status of Out has been added to support this functionality. The Out status is displayed in the staff client and in PAC, where it is displayed as **Sent**.

Note:
Organizations that do not use Borrow by Mail can choose to enable Out requests for display. See "Request Status of Out" on page 76.

Placing a Borrow by Mail Request from the Staff Client

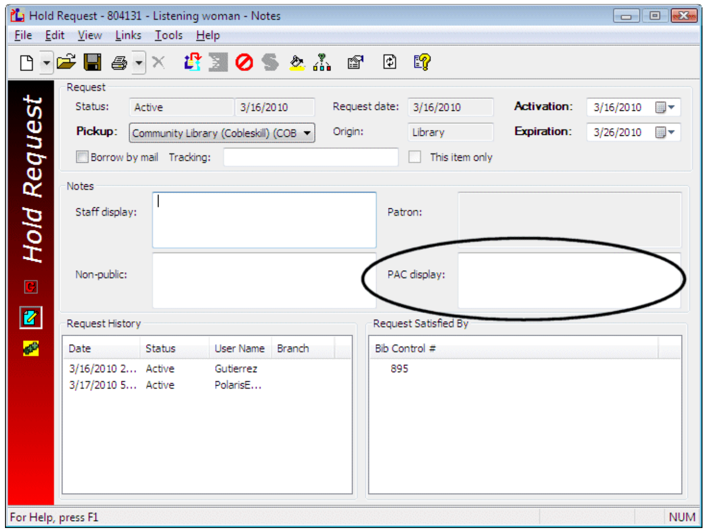
When Borrow by Mail is enabled for the log-on branch (see "Setting Up Borrow by Mail in Polaris Administration" on page 69), staff members can indicate that a request is for Borrow by Mail with a new Borrow by Mail check box on the Hold Request workform.



The default pickup location is the processing center designated for the workstation's branch. If more than one processing center has been specified in Polaris Administration, these are available as pickup locations in the list. The staff member supplies the patron and title information in the usual way.

Note:
The Borrow by Mail option is not available for interlibrary loan (ILL) requests.

You can set up a default PAC display note to identify the request as Borrow by Mail; patrons can view the note in the patron account in PAC. The note is also displayed on the Hold Request workform - Notes view. See "Setting Up Borrow by Mail in Polaris Administration" on page 69.



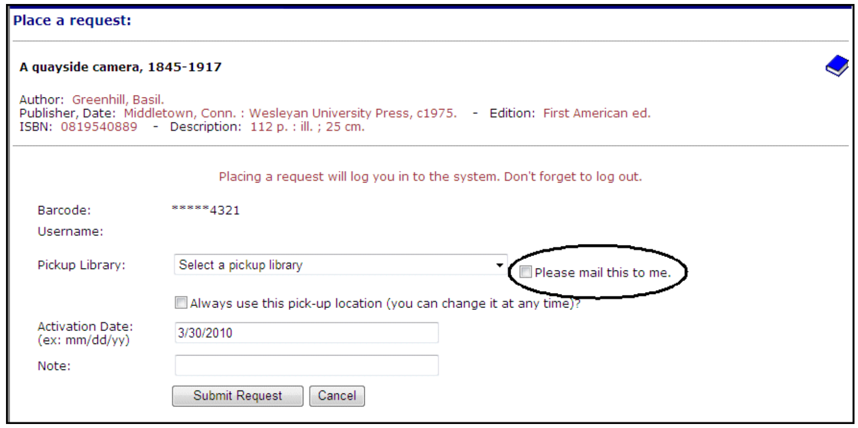
Note:
Staff members with the new Circulation permission **Modify PAC display note: Allow** can add or modify a PAC display note for any request (not just Borrow by Mail requests). See "PAC Display Note for Hold Requests" on page 74.

If Borrow by Mail requests are processed during normal check-in (not sent to a central processing location), you can set up a staff display note that identifies the request as Borrow by Mail and is added automatically to the hold request when it is saved. When the item is trapped at check-in, the note will alert the circulation clerk that the item needs to be mailed. If Borrow by Mail requests are processed in bulk at a central location, the staff display note may not be needed. See "Setting Up Borrow by Mail in Polaris Administration" on page 69.

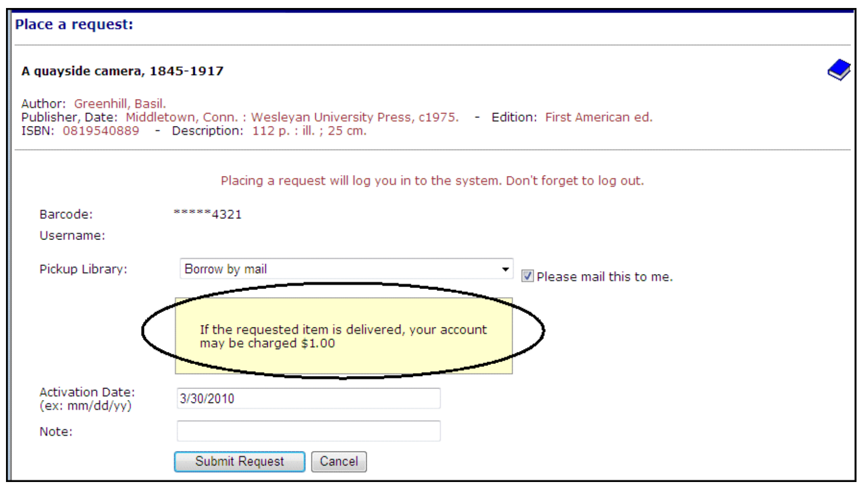
Placing a Borrow by Mail Request from the PAC

If a patron's code and the material type are enabled for Borrow by Mail requests (see "Setting Up Borrow by Mail in Polaris Administration" on page 69), the patron can check **Please mail this to me** when placing the request in PAC.

Note:
Borrow by Mail is not available for interlibrary loan (ILL) requests.

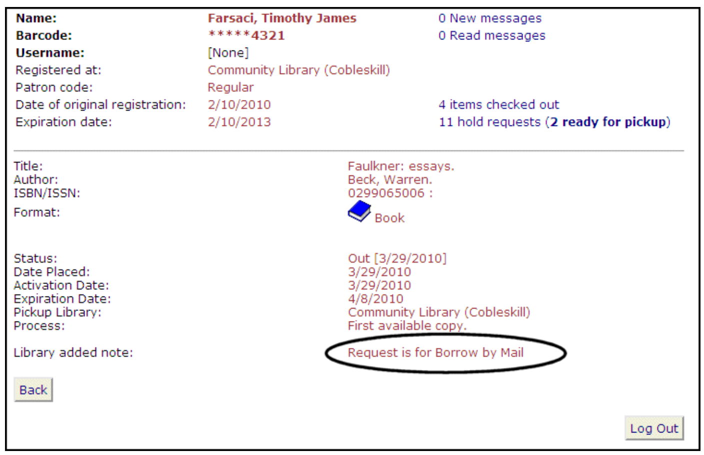


An optional confirmation message is displayed. If there is a fee for Borrow by Mail requests, the message states the charge and provides the patron the opportunity to cancel the request.



An optional PAC display note is available for Borrow by Mail hold requests listed on the PAC patron account Requests page.

When you place the cursor over the note icon, the note is displayed. The default text is **Request is for Borrow by Mail**. When you click the icon, details of the request, including the library note, are displayed.



To set up the confirmation message and display note, see "Setting Up Borrow by Mail in Polaris Administration" on page 69.

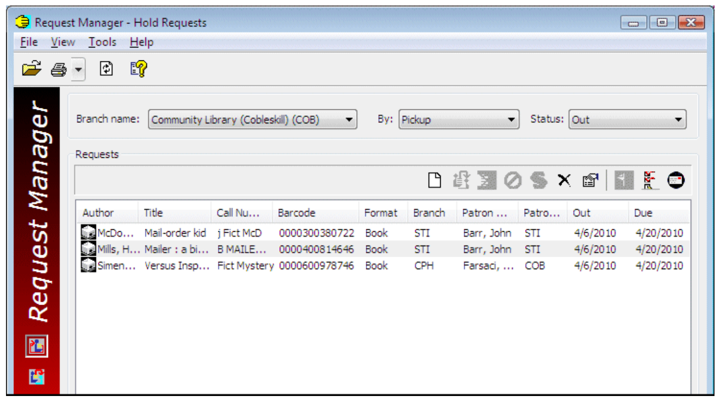
In the requests summary information in the heading of the patron account pages, if several requests have a Held status, those that are Borrow by Mail are listed in a separate count; for example:

4 ready for pickup
2 will be mailed

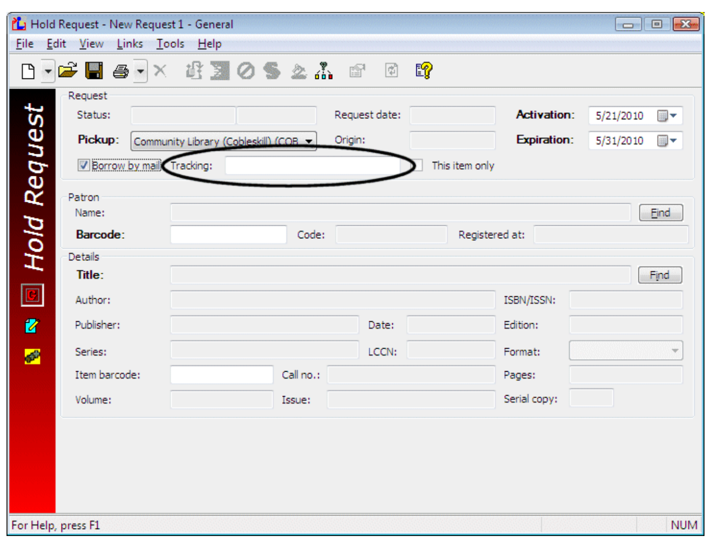
Processing Borrow by Mail Requests

You can process Borrow by Mail items in bulk or during normal check-in.

Bulk processing - When items that fill Borrow by Mail requests arrive at the processing center, a staff member checks them in and the status changes to Held. On the Request Manager, the staff member selects the processing center in the **Branch name** box, selects **Pickup** in the **By** box, and sets the status to Held. Borrow by Mail requests are marked by a new "package" icon. Item-level Borrow by Mail requests are marked by the package icon with the letter I.



To print a checklist of the items to be mailed, select the Borrow by Mail items and click the checklist button above the Requests list. (The checklist is available for requests that are Shipped, Held, or Out.) If your postal meter generates package tracking numbers, you can note them or attach them to the printed checklist. Later, you can enter the tracking numbers in the new **Tracking** field on the appropriate Hold Request workforms. This field is available only for Borrow by Mail requests.



To print the mailers, select the Borrow by Mail items and click above the Requests list. The printed mailer set for each item includes a cover letter, a mailing label, and a return label. The cover letter lists the Borrow by Mail fee, if any, the item data, and instructions for returning the item. You can customize the cover letter header and text in Polaris Language Editor.

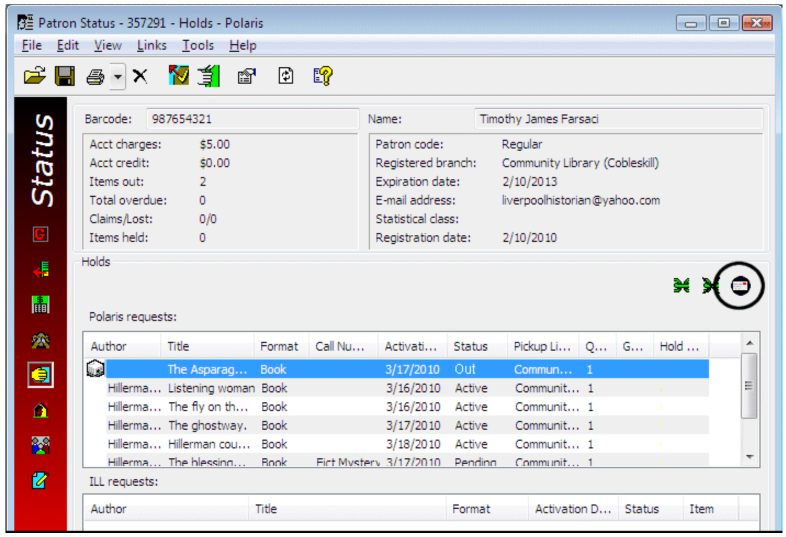
Note:
Mailer printing is available for requests with the status of Out.

To check out the Borrow by Mail items, select the items and click above the Requests list, or right-click and select **Bulk Check Out** from the context menu.

If an extended loan period has been set for Borrow by Mail items, the due date is calculated with the extended loan period. If a fee has been set for Borrow by Mail processing, the fee is charged to the respective patron accounts. The system uses the processing center’s settings for the loan period and fee.

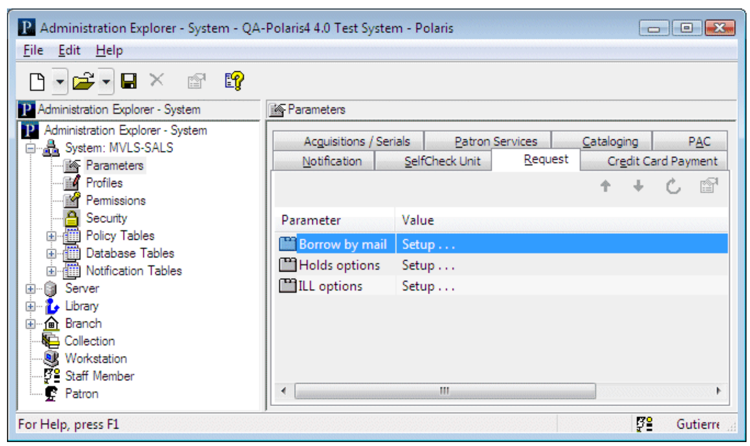
Blocks for held items do not affect bulk checkout. If an item cannot be checked out due to other blocks on the patron account, you can automatically send a failure notice to the patron. See “Setting Up Borrow by Mail in Polaris Administration” on page 69. If multiple processing centers have been defined in Polaris Administration and a request’s pickup branch differs from the workstation branch, the item cannot be checked out and a message appears. When the items are checked out, the request status changes to Out and they can be listed in the Request Manager by the Out status.

Processing during normal check-in - When an item that fills a Borrow by Mail request is checked in at a location that is not identified as a processing center in Polaris Administration, the item status goes to In Transit like any other hold request item and is transferred to the designated processing center for the check-in branch. However, if the check-in location is identified as its own processing center, the item is trapped for the hold request. The staff member then checks the item out to the patron, selects the Borrow by Mail item or items in the Patron Status workform - Requests view, and clicks the Borrow by Mail icon to print the mailer. Mailer printing is available for requests with the status of Out.

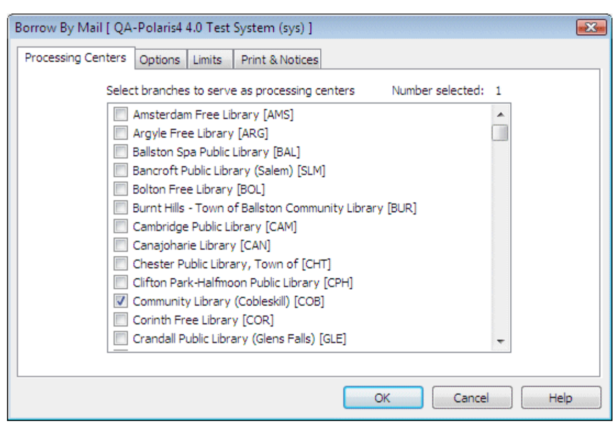


Setting Up Borrow by Mail in Polaris Administration

In Polaris Administration, double-click the new **Request** parameter **Borrow by Mail** to set up and enable these features on the Borrow by Mail dialog box.

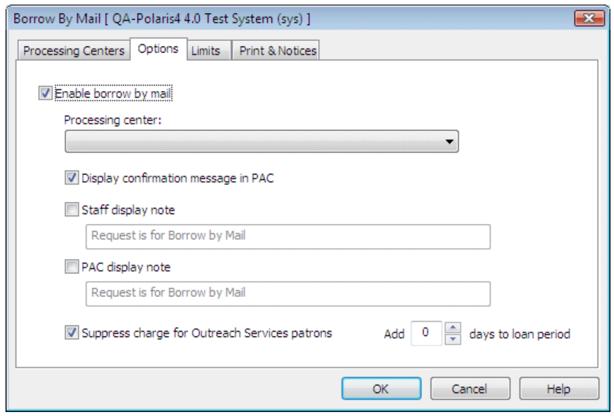


Processing Centers - These are set at the system level only, and the tabbed page is visible only at the system level.



Select all the organizations that might serve as processing centers for the branches that will enable **Borrow by Mail**. To enable Borrow by Mail features, at least one organization must be designated as a processing center on this tabbed page. Processing centers may be actual branches or virtual organizations set up for this specific purpose. For more information about creating new organizations, see "Setting Up Organizations" in the *Polaris Administration Guide* or the equivalent topic in staff client online Help.

Options - Set these at the system, library, or branch level.



- Select (check) **Enable Borrow by Mail** and select a processing center for this organization. An item that fills a Borrow by Mail request created in the staff client is shipped to the processing center designated for the log-in branch of the workstation that created the hold request. An item that fills a Borrow by Mail request from the PAC is shipped to the processing center designated for the patron's registered branch.

  Important:
  Be sure the processing center is listed in the holds routing sequence table for the branch that will originate hold requests. See "Setting Up Holds Routing" in the *Patron Services Administration Guide* or the equivalent topic in staff client online Help.

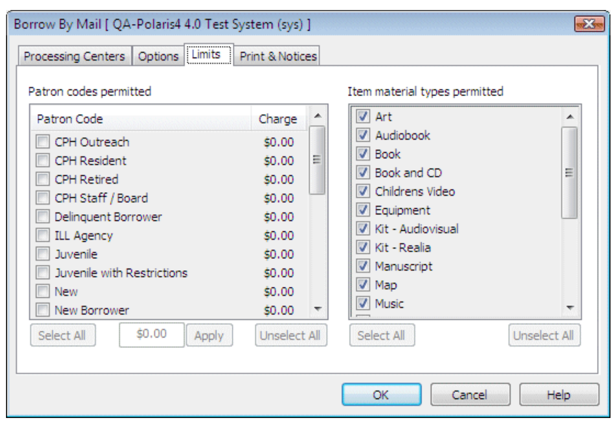
- Select (check) **Display confirmation message in PAC** to display a message when the patron places a Borrow by Mail request. If you charge a delivery fee, the message states the charge and offers the option to continue or cancel the request.
- Select (check) **Staff display note** and edit the text of the note if you wish (maximum 250 characters). This message appears when an item that fills a Borrow by Mail request is trapped at circulation, and alerts the staff member that the item requires Borrow by Mail processing. The system uses the processing center's setting. See "Processing Borrow by Mail Requests" on page 67.

- Select (check) **PAC display note** and edit the text of the note if you wish (maximum 250 characters). This note is available in the information view for individual items listed on the PAC patron account Requests page. The system uses the processing center's setting.

  Note:
  Staff members with the appropriate permission can edit the note for individual hold requests. See "Placing a Borrow by Mail Request from the Staff Client" on page 63.

- Select (check) **Suppress charge for Outreach Services patrons** if the processing center ordinarily charges a delivery fee for Borrow by Mail requests, but you do not want to charge a fee to homebound (Outreach Services) patrons. In PAC, the system uses the setting for the patron's registered branch.
- If you want to change the loan period to accommodate shipping time back and forth, indicate the number of days to extend the loan period. This setting is available only if the organization is a processing center. The system uses the processing center's setting.

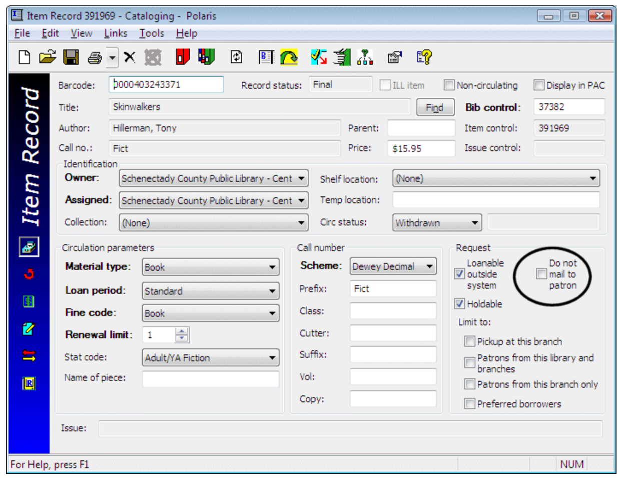
Limits - Set patron codes and item materials at the system, library, or branch level. Charges can be set at the system and library levels, or by an organization designated as a processing center.



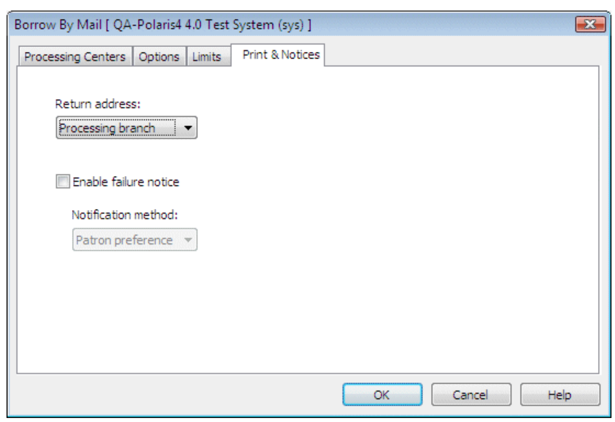
- Select (check) the patron codes for the patrons permitted to place Borrow by Mail requests. The system uses the settings for the patron's registered branch in both the staff client and PAC.
- (System or library level only, or organization designated as a processing center.) If you want to charge a Borrow by Mail delivery fee, select the appropriate code, set the charge amount, and click **Apply**. You can set separate charges for different patron codes. To specify the same charge for multiple patron codes, select the codes, then set the charge amount and click **Apply**. The system uses the processing center's settings for charges. A processing center should set charges for all the patron codes it intends to charge, regardless of whether those codes are used for the processing center's own patrons.

- Deselect (uncheck) the item material types that should not be eligible to fill Borrow by Mail requests. For PAC requests, the system uses the setting for the patron’s registered library. For staff client requests, the system uses the setting for the workstation branch.

Note:
You can prevent a specific item from filling a Borrow by Mail request by checking the new setting **Do not mail** on the Item Record workform - Cataloging view.



Print & Notices - Set these at the system, library, or branch level.



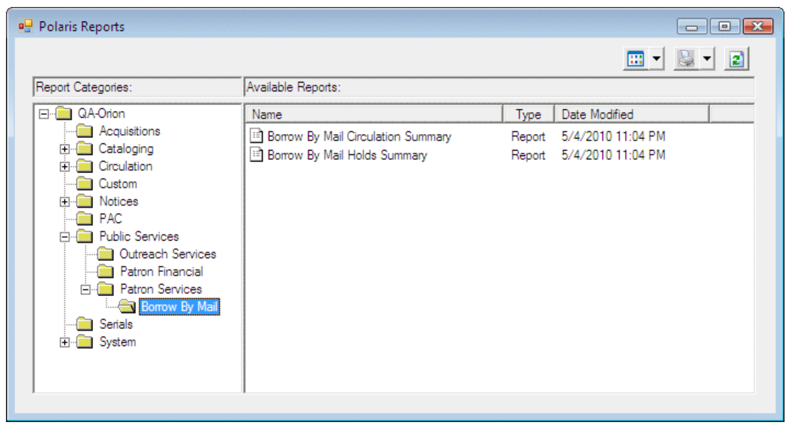
- Specify a return address for the item mailer. You can select **Processing Branch** (default) or **Item’s Branch** (item’s assigned branch).
- Select (check) **Enable failure notice** to generate a notice to the patron if an item cannot be checked out during Borrow by Mail bulk checkout due to blocks on the patron account. If you check this option, select a notification method. The method options are determined by your settings for the **Notification options** parameter - General tabbed page. For more information about these settings, see “Setting Up Notices” in the *Polaris Patron Services*

Administration Guide or the equivalent topic in staff client online Help. You can edit the text of the notice using Polaris Language Editor. For more information, see Language Editor online Help.

Note:
Telephone notices include Borrow by Mail messages if Borrow by Mail is enabled at the system level. If you use both both telephone notification and Borrow by Mail, you should enable Borrow by Mail at the system level, then disable it for any branch that is not using Borrow by Mail.

Borrow by Mail Reports

Borrow by Mail reports are available from the Polaris Shortcut Bar. Select **Utilities, Reports and Notices**. In the Polaris Reports dialog box, select **Public Services, Patron Services, Borrow by Mail.**

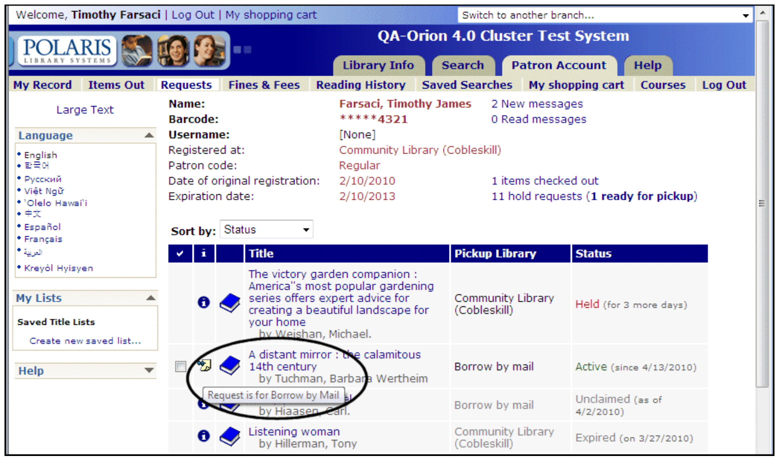


- **Borrow by Mail Circulation Summary** - A summary of Borrow by Mail circulation (number of check-outs), including material type, the number of items checked out, the number of patrons transacting, and the total number of check-out transactions. Each patron is counted once, regardless of the number of items checked out to that patron, and renewals are not included. You can filter the report by organization (all branches designated as Borrow by Mail processing centers) and specify a date range.
- **Borrow by Mail Holds Summary** - A summary of Borrow by Mail requests, including the number of requests created, requests filled (requests become held), requests checked out, requests unclaimed, and requests cancelled. You can filter the report by pickup branch (processing center) and specify a date range.

Borrow by Mail filters and columns have also been added to Holds list and count reports in SimplyReports.

PAC Display Note for Hold Requests

Staff members with the new Circulation permission **Hold requests: Modify PAC display note** can add or modify a PAC display note on the Hold Request workform - Notes view. The note is available to the patron in the PAC Patron Account - Requests page and in the detailed information for a specific request.

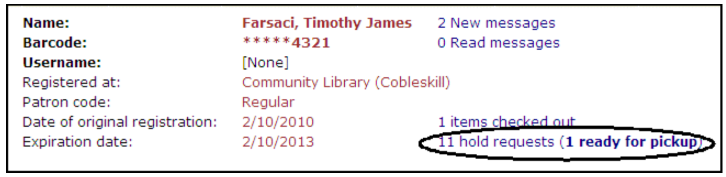


Note:

Organizations that use Borrow by Mail features can set up a default PAC display note to identify Borrow by Mail requests in the PAC patron account. See "Setting Up Borrow by Mail in Polaris Administration" on page 69.

Summary Requests Count in PAC Patron Account Pages

As in previous versions of Polaris, the header area of PAC patron account pages displays a summary count of the patron's requests.



The count has now been refined to reflect the patron's requests more accurately:

- **Hold requests** - Those with a status of Active, Pending, Inactive, Held, Shipped, Unclaimed, and Not-supplied are included. Expired, Cancelled, and Out requests are not included.
- **ILL requests** - Those with a status of Active, Inactive, and Received (the request status is Received, the item status is Held) are included.

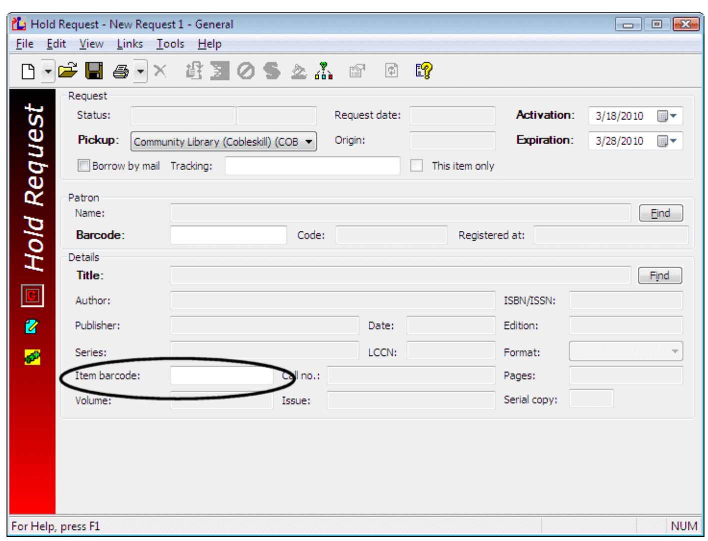
If several requests have a Held status, those that are Borrow by Mail are listed in a separate count; for example:

4 ready for pickup
2 will be mailed

For more information, see "Borrow by Mail" on page 62.

Scanning Item Barcodes into Request Workform

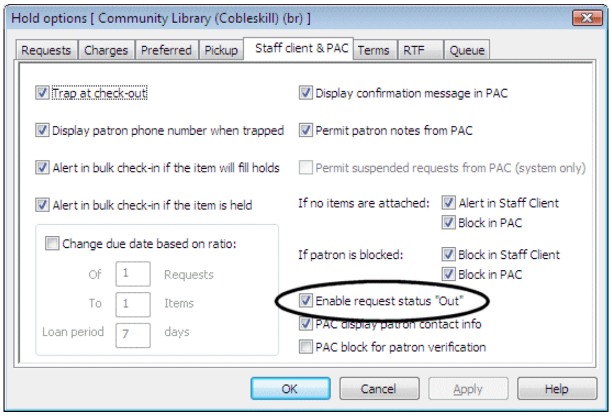
You can now scan an item barcode directly into the Hold Request workform.



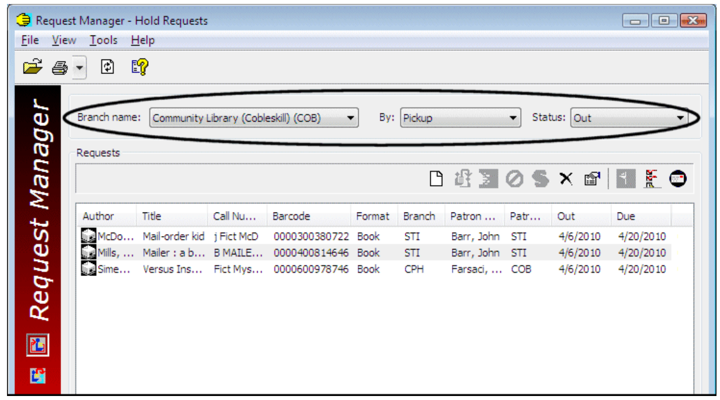
Request Status of Out

A request status of Out has been added that allows the hold request to remain available in the system for tracking purposes even when the item has been checked out. The request status changes to Out when a held item is checked out. The request is automatically deleted when the item status changes from Out to In, Held, Transferred, In-transit, or Lost, but remains available if an item status changes from Out to Claim Never Had or Claim Returned. Requests with the status of Out do not count against request limits.

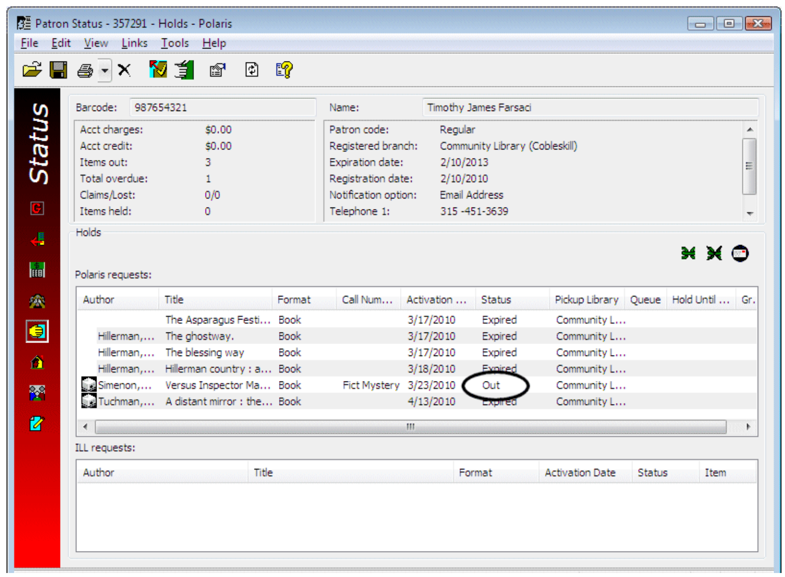
The Out request status is automatically enabled for organizations using Borrow by Mail (see "Borrow by Mail" on page 62). Other organizations can choose to enable the Out status for requests and display it in the staff client and the PAC patron account. On the Holds options dialog box - Staff & PAC tabbed page (Request parameters), select (check) the new option **Enable request status "Out"**. The option is available at the system, library, and branch levels. It is unchecked by default. The setting for the workstation's log-on branch controls the display in the staff client, while the setting for the patron's registered branch controls the display in the PAC patron account.



The Request Manager offers a new listview for requests with the status of Out. This view is available for branches that use Borrow by Mail, or where both the staff member's log-on branch and the branch that checked the item out have opted to enable the request status of Out.

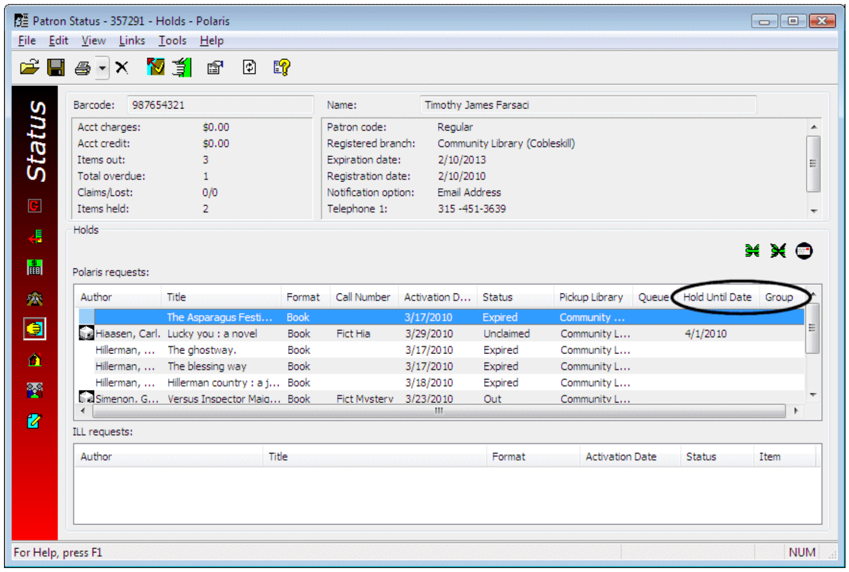


The status is available in the Patron Status workform - Holds view under the same conditions.



Patron Status Workform - Holds View Column Positions

In the list of requests on the Patron Status workform - Holds view, the **Held Until Date** column now appears to the left of the **Group** column to minimize horizontal scrolling.



Request Manager - Date Columns Added

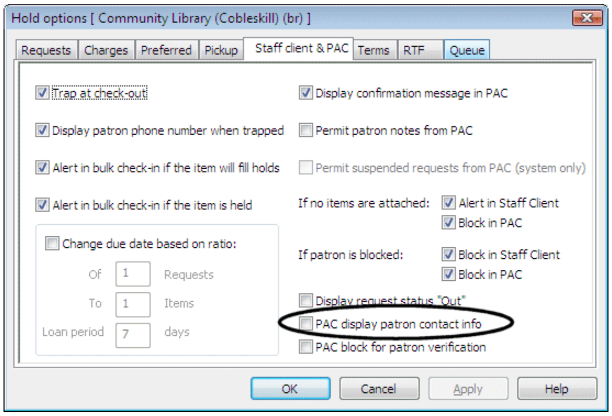
In the Request Manager - Holds View, displayed by Item, date columns have been added to the following status lists:

- **Held** - Held date
- **Pending** - Pending date
- **Shipped** - Shipped date
- **Unclaimed** - Unclaimed date

Display Contact Information on PAC Hold Request Page

You can now display a patron's contact information on the PAC request confirmation page so that patrons can easily verify their contact information for hold notices. The information includes a link to update the information if necessary.

To display the contact information and link, on the Holds options dialog box - Staff & PAC tabbed page (**Request** parameters), select (check) the new option **PAC display patron contact info**.

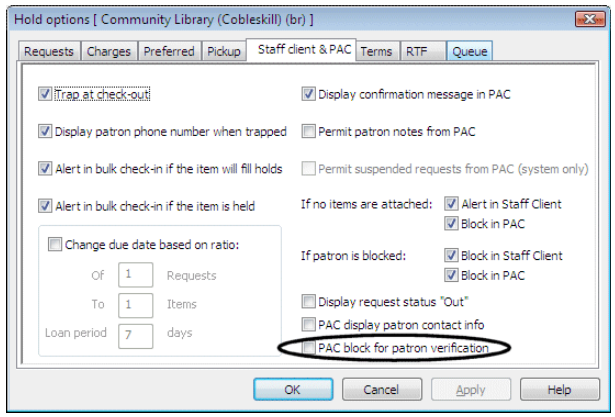


The option is available at the system, library, and branch levels. It is unchecked by default.

For more information about the Contact Information and Preferences feature in PAC, see "Changes to PAC Patron Account Pages" on page 154.

Blocking Hold Requests for Patron Data Verification

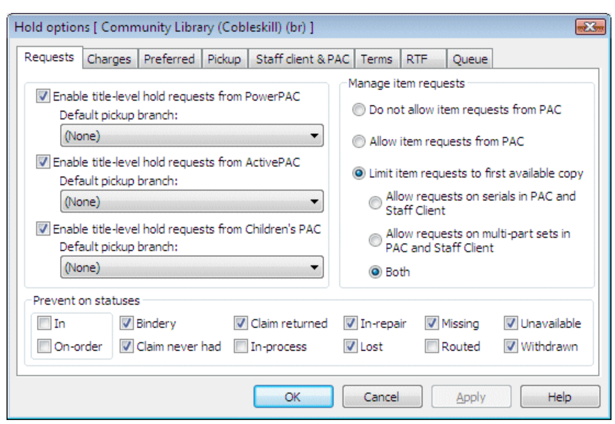
You can now choose to block hold requests from PAC if there is a verification block on the patron record. This type of block is added when the patron has registered online or has requested updates to certain patron account information (see “Updating Account Information from PAC” on page 158). On the Holds options dialog box - Staff & PAC tabbed page (Request parameters), select (check) the new option **PAC block for patron verification**.



The option is available at the system, library, and branch levels. It is unchecked by default.

Default Pickup Branch for PAC Requests

As in previous versions of Polaris, you set the default pickup branch for PAC hold requests on the Holds options dialog box - Requests tabbed page (Request parameters). The system uses the setting for the patron’s registered branch.



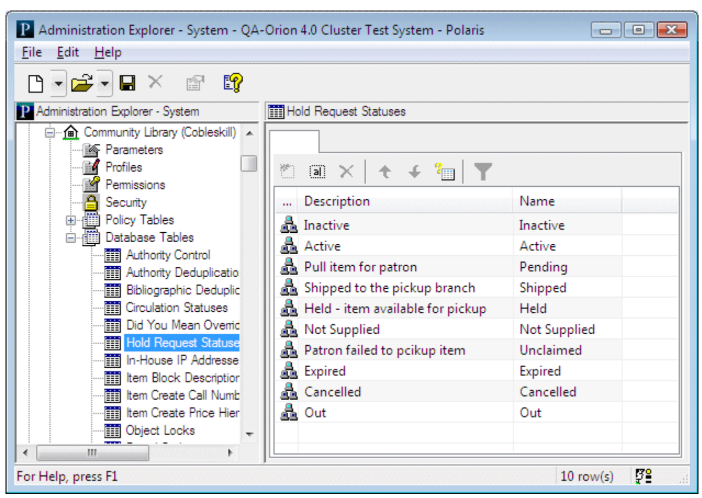
The options **Patron's branch** and **Login branch** have been removed from the branch list, and you must now select either **None** (forcing the patron to choose a pickup branch when placing the request) or a specific organization. If you currently have set the default pickup branch to **Patron's branch**, the actual branch name will be displayed as the default selection when you upgrade. If you currently have set the default pickup branch set to **Login branch**, the setting will be changed to **None** when you upgrade, and the patron will need to choose a pickup branch.

When the default setting is **None** and the patron selects a pickup branch for the first time, or changes the current pickup branch selection, a message offers to use the new location for subsequent requests unless it is changed again. The patron can choose to use the new selection or keep the old one for subsequent requests. The selection can be changed at any time.

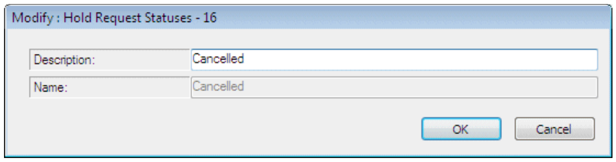
Important:
Do not set the default option to **None** for Polaris PowerPAC Children's Edition, since patrons cannot select a pickup branch when placing requests from the Children's Edition.

Hold Request Status Descriptions

Using the new database table Hold Request Statuses, you can now set your own descriptions to display for the standard hold request statuses. You need the new System Administration permission **Modify hold status table: Allow** to work with this table.



The table is available at the system, library, and branch levels, but any changes affect all organizations in the system. Double-click the description you want to edit and type your new description in the Modify dialog box.



The descriptions you specify appear throughout the staff client, PAC, and Polaris ExpressCheck where hold request statuses are displayed.

Trapping Items for Holds at Check-In

In previous versions of Polaris, if an item that could otherwise fill a hold request had a circulation status that made it ineligible (such as Missing), you had to check the item in once to change the status to In, then check it again to trap it for the hold. Now you need to check in the item only once, and it is trapped for the hold regardless of the circulation status.

This change affects only items trapped at check-in. Items with the circulation statuses designated as ineligible in Polaris Administration (Request parameter **Hold options**, Requests tabbed page) remain ineligible to fill requests when hold requests are placed and requests are routed.

In-Transit Slip Improved

When an item’s status changes to Transferred to fill a request, the in-transit slip now includes the text **FOR HOLD**. The text does not appear on in-transit slips printed when an item is checked in and just needs to be shipped back to its assigned branch.

Message When Unclaimed Date Is Changed to Closed Date

If a staff member changes the unclaimed date of a hold request when saving the request, and the pick-up branch is closed on the new date, the unclaimed date is set to the next day the pick-up branch is open. A message now informs the staff member of the change.

Circulation Status Update for Held-to-Held Items

When an item’s circulation status goes from Held for one patron to Held for another, the status date is now updated in the Item Record workform.

Request Time to Fill Report

This new toolbar report shows how many days it took to fill hold requests during a specified time period, from the date the request was placed to the date the item was placed on the hold shelf. The report is organized in 10-day increment columns. That is, you see how many requests were filled in 10 days or less, how many were filled in 11-20 days, and so forth. A percentage of the total requests filled is also provided for each 10-day increment, as well as an overall average days-to-fill figure. (Note that the percentages for each 10-day column may not total exactly 100% due to rounding.) The report is grouped by pick-up branch, and you can filter the report by pick-up branch.

Note:
The report does not include requests that took more than two years to fill.

Request Time to Fill for Saturday, December 26, 2009 to Friday, March 26, 2010

	Days to Fill										
Pickup Branch	up to 10	11 - 20	21 - 30	31 - 40	41 - 50	51 - 60	61 - 75	76 - 90	91 +	Total	Avg Days To Fill
Stillwater Public Library	28	0	0	0	0	0	0	0	1	29	5.14
Community Library (Cobleskill)	3	0	0	0	0	0	0	0	0	3	1.00
Total	31	0	0	0	0	0	0	0	1	32	3.07
Percentage	96.88 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	3.13 %	100%	

To run the report, select **Utilities, Reports and Notices, Circulation, Holds**, and double-click **Request Time to Fill**.

Pending Holds Count Report

This new toolbar report counts pending requests per day for a selected pick-up branch or branches, and can help you gauge the amount of staff time spent on looking for items that fill requests and pulling them from the shelves. You specify a date range and select an organization or organizations (the pick-up branches for the hold requests). The report lists all the holds requests that changed to a status of Pending during the selected date range for the selected pick-up libraries. If the same request went Pending more than once during the specified time period, it is counted only once.

The report is organized by branch and lists one line per day during the time period with the total number of pending requests for that day. If the count for a day is 0, that day is not listed. For example, a selected date range of 30 days could include up to 30 lines for a branch, with a count of requests for each day. The reports also includes the total number of requests for each selected branch and the grand total for all selected branches.

To run the report, select **Utilities, Reports and Notices, Circulation, Holds**, and double-click **Pending Holds Count**.

Holds Alert Reports - By Branch, By Library

Two new toolbar reports list titles where the number of Active and Pending requests is equal to or greater than a selected number of requests, and count the number of items linked to those titles that might fill the requests. The linked items count includes items with a Final record status, and any circulation status except Claim Never Had, Claim Returned, Lost, Missing, Withdrawn, or Unavailable. You can select a pickup branch or branches to filter the **Holds alert report by branch**. You can select a library or libraries to filter the **Holds alert report by library**; in this case, the report includes requests where the pick-up branch belongs to one of the selected libraries.

Note:
These reports are based on current holds data (all current Active and Pending requests), not transaction data. They do not report the number of requests that have been placed in the past, only the requests that are in the system when the reports are run.

Report output columns include the bib record ID, title, author, type of material (format), ISBN, local holds count, local items count, system holds count, and system items count. The illustration shows an example.

Holds alert report by branch

Community Library (Cobleskill)

Record ID	Title	Author	Format	ISBN	Local holds	Local Items	System holds	System items
679883	Dragons	Krensky, Stephen.	Book	9780822565437 (lib. bdg. : alk. paper)	1	0	1	2

Schenectady County Public Library - Central

Record ID	Title	Author	Format	ISBN	Local holds	Local Items	System holds	System items
161329	A Look at Saratoga Springs, New York, in yester years.		Book		1	0	1	2
183894	A raisin in the sun	Hansberry, Lorraine, 1930-1965.	Book	0451137469	1	1	1	4
439988	A tree grows in Brooklyn [sound recording]	Smith, Betty, 1896-1972.	Nonmusical Sound Recording	0736650679	1	0	1	1
359525	A windy day	Kincaid, Eric.	Book		1	0	1	1
333695	Astronomy	Kerrod, Robin.	Book	0836820835 (lib. bdg.)	1	0	1	2
359768	Baby on the way basics.		Serial		3	1	3	10
73	Beethoven	Solomon, Maynard.	Book	002872240X (pbk.) :	1	0	1	3
722911	Butterflies for two : my first sharing book	Waite, Michael P., 1960-	Book	0781402751	1	0	1	1
298077	Classico authentic Italian cooking		Book	0696205556 :	1	0	1	1
680146	Eight wild nights : a family Hanukkah tale	Cleary, Brian P., 1959-	Book	9781580131520 (lib. bdg. : alk. paper)	1	0	1	3
18453	Emily Post's Wedding planner	Post, Elizabeth L.	Book	0060909358 (pbk.) :	1	0	1	2
346145	Entering school zone III : [videorecording] fishing for an invitation I.		Videotape	0897764056	1	1	1	1

Page 1 of 6 Report Printed: 8/11/2010 9:09:30 AM

To run these reports, select **Utilities, Reports and Notices, Circulation, Holds**, and double-click **Holds alert report by branch** or **Holds alert report by library**.

Turnover Rate Reports

Turnover rate is the number of items circulated divided by the total number of items owned. In Polaris 4.0, two new toolbar reports calculate turnover rate by collection or item statistical code for a selected branch or multiple branches. These reports can help you determine, for example, how heavily a collection is used in relation to the size of the collection. To access these reports, select **Utilities, Reports and Notices, Circulation**.

Turnover Rate

This report counts all item check-out and renewals where the item's assigned branch matches a selected branch or branches and the transaction date is within the selected date range. You specify whether to report by collection (the default) or by item statistical code.

For each selected branch, the report lists each collection or item statistical code that has had circulation, the total items in the collection or statistical code, the number of circulations for each collection or statistical code, the corresponding turnover rate (circulated items/total items) expressed as a decimal figure, and the totals of these figures for each branch. If the report includes more than one branch, combined totals for the selected branches are also included.

- Check-out and renewal transactions are counted without regard to the transacting patron. That is, if the same patron checks out the same item 12 times, 12 transactions are counted.
- The patron's registered branch is not considered in any way.
- If an item is put in transit to fill a hold at another branch and is checked out from that branch, the transaction is counted.

Note:
The item count is based on the number of items in the assigned branch's holdings on the date the report is run.

Fiscal Year Turnover Rate

This report offers similar information to the Turnover Rate report, but you can specify a fiscal year and that year's starting month. The report then compares that year's turnover rate information with the current year's statistics.

Important:
Because this report gathers up to two years of data, it may take several minutes to complete.

Uncirculated Items Report Improved

The Uncirculated Items report, also available in previous versions of Polaris, identifies items with little or no circulation since their creation date. You specify the item record creation date and circulation thresholds. The report lists all items created before the specified date with a record status of Final that have the specified number or fewer transactions. In Polaris 4.0, the default setting for number of transactions is 0; that is, no transactions.

Lost Item Charges

An item's status may be set to Lost when an overdue item is billed and billed items are automatically declared lost, or when a staff member manually declares the item lost. In previous versions of Polaris, the replacement cost, processing fee, and overdue charges were calculated when the item's status changed to Lost, and the patron account was charged according to policies established in Polaris Administration. If a lost-and-paid item was later recovered, the library could choose to refund the replacement amount but retain the overdue amount.

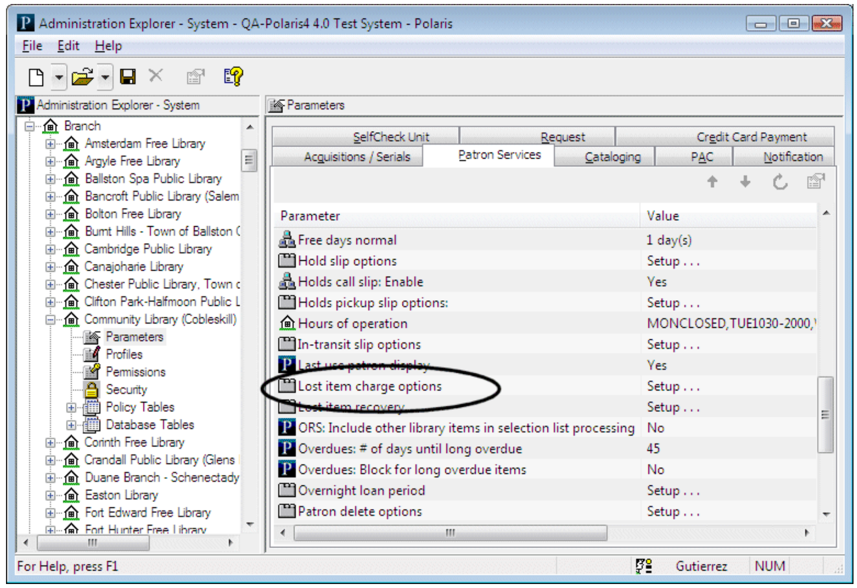
Polaris 4.0 retains this capability but provides an alternate workflow for libraries that prefer to charge only the replacement and processing fees for a lost item. If the lost item is later recovered, but not yet paid for, the library can waive the replacement fees and instead calculate and charge the overdue fine at that time. If the item is later recovered and the replacement fee has already been paid, the library can refund or credit the replacement fee but charge the overdue fine, calculated up to the point when the item was returned.

As part of this development, several changes have been made in Polaris Administration:

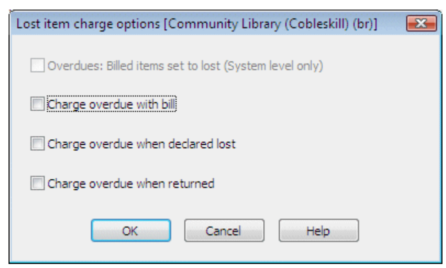
Lost Item Parameters

The existing lost item parameters **Overdues: Billed items set to lost**, **Lost item: Charge overdue if billed** (renamed **Charge overdue with bill**), and **Lost item: Charge overdue if declared lost** (renamed **Charge overdue when declared lost**) have been grouped under the new Patron Services parameter **Lost item charge options**, available at the system, library, and branch levels.

Note:
The setting for **Governing library for fine calculation** (system-level Patron Services parameter **Consortium circulation)** determines what organization's settings for the **Lost item charge options** parameter control overdue charges on lost items.



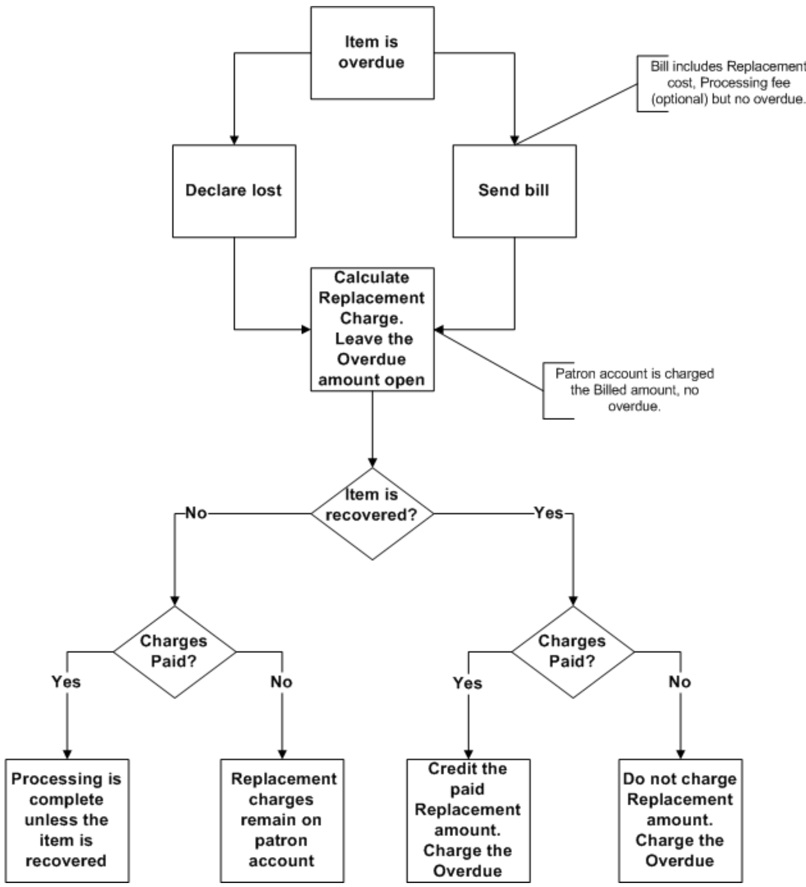
When you double-click **Lost item charge options**, the Lost item charge options dialog box opens. The new option **Charge overdue when returned** is available on this dialog box.



Note:
If you select **Charge overdue when returned**, the options **Charge overdue with bill** and **Charge overdue when declared lost** are not available for selection.

If you choose to implement the option **Charge overdue when returned**, future lost item processing reflects your change. The new setting does not affect processing for items already declared lost or billed-to-lost. Similarly, if you decide not to use the new option after all and change lost item processing options back to their former state, your change does not affect processing for those items already lost.

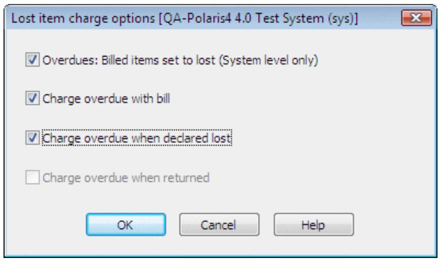
The diagram summarizes lost item processing when you implement **Charge overdue when returned.**



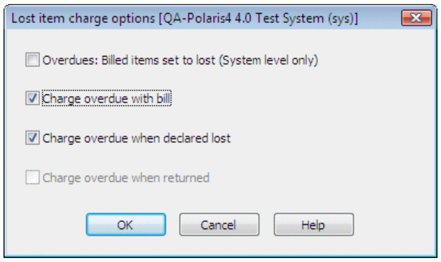
Suggested Settings for Lost Item Charge Options

- **Overdues: billed items set to lost** - System level only. Setting the item status to Lost at the time the item is billed will insure the most consistent results for lost item recovery. However, libraries may leave this unchecked if they prefer to declare the item lost manually.
- **Charge overdue with bill** - For best results, check this option if it is available (not grayed out). When this option is selected, the overdue charge is included in the bill regardless of whether the billed items are set to lost. If you prefer not to charge overdues with the bill, select the new option **Charge overdue when returned**. The replacement fee and optional processing fee will still be billed.
- **Charge overdue when declared lost** - Like **Charge overdue with bill**, this option is available only if **Charge overdue when returned** is not set. For best results, check this option if it is available. If the library does not charge overdues when items go to Lost as a matter of policy, the option **Charge overdue when returned** should be checked instead.

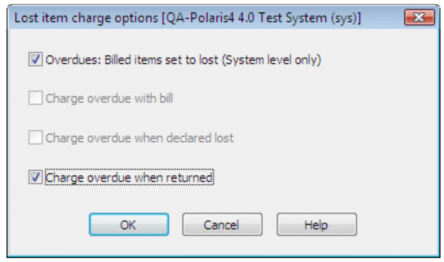
- **Charge overdue when returned** - Select this option if the library policy is to charge the overdue fine only if and when the lost item is returned. If you select this option but do *not* set **Overdues: billed items set to lost**, the library charges the overdue fine when a lost item is recovered but does not assume an item is lost until the patron comes in and says he can't find it. In this situation, you will see the following effects:
  - No automatic lost item recovery options are possible because the item's status is not Lost.
  - The patron is billed for the replacement cost and optional processing fee. However, the overdue fine remains uncharged and unresolved.
  - If the patron brings the item back, a staff member checks the item in and waives the replacement and optional processing fees. The overdue fine is calculated at that time and the staff member pays, waives, or charges the overdue fine.
  - If the patron says he can't find the item, the staff member declares the item lost on the Patron Status workform - Items out view, then pays, waives or leaves the replacement and optional processing fees. The item is now lost, so lost item recovery options may apply. (If the staff member does not declare the item lost, it stays out to the patron until checked in and the overdue fine is calculated at that time.)
- **Settings for charging overdue fines with the bill**
  - Billed items are automatically declared lost:



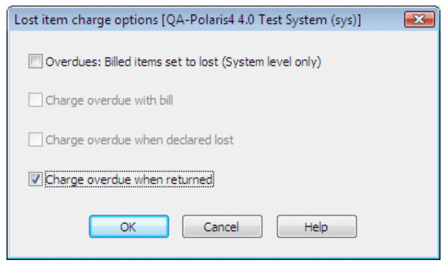
  - Billed items are not automatically declared lost:



- **Settings for charging overdue fines when the item is returned:**
  - Billed items are automatically declared lost:



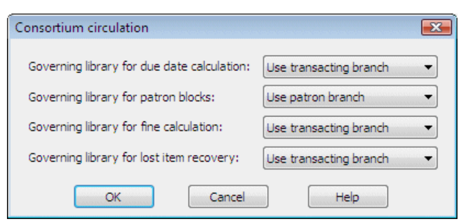
  - Billed items are not automatically declared lost:



Lost Item Recovery Actions

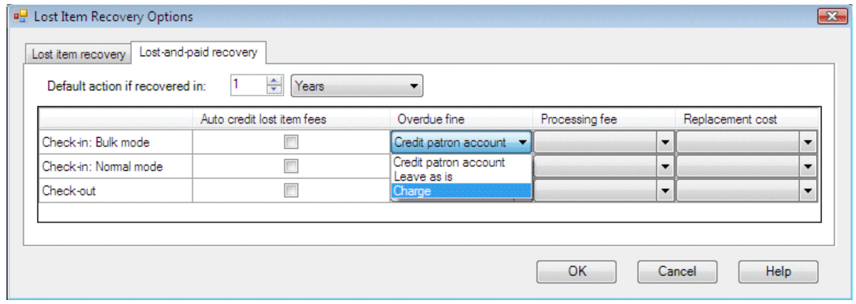
If you choose to implement the option **Charge overdue when returned**, you should also consider your settings for the Patron Services parameter **Lost item recovery**.

The system-level Patron Services parameter **Consortium circulation** offers the new option **Governing library for lost item recovery**. You can set this option to the transacting branch (the default setting, which represents current Polaris behavior) or the lending branch. The option determines what organization's settings for the **Lost item recovery** parameter control processing when a lost item is recovered.

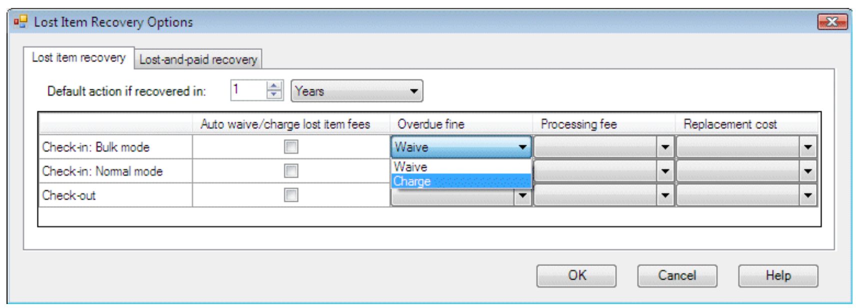


Lost item recovery settings control the automatic actions the system takes, if any, when a lost item is recovered in the selected circulation situations. On the Lost-and-paid recovery tabbed page, **Charge** has been added to the

Overdue fine options, and you should select this option to provide the appropriate automatic action for overdue fines when a lost-and-paid item is checked in.



On the Lost item recovery tabbed page, select **Charge** for overdue fines to perform this action when a lost item is checked in but the fees have not been paid. (If you set this option to **Waive**, the overdue fine is charged and then waived automatically.)



If you choose to implement the option **Charge overdue when returned** but do not set any automatic actions for lost item recovery, you will see a change when an item is checked in that is overdue, has been declared lost, and is not paid. The overdue fine is not charged when the item is declared lost, but continues to accrue. (The replacement and processing fees may or may not be paid.) When the item is checked in, the overdue fine is calculated and the amount is displayed in the Resolve Lost Item dialog box, where the staff member takes action on the charges associated with the item. The options for resolving the overdue fine are **Pay**, **Waive** (calculates and charges the overdue fine, then auto-waives the charge), or **Leave as is**. The options for resolving processing and replacement fees have not changed.

Calculating the Overdue Charges

If you choose to implement the option **Charge overdue when returned**, the amount of the overdue charge will be calculated from the day following the due date (the day the item went overdue) through the day the item is returned, up to the maximum overdue fine threshold. The calculation is based on the settings of the governing library for fine calculation, which is determined by the system-level Patron Services parameter **Consortium circulation.**

Pay All Charges from Credit Balance

Previously, if you selected **Pay All** to resolve charges on a patron’s account, you could use the patron’s credit balance only if the balance met or exceeded the amount of all charges. In Polaris 4.0, if you select **Pay All** to resolve charges on a patron’s account and the patron’s credit balance is less than the amount of all charges, a dialog box appears where you can choose to make a partial payment using the credit balance.

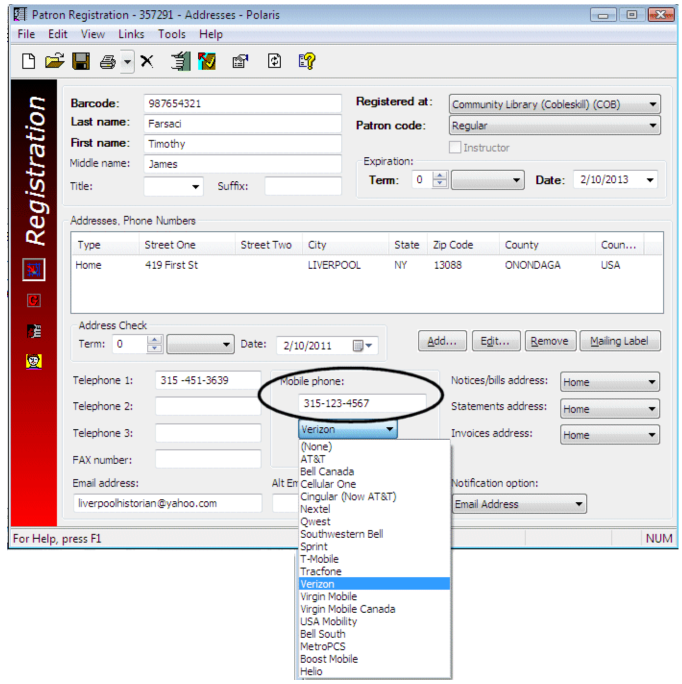
Text Message Notification

With Polaris 4.0 you can send text message notices to patrons’ mobile phones as part of normal notice processing. You can send notices by text message alone, or in addition to another method. For example, you can send a request notice by text message only, or by e-mail with an additional text message. As with other notification methods, you can set text messaging as the patron’s preferred notification method in the Patron Registration workform. This feature does not require any additional license.

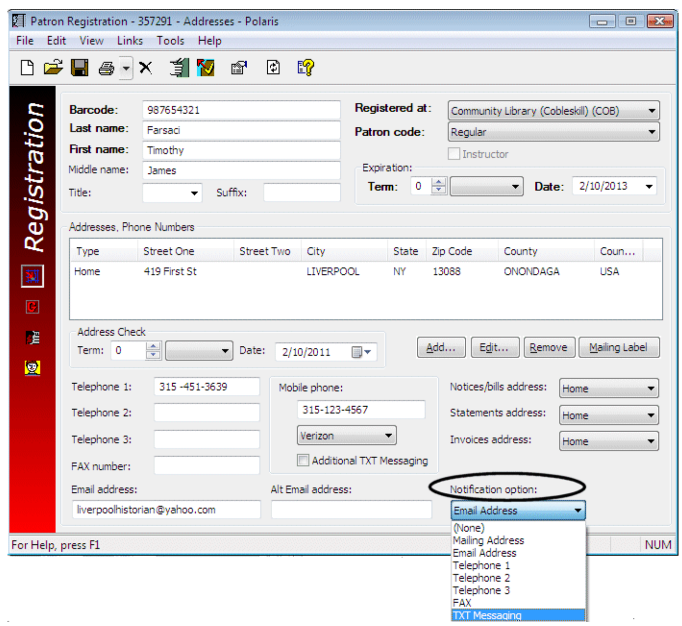
Note:
Some mobile phone service carriers charge their customers for text messages received, so these patrons may prefer a different notification method.

Patron Record Workform Changes

The Patron Registration workform has a new **Mobile phone** field where you enter the patron’s mobile phone number as a 10-digit number, with or without hyphens. This is the number the system uses for text messages. Then choose the patron’s mobile phone service carrier from the drop-down list. The available carriers are set in Polaris Administration; see “Specifying Available Carriers” on page 94.



To set text messaging as the patron's preferred notification method, select **TXT message** from the **Notification option** drop-down list.



Note:

The labels **Voice phone 1**, **Voice phone 2**, and **Voice phone 3** have been changed to **Telephone 1**, **Telephone 2**, and **Telephone 3**. The system uses this number or numbers for telephone notification (voice).

Select (check) **Additional TXT messaging** if the patron's mobile phone accepts text messages and you plan to send text messages in addition to other types of notices such as e-mail or print.

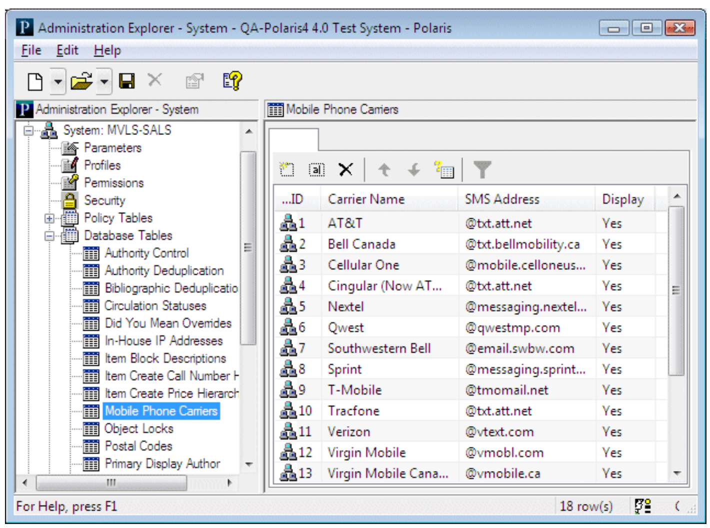
As in previous versions of Polaris, the default notification settings for normal and express patron registration are controlled by the Patron Services parameters **Patron registration options** and **Express patron registration options** respectively. You can select **TXT Messaging** as the default notification option for either or both of these parameters.

Specifying Available Carriers

You set up the list of possible mobile phone carriers for text messages in Polaris Administration. The carriers you specify are then available for selection in the Patron Registration workform and when patrons register or update their account information from the PAC.

Use the new system-level database table **Mobile Phone Carriers** to specify the possible carriers.

Note:
You need the new system-level System Administration permission **Modify mobile phone carriers: Allow** to work with this table.



To add a carrier, click . Carrier display names and SMS addresses are limited to 100 characters each. Addresses should include the @ sign.

Examples:
AT&T - **@txt.att.net**
Verizon - **@vtext.com**
T-Mobile - **@tmomail.net**

Tip:
Polaris provides a list of common carriers in the table. Use these methods to suppress a carrier that you do not want to display for selection or to delete a carrier.

To edit a carrier entry, select the entry and click . To delete a carrier entry, select the entry and click . If the modification or deletion would cause an existing setting to be invalid in a patron record, you receive a warning message when you attempt to save your changes. If you choose to continue, the carrier is set to **None** in the patron record and text messages notices will not be delivered. The patron's mobile phone number remains in the record.

Text Message Content

As with other notice types (see "Editing Notice Text" on page 101), you can edit text message notices in Polaris Language Editor. If you edit the messages, be aware of these rules:

- **Character limit** - Individual messages are limited to 160 characters including the subject line, if specified, and the sender's address if the carrier includes it. Longer messages may be split and sent as multiple messages.
- **URLs** - You can include a URL in the message, but note that the URL takes up message space and the link may not be active, depending on the patron's carrier.
- **Languages** - Like other notices, you can customize text message notices in English and other languages using Polaris Language Editor. However, text messaging does not support Unicode, so text message notices in languages with diacritics are not rendered accurately.

For more information about editing notices and a list of default text message notices, see the *Polaris Language Editor Guide* or Language Editor online Help.

Text Message Processing

Text messages are sent by the Polaris E-mail Manager as part of conventional e-mail notice processing. They are included in the Summary Report as a separate notification category. For more information about e-mail notice setup and processing, see "Delivering Notices By E-mail" in the *Polaris Patron Services Administration Guide* or the equivalent topic in online Help.

Successful text message notices are posted and the appropriate patron and item records are updated accordingly. Failed text message notices, where text message is the specified notification method, are converted to print. Failed "additional" text messages are not converted.

Note:
"Additional" text messages, where the text messages are sent in addition to notices sent by another primary notification method, are not recorded in item or patron records.

Patron Options From PAC

When registering for a new library account from PAC, a patron can now specify a mobile phone number and carrier. Text messaging is not a separate option in PAC self-registration, but in the staff client, a staff member can set the option in the patron record. Once registered, a patron can change his notification preference, including text message notification, if you choose to allow this feature. See "Updating Account Information from PAC" on page 158.

Patron Bulk Change and Text Messages

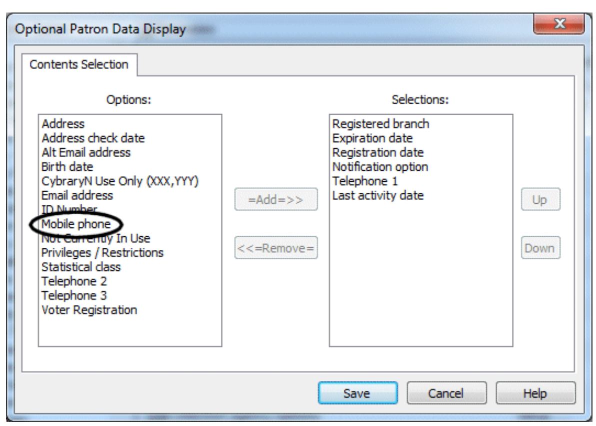
- **TXT Messaging** has been added to the list of notification options on the Patron Record Bulk Change dialog box - Address tabbed page.
- A check box for **Additional TXT messaging** has been added to the Patron Record Bulk Change dialog box - General tabbed page.

Searching by Mobile Phone Number

All Patron Record Find Tool searches now include the ability to search by and limit by the free text **Mobile phone** field. The existing **Voice phone** search by/limit by access point has been renamed **Telephone**. When you search by or limit by **Telephone**, the search includes the **Telephone 1**, **Telephone 2**, **Telephone 3**, and **Mobile phone** fields in the patron record.

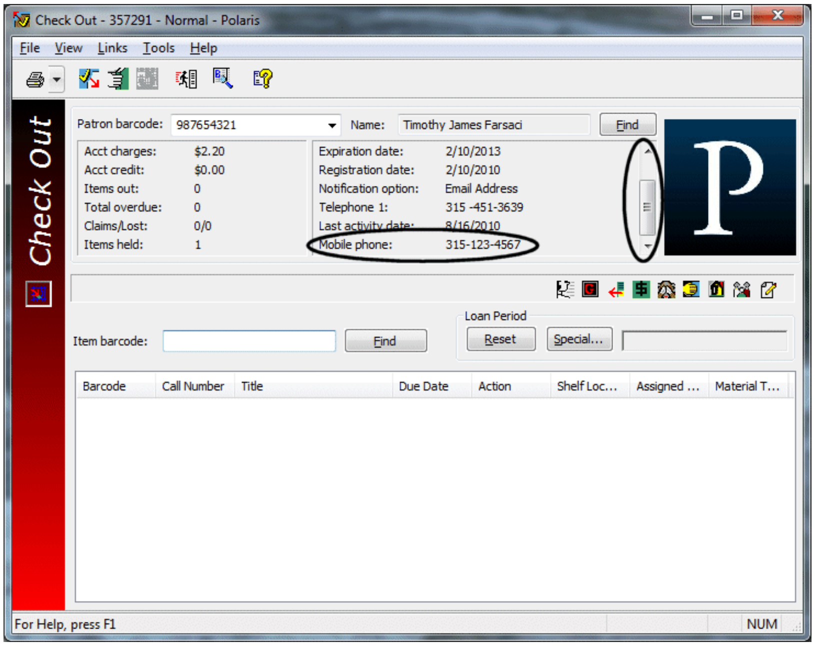
Mobile Phone Number in Check Out/Patron Status Header

You can add the patron mobile phone number field to the header information in the Check Out workform and the Patron Status workform. In Polaris Administration, double-click the Patron Services parameter **Check-out: Optional patron data**. The Optional Patron Data Display dialog box appears. Select **Mobile phone** in the **Options** list and click **Add**.



The field is placed in the **Selections** list. To move the field higher or lower in the workform header, select **Mobile phone** in the **Selections** list, and click **Up** or **Down**. Then click **OK** on the dialog box.

The mobile phone number field appears in the position you specified on the Check Out workform and Patron Status workform headers. You may have to scroll the header area to see the field, depending on how many fields are selected for display and their relative positions. The illustration shows the Check Out workform.



Related SimplyReports Changes

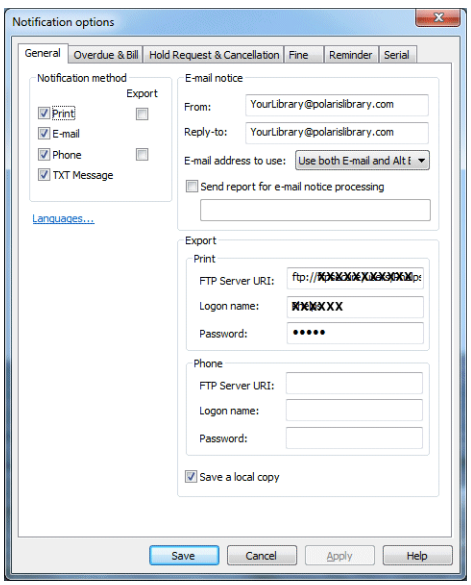
SimplyReports has been updated to use the new mobile phone and text messaging fields. See "New Options for Patron Mobile Phone & Text Messaging" on page 178.

Changes to Notification Setup

The Notification Options dialog box (Polaris Administration, **Notification** parameters) has been streamlined and new options have been added to accommodate text message notices (see "Text Message Notification" on page 92). Text editing fields have been removed, because the text for all types of notices is now edited in Polaris Language Editor (see "Editing Notice Text" on page 101). For more information about setting up notification, see "Managing Notification" in the *Polaris Patron Services Administration Guide* or the equivalent topic in staff client online Help.

General Tabbed Page

Text message notices - **TXT Message** has been added as a notification method. Check this option if you plan to send any type of notice by text message or by patron preference, if patrons can choose text messaging as their preferred notification method. You now use the other tabbed pages to enable specific notice types.

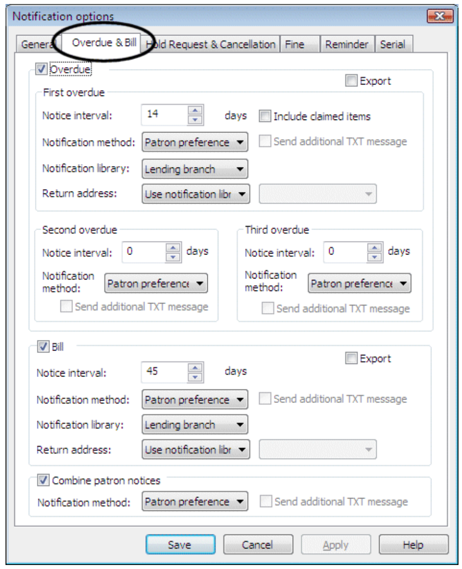


Haitian Creole notices - If licensed, Haitian Creole is available as a notification option. Click **Languages** to enable this language. Haitian Creole is also available as the patron's preferred language in the Patron Registration workform, and you can edit Haitian Creole notices in Polaris Language Editor.

Exporting print and phone notices - If you export print notices to UMS and phone notices to Talkingtech's i-tiva, you can now specify separate FTP settings for the two vendors on this tabbed page. (Previously, libraries who used both services had to request special background programming.)

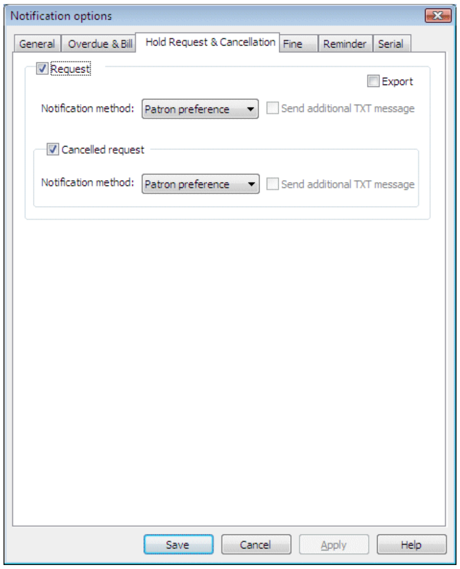
Overdue & Bill Tabbed Page

The setup options for three overdue notices, bills, and combined notices have been consolidated on this tabbed page. If you selected the new **TXT Message** delivery method option on the General tabbed page, you can select **TXT Message** as the notification method for any of these notices. If you select a different method, you can also check **Send additional text message**.



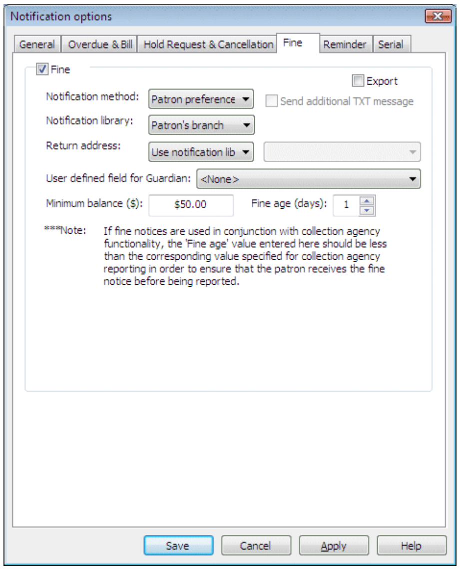
Hold Requests & Cancellation Tabbed Page

The setup options for request pick-up notices and request cancellation notices have been consolidated on this tabbed page. If you selected the new **TXT Message** delivery method option on the General tabbed page, you can select **TXT Message** as the notification method for either or both of these notices. If you select a different method, you can also check **Send additional text message**.



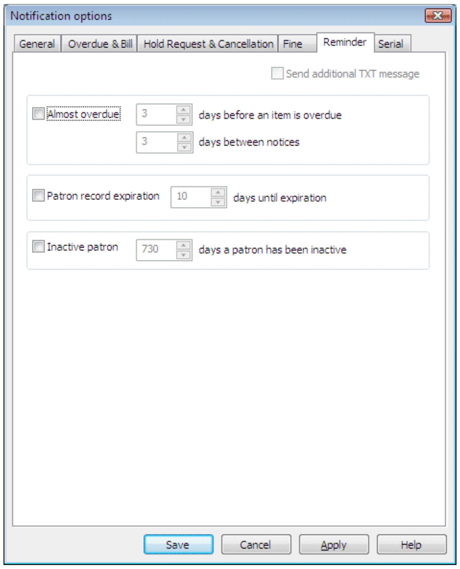
Fine Tabbed Page

If you selected the new **TXT Message** delivery method option on the General tabbed page, you can select **TXT Message** as the notification method for fine notices. If you select a different method, you can also check **Send additional text message**. Other fine notice options are unchanged.



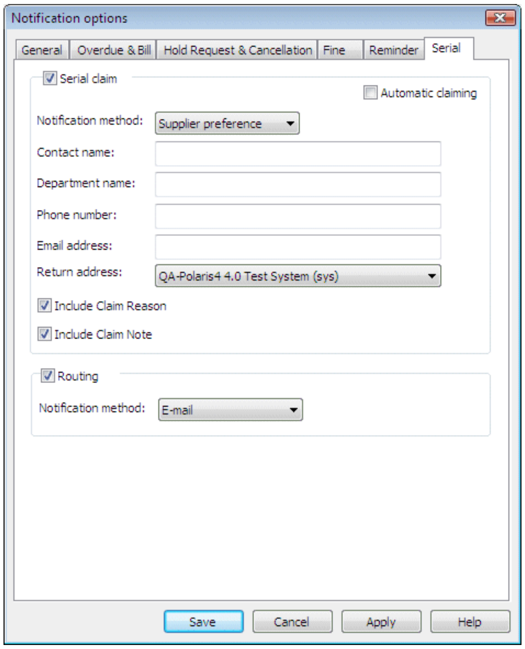
Reminder Tabbed Page

If you selected the new **TXT Message** delivery method option on the General tabbed page, you can check **Send additional text message** to send an additional text message when any of these e-mail reminder notices is sent. Other e-mail reminder options are unchanged.



Serial Tabbed Page

Setup options for serial claim notices and serial routing notices have been consolidated on this tabbed page.

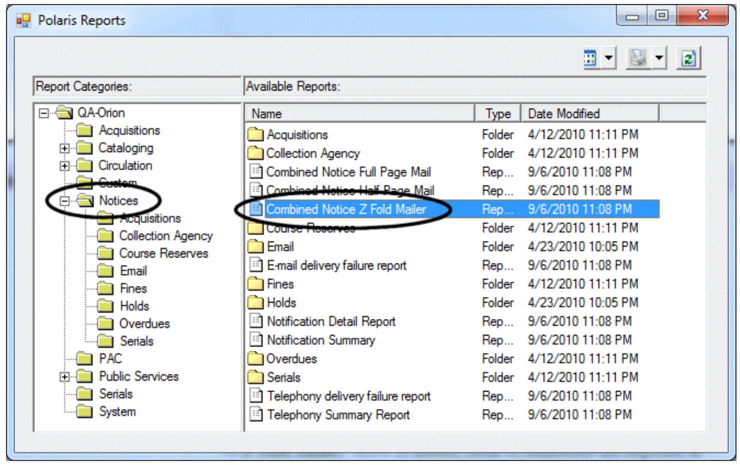


Editing Notice Text

Text editing fields are no longer available on the Notification Options dialog box. You now edit text for all notices, including text message notices (see "Text Message Notification" on page 92), with Polaris Language Editor. For a list of notice text strings and information about editing them, see the *Polaris Language Editor Guide* or Language Editor online Help.

Z-Fold Mailers for Combined Notices Available

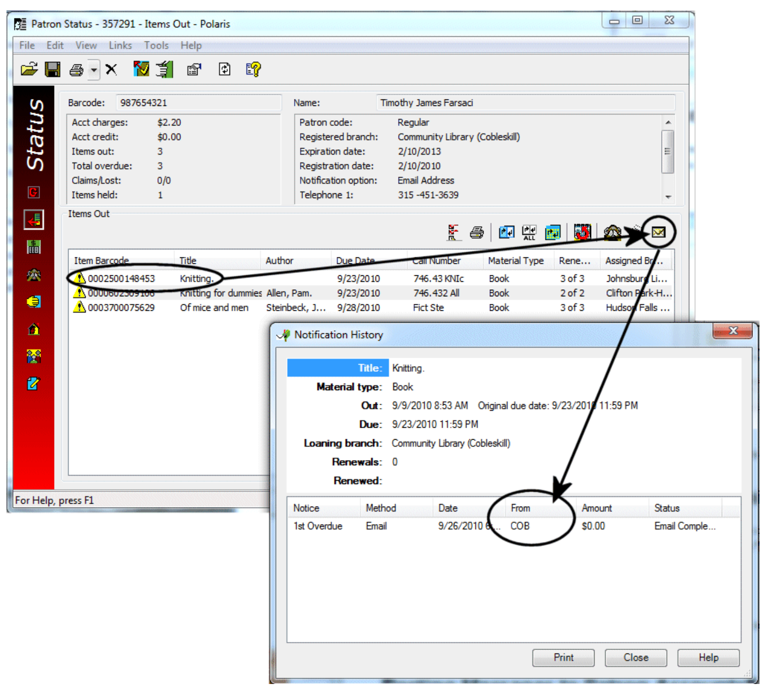
You can now print combined notices in Z-fold mailer format. This option is available from the Polaris Shortcut Bar, under **Utilities, Reports and Notices, Notices.**



Note:
This feature was also added to Polaris 3.6, build 305 or later.

Item Notice History - Consistent Organization

In the notice history for an item, the organization listed is now the notification library, regardless of the notification method.



Hold Notices Exported to UMS

Hold notices exported to UMS now include the pickup branch ID and name.

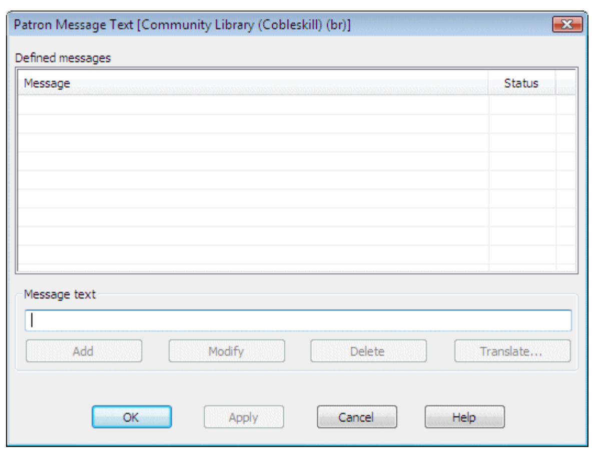
Posting Messages to Patron Accounts

You can now post predefined and free-text messages to specific patron accounts. The messages are sent and managed from the Patron Status workform - Notes view, and patrons can read and delete them from the PAC patron account.

Note:
Patrons can also view their messages in the patron account on SIP self-check workstations if the SIP provider supports this feature, and they are printed on the SIP checkout receipt. Messages are shortened to 250 characters if necessary, and they cannot be marked as read or deleted.

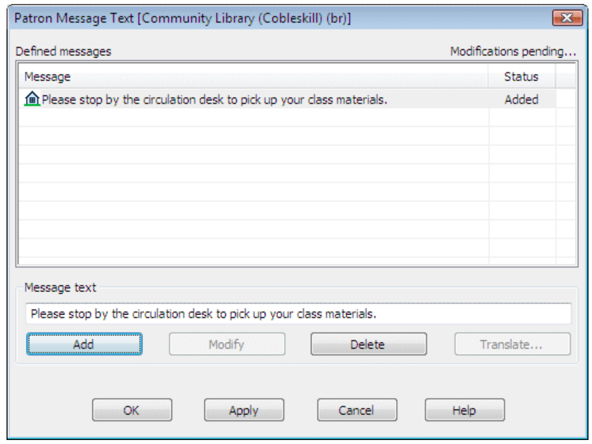
Setting Up Messages in Polaris Administration

Use the new Patron Services parameter **Patron message text: Configure**, available at the system, library, and branch level, to set up the predefined messages that can be selected and posted from the staff client. (Polaris does not supply any predefined messages.)



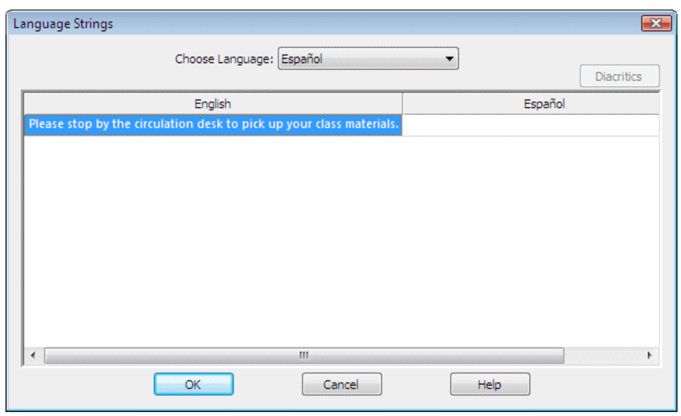
- **Add a message** - Type up to 250 characters in the **Message text** box, including alpha-numeric and special characters, and click **Add**. The message is added to the list with an icon that indicates the organizational level at which it was added.

Note:
The **Message** list includes all the messages added at the system and parent library levels as well as the branch level. The appropriate organizational icon indicates the level at which the message was added. To add a message from a parent organization for use by your organization, click the message. The text appears in the **Message text** box. Then click **Add**. Only messages defined at your organizational level can be modified or translated.



Click **Apply** to save your changes and continue to work with the Patron Message Text dialog box, or click **OK** to save your changes and close the dialog box.

- **Modify a message** - Select the message in the Patron Message Text dialog box. The message is placed in the **Message Text** box, where you can edit it. Then click **Modify**.
- **Translate a message** - You can translate an existing message into any licensed Polaris PowerPAC language. Select the message in the Patron Message Text dialog box and click **Translate**. The Language Strings dialog box opens.



Select a language from the list and type your translation in the language column. To insert a diacritic character, click **Diacritics**. The Character Picker dialog box opens. Select a graphic character set, select the character, and click **Insert**. For details on choosing diacritic characters, see "Choose a character/diacritic mark from a chart" in the *Polaris Cataloging Guide 4.0* or the equivalent topic in staff client online Help.

- **Delete a message** - Select the message in the Patron Message Text dialog box and click **Delete**. If the message is linked to any patron record, a warning message is displayed. You can cancel the deletion or continue to delete the message. If you delete it, it is removed from any patron accounts where it is currently posted.

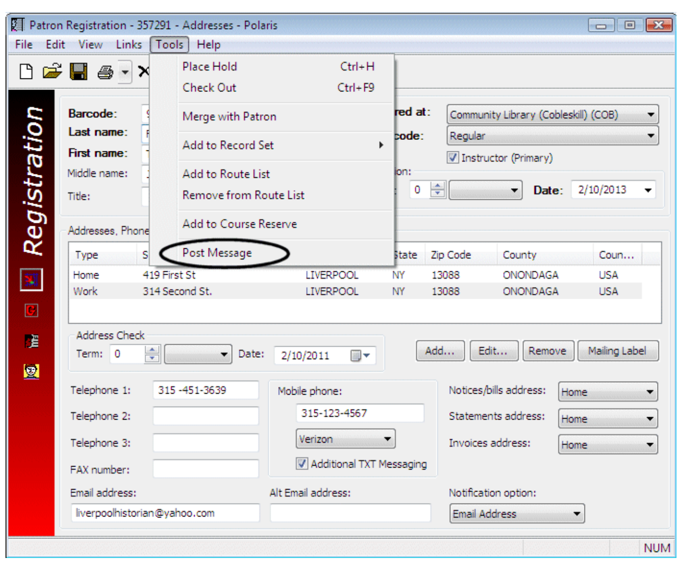
Use the new Patron Services parameter **Patron message text: Expiration period**, available at the system, library, and branch levels, to set the posting period for patron messages. After a message has been posted for the time period you set, it is automatically deleted. The default setting is 14 days; valid values are 1-99 days. The time is counted from 11:59 on the day the message is created through 11:59 or after of the final day. (The exact time depends on when the automatic deletion job runs.) For example, if the time limit is 5 days, a message created at 2:00 p.m. on Monday will expire at or after 11:59 p.m. Saturday. The period is not affected if the message text is modified. However, if the expiration period is changed, all messages are immediately affected. For example, reducing the expiration period may cause some messages to expire immediately and shorten the life of others.

Two organization-level Circulation permissions have been added for patron messages. To post or modify patron messages, staff members need the permission **Post patron message: Allow** for the patron's registered branch. To delete a message from a patron account, the staff member needs the permission **Delete patron message: Allow** for the patron's registered branch. These permissions are not granted by default.

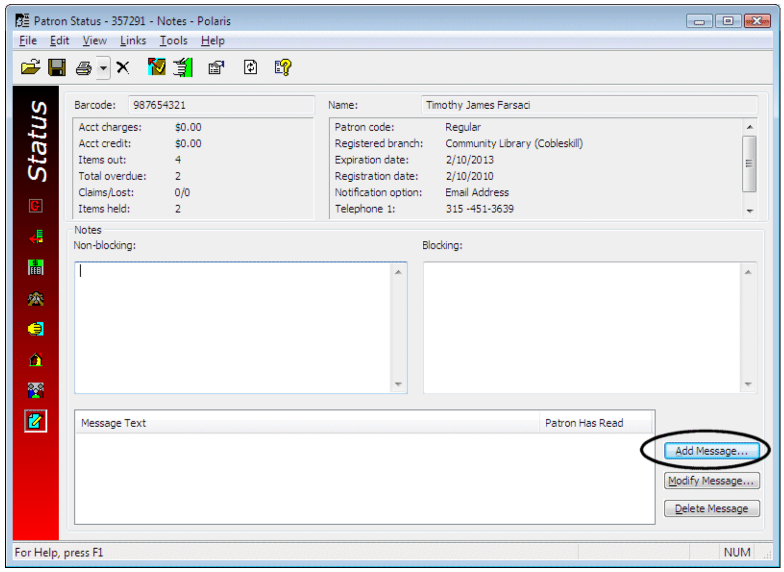
Managing Patron Messages in the Staff Client

You need the permission **Post patron message: Allow** to post messages to a patron account.

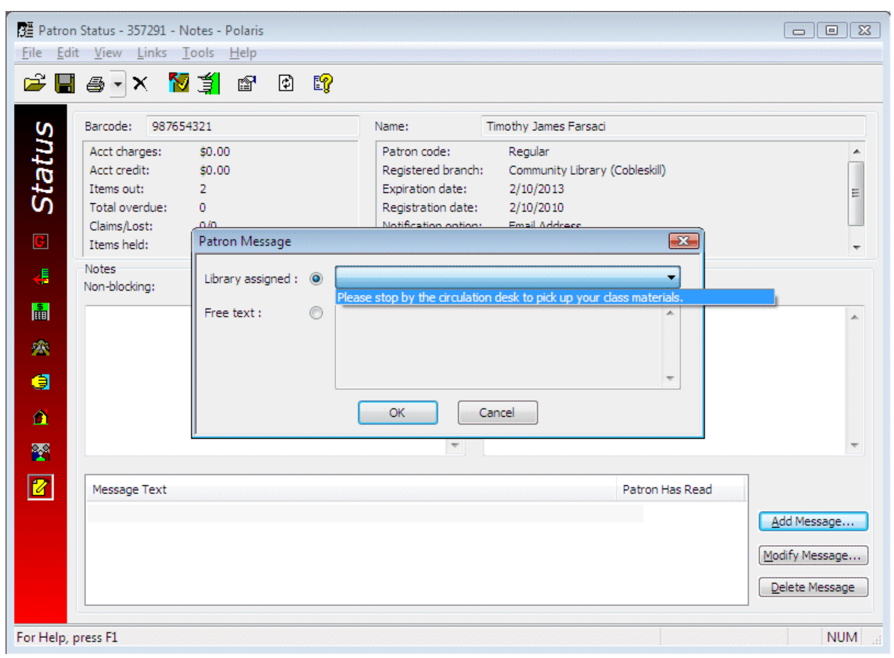
To post a message from the Patron Registration workform, select **Tools, Post Message**.



To post a message from the Patron Status workform - Notes view, click **Add Message** in the new messages area of this view.



The Patron Message dialog box opens, where you can select a **Library-assigned** message from the drop-down list. The message options are those set in Polaris Administration for the staff member's log-on branch. Or you can select **Free text** and type a message in the free text box.



When you click **OK**, the dialog box closes and the message is added to the **Message Text** column. The **Patron Has Read** column indicates whether the patron has marked the message as read in the PAC patron account.

When the patron account has a message, the Notes icon on the Patron Status workform view bar is yellow (as for non-blocking notes). If the patron has both blocking notes and messages, the color is red. (The blocking note color takes precedence.)

You can work with posted messages in the following ways:

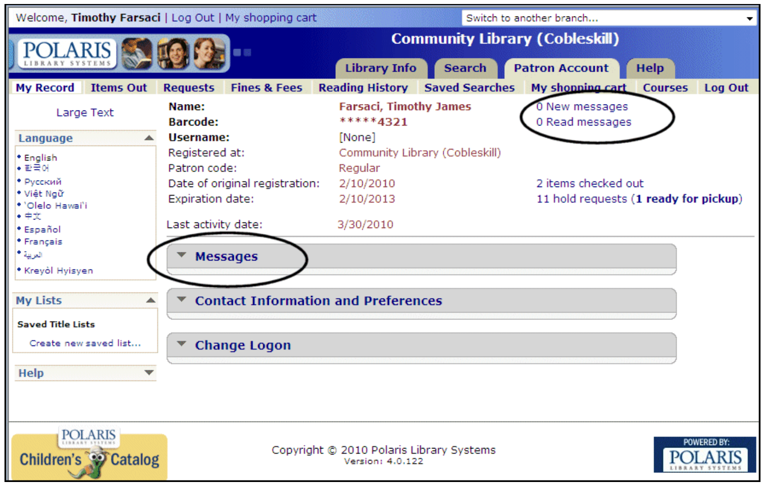
- **View message properties** - Right-click the message in the Patron Status workform - Notes view, and select **Properties** from the context menu. The Properties dialog box lists the creator's user name, workstation, branch, and the creation date and time. If the message has been modified, the modifier and modification date and time are listed.
- **Modify a message** - Select the message in the Patron Status workform - Notes view and click **Modify Message**. You need the permission **Post patron message: Allow** to modify messages.
- **Delete a message or multiple messages** - Select them in the Patron Status workform - Notes view and click **Delete Message.** You need the permission **Delete patron message: Allow** to delete messages.

If a patron has unread messages, an alert message appears in the Patron Blocks dialog box during check-out. You can continue the check-out operation or cancel it, and you can also click the block text to open the Patron Status workform - Notes view. The alert message does not place any blocks on patron activity in the PAC.

Note:
If patron records are merged, messages attached to the secondary (losing) patron record are not copied to the primary record.

Managing Patron Messages in PAC

The My Record page in the PAC patron account displays a Messages bar that you can click to expand the Messages area. (If there are unread messages, the Messages area is automatically expanded.) The header area of the page also displays counts of new and read messages that are links to open the Messages area of the account. These summary links are displayed in the top portion of every page of the patron account and on the confirmation page when a hold request is placed, if Single Login is enabled.



When the Messages area is expanded, patrons can check messages and mark them as read or delete them.

When a patron marks a message as read, the status is noted in the Patron Status workform - Notes view in the staff client. When a patron deletes a message, the message is also deleted from the Patron Status workform - Notes view. (Messages are also automatically removed according to the expiration period set in Polaris Administration. See "Setting Up Messages in Polaris Administration" on page 103.)

Patrons with Messages Report

This report provides a snapshot of read and unread messages currently in patron accounts where the patron’s registered branch matches the selected branch or branches and where the patron record has at least one message, read or unread. The report includes patron names, message text, whether the message is read, the date the message was created, and the creator.

To access this report, select **Utilities, Reports and Notices** on the Polaris Shortcut Bar. In the Polaris Reports dialog box, select **Public Services, Patron Services, Patrons with Messages**.

Modify Patron Status Workform - Reader Services View

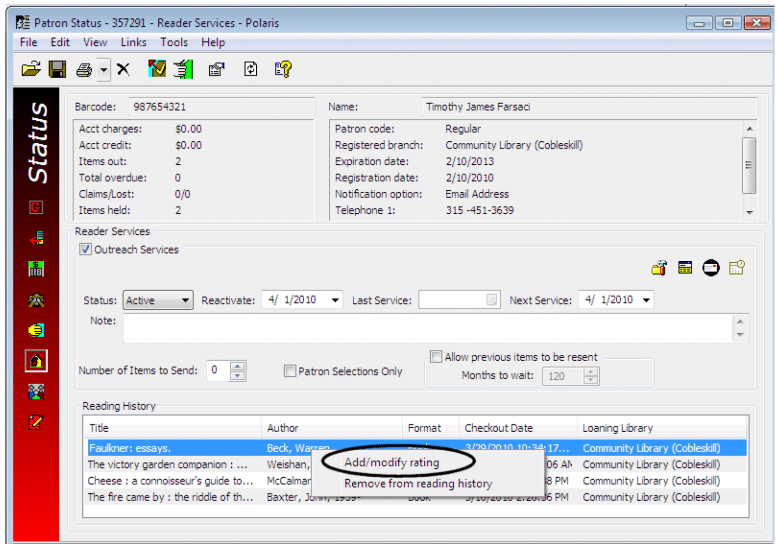
A new Circulation permission, **Patron Status: Modify reader services** controls the ability to make changes on the Patron Status workform - Reader Services view. For example, this permission is necessary to check or uncheck the Outreach Services option for the patron. The new permission is available at the branch level and applies to that organization’s patron records. The permission is granted to all staff at upgrade to minimize disruption to your current workflow.

If you remove the new permission from a staff member who has the existing permission **Patron Status: Display reader services**, the staff member can open the Patron Status workform - Reader Services view in read-only mode, but cannot make any changes.

Note:
Separate permissions control the ability to work with reader ratings and remove entries in the reading history list. See “Setting Up Reader Ratings in Polaris Administration” on page 112 and “Removing Items from Reading Histories” on page 118.

Outreach Services - Reader Ratings

Staff members with the appropriate permission for the patron’s registered branch can now enter reader ratings submitted by Outreach Services patrons after the items have been returned. This feature is available from the Patron Status workform - Reader Services view. You right-click the title and select **Add/modify rating** from the context menu to enter the rating.



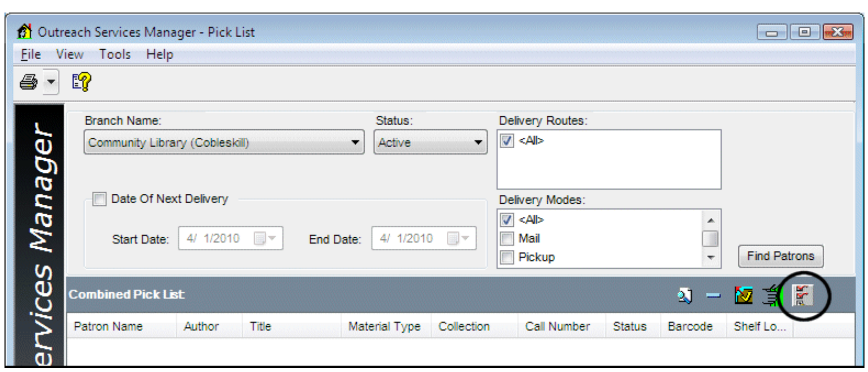
Note:
Bibliographic records with the status of Provisional, Final, or Deleted can be rated. When bibliographic records are purged, any ratings associated with them are lost.

The Reading History list includes new Rating and Note columns for outreach services patrons, where the rating number and any associated note are displayed.

The rating scale is set up in Polaris Administration. See "Setting Up Reader Ratings in Polaris Administration" on page 112.

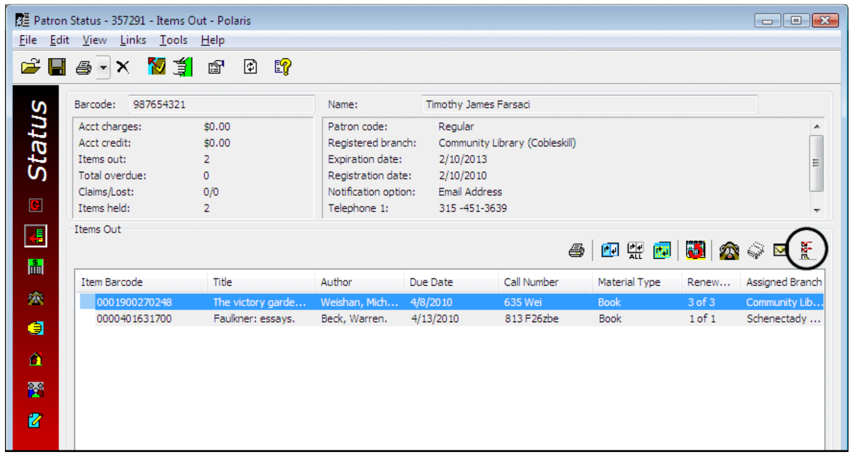
Printing a Packing List

To gather the ratings, you provide a printed packing list to the Outreach Services patron when you check out items to the patron. You can print the list from the patron's ORS Selection List workform or from the Outreach Services Manager Pick List view, shown in the illustration. When you print the packing list from the Outreach Services Manager, a separate list is printed for each patron.



You can set the packing list to print automatically when the items are checked out from the patron's ORS Selection List or the Outreach Services Manager Pick List view. See "Setting Up Reader Ratings in Polaris Administration" on page 112. In this case, the list is printed in addition to the check-out receipt, if check-out receipts have been enabled for the workform.

You can also print a packing list from the Patron Status workform - Items Out view for selected items that have already been checked out, if the patron is an Outreach Services patron.



Note:
If items are checked out to an Outreach Services patron from the Check Out workform, only the standard check-out receipt is printed.

The 8.5 x 11" packing list consists of the following elements:

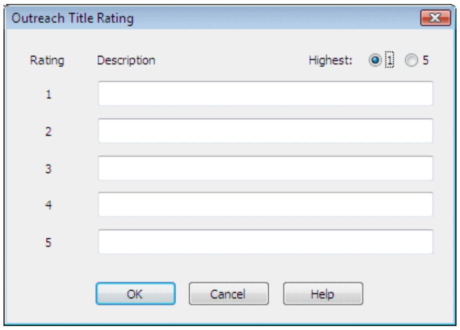
- **Header** - The library name and any text you define. See "Setting Up Reader Ratings in Polaris Administration" on page 112.
- **Date and time**
- **Patron data** - Patron's name, patron code, and last six digits of the patron barcode
- **Item data** - the complete call number, item material code, first 50 characters of the title, and the due date
- **Rating** - The text defined for the rating line. See "Setting Up Reader Ratings in Polaris Administration" on page 112.
- **Total items**

Setting Up Reader Ratings in Polaris Administration

Permission - The new Circulation permission **Modify ORS patron ratings: Allow** is required to work with ORS ratings. The permission is available at the system, library, and branch levels, and is set only for the Administrator group by default.

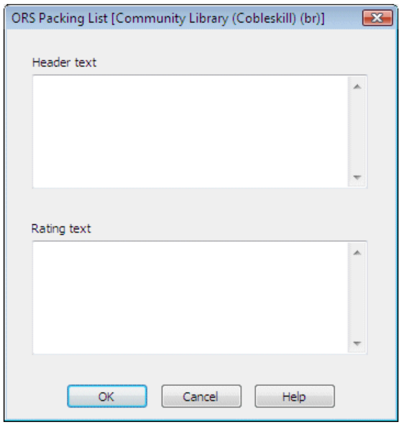
Enable patron ratings - Set the new Patron Services parameter **Outreach title rating enabled** to **Yes**. The parameter is available at the system, library, and branch levels; it is set to **No** by default.

Ratings - Define the 1-5 rating scale with the new system-level **Patron Services** parameter **Outreach title rating**. Double-click the parameter to open the dialog box.



Click the **Highest** value to indicate which end of the scale (1 or 5) is the most positive rating a title can receive. Then type a description (maximum of 50 characters) for each rating increment on the scale.

Packing list text - Specify the header text and introductory rating text with the new Patron Services parameter **ORS packing list**, available at the system, library, and branch levels. Each part can be 500 characters maximum; press **ENTER** to start a new line within the header or rating text. Other content is always included in the packing list; see "Printing a Packing List" on page 110.



Automatically print the packing list - Set the packing list to print automatically at check-out with the new Patron Services parameter **ORS automatically print packing list**, available at the system, library, and branch levels. The parameter is set to **No** by default.

Ratings Reports

These reports are available from the Polaris Shortcut bar. Select **Utilities, Reports and Notices**. In the Reports dialog box, select **Public Services, Outreach Services**.

- **ORS Rated titles** - This report includes titles where the title appears on a reading history linked to an ORS patron, the patron's registered branch is a selected branch, the title has an average rating that matches the selected ratings, and at least one item attached to the title appears in the selected patron reading histories and has a rating date within the selected range. You can filter the report by branches, ratings, and rating date range, and opt to combine branch totals or report each branch separately. The report lists title, author, format (bibliographic format), patrons (the number of patron records where the title appears), number of ratings, average rating, total number of items for the branch, total number of patrons for the branch, and grand totals for items and patrons when multiple branches are selected.

  Note:
  You can sort this report by author, format, number of ratings, or title. You must select a sort option to run the report.

- **ORS Rated titles by patron** - This report includes all titles where the patron is an ORS patron, the patron's registered branch is a selected branch, the title has an average rating that matches the selected ratings, and at least one item attached to the title appears in the selected patron reading histories and has a rating date within the selected range. You can filter the report by branches, ratings, and rating date range. The report lists patron name, titles grouped alphabetically by rating, author, format, number of ratings, and average rating.

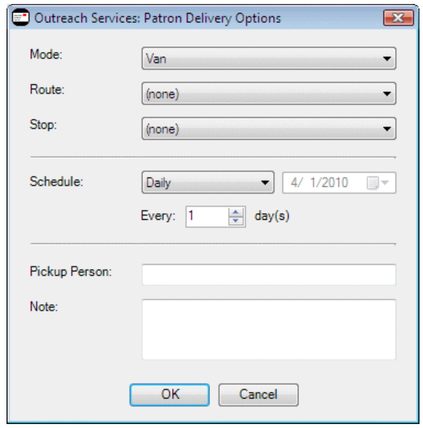
  Note:
  You can sort this report by format, patron name, or title. You must select a sort option to run the report.

- **ORS titles not rated -** This report shows the number of titles with no rating checked out to ORS patrons for a specified date range. You can filter the report by patron's registered branch, and sort it by author, format, title, or total check-outs.

  Note:
  You must select a sort option to run the report.

Daily Delivery Schedule for Outreach Services Patrons

A Daily delivery option has been added for Outreach Services patrons. On the Patron Delivery dialog box, select **Daily** for the delivery schedule and specify the frequency in days (1-999).



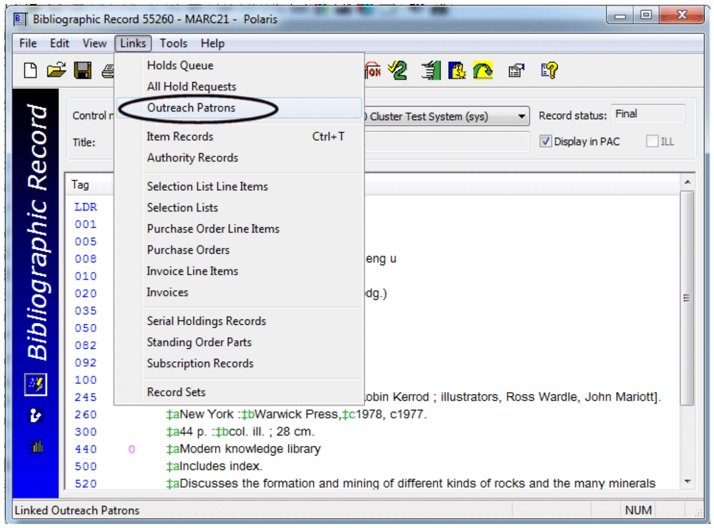
Link from Bib Record to Outreach Services Patrons

You can now link from a bibliographic record to Outreach Services patrons who have items linked to the bibliographic record in their reading histories. If you are searching for items for an Outreach Services patron, you can use this method to see if the patron has already read the title, without opening the patron record and sorting though the patron's reading history.

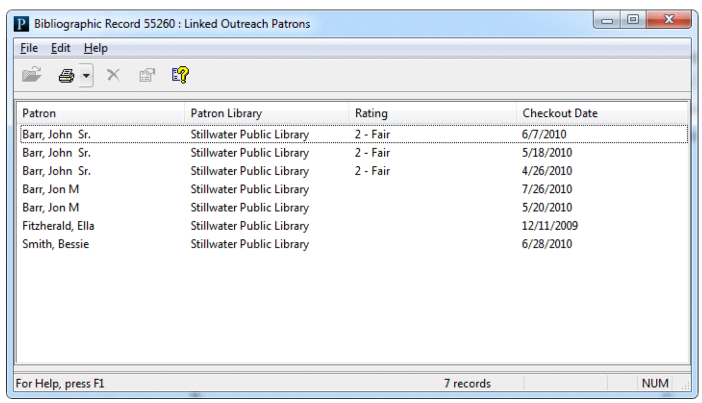
Note:
This feature is available if Outreach Services is licensed for the staff member's log-on branch.

You need the new system-level Circulation permission **ORS: Link from bibliographic record: Allow** to use this feature. At upgrade, the default permission setting is No (the permission is not assigned).

To see the list of linked Outreach Services patrons, select **Links, Outreach Patrons** in the Bibliographic Record workform or from the context menu for a bibliographic record in the Find Tool search results list.



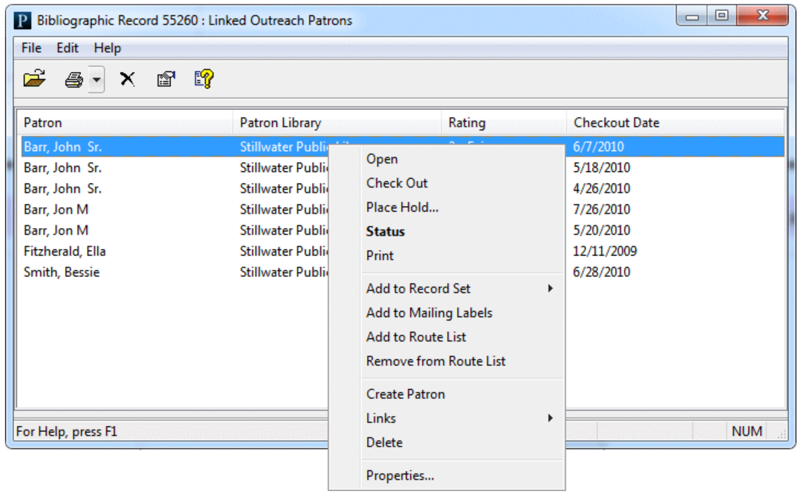
The list of linked Outreach Services patron records is displayed if one or more items are included in a patron reading history and the patron's Outreach Services status is Active. (If you select **Links, Outreach Patrons** and no qualified patron records are linked to the bibliographic record, a message is displayed instead. If only one patron record qualifies for display, the record is opened in the Patron Status workform - Reader Services view.)



The list includes Outreach Services patron names, registered branches, ratings if available, and last check-out date.

- If the patron has checked out an item more than once, the entry appears multiple times.
- If the title is removed from the patron's reading history, the link is not displayed in the list.
- If the item record status is Deleted, the entry remains in the patron reading history and the link from the bibliographic record is still displayed in the list. When the item record is purged, the link is no longer displayed in the list.

You can right-click a patron listing to open a standard Patron Status context menu.



If you select **Status** from the context menu, the Patron Status workform - Reader Services view opens.

Update Service Date for ORS Patrons from Normal Check Out

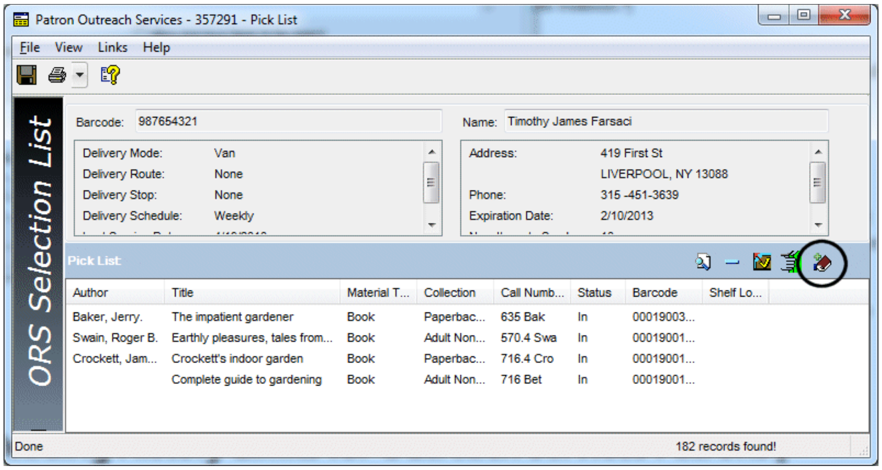
You can now display a prompt during normal check out to update an active Outreach Services patron's next service date if an item not on the patron's pick list is checked out to the patron. The staff member can choose to update the patron's next service date or not. If no prompt is displayed, or if the staff member chooses not to update the service date, the patron's next service date is not affected. To enable the prompt in Polaris Administration, set the new Patron Services parameter **ORS: Prompt for update during normal check-out** to **Yes** (the default value). The parameter is available at the system, library, and branch levels. The system uses the setting of the staff member's log-on branch.

If the staff member chooses to update the next service date from the prompt, the patron's Next Service Date and Last Service Date are updated based on the Outreach Services delivery schedule set for that patron.

Adding Held Items to the Outreach Services Pick List

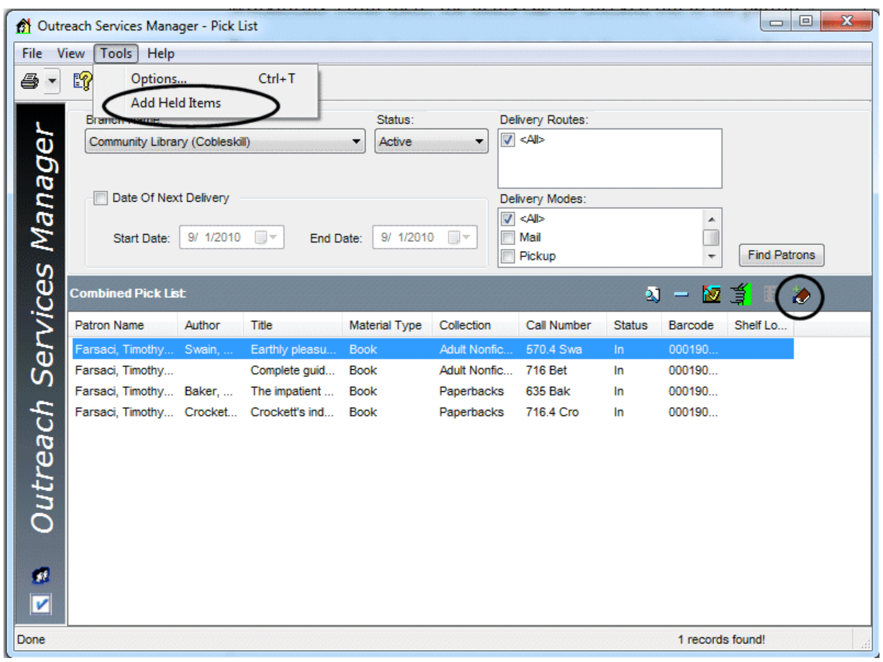
You can now add a patron's held items to the Outreach Services pick list from the Outreach Services Selection List and Outreach Services Manager workforms. From there, the items can be checked out to the patron.

From an individual patron's pick list, click the new Add Held Items icon above the patron's pick list of items.



If the patron has no held items, a message is displayed. If there are held items, they are added to the pick list. A new Held for Patron icon marks the held items in the pick list.

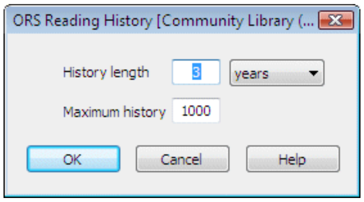
From a combined pick list in the Outreach Services Manager, you can select a single patron and click the Add Held Items icon. In the Outreach Services Manager, the option is also available from the Tools menu.



For more information about Outreach Services processing, see "Managing Outreach Services" in the *Polaris Patron Services Guide* or the equivalent topic in staff client online Help.

Reading History Limits for Outreach Services Patrons

You can now set limits on reading histories for Outreach Services patrons that are separate from reading history limits for non-Outreach Services patrons. Use the new Patron Services parameter **ORS reading history** to set the limits for Outreach Services patrons. The parameter is available at the system, library, and branch levels. Double-click the parameter to open the dialog box.



To specify the length of time (from check-out date to current date) to retain an entry in the Reading History list, type the number of months or years in the first **History length** box and select the unit of time (months or years) in the second **History length** box. In the **Maximum history** box, type the maximum number of entries that can be retained at one time in the Reading History list for Outreach Services patrons. The system uses the settings for the patron's registered branch.

Note:
Use the Patron Services parameter **Reading History** to enable reading histories and set limits for non-Outreach Services patrons.

Removing Items from Reading Histories

In Polaris 4.0 you can remove selected items from a patron's reading history both in the staff client and from the PAC patron account. Removing an item from a reading history simply suppresses the display from the patron's reading history in the staff client and in the PAC patron account. The item record is not deleted, and no circulation transactions for the patron or item are affected.

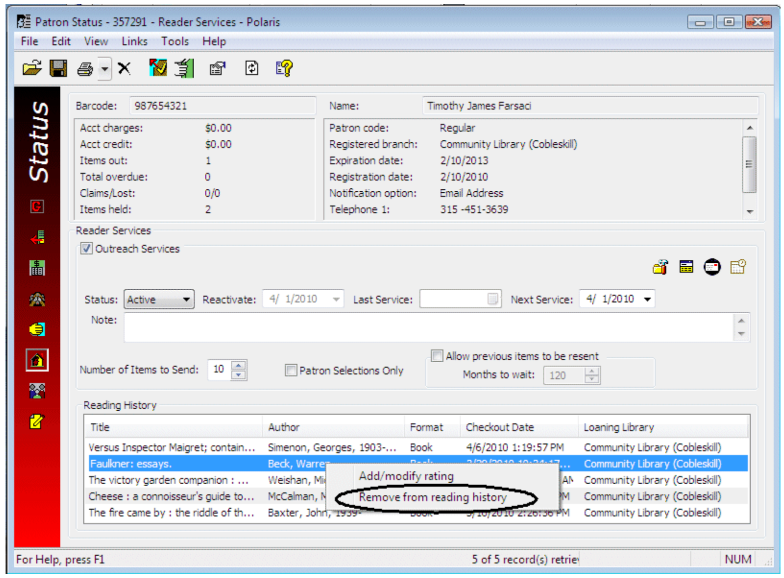
Removing Items in the Staff Client

For the staff client, the following separate Circulation permissions control the ability to remove items from the reading histories of non-Outreach services patrons and Outreach Services patrons:

- **Reading history: Remove non-ORS patron history entries: Allow**
- **Reading history: Remove ORS patron history entries: Allow**

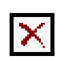
The permissions are available at the system, library, and branch levels. By default, they are assigned to the Administrator group only. Staff members need the appropriate permission for the patron's registered branch.

To delete items from a patron’s reading history, right-click the title or titles in the Reading History list (Patron Status workform - Reader Services view), and select **Remove from reading history** from the context menu.



Note:
When an item is removed from the reading history of an Outreach Services patron, the title will be eligible to reappear on the patron’s selection list. At checkout, the message that warns you when the Outreach Services patron has already had the title does not appear.

Removing Items in the PAC Patron Account

You can also allow patrons to remove items from their reading histories from the PAC patron account. To provide this feature, set the PAC profile **Patrons can remove reading history** to **Yes**. This parameter is available at the system, library, and branch levels; the system uses the setting for the patron’s registered branch. In the PAC patron account Reading History page, the patron clicks the delete icon  by an item to remove the item from reading history.

A confirmation message, **Are you sure you want to remove this title from your reading history?** is displayed. You can edit the message text in Polaris Language Editor. The String ID is **PACML_MESSAGE_AYSRH**.

Enable Patron Preferences Profile Renamed

This Patron Services profile has been renamed **Patron can enable/disable reading history** to describe its function more accurately. The profile controls whether the patron can stop or start a reading history from the PAC patron account. If the setting is **Yes**, the option is available in the Contact Information and Preferences section of the PAC patron account. As in previous versions of Polaris, if you will allow patrons to start and stop reading histories, you must set up reading history parameters. See "Setting Reading History Options" in the *Polaris Patron Services Administration Guide 4.0*. Also, reading histories are always active for Outreach Services patrons.

Verify Patron Block for Offline Registration

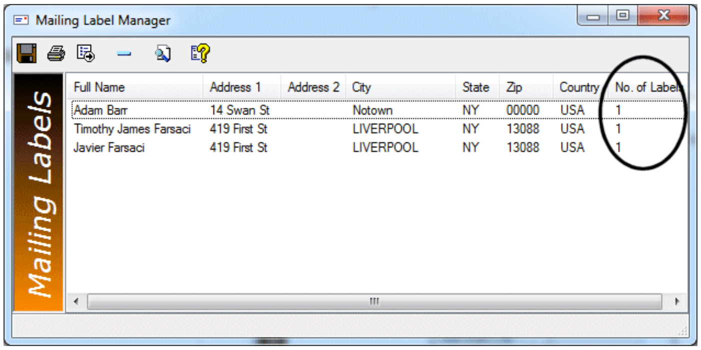
A Verify Patron block is now added to patron records created by offline registration. For information about removing the block, see "Resolve a Verify Patron Block" in the *Polaris Patron Services Guide* or the equivalent topic in staff client online Help.

Street Information Required for Patron Address

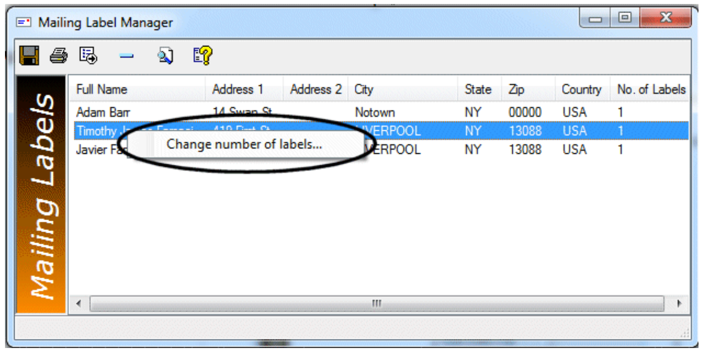
The Street One or Street Two field in the Patron Registration workform must now contain information in order to save the patron address.

Multiple Mailing Labels

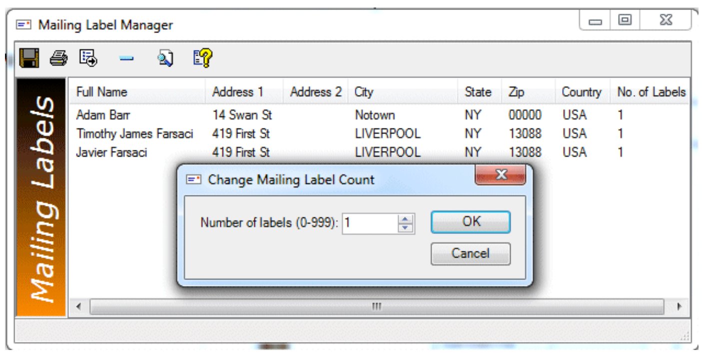
You can now print multiple labels for the same patron from the Mailing Label Manager. A new **No. of Labels** column indicates how many labels to print for the patron.



To change the number for a patron and address already listed in the Mailing Label Manager, right-click the patron address and select **Change number of labels**.



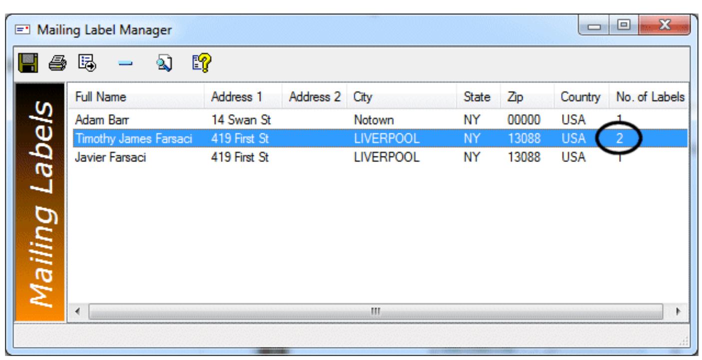
In the Change Mailing Label Count dialog box, set the number of labels and click **OK**.



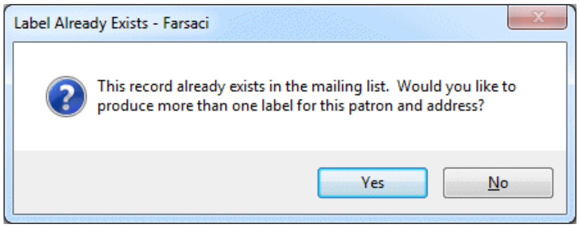
The **No. of Labels** column is updated, and the indicated number of labels will be produced for this patron and address after you save your changes.

Important:

If you update the number of labels, you must click the Save icon before printing the labels.



When you add a patron to the Mailing Label Manager from Mailing Label Manager itself, the Patron Registration or Patron Status workform, patron record set, or Find Tool results list, and the patron is already listed in the Mailing Label Manager, you receive a duplicate entry message.

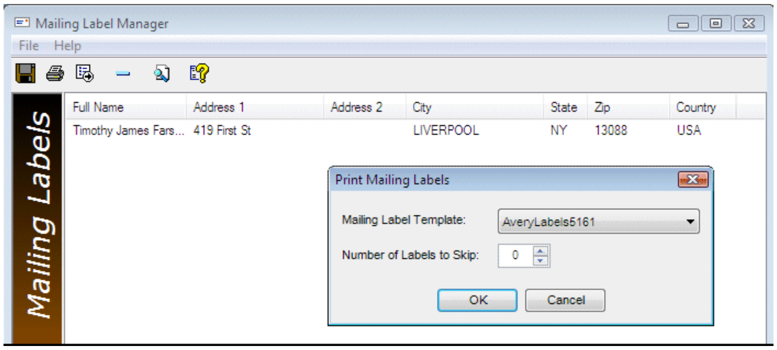


If you click **Yes**, the Change Mailing Label Count dialog box opens and you can set the number of labels to produce.

For more information about patron mailing labels, see "Creating Patron Mailing Labels" in the *Polaris Patron Services Guide* or the equivalent topic in staff client online Help.

Avery® 5161 Labels Supported

The Mailing Label Manager now supports Avery 5161 labels, and you can select this option when you print patron mailing labels. For more information, see "Creating Patron Mailing Labels" in the *Patron Services Guide* or the equivalent topic in staff client online Help.



Avery Label Printing Improved

The Mailing Label Manager now uses dynamic font sizing to better accommodate Avery sheet labels. By default, labels are printed in 14 point Arial. If a label contains a line with more than 28 characters, the font size is automatically changed to 10 points, which allows approximately 40 characters per line.

When the 10-point font is used and a line still exceeds about 40 characters, the following rules are applied:

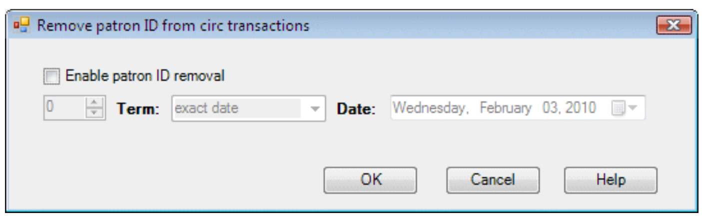
- The city/state/Zip code line is never truncated.
- Avery 5161 (4" x 1") - Street 1 may use two lines. Other lines may be truncated.
- Avery 5262 (4" x 1.33") - Street 1 and Name may use two lines. Other lines may be truncated.
- Avery 5163 (4" x 2") - All fields may use 2 lines.

For proper printing, in the Adobe Print dialog box, set **Page Scaling** to **None** and select (check) **Auto-Rotate and Center**.

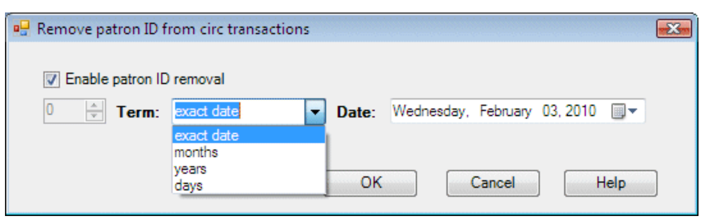
For more information about patron mailing labels, see "Creating Patron Mailing Labels" in the *Polaris Patron Services Guide* or the equivalent topic in staff client online Help.

Removing Patron IDs from Circ Transactions

Using the new Patron Services parameter **Remove patron ID from circ transactions**, you can choose to purge patron identification data from circulation transaction records at intervals you specify. Double-click the parameter at the system, library, or branch level to open the Remove patron ID dialog box.



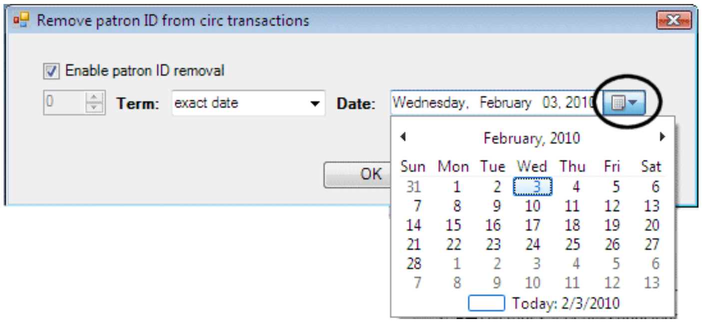
Select (check) **Enable patron ID removal**. The **Term** options become available, and you can set the interval at which patron IDs should be removed from the transactions log.



Select an interval or select a date:

- Select **months**, **years**, or **days** in the **Term** box, and set the appropriate number. For example, if you set the term to **2 years**, patron identification information is kept for two years following the date of the transaction, then purged from the transaction database.

- Select **exact date**, and type a date or select a date from the calendar. information for that date will be purged. This option is most useful for testing or implementing the purge feature for a short period of time.



Patron IDs are removed from transactions according to the transacting branch's settings for this parameter. The transacting branch is identified in the transaction header **OrganizationID**.

The program identifies transactions prior to the cut-off time period by counting back the number of days starting from beginning of the day it runs (12:00 midnight) through the final day (12:00 midnight). Patron IDs are removed from transactions with a date/time stamp earlier than 12:00 midnight.

Example:
The term is set to 30 days. When the program runs on the night of August 30, it will count back from midnight August 30 through the full day to midnight July 31. The patron ID will be removed from all transactions prior to 12:00 July 31.

The table lists the transactions from which patron IDs are purged if you choose to enable this feature:

Transaction Type ID	*Transaction Description*
2011	OBSOLETE: Renewal Overdue Block
2012	OBSOLETE: Renewal Overdue Block Override
2090	OBSOLETE: Add hold request
2091	OBSOLETE: Reactivate hold request
2092	OBSOLETE: Cancel hold request
2093	OBSOLETE: Satisfy hold request
2094	OBSOLETE: Ship item for hold
2095	OBSOLETE: Receive item for hold
2096	OBSOLETE: Deny item for hold
2097	OBSOLETE: Bibliographic hold
2098	OBSOLETE: Serial issue hold
2099	OBSOLETE: Item specific hold
2111	OBSOLETE: Trap item for hold

Transaction Type ID	*Transaction Description*
2112	OBSOLETE: Trap hold renew cancelled
2150	OBSOLETE: Patron check out or renewal block
2183	OBSOLETE: Claim block
2185	OBSOLETE: Claim cancelled
2186	OBSOLETE: Claim block
2187	OBSOLETE: Claim block override
6001	Check out
6002	Check in
6005	Hold request created
6006	Holds become held (item received for hold request)
6007	Holds become expired
6008	Holds become unclaimed
6009	Holds become denied
6010	Holds become pending
6011	Holds become not supplied
6012	Holds become shipped
6013	Holds become cancelled
6026	Item claimed lost
6027	Item claimed never had
6028	Item claimed returned
6033	ILL Request created
6034	ILL Request become active
6035	ILL Request received
6036	ILL Request returned
6037	ILL Request become cancelled
6039	Hold satisfied (item checked out to patron)
7000	eCommerce Payment

Remove Patron ID Report

When you enable patron ID purging, you can run a report to track the number of patron IDs purged during a specified time period. Select **Utilities, Reports and Notices** from the Polaris Shortcut bar, select **Circulation** in the Polaris Reports dialog box, and double-click **Remove Patron ID from circ transactions process log.** You set transaction start and end date parameters for this report. The report columns include Organization (transacting organization), Transaction Start Date (starting date of the purged transactions), Transaction End Date (ending date of the purged transactions) and Patron IDs Removed (number of patron IDs purged).

Duplicate Patron Detection Processing

As in previous versions of Polaris, duplicate detection ensures that patron barcode numbers are unique and that each patron is registered only once. Polaris checks the barcode, patron name fields, address, and registered library for matches, as well as additional fields you may specify with the Patron Services parameter **Duplication detection options.** When you attempt to save the patron record, if any possible duplicate records exist, they are displayed in the Duplicate Patrons dialog box. In Polaris 4.0, to conserve system resources, the Duplicate Patrons list is limited to 500 entries per duplicate detection criterion. For example, if 1,000 patrons have the same e-mail address and 30 have the same phone number, 530 possible duplicate records are listed.

Note:
This change was also made to Polaris 3.6.284 and later.

Duplicate Patron Detection - Birth Date

When a birth date is included in patron registration, the system now uses the birth date to check for duplicate patron records, in addition to the barcode, patron name fields, address, and registered library for matches, as well as additional fields you may specify with the Patron Services parameter **Duplication detection options**. If no birth date is supplied, duplicate checking uses only the existing criteria.

A similar change was made to patron self-registration from the PAC. See "Improved Duplicate Checking for Self-Registration" on page 153.

Processing Deleted Patron Records

When a patron record is manually deleted in the Polaris staff client, it is no longer immediately removed from the database. Instead, the barcode, password, name, address, e-mail address, and user-defined fields are made blank, and the records are not returned in Find Tool search results. The altered record is then deleted as part of the nightly Patron Processing SQL job. This change was made to improve staff client performance and does not affect your current workflow. The existing settings, procedures, and conditions for automatically and/or manually deleting patron records have not changed.

Note:
This change was also made to Polaris 3.6.295 and later.

Retaining Financial Information for Deleted Patron Records

Certain patron account data from deleted patron records is now saved in new, separate database tables for the period specified in the Patron Services parameter **Account transaction deletion**. This is to ensure the accuracy of the following reports when the transacting patron records have been deleted:

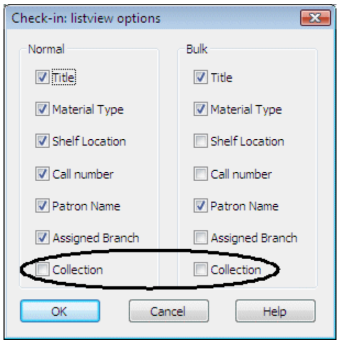
- Daily Cash Balance Detail
- Daily Cash Drawer
- Daily Cash Drawer POS
- Billed Patrons
- Fines and Fees
- Fines and Fees Summary
- Non-POS Payments

Note:
The Daily Cash Balance Detail, Daily Cash Drawer, and Daily Cash Drawer POS reports can use retrospective data dating back to the beginning of the calendar year during which Polaris 4.0 was installed. The other reports listed here use only data from patron records deleted after Polaris 4.0 was installed. This is because these reports include both charge and payment transactions, and the retrospective data does not include charges.

The saved data is later purged according to the parameter setting in the nightly Patron Processing job. For example, if the setting for **Account transaction deletio**n is two years, any data older than two years is purged when the job runs. For more information about setting the **Account transaction deletion** parameter, see "Setting Patron Accounting Options" in the *Polaris Patron Services Administration Guide* or the equivalent topic in staff client online Help. For more information about the reports, see "Patron Accounting Reports" in the *Polaris Patron Services Guide* or the equivalent topic in staff client online Help.

Collection Column Option for Check In Listview

You can now include a Collection column in the Check In workform listview. Use the Patron Services parameter **Check-in: Listview options** to set this option for the normal and/or bulk Check In workforms.

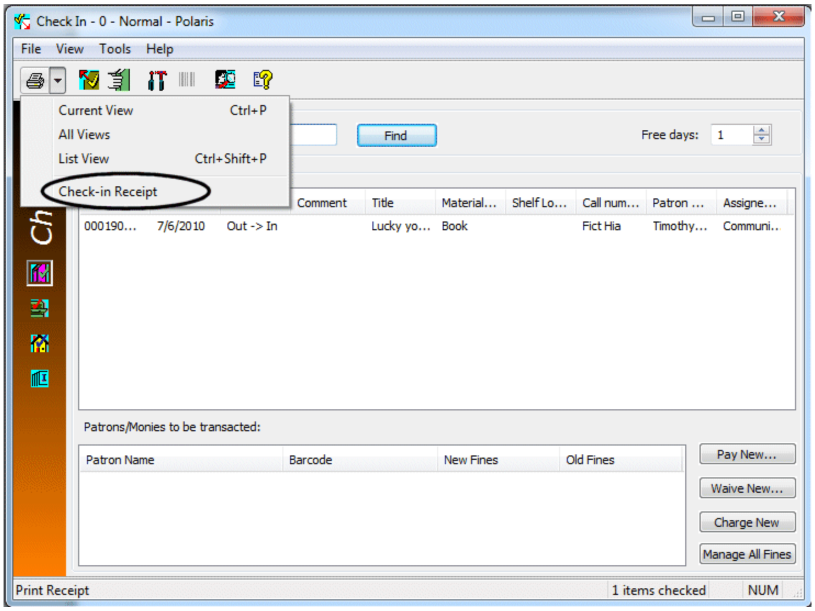


Patron Name Removed from Comments, Check In Listview

The requesting patron's name is now suppressed from the Comment column in the Check In workform listview when an item becomes held.

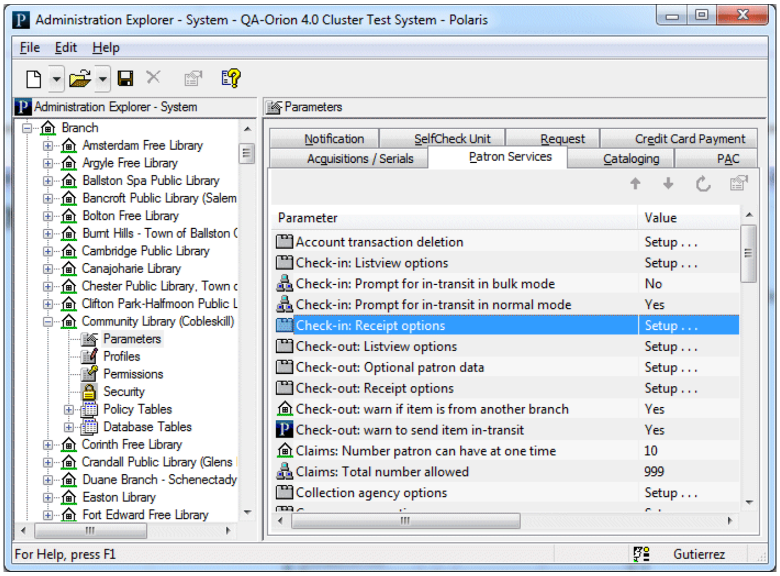
Check-In Receipt Printing

You can now print a check-in receipt formatted for a receipt printer from the Check In workform - Normal and Check In workform - Bulk views. When a patron's items have been checked in, select one or more items in the list and select **File, Check in Receipt**.

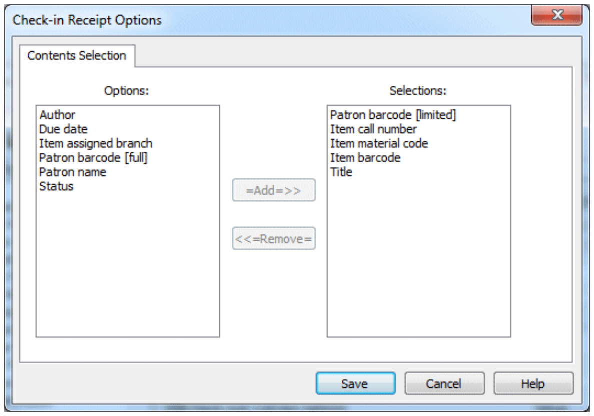


If items are selected from multiple patrons, the items are grouped by patrons, and three blank lines are added at the end of each group. If auto-cut receipt printing is enabled, the receipt is cut at the end of each patron's group of items. (Items with no patron information, for example those that went from In to In at check in, are also grouped together and separated from patron items.)

Default information on the receipt includes the item barcode, title, author, material type, call number, and patron's limited barcode. You can specify the information on the receipt with the new Patron Services parameter **Check-in: Receipt options**, available at the system, library, and branch levels.

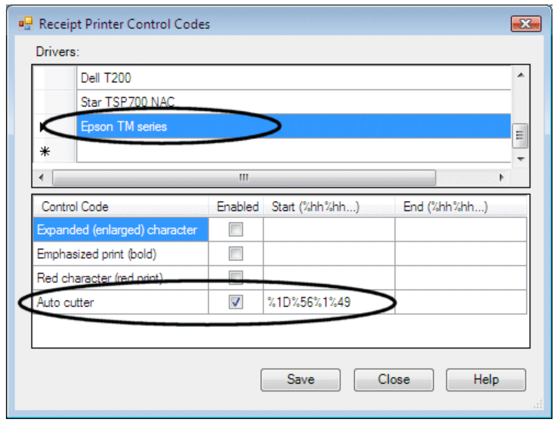


Double-click the parameter to open the dialog box. To add information fields to the receipt, select them in the Options list and click **Add**. To remove information fields from the receipt, select them in the Selections list and click **Remove**. To print receipts, at least one field must be listed in Selections.



Epson TM Series Receipt Printer - Auto-Cut Control Code

An auto-cutter control code has been added for Epson TM series receipt printers, so you can now produce auto-cut receipts from these printers. In Polaris Administration, you can enable the new control code using the system-level **Staff Client** profile **Receipt printer control codes.**



Auto-cut receipts are used to append the pick-up slip to the default hold slip, the hold call slip, or both. Both slips are printed together so the information needed for processing is available on the standard hold slip or hold call slip, and the pick-up slip portion can be torn off and placed with the item.

For more information about setting up receipt printing, see "Setting Up Circulation Receipts" in the *Polaris Patron Services Administration Guide* or the equivalent topic in staff client online Help.

Note:
This feature was also added to Polaris versions 3.6.279 and later.

Polaris PAC Applications

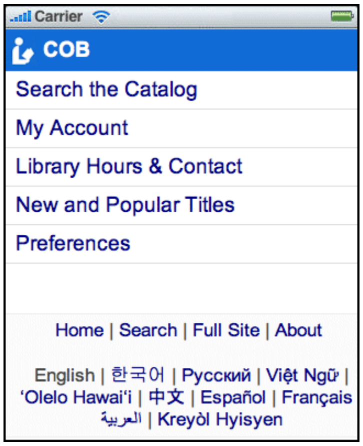
Polaris 4.0 includes the following improvements in Polaris PAC applications.

Mobile PAC

Polaris® Mobile PAC™ is a new Web-based PAC that has been optimized for mobile devices, providing simplified access to many of the features that are available in Polaris PowerPAC. It is designed to work with mobile devices where users navigate the interface in either of two ways:

- **Pointing device** - User touches the desired option or selects it with a stylus.
- **Navigation keys** - User presses navigation keys (such as arrow keys) on the device key pad to move the focus up or down in a list.

Note:
Any device with a Web browser can access the Mobile PAC site, including mobile devices with browsers optimized for mobile use and desktop machines with standard Web browsers. Full functionality may not be available for standard cell phones that have limited keypads (rather than full keyboards) and that lack pointing devices.



Major features include:

- New and popular titles searches
- Quick and advanced catalog searches
- Bibliographic details and item availability information for search results
- Hold requests
- Patron account access, including renewing items and managing requests

Mobile PAC also offers a multilingual version, where users can select the display language on any page or set a language preference that persists from session to session.

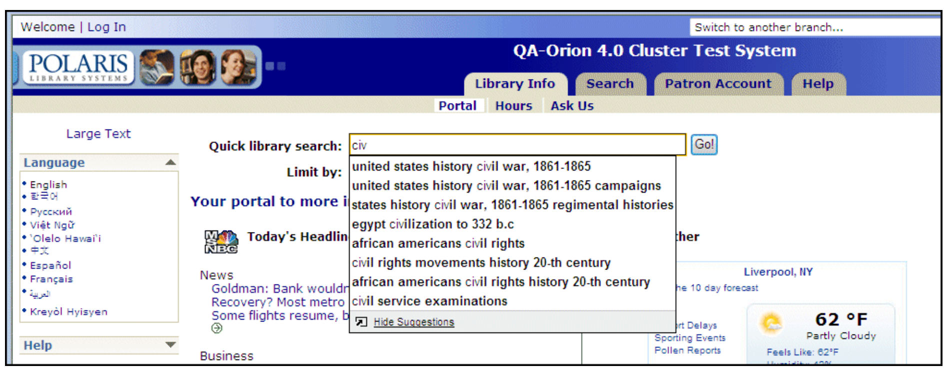
Polaris Administration settings control the features available in Mobile PAC. Mobile PAC shares some existing settings with other Polaris PAC applications. Other (new) settings apply only to Mobile PAC. For details, see the *Polaris Mobile PAC Administration Guide*.

Polaris Mobile PAC is a licensed product. For more information about obtaining Mobile PAC, contact Polaris Library Systems.

Automatic Search Suggestions in PAC

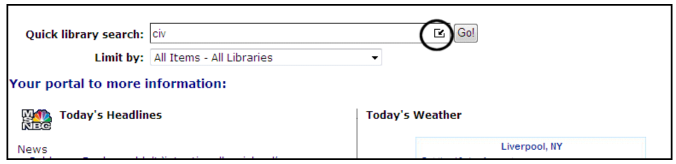
Quick, keyword, phrase, and advanced searches in Polaris PowerPAC now offer suggested search terms as you type. You can ignore the suggestions and continue to type your search term, or click a suggestion to launch the search for the suggested term.

Note:
The auto-suggest feature is not available for numeric search access points in keyword searches (such as ISBN and ISSN), or when searching remote databases.



To hide suggestions for the PAC session, click **Hide Suggestions** at the bottom of the suggestion list.

To show the suggestions after hiding them, click the arrow in the search text box.



Automatic search suggestions are also available for certain keyword and phrase searches in the Polaris Find Tool. See “Polaris Find Tool Enhancements” on page 14. The new Cataloging parameter **Auto-suggest feature enabled** controls this feature in both the PAC and the Find Tool.

Social Bookmarking for PAC Search Results

Social bookmarking is a method for Internet users to share, organize, search, and manage bookmarks of Web resources. Polaris PowerPAC users can now share bookmarks to titles in PAC search results on over 200 sites that support social bookmarking, such as Facebook™, Twitter™, and Digg™.

Polaris uses AddThis™ to provide this feature, a widely available no-fee service that maintains the social bookmarking URLs and provides usage analytical statistics to libraries that register for an AddThis account.

If you enable bookmark sharing, a **Share** link is displayed for the title in Polaris PowerPAC search results.

When the patron clicks **Share**, a Bookmark & Share dialog box appears.

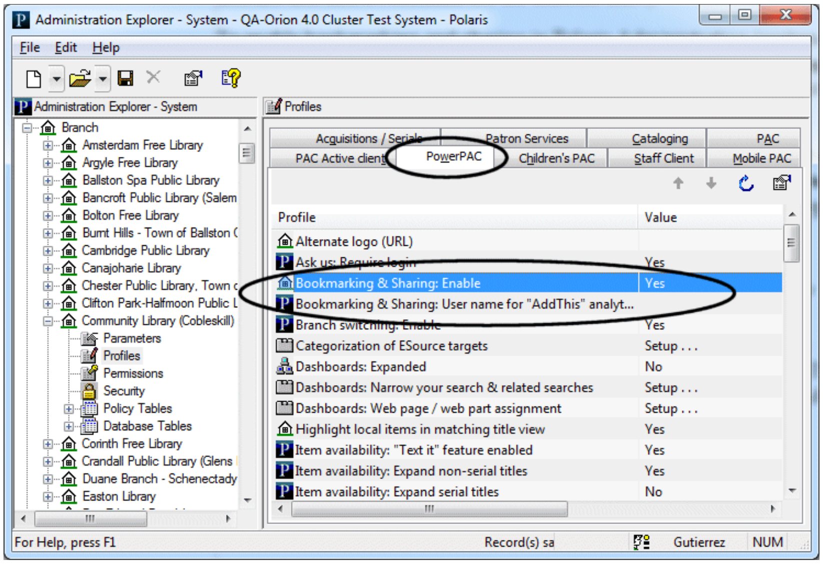
The initial Bookmark & Share menu items represent the most popular bookmarking and sharing sites according to AddThis. The patron can select a site from this list, or click **More** to open a larger dialog box with a list of additional sites and a search feature that covers more than 200 social bookmarking providers. The patron clicks a site link to open a pop-up window for the selected site, where the patron can log in to her site account and add a bookmark for the selected title. When someone clicks the link on the social network site, a search for the title is launched in the library catalog.

To enable bookmarking and sharing in Polaris Administration (system, library, or branch level), set the PowerPAC profile **Bookmarking & Sharing: Enable** to **Yes**. This setting displays the **Share** link in Polaris PowerPAC. The default setting is **No**.

If you want usage statistics from AddThis, set up an AddThis account at the AddThis Web site. Go to **http://www.addthis.com/** and click the **Join Now** link at the top of the page. Create a user name and password, and supply an appropriate e-mail address.

> **Note:**
> The AddThis terms of service and privacy policies are available on the AddThis Web site.

Then, in Polaris Administration, type your AddThis user name in the PowerPAC profile **Bookmarking & Sharing: User name for AddThis analytics**. This setting is available on the system, library, and branch levels; the default setting is blank (no user name).



PowerPAC Accessibility Improvements

Polaris PowerPAC pages have been changed to improve accessibility in the following ways:

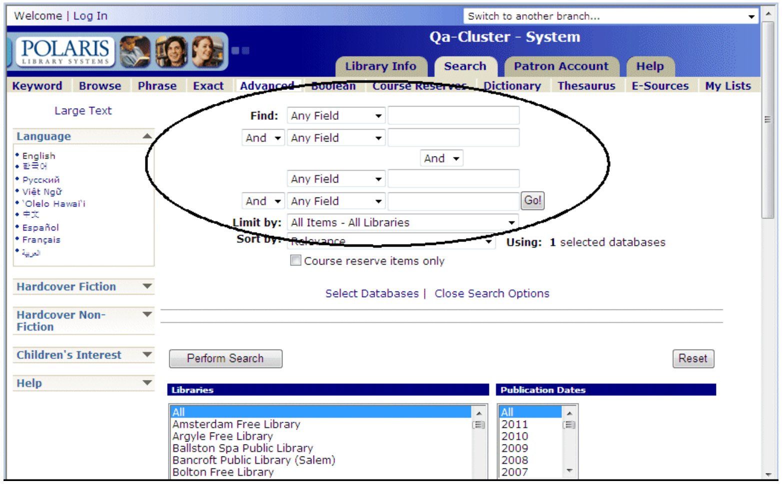
- ALT tags have been added to provide text equivalents for inline images.
- "Skip navigation" links have been added to the top of each PowerPAC page.
- Table header <TH> tags have been added to distinguish column headers for data tables, such as those displayed on patron account pages.

Although these changes are not generally visible when the pages are displayed, they improve the experience of patrons who use screen readers.

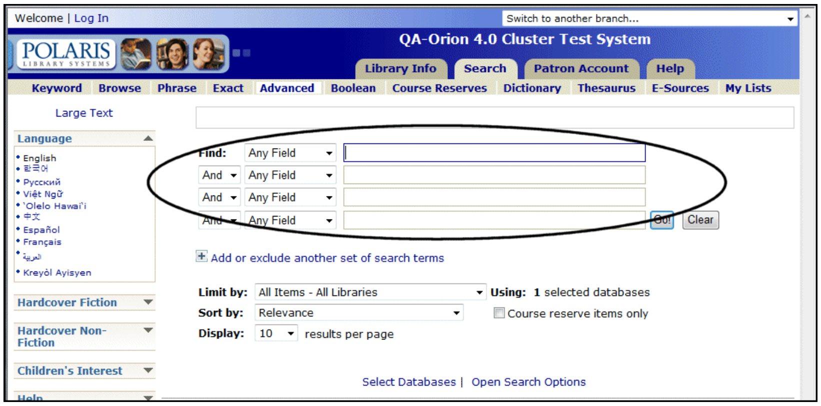
Advanced Searching in Polaris PowerPAC

The Advanced search page in Polaris PowerPAC, where patrons can construct nested Boolean searches without typing CQL commands, has been redesigned to make this search type more powerful and easier to use.

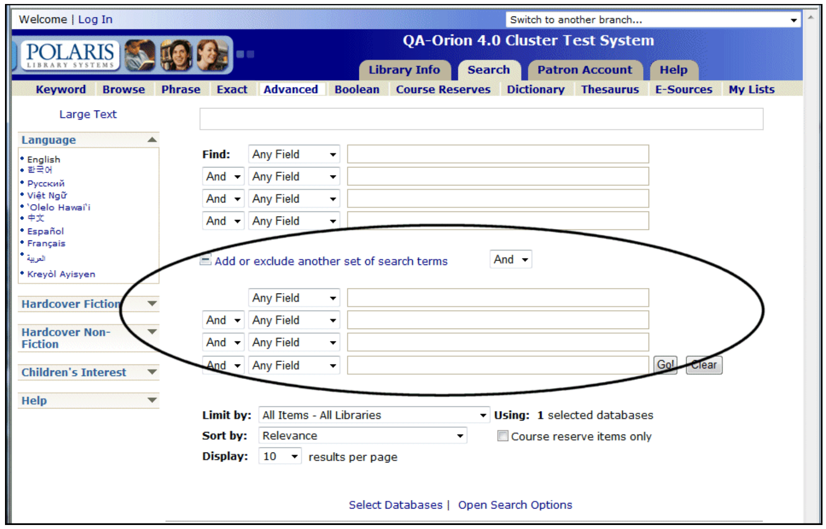
Previously, you could set up a nested Boolean expression that, at its most complex, could be linked to another nested Boolean expression with the Boolean operators AND, OR and NOT.



Now when the Advanced search page opens, you see additional search boxes for the first expression.

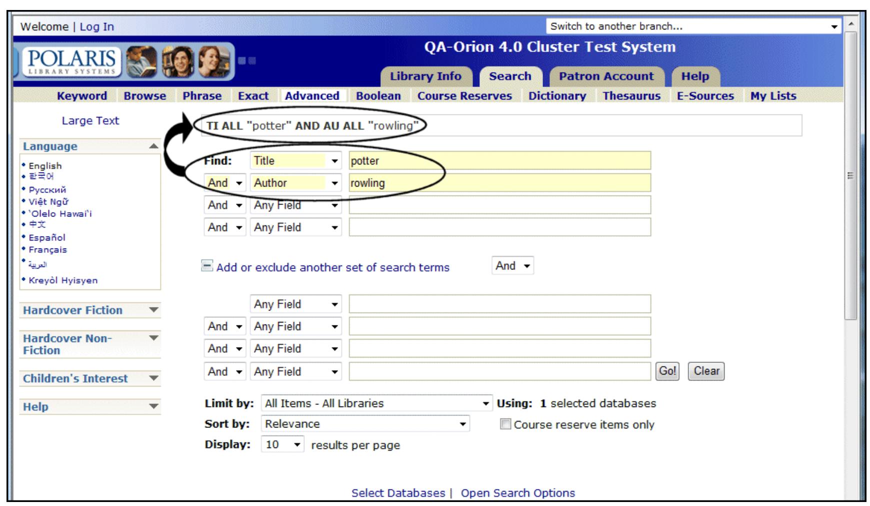


To add another set of nested search terms, you click the plus sign by **Add or exclude another set of search terms** to expand the page. The second set of nested expressions can be connected to the first by the Boolean operators AND, OR, or NOT.



When the page is in the expanded state, you can click the minus sign by **Add or exclude another set of search terms** to collapse the page. However, any search terms or Boolean operators you have entered for the second set of search terms are erased.

The new Advanced search page also includes a read-only display of the search query, entered as you type it, using standard Boolean syntax expressed in CQL. The terms you entered are displayed in normal type. The search commands, operators, and punctuation that the program creates are displayed in bold type.

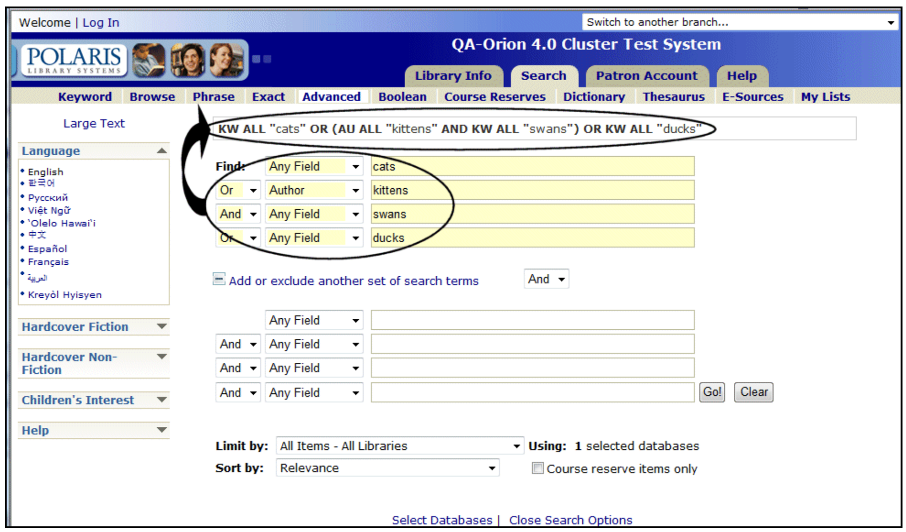


Order of Precedence

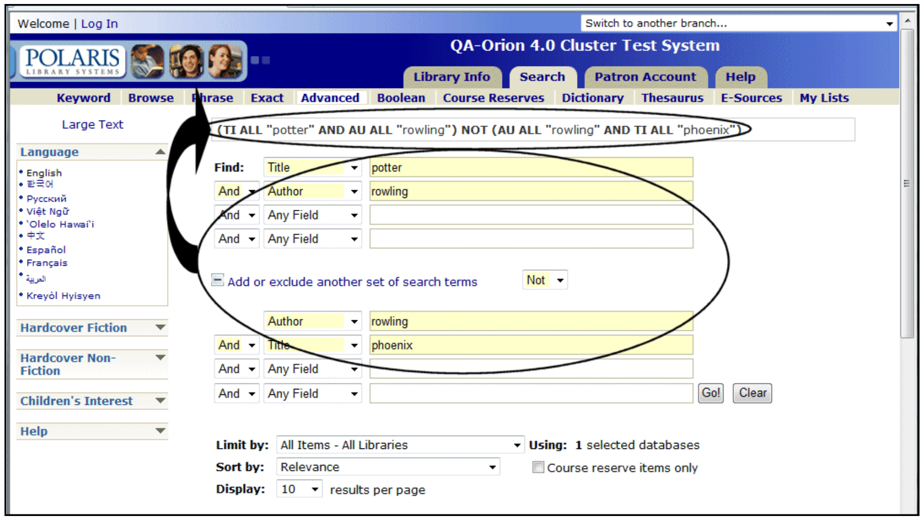
When the search is launched, the operators will be processed according to the following order of precedence (lower values take precedence over higher values):

- AND = 1
- OR = 2
- NOT = 3

The search bar at the top of the page shows the order of precedence by placing nesting parentheses where appropriate. Terms within parentheses are processed first.



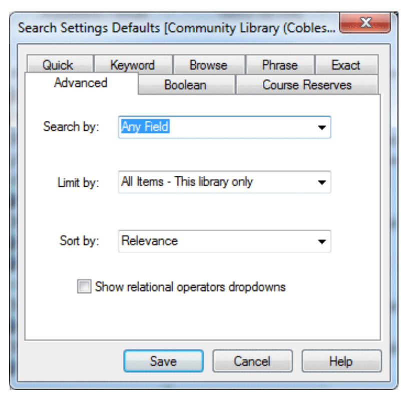
When both the top and bottom set of search terms are used, terms in the top portion are placed in parentheses and processed in order of precedence, the terms in the bottom portion are placed in parentheses and processed in order of precedence, then the top and bottom sections are combined according to the operator that separates them.



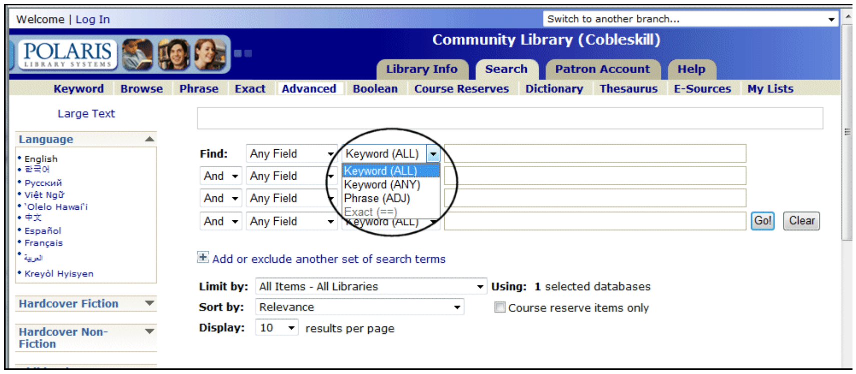
Text Entry

Characters - Letter case, multiple spaces, and punctuation are ignored. Omit hyphens in numbers. However, you can include the following characters if they immediately precede or follow a letter or number (no space between): **+ # % $**

Multiple words - If you type multiple words in a text entry box, by default the search looks for all the words you entered (**Keyword ALL** search). This is the only option in Polaris 3.6.256 and later versions. In Polaris 4.0, you can offer patrons a choice. In Polaris Administration, open the PAC profile **Search settings defaults**, Advanced tabbed page, and select (check) **Show relational operators dropdowns**.



When this option is checked, a drop-down list next to each text box is displayed, where patrons can choose how multiple words should be handled.



The table shows the applicable access points for each option, and the effect on search results:

Option	*Access Points*	*Search Effect*
Keyword (ALL)	AU, GENRE, KW (Any Field), NOTE, PUB, SE, SU, TI	All of the keywords in the search term must exist.
Keyword (ANY)	AU, GENRE, KW (Any Field), NOTE, PUB, SE, SU, TI	Any one of the keywords in the search term must exist.
Phrase (ADJ)	AU, GENRE, KW (Any Field), NOTE, PUB, SE, SU, TI	All of the keywords in the search term must exist, and must be adjacent to each other in the order specified in the search term.
Exact (==)	AU, CODEN, ISBN, ISSN, LCCN, PN, SE, STRN, SU, SUDOC, TI	The search term must be an exact match.

If you think these choices would be confusing to patrons, leave the **Show relational operators dropdowns** option unchecked (the default setting).

Boolean operators as text - If you type the Boolean operators **and**, **or**, or **not** in a text entry box, the words are treated as search text and not as Boolean operators.

Wildcard characters - You can type a part of a word and use a wildcard character. The wildcard character asterisk (*) represents the rest of the word. For example, if you type **King***, the results include words such as *King*, *Kingsley*, and *Kingford*. The question mark (?) represents exactly one character. For example, **wom?n** finds *woman* and *women*.

Note:
For the number fields **CODEN**, **ISBN**, **ISSN**, **Publisher No.**, **STRN**, and **SuDoc**, enter the complete number for best results.

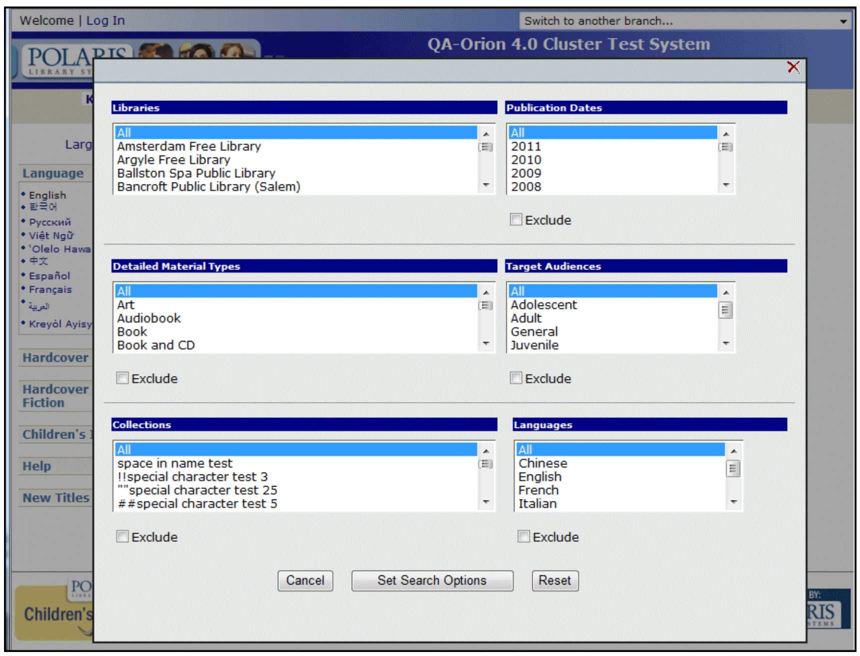
Blank text boxes - If you leave any text entry boxes blank, the Boolean operator and search field associated with the text entry box are ignored, and the remaining search terms with their associated operators and search fields are processed.

Text box appearance - As you construct your search, the form shows the active boxes in a contrasting color. The default yellow color can be customized in the underlying **styles.css** file by changing the rule **.AdvancedHighlight {background-color: #FFFFCC}**.

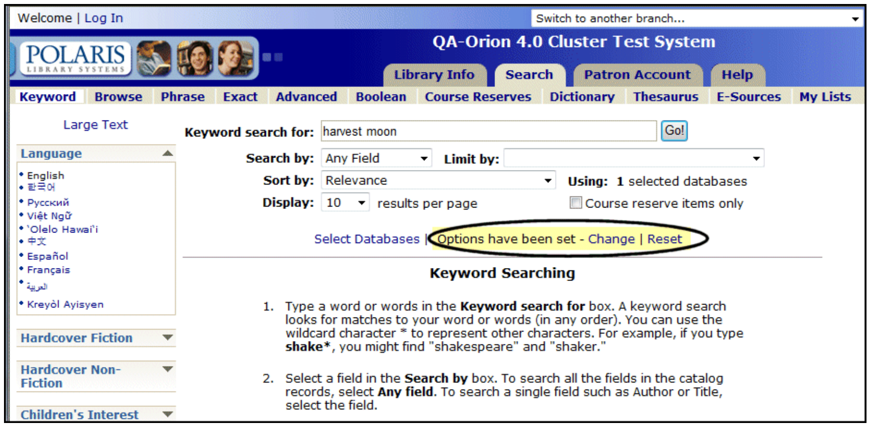
Note:
This change to advanced searching was also made to Polaris 3.6, versions 256 and later.

Search Options Settings In Polaris PowerPAC

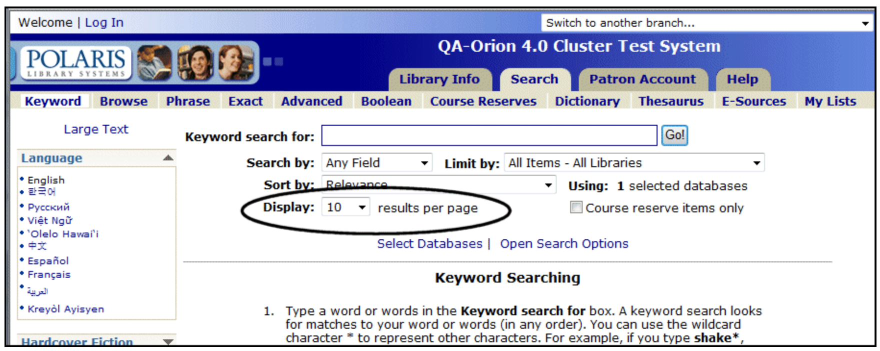
The Polaris PowerPAC interface for setting search options has been improved. (As in previous versions, Search Options are available for keyword, phrase, exact, advanced, and Boolean searches.) When you click **Open Search Options** on the search page, a "light box" window opens to display the search options. (To move the window, click and drag the top bar.)



After you make your settings and click **Set Search Options**, the light box closes and the search page is displayed. You click **Go** to launch the search, the same method you use when no Search Options have been set. The search header area shows when Search Options have been set; you can click **Change** to open the light box and edit the settings, or click **Reset** to return the settings to their default values.



As part of this development, the **results per page** setting has been moved from the Search Options group of settings to the search header area of the page. This means a user can now reset Search Options without clearing the results per page setting. The **results per page** setting is also retained across search pages, until the user returns to the portal page.



These improvements also resolve an issue in previous versions of Polaris where resetting search options always returned the user to the keyword search page.

Suppressing Request and Availability Features in PAC

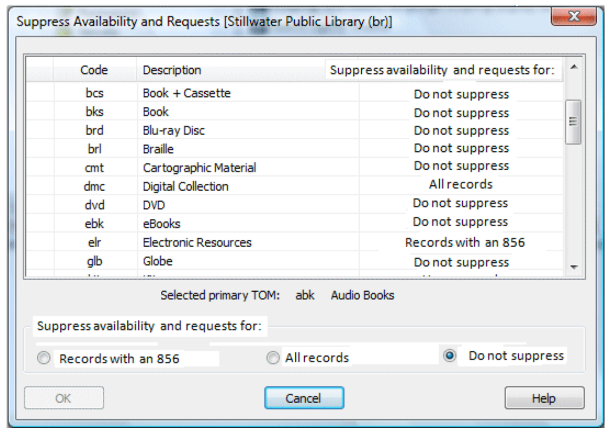
In previous versions of Polaris, the ability to place requests in PAC is automatically suppressed for a bibliographic record when all these conditions are true:

- Type of Material (TOM) =elr (Electronic resources)
- The bibliographic record has at least one 856 tag
- There are no linked item records

For Polaris Fusion users, the Availability and Place Request buttons are also suppressed when TOM = dmc (Digital collections) and availability = 0.

In Polaris 4.0 PowerPAC and Mobile PAC, you can suppress the ability to place requests and the display of availability information for bibliographic records with the primary system-defined TOMs that you specify. For example, you can suppress these features for materials where the item is not physically in the library, either because it is e-content that is available only in downloadable form, or because it is in an external storage device from companies such as Libramation's MediaBank or redbox®.

In Polaris Administration, use the new PAC profile **Suppress availability and requests** to specify the primary TOMS that are candidates for suppression. The profile is available at the system, library, or branch level. The setting of the PAC connection organization determines the effect on Polaris PowerPAC and Mobile PAC.



Note:
The list is ordered by the three-character alphabetic code that represents the TOM. The descriptions are the Polaris default descriptions, not the custom display descriptions you may have defined in the PAC Limit by Display policy table.

You can opt to suppress request and availability options for all records with a specific primary TOM, or only those that have at least one 856 in the bib record.

Important:
If **All records** is selected for any given type of material, records of that type that do not have 856 fields will appear in the catalog but there will be no way for the user to request the resource or view availability. This is likely acceptable for Fusion resources (TOM=dmc), which typically do not have 856 fields and are accessed by clicking a thumbnail image, but may be a problem for other types of material. The **All records** setting should be used with caution.

By default, Electronic resources (**elr**) and Digital collection (**dmc**) are selected for suppressing request and availability options. The option **Records with an 856** is selected by default for all TOMs except **dmc**, where **All records** is selected. Other types of material for which you may want to suppress request and availability options include AudioEBook (**aeb**) and

Ebook (**ebk**), but your library's cataloging practices should determine which TOMs (if any) you designate for suppressing request and availability options.

The ability to place requests and view availability information in PAC are now suppressed under these conditions:

- The primary TOM is checked listed in the PAC profile **Suppress Availability and Requests**
- At least one 856 is present in the bib record (if you have selected **Records with an 856** for that TOM)
- The system availability count = 0 ; there are no linked item records, or the linked item records all have **Display in PAC** set to **No**, or the linked item records all have circulation statuses that are set for suppression from the display in the PAC profile **Suppress item display**.

  Note:
  If a bibliographic record has linked issue records (via the serial holdings record) but no linked item records, the issue records are factored into the availability count, so availability information is not suppressed in this case.

When these conditions are met, the following elements are suppressed from the results displays in PowerPAC and Mobile PAC:

- Item availability fields in the brief (unexpanded and expanded) and full title displays, regardless of the settings in the PAC **Title Display: Configure** profile:
  - Local Availability Summary
  - System Availability Summary
  - # Local items
  - # System items
  - # Local items in
  - # System items in
- PowerPAC **Availability** button at the title level
- Mobile PAC **Find It** button at the title level
- PowerPAC **Place Request** button and Mobile PAC **Request It** button at the title level

Because the absence of linked item records is one of the criteria for suppression, your cataloging practices will determine whether you want to take advantage of this development. For example, if you create item records for downloadable resources, the request and availability features will not be suppressed for these types of material. As another example, if you use the same bibliographic record for multiple types of material (for example, the CD version of an audiobook and the downloadable version), and there are linked item records, the request and availability features will not be suppressed. Finally, some libraries use the same bibliographic record for items that are physically held in the library and those that are in an external storage device. For example, a library may have copies of a popular DVD available on the library shelves and also in its MediaBank distribution device. In this case, as in the preceding case, if there are linked item records, the request and availability features will not be suppressed.

Important:
This development does not affect the staff client. It is intended to lessen patrons’ confusion about how to access and obtain certain material types, but it does not prevent a staff client user from placing a hold on one of the suppressed types of material.

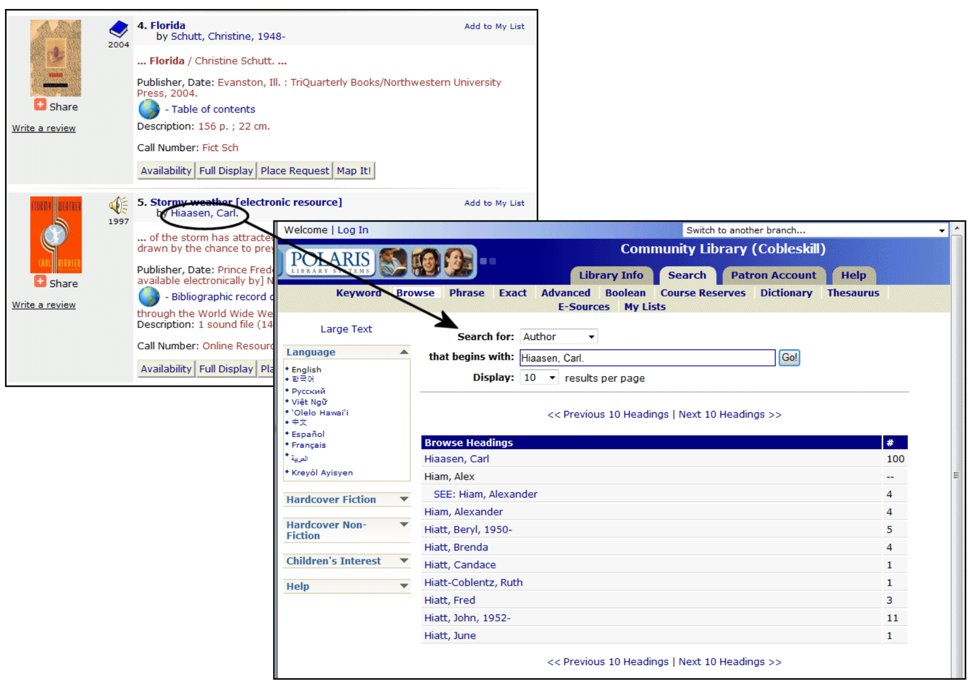
Large Print Icon Changed

Titles in large print format (Type of Material = lpt) are now indicated by a book icon labeled **LP** , instead of **ABC**.

Author Link in Brief Title Display

In Polaris PowerPAC search results, the author in the initial brief display is now a link. You can click the link to browse for the author.

Note:
This feature is not available for remote database search results or in the PAC view of a bibliographic record in the staff client.



856 Tags in PAC Brief Title Display

The Brief Title display in Polaris PowerPAC and Mobile PAC search results now uses the following logic when displaying link text for the Web links from the 856 tag:

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 default Web link text is **Web Site**. You can change the label using the PAC profile **Title Display: Configure**. For more information, see "Customizing Search Results Data" in the *Polaris Public Access Administration Guide* or the equivalent topic in staff client online Help.

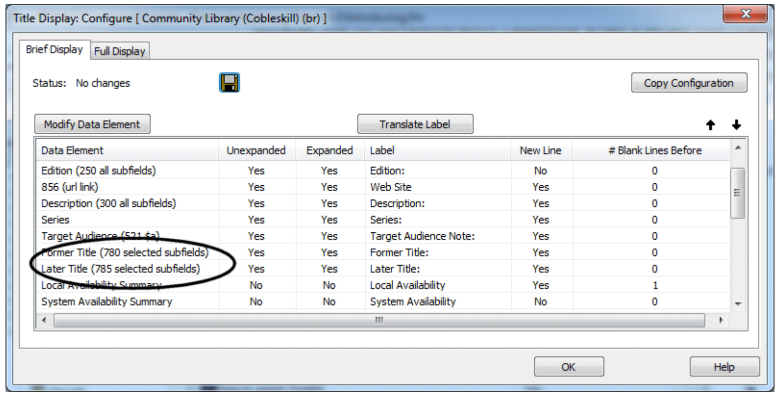
As in previous versions of Polaris, when the link is selected, the related Web site opens.

Former Title and Later Title in PowerPAC Brief Title Display

You can now choose to display Former Title (780 selected subfields) and Later Title (785 selected subfields) fields in the Polaris PowerPAC brief title display. Previously, these fields were available only for the full display. For libraries that do successive entry cataloging when a serials title changes, retaining both the old and new bibliographic records for the serial, this feature allows patrons to find all the issues that have been received for a serials title under both the old and new titles. (See "Change the Serial Holdings Record's Title" on page 60.)

Note:
Subfields o, r, u, w, x, y, z, 4, 6, 7, and 8 are suppressed from the brief title display but retained in the full title display.

As with other title display elements, use the PAC profile **Title Display Configure** to set the Former Title and Later Title in the brief title display. Both elements are set to display by default in both the unexpanded and expanded brief title view.



As with other title display elements, you can translate and customize the labels. For more information, see "Customizing Search Results Data" in the *Polaris Public Access Administration Guide* or the equivalent topic in staff client online Help.

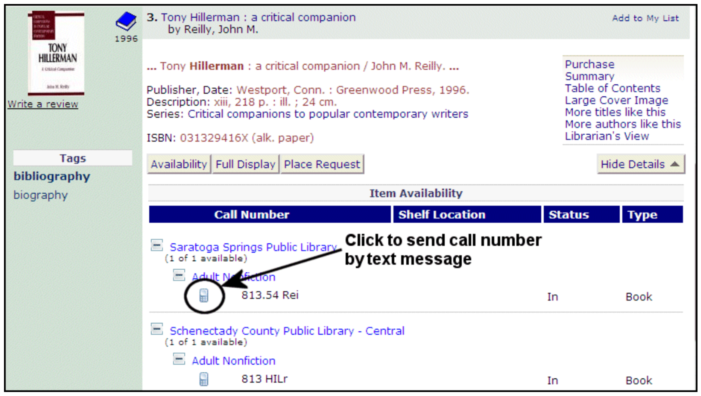
Suppressing the Due Date in Item Availability

In previous versions of Polaris, if you set the PAC parameter **Item Availability: Display detailed item status** to **Yes**, the resulting item availability information included both specific circulation status and due date. In Polaris 4.0, if you set **Item Availability: Display detailed item status** to **Yes**, you can also set a new PAC parameter **Item Availability: Display due date in detailed item status** to display or suppress the due date. The parameter is available at the system, library, or branch level and is set to **Yes** by default. If **Item Availability: Display detailed item status** is set to **No**, the due date is not displayed regardless of the setting for **Item Availability: Display due date in detailed item status.**

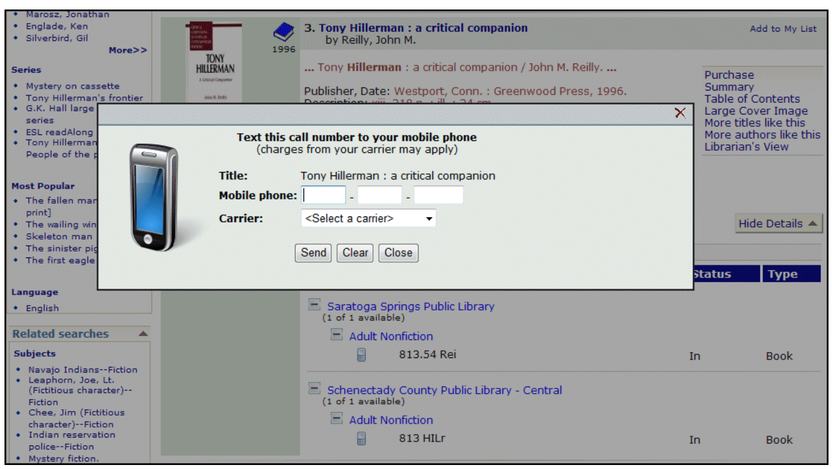
The new parameter applies to Polaris PowerPAC, Polaris ActivePAC, and Mobile PAC.

Send a Call Number by Text Message (Text It)

From the Polaris PowerPAC item availability display, a patron can now send an e-mail text message containing the item call number to his or her mobile phone via the mobile phone carrier's SMTP e-mail service. If you enable this feature, a Text It icon appears next to each item in the Availability display for a title in Polaris PowerPAC search results.



When you click the Text It icon, a "lightbox" window opens over the current page, which is dim behind the lightbox. (To move the window, click and drag the top bar.)



If the patron is logged in and the patron record includes a mobile phone number and carrier, the **Mobile phone number** and **Carrier** fields are already set. If the patron is not logged in, or is logged in but does not have a mobile phone number and carrier in the patron record, the patron types the mobile phone number and selects a carrier from the list. The carrier options are set in the system-level database table **Mobile Phone Carriers**. When the patron clicks **Send**, the text message is sent to the patron's mobile phone.

The "from" field of the message is taken from the PAC profile **Email notification: email address of sender** for the current connection organization. If no address has been specified in that profile, the "from" field is taken from the system-level parameter setting for the return e-mail address in **Notification options**. (If no address is available from these settings, the Text It icon is not displayed.) The subject of the message is the first 30 characters of the title. The body of the message includes the branch display name and the call number and designation (if present). Due to common carrier limitations, the entire message must not exceed 160 characters. If the message would be longer, certain fields are automatically eliminated in the following order, until the total number of characters is 160 or fewer:

- Branch display name
- Designation
- If the branch display name and designation have been eliminated and the total still exceeds 160 characters, characters are removed from the end of the call number field until a total of 156 characters is reached. Then the system adds a space and an ellipsis to the end of the call number.

The patron does not receive notification if the delivery fails, and Polaris does not record the failure.

Setting Text It in Polaris Administration

In Polaris Administration, the new PowerPAC profile **Item availability: "Text it" feature enabled** controls this feature. The profile is available at the system, library, and branch levels and is set to **Yes** by default.

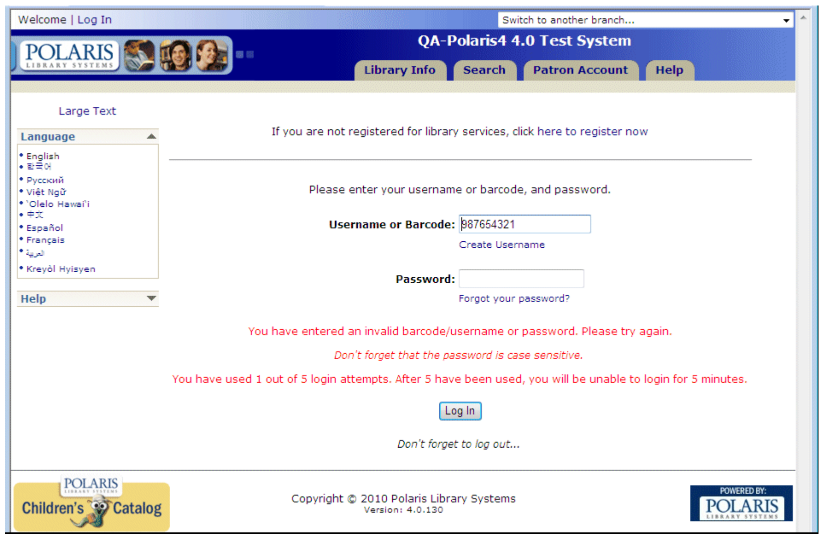
Text It Report

A new report option, **PAC text it usage**, is available in SimplyReports on the **Patron** tab, **Patron Statistical Reports** sub-tab. The report includes an activity summary, the number of in-house transactions, and the number of outside transactions. In-house transactions are those from workstations that are identified as in-house for the selected transacting organizations in the In-House IP Addresses database table.

Standard SimplyReports parameters, filters, and formats for patron statistical reports are available for the new report.

Limiting PAC Log-In Attempts

You can now set a limit on the number of times a patron can attempt to log in to the PAC without success. At the first unsuccessful attempt, the system starts timing the attempts to log-in, and a warning message appears at the first unsuccessful attempt.



When the limit is reached within 5 minutes of the first unsuccessful attempt, a message appears and the patron must wait 5 minutes before trying to log in again.

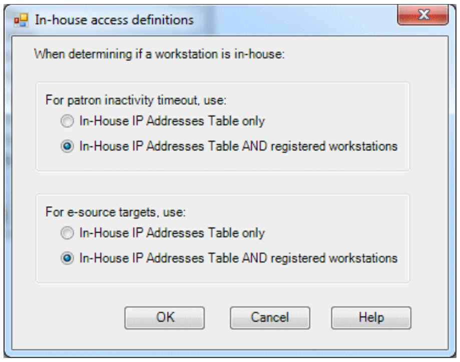
In the library, a staff member can use the staff override password within the initial 5-minute "window" to log the patron in. If a staff member resets the patron's password from the staff client, the patron must also wait 5 minutes before attempting to log in with the new password.

In Polaris Administration, use the new system-level PAC profile **Login retries** to enable or disable the limit and set the number (5-99) of attempts allowed. By default, the limit is enabled and 5 attempts are allowed. This setting affects all log-in pages in Polaris PowerPAC, Polaris PowerPAC Children's Edition, and Mobile PAC.

You can edit the warning and stop messages using Polaris Language Editor (string IDs **PACML_LOGINFAIL_2**, **PACML_LOGINFAIL_3**, and **PACML_LOGINFAIL_3U**). For more information about editing messages, see the *Polaris Language Editor Guide* or Language Editor online Help.

Defining In-House Access

Using the new PowerPAC profile **In-house access definitions: Setup** in Polaris Administration, you can now control how a workstation's in-house status is determined. The profile is available at the system, library, and branch levels; the system uses the setting of the Polaris PowerPAC connection organization.



You can set separate criteria for the patron inactivity timeout (see "Patron Inactivity Timeout at Library Workstations" on page 152) and access to e-source targets. If you select **In-House IP Addresses Table only**, a workstation's IP address must be included in that table to be considered in-house. If you select **In-House IP Addresses Table AND registered workstations**, a workstation's IP address can either be included in the In-House IP Addresses table or the workstation can be registered in Polaris to be considered in-house. This is the default setting for both patron inactivity timeout and e-source target access.

This change was made because look-ups to determine whether a workstation is registered in Polaris can impact performance on slow or complicated networks. If you experience these problems, you can change the setting for one or both situations to **In-House IP Addresses Table only.** This setting has the following additional implications for staff workstations, which are registered in Polaris:

- If a staff member's workstation is not listed in the In-House IP Addresses table and you have limited access to an e-source target to in-house workstations only, the staff member will not be able to access the e-source target in the PAC. If this situation is an issue, you must include the workstation IP address in the In-House IP Addresses table.
- If a staff member's workstation is listed in the In-House IP Addresses table, the staff member has logged in to his own patron account in PAC, and you have enabled a patron inactivity timeout, the staff member's session will be eligible to time out.

Related Information

- **Setting a patron inactivity timeout** - See "Allowing Patron Account Access" in the *Polaris Public Access Administration Guide* or the equivalent topic in staff client online Help.
- **Setting up e-source restrictions** - See "Managing E-Sources" in the *Polaris Public Access Administration Guide* or the equivalent topic in staff client online Help.
- **Entering information in the In-House IP Addresses table** - See "Identifying In-House Computers" in the *Polaris Administration Guide* or the equivalent topic in staff client online Help.

Patron Inactivity Timeout at Library Workstations

You can now set a period of inactivity after which a logged-in patron using Polaris PowerPAC at a library workstation is automatically logged out. A logged-in patron's activity consists of any of the following actions:

- Clicking Polaris product buttons
- Clicking links
- Clicking cover images
- Clicking in the white areas of the PowerPAC portion of the browser window
- (Credit card payment form only) Text entry

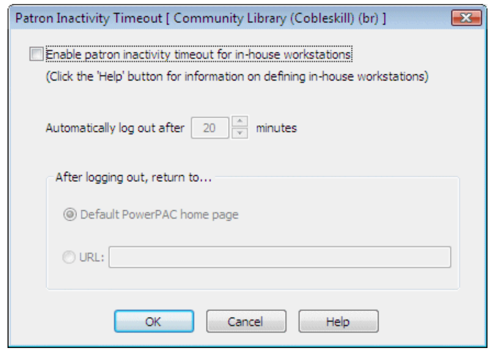
When any of these actions occur, activity is registered and the inactivity timer is restarted. When this feature is enabled, the browser status bar displays a count-down timer when 60 seconds are left before automatic logout.

> **Note:**
> When a credit card payment is submitted, the Patron Inactivity Timeout value is calculated by adding it to the credit card gateway timeout set in the Credit Card parameter **Online payments: Configure**, plus 90 seconds.

The automatic logout applies only to in-house workstations (see "Defining In-House Access" on page 151). If you use Polaris PowerPAC on workstations within the library and you are enabling the patron inactivity timeout, be sure to list them in the In-House IP Addresses database table.

- For information about registering client workstations in Polaris Administration, see "Setting Up Workstations" in the *Polaris Administration Guide* or the equivalent topic in staff client online Help.
- For information about listing PowerPAC workstations in the In-House IP Addresses database table, see "Identifying In-House Computers" in the *Polaris Administration Guide* or the equivalent topic in staff client online Help.

To set the inactivity timeout in Polaris Administration, double-click the new PowerPAC profile **Patron inactivity timeout** at the system, library, or branch level. The Patron Inactivity Timeout dialog box opens.



Select (check) **Enable patron inactivity timeout for in-house workstations** to enable the inactivity timeout, and set the time after which the patron is logged out. You can specify a time from 1 to 20 minutes; the default setting is 20 minutes.

Then select an option to specify the page that should display after the inactivity period and automatic logout:

- Select **Default PowerPAC home page** to return to the page you have specified as the PowerPAC home page. See "Set up Polaris PowerPAC" in the *Polaris Public Access Administration Guide* or the equivalent topic in staff client online Help.
- Select **URL** and type the complete URL of the page that should be displayed (255 characters maximum).

Click **OK** to save your settings.

Improved Duplicate Checking for Self-Registration

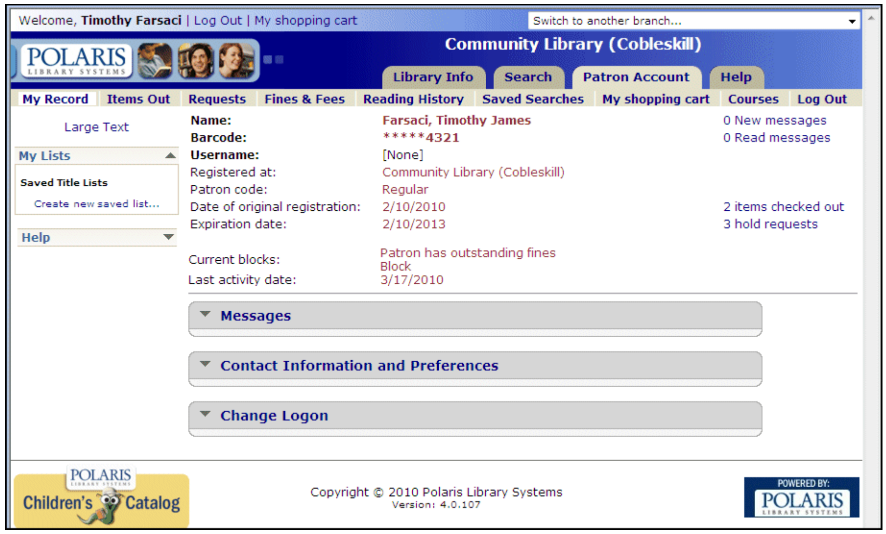
When a birth date is included in PAC self-registration, the system now uses the birth date to check for duplicate patron records, in addition to the first name and last name. If no birth date is supplied, duplicate checking uses only the first and last names as in previous versions of Polaris.

Note:
Use the PAC profile **Patron Access options** to require a birth date entry for patron registration from PAC. For more information, see "Set up online patron self-registration" in the *Polaris Public Access Administration Guide* or the equivalent topic in staff client online Help.

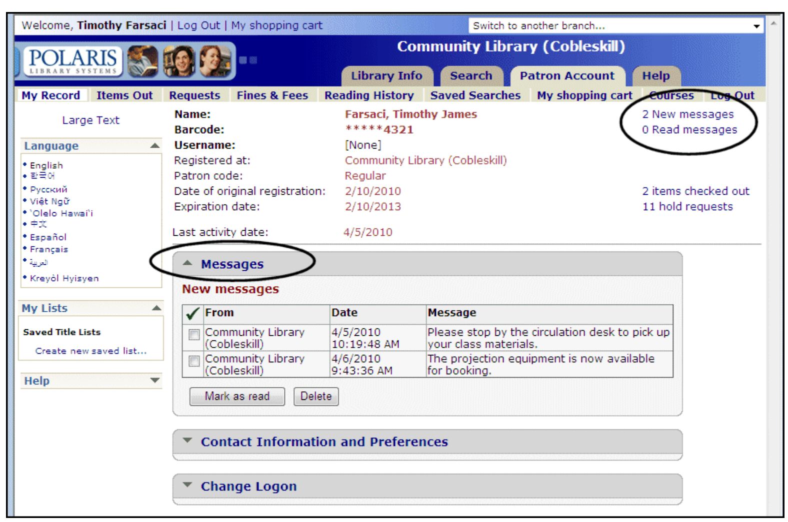
A similar change was made to patron registration in the staff client. See "Duplicate Patron Detection - Birth Date" on page 126.

Changes to PAC Patron Account Pages

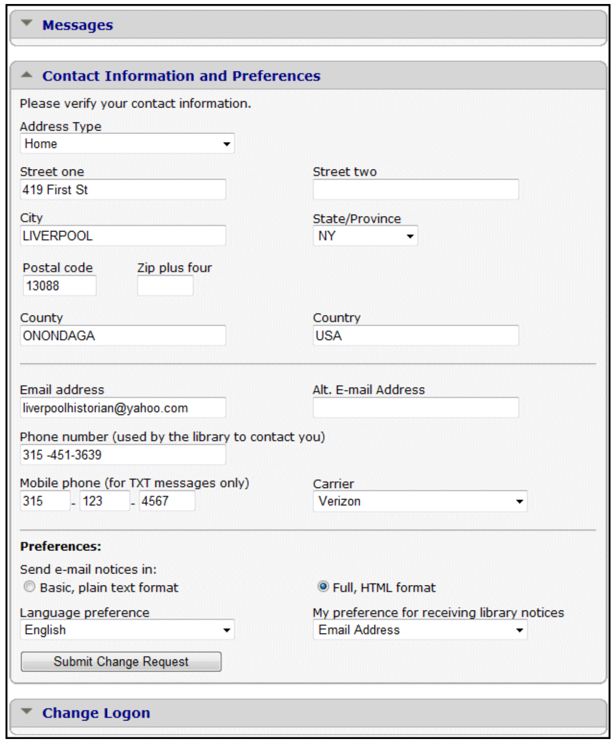
The patron account pages in Polaris PowerPAC have been redesigned for ease of use and to accommodate new developments. From the opening My Record page, patrons can now read messages from the library, update contact information, and change log-on information (see "Posting Messages to Patron Accounts" on page 103).



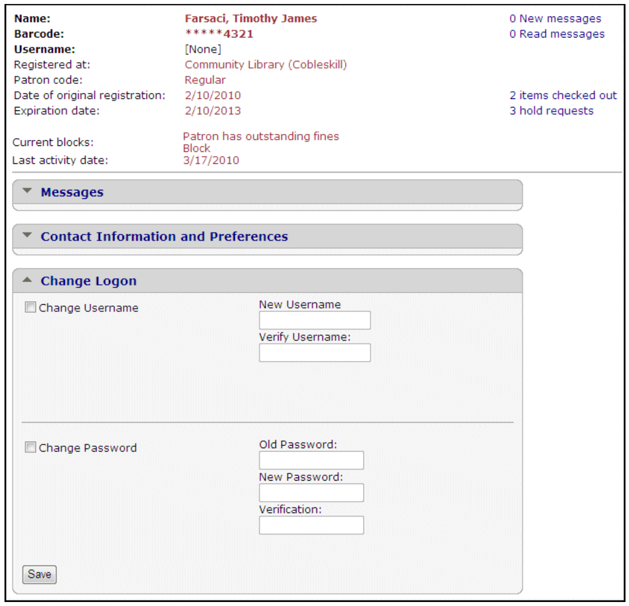
- Click **Messages** to expand this area of the page and read messages from the library, a new feature in Polaris 4.0 (see "Posting Messages to Patron Accounts" on page 103). If the patron has unread messages, this area is expanded when the page opens. Patrons can mark messages as read and delete them in this area. The header area of the Patron Account pages also summarizes the New and Read message counts in convenient links that expand the Messages area.



- Click **Contact Information and Preferences** to expand this area of the page. Patrons can update and submit their changed account information, including the new mobile phone number and carrier fields. You can optionally allow patrons to change phone numbers and e-mail addresses, with or without incurring verification blocks, and change the notification method. See “Updating Account Information from PAC” on page 158. This area also includes the options for reading histories, e-mail format, and language preference.

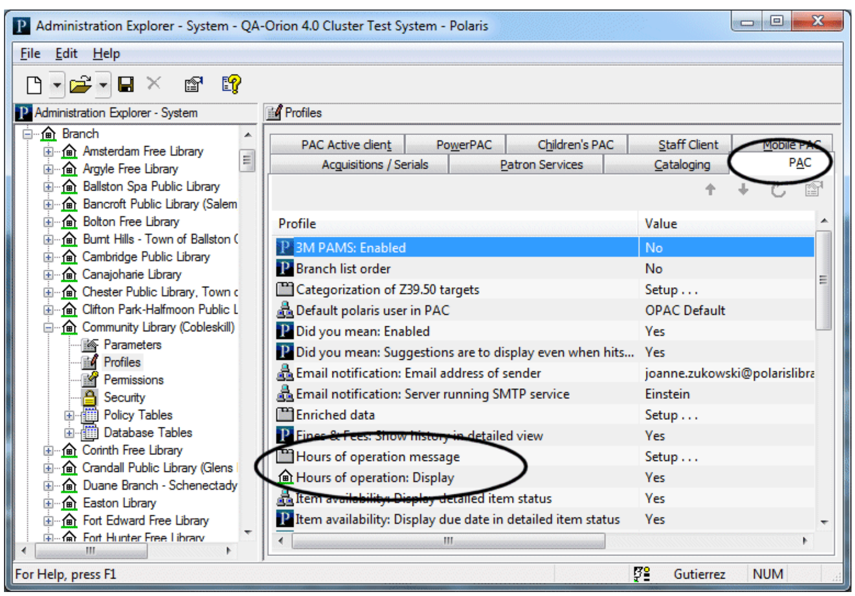


- Click **Change logon** to expand this area of the page. Patrons can set and change user names and passwords in this area.

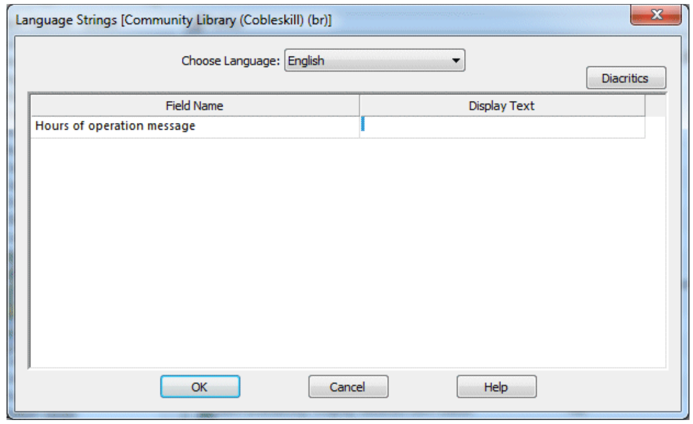


Hours of Operation Message in PAC

Using the new PAC profile **Hours of operation message**, you can now specify a message to display in Polaris PowerPAC and Mobile PAC on an organization's Hours page. This option is useful for organizations with split hours or other conditions that the usual Hours of Operation table does not accommodate. The profile is available at the system, library, and branch levels.



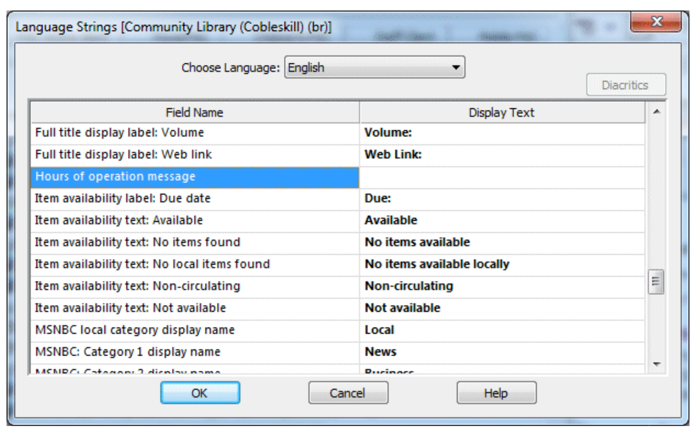
To specify a message, double-click the **Hours of operation message** profile. The Language Strings dialog box opens.



You can choose a language from those licensed for Polaris PowerPAC. Then double-click the message field in the **Display text** column and type the message (up to 500 characters). Click **OK**.

> **Note:**
> You can insert diacritic characters in your message. Click **Diacritics**. In the Character Picker dialog box, select a graphic character set. Then select the character, and click **Insert**.

You can also use the PAC profile **Multiple language strings** to specify the message. This method may be more convenient if you have multiple messages to customize. For more information, see "Editing Messages, Labels, and News Headings" in the *Polaris Public Access Administration Guide* or the equivalent topic in staff client online Help.



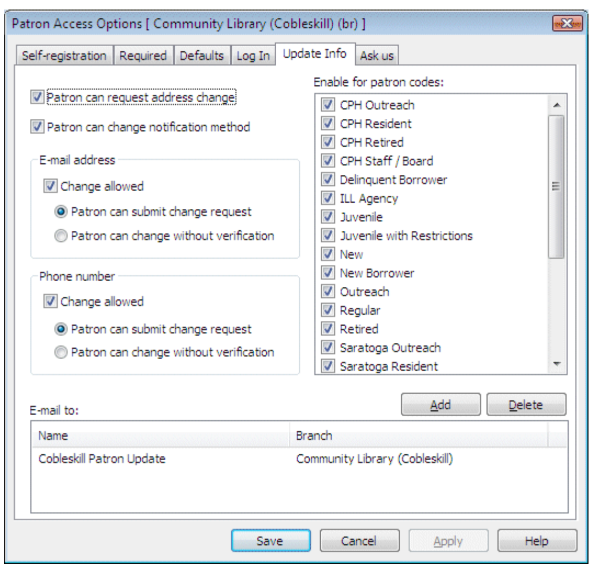
In a related development, the PAC profile **Hours of operation: Display** controls whether the table of hours is displayed on the organization's Hours page. This profile works independently of **Hours of operation message** profile, so you can choose to display the message only, the table only, or both.

Important:
As in previous versions of Polaris, the hours listed in the table on the PAC Hours page are controlled by the settings in the Patron Services parameter **Hours of operation**. Even if you do not want to display the table on the PAC Hours page, you must set up the organization's schedule in the Patron Services parameter **Hours of operation**, because these settings also affect due dates and other circulation processes.

To accommodate this development, a new PowerPAC profile **Navigation: Hours** now controls whether the Hours page itself is available in Polaris PowerPAC. This profile takes over the function previously performed by the **Hours of operation: Display** profile. (The **Library Hours & Contact** link is always displayed in Mobile PAC. For more information, see the *Polaris Mobile PAC Administration Guide*.)

Updating Account Information from PAC

You can now allow patrons to request a different notification preference from the PAC, and change their telephone numbers and e-mail addresses from PAC without placing a verification block on the patron account. The new options are available from the PAC profile **Patron access options**. The Patron Access Options dialog box - Update Info tabbed page has been redesigned to accommodate these changes, which are available at the system, library, and branch levels.



Individual check boxes are available for **Patron can request address change** and **Patron can change notification method.** The options are not selected (unchecked) by default for new sites, but if you allowed patrons to request updates in previous versions of Polaris, these new options are selected. As in previous versions of Polaris, the address change update request places a verification block on the patron account and an e-mail message is sent to the address specified in the dialog box. The notification method change does not place a verification block on the patron record.

New options are available for e-mail address and telephone number changes:

- **E-mail address change** - Select (check) **E-mail address change allowed**, then choose one of the following options:
  - **Patron can submit change request** - This option places a verification block on the patron record when the patron requests an update. The option is not selected (unchecked) by default for new sites, but if you allowed patrons to request updates in previous versions of Polaris, this new option is selected by default.
  - **Patron can change e-mail address w/o verification** - This option allows the patron to change an e-mail address without incurring a verification block.
- **Phone number change** - Select (check) **Phone number change allowed**, then choose one of the following options:
  - **Patron can submit change request** - This option places a verification block on the patron record when the patron requests an update. The option is not selected (unchecked) by default for new sites, but if you allowed patrons to request updates in previous versions of Polaris, this new option is selected by default.
  - **Patron can change phone number without verification** - This option allows the patron to change an e-mail address without incurring a verification block.

Any options you select apply to all the patron codes selected in the **Enable for patron codes** list.

Credit Card Payments from PAC

Credit card payments for fines and fees are now allowed from PAC if both the following conditions are true:

- The patron's registered branch allows credit card payments.
- The PAC connection organization allows credit card payments.

The text for refund and privacy policies is based on the settings of patron's registered branch.

Credit card payments for donations have also changed. In general, the list of "receiving" organizations is limited to those with credit card processing enabled. When a donation is made, the receiving organization's credit card settings are applied. If the connection organization is a branch, and that branch has enabled credit card processing, donations can only be made to that branch. However, if the connection organization is the system and the system organization does not have donations enabled, Polaris checks if any library or branch organizations accept donations. If so, a donation can be made, and the list of receiving organizations consists of those that accept donations. (The system organization does not appear in the list.) This change was made so that systems that do not allow branch switching in PAC can still accept donations for specific branches.

For more information about setting up credit card processing in Polaris Administration, see "Credit Card Processing" in the *Patron Services Administration Guide* or the equivalent topic in staff client online Help. For general information about e-commerce and Polaris, see "E-Commerce FAQ," available on the Customer Extranet.

Ask Us Sent From Address

Using the Ask Us feature, patrons can send a reference question from PAC to a designated library e-mail address. In Polaris 4.0, the Sent From e-mail address on the message to the library is the e-mail address the user has specified in the Ask Us form, if any. If no address is specified, the user has logged in as a patron, and the patron account includes an e-mail address, that address is used. This means that staff members who reply to Ask Us messages do not have to manually copy the sender's e-mail address into the reply.

Note:
If no e-mail address is specified in the Ask Us form or in the patron account, or the patron has cleared the address from the form, the Sent From address is that specified in the PAC profile **Email notification: Email address of sender**.

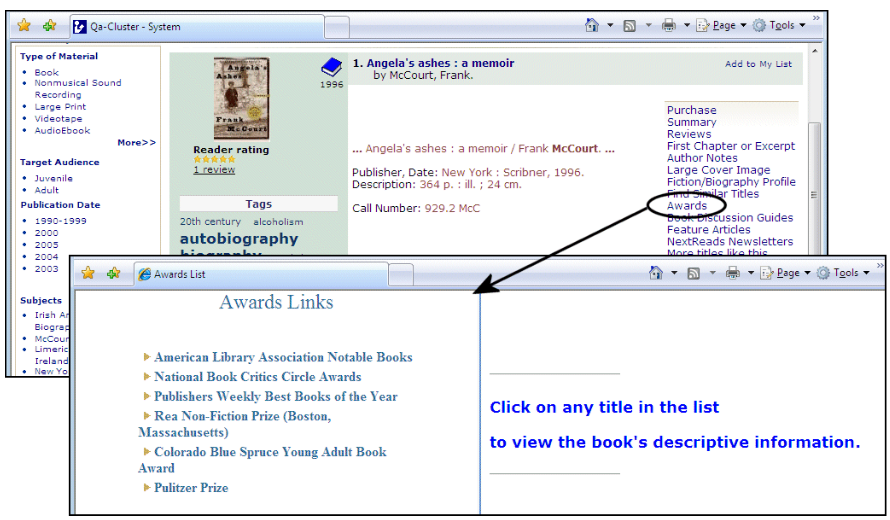
E-Sources Setup Improved

In the PowerPAC profile **Categorization of E-Source targets**, Add/Modify E-Source Target dialog box, the General Restrictions tabbed page now works independently of the Patron Codes tabbed page. Any restricted patron codes settings on the Patron Codes tabbed page are checked only if you set **Login required** for in-house or remote workstations on the General Restrictions tabbed page. (Previously, if any patron codes were restricted, all patrons were forced to log in regardless of your **Login required** settings.)

External Web Sites

External Web sites such as those linked to 856 MARC tags, the **Purchase** option, and Syndetics™ Awards now open in secondary browser windows instead of within a Polaris PowerPAC frameset. This change was necessary because the default security settings on many browsers now ignore cookies in frames where the domain of the URL is different from the page serving the frameset. These browser settings can prevent the external sites from working correctly.

The illustration shows an example of Syndetics Awards.



Note:
This change was also made to Polaris 3.6, versions 256 and later.

Naming Title Lists - Polaris PowerPAC

When a patron saves a title list in the patron's account, the title list name cannot contain these characters: plus sign, single quote, double quotes, or backslash (\). A message now appears if any of these characters are used, and the patron must specify a different name.

Keyword and Phrase Deep Link Searches - Polaris PowerPAC

Deep links allow searches for specific bibliographic records in your PAC from external sites. Such searches are launched, for example, when you use the PAC look-up feature on the sites of book and material vendors, or when enriched content providers such as Syndetics search your library catalog for similar titles.

In versions of Polaris 3.5 earlier than 3.5.482, deep link searches by author, title, subject, or series were changed from keyword to phrase searches to return a narrower results set. However, the change to phrase searching meant that these searches returned only those results where the tag contents exactly matched the search term, a situation that did not usefully reflect the library catalog. For example, **author=john+grisham** finds hits when processed as a keyword search, but may not find hits when processed as a phrase search because author names are not generally cataloged in first name, last name order.

Author, title, subject, and series searches have been restored to keyword searches to ensure that hits are returned whether an author's name order in the deep link search is first, last or last, first. If you want these searches to return only hits that match the order in the tag, you can have your vendor add a **type=phrase** query string parameter to the vendor's template.

Examples (keyword default):

http://mylibrary.com/polaris/view.aspx?author=Shakespeare

http://mylibrary.com/polaris/view.aspx?author=John+Grisham

Example (type=phrase parameter):

http://mylibrary.com/polaris/view.aspx?author=Grisham+John&type=phrase

The **type=phrase** parameter applies only to deep link searches by author, title, subject, or series. For more information about other types of deep link searches, see "Deep Links to Polaris PowerPAC" in the *Polaris Public Access Administration Guide* or the equivalent topic in staff client online Help.

Note:
This change was also made to Polaris 3.5, version 482 and later, and Polaris 3.6, version 259 and later.

LCCN Deep Link Searches - Polaris PowerPAC

LCCN is a new deep link access point for searching Polaris PowerPAC from an external site. As with other deep link searches, the URL must be prefixed with your site-specific base URL (example: **mylibrary.com/polaris/**). For more information about other types of deep link searches, see "Deep Links to Polaris PowerPAC" in the *Polaris Public Access Administration Guide* or the equivalent topic in staff client online Help.

Example (single LCCN):

http://mylibrary.com/polaris/view.aspx?lccn=2001627090

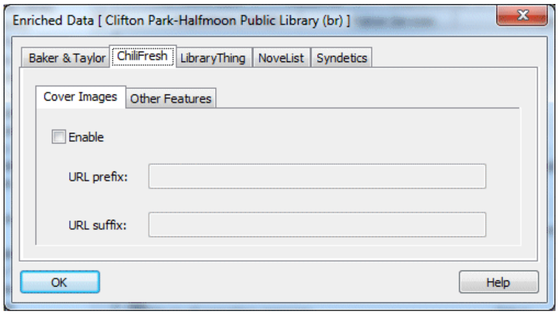
Example (multiple LCCNs):

http://mylibrary.com/polaris/view.aspx?lccn=2001627090,2001336783,85153773

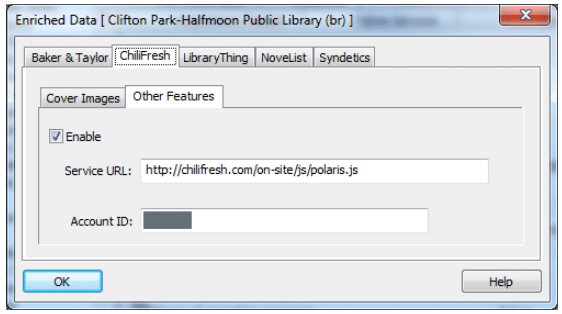
ChiliFresh Cover Images

Polaris PowerPAC and Mobile PAC now support cover images from ChiliFresh.com. If you subscribe to ChiliFresh Connections, a readers' social networking tool available in the PAC, you can receive ChiliFresh cover images at no cost. These images are displayed in the PAC and work with the ChiliFresh drag-and-drop feature to add covers to reader recommendations and virtual Connections bookshelves.

In Polaris Administration, use the PAC profile **Enriched data** to enable ChiliFresh cover images. Click the ChiliFresh tab on the Enriched Data dialog box. On the Cover Images sub-tab, select (check) **Enable** and type the URL prefix and suffix for your ChiliFresh cover images account in the appropriate fields.



ChiliFresh features such as reviews and ratings, available in previous versions of Polaris, are now set up on the Other Features sub-tab. If you already subscribe to these features, your settings are retained here.



If you have already implemented ChiliFresh cover images by entering the ChiliFresh cover image URL in the Enriched Data dialog box - Baker & Taylor tabbed page (Cover Images sub-tab), a database alter script looks for the ChiliFresh URL in the **URL prefix** field on the Baker & Taylor Cover Images sub-tab, and if found, moves your settings as follows:

- Copies both URL fields (prefix and suffix) from the Baker & Taylor Cover Images sub-tab to the ChiliFresh Cover Images sub-tab
- Copies the existing **Enabled** setting from the Baker & Taylor Cover Images sub-tab to the ChiliFresh Cover Images sub-tab
- Removes the ChiliFresh URLs from the Baker & Taylor Cover Images sub-tab
- Removes (clears) the **Enabled** setting from the Baker & Taylor Cover Images sub-tab

Note:
As in previous versions of Polaris, you can receive PAC cover images for the brief title display from one source only.

For more information about ChiliFresh.com products, go to **www.chilifresh.com**.

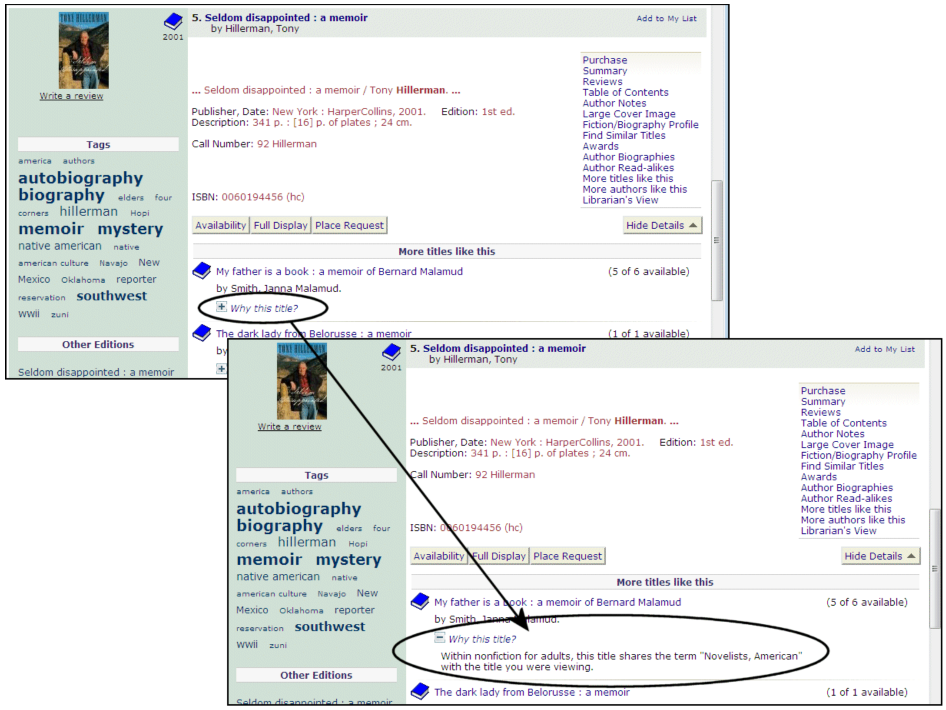
NoveList® Changes - More Titles Like This

Several changes have been in made in the "More Titles Like This" feature from EBSCO's NoveList as displayed in Polaris PowerPAC.

Note:
For more information about setting up NoveList for the PAC, see "Enabling Enriched Data" in the *Polaris Public Access Administration Guide* or the equivalent topic in staff client online Help.

"Why this title?"

When NoveList supplies the appropriate information for a title in the More Titles Like This list, you can click **Why this title?** to display the reason for the title suggestion. When NoveList's reason is displayed, you can click the minus sign by the link to suppress the reason.



You can edit the default link text (**Why this title?**) using Polaris Language Editor. The string mnemonic is **PACML_NOVELIST_WHY**. For more information, see the *Polaris Language Editor Guide* or Language Editor online help.

Sorting

NoveList now sorts the suggested titles by relevance, as determined by NoveList reviewers. However, Polaris PowerPAC continues to place titles with at least one copy available before titles with no copies available; the results are then subsorted according NoveList's relevance ranking, instead of by format, then title.

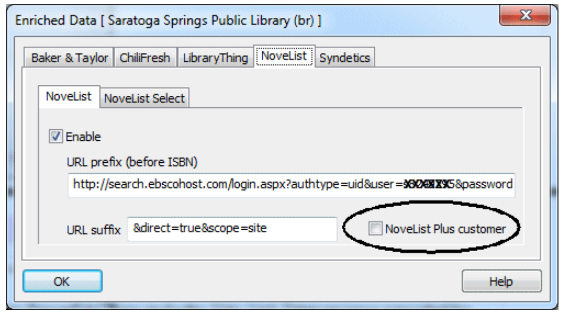
Deduplication

Multiple listings for the same title are no longer displayed. Previously, if there were multiple MARC records in the Polaris database that matched NoveList's suggestions and had the same ISBN, all the titles were displayed in the More Titles Like This list. Now only one title for a given ISBN is displayed. When the user clicks that title, if there are multiple MARC records in the database with that ISBN, the resulting search returns all those records.

Note:
This change was also made to Polaris 3.6, version 273 and later.

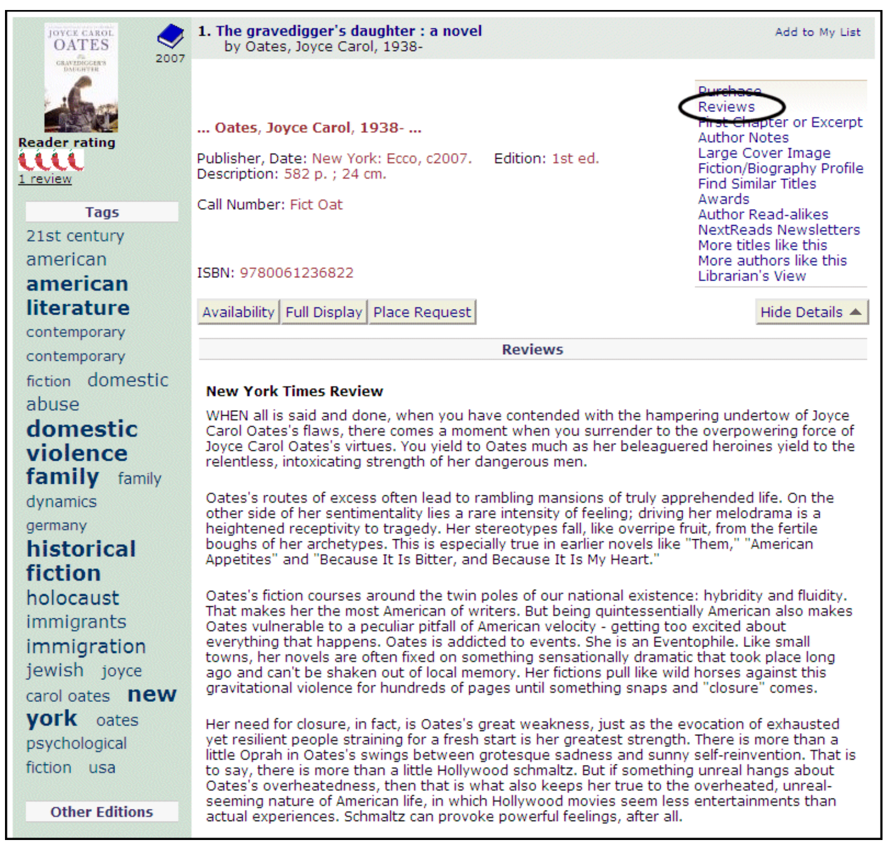
NoveList Plus Setting

A new Polaris Administration setting in the PAC profile **Enriched data** allows NoveList Plus customers to display the NoveList non-fiction title links without using customized code. Select (check) **NoveList Plus customer** on the Novelist tabbed page. When this option is checked, the NoveList link is available for non-fiction as well as fiction titles.



Syndetics™ Reviews - *New York Times*

Polaris PowerPAC now includes *New York Times* reviews provided by Syndetics. These are available with other reviews from Syndetics when you click **Reviews** in the detailed view for a title in PowerPAC search results.



For more information about setting up enriched content from Syndetics, see "Syndetics Enriched Data" in the *Polaris Public Access Administration Guide* or the equivalent topic in staff client online Help.

Note:
This change was also made to Polaris 3.6, version 284 and later.

Haitian Creole Available for Polaris PowerPAC

A Haitian Creole licensed translation is now available for Polaris PowerPAC. Contact your Polaris Site Manager if you are interested in obtaining a license for this version.

As with other licensed languages, Haitian Creole language strings can be edited with the Polaris Language Editor. For more information, see the *Polaris Language Editor Guide* or online Help for the Language Editor.

Note:
If licensed, Haitian Creole is available as a notification option. See "Changes to Notification Setup" on page 98. Haitian Creole is also available as the patron's preferred language in the Patron Registration workform, and you can edit Haitian Creole notices in the Polaris Language Editor.

SIP Self-Check

The following changes have been made to SIP self-check processes.

Renewals

Renewals at SIP self-check units are now allowed or blocked according to the settings in the **Patron Services** profile **Patron initiated renewal: Blocking conditions**.

As in previous versions of Polaris, these settings also control renewals from PAC or by telephone. For more information, see "Set blocks on patron-initiated renewals" in the *Polaris Patron Services Administration Guide* or the equivalent topic in staff client online Help.

Note:
This feature was also added to Polaris versions 3.6.281 and later.

Collection Agency Blocks

You can now choose to block transactions at SIP self-check units if the patron account has a collection agency block. Use the new **SelfCheck Unit** parameter **Collection agency block: Patron is blocked** (available at the system, library, and branch levels) to control this feature. The system uses the setting for the workstation's branch. The default setting is **Yes**. If the patron account is paid down to $0.00, the SIP collection agency block is removed.

Note:
If you set this parameter to **No**, patrons are blocked if they owe amounts over the maximum fine limit, but not if they owe less than the limit. Collection agency blocks are ignored.

For more information about setting up SIP self-check, see "Setting Up SIP Self-Check Circulation" in the *Polaris Patron Services Administration Guide*. For more information about setting up collection agency services in Polaris, see "Managing Collection Agency Services" in the *Polaris Patron Services Administration Guide* or the equivalent topic in staff client online Help.

Note:
This feature was also added to Polaris versions 3.6.305 and later.

3M™ SIP Circulation Transactions

As part of the process to detect tampering, 3M self-check units identify items on the desensitizer by briefly checking them out and then back in before the patron checks them out. The item record is not changed and the security tag or tattle tape security device is not desensitized during this detection process.

Polaris now identifies the check-out/check-in transaction pairs used in 3M's detection process and removes them from statistical count reports, so they do not falsely inflate circulation statistics.

Note:
For more information about 3M self-check processes, see your 3M equipment documentation.

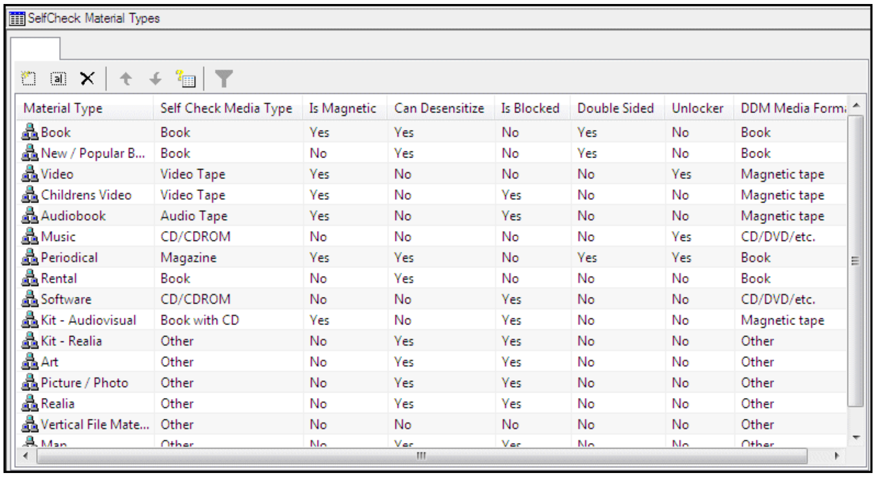
Note:
This feature was also added to Polaris versions 3.6.275 and later.

DDM Media Format for EnvisionWare® RFID

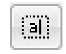
Polaris now supports seven Danish Data Model (DDM) media formats for use with RFID tags from EnvisionWare, Inc. These formats include the following:

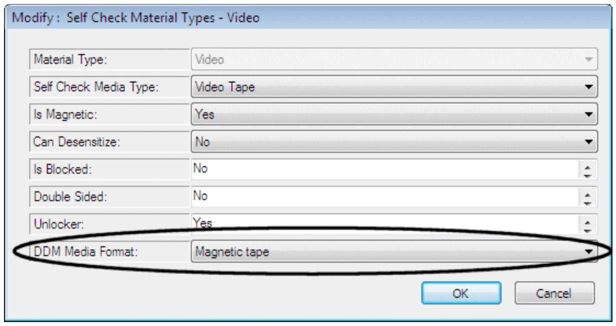
- Book
- CD/DVD
- Magnetic Tape
- Other
- Other, careful handling is required
- Undefined
- Very small item, special handling may be required

In Polaris Administration, use the SelfCheck Material Types policy table to map your Polaris material types to the DDM media formats.


SelfCheck Material Types

Material Type	Self Check Media Type	Is Magnetic	Can Desensitize	Is Blocked	Double Sided	Unlocker	DDM Media Form:
Book	Book	Yes	Yes	No	Yes	No	Book
New / Popular B...	Book	No	Yes	No	Yes	No	Book
Video	Video Tape	Yes	No	No	No	Yes	Magnetic tape
Childrens Video	Video Tape	Yes	No	Yes	No	No	Magnetic tape
Audiobook	Audio Tape	Yes	No	Yes	No	No	Magnetic tape
Music	CD/CDROM	No	No	No	No	Yes	CD/DVD/etc.
Periodical	Magazine	Yes	Yes	No	Yes	Yes	Book
Rental	Book	No	Yes	No	No	No	Book
Software	CD/CDROM	No	No	Yes	No	No	CD/DVD/etc.
Kit - Audiovisual	Book with CD	Yes	No	Yes	No	No	Magnetic tape
Kit - Realia	Other	No	Yes	Yes	No	No	Other
Art	Other	No	Yes	Yes	No	No	Other
Picture / Photo	Other	No	Yes	Yes	No	No	Other
Realia	Other	No	Yes	Yes	No	No	Other
Vertical File Mate...	Other	No	No	No	No	No	Other

Select the Polaris material type to map and click . The Modify Self Check Material types dialog box opens, where you can select the DDM media format to map to the selected Polaris material type.



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

For more information about DDM formats and EnvisionWare RFID, go to:

http://www.envisionware.com/en/ddm_use

Note:
This feature was also added to Polaris versions 3.6.283 and later.

Polaris® ExpressCheck™

The following changes have been made to Polaris ExpressCheck.

Credit Card Payments from Polaris ExpressCheck

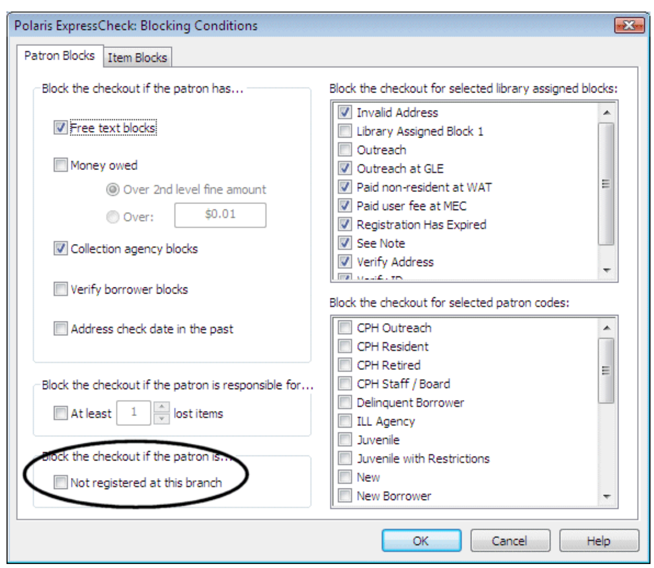
Credit card payments for fines and fees are now allowed from Polaris ExpressCheck if both the following conditions are true:

- The patron’s registered branch allows credit card payments.
- The ExpressCheck workstation’s branch allows credit card payments.

Limit to Registered Patrons

You can now limit circulation at a Polaris ExpressCheck workstation to patrons registered at the branch with which the workstation is associated. When this option is set, after a patron registered at a different branch scans her card, a message appears and access is denied.

In Polaris Administration, you can set this option at the system, library, or branch level with the **SelfCheck Unit** parameter **Polaris ExpressCheck: Blocking conditions**. Select (check) **Not registered at this branch**. By default, this block is not checked.



You can edit the block message using Polaris Language Editor:

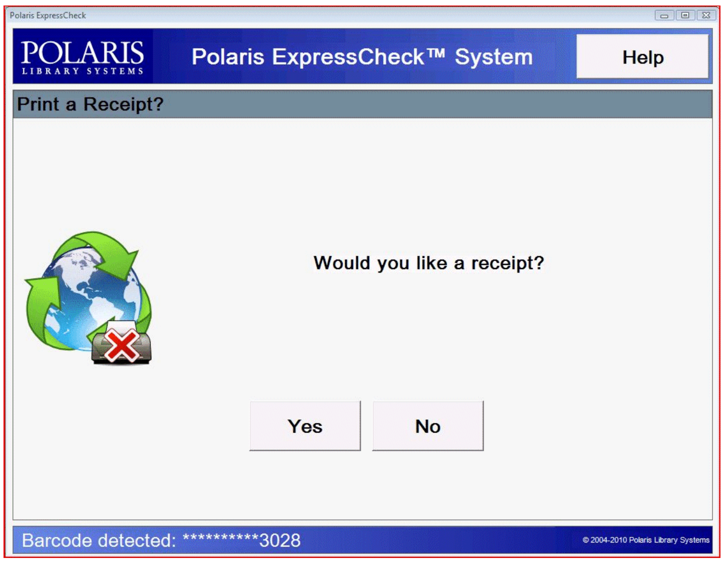
Mnemonic (String ID)	Default Message
EC_TEXT_ACCESS_LOCALPATRONSONLY_CAPTION	Local Patrons Only
EC_TEXT_ACCESS_LOCALPATRONSONLY	Check-out is limited to patrons from this branch. Please see a librarian.

For more information about editing messages, see the *Polaris Language Editor Guide* or Language Editor online help.

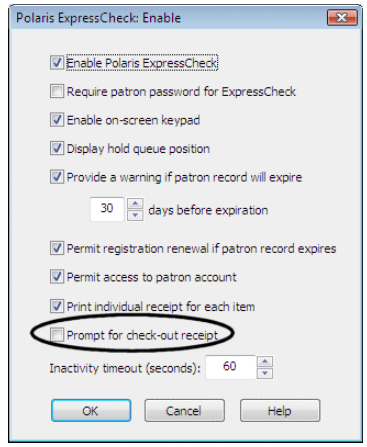
Note:
This feature was also added to Polaris versions 3.6.259 and later.

Prompt for Receipt

A "Print a Receipt?" option is now available in Polaris ExpressCheck to help minimize paper receipts. If the option to prompt a patron for a printed receipt is enabled, the option is displayed when the patron checks items out and exits ExpressCheck from the Patron Account, or when the patron checks out items for which a receipt has not yet been printed.



In Polaris Administration, you can set this feature at the system, library, or branch level with the **SelfCheck Unit** parameter **Polaris ExpressCheck: Enable**. Select (check) **Prompt for checkout receipt**. By default, the option is not checked and receipts are printed automatically.



Note:
If the workstation setup option **Print receipt on timeout** is set, a receipt still prints on time out regardless of your setting for the new receipt prompt. Also, if the workstation setup option **Display print receipt button** is set, the patron can still click the print receipt button to print a receipt.

You can edit the text portions of the prompt using Polaris Language Editor:

Mnemonic (String ID)	*Default Message*
EC_TEXT_CHECKOUT_RECEIPTPROMPT_CAPTION	Print a Receipt?
EC_TEXT_CHECKOUT_RECEIPTPROMPT	Would you like a receipt?

For more information about editing messages, see the *Polaris Language Editor Guide* or Language Editor online help.

You can replace the default image with your own image file by editing the **EC_interface.xml** file. Under **checkoutform**, **promptforreceipt**, type a valid image path using the **filename** attribute.

Example:
<promptforreceipt filename="c:\images\tree.png"></promptforreceipt>

For more information about editing the ExpressCheck interface in the **EC_interface.xml** file, see the *Polaris ExpressCheck Administration Guide*.

Note:
This feature was also added to Polaris versions 3.6.259 and later.

3M RFID Support

The 3M Enhanced Pad Staff Workstation for RFID circulation is now supported by the Polaris staff client and the Polaris RFID Conversion utility.

Before you install your updated Polaris client software, install the 3M Enhanced Pad Staff Workstation software. This installs the Enhanced Pad Staff Workstation Service utility. Polaris recommends that you run the utility to set the hardware Reader Sleep Delay to 1 minute.

When you install your Polaris client software, select **Enable RFID** from the Polaris client installation options. In the RFID Configuration dialog box that appears during installation, select **3M** from the vendor list and select your tag format.

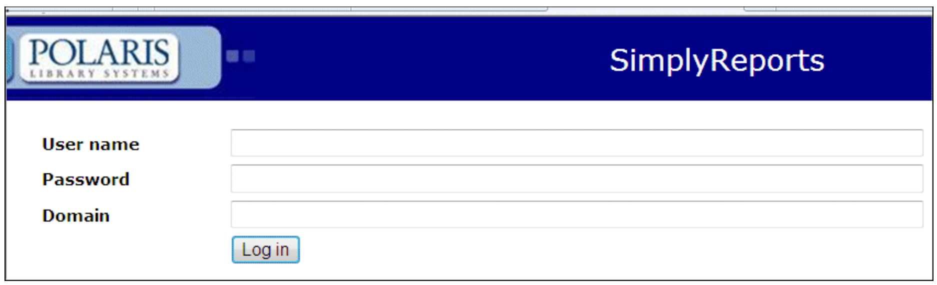
Note:
This feature is also available in Polaris version 3.6.283 and later.

SimplyReports

The following enhancements were made for SimplyReports version 4.0.

Log In Page for SimplyReports

You can now log in to SimplyReports using your username, password, and domain name. This allows you to log on at shared workstations or from outside the library’s domain. When you select SimplyReports from your desktop, you now see the following log in page:

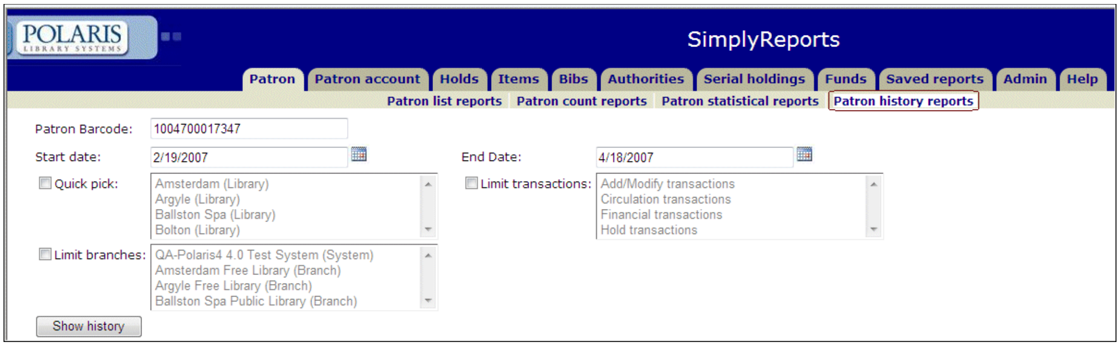


Patron and Item History Reports for SimplyReports

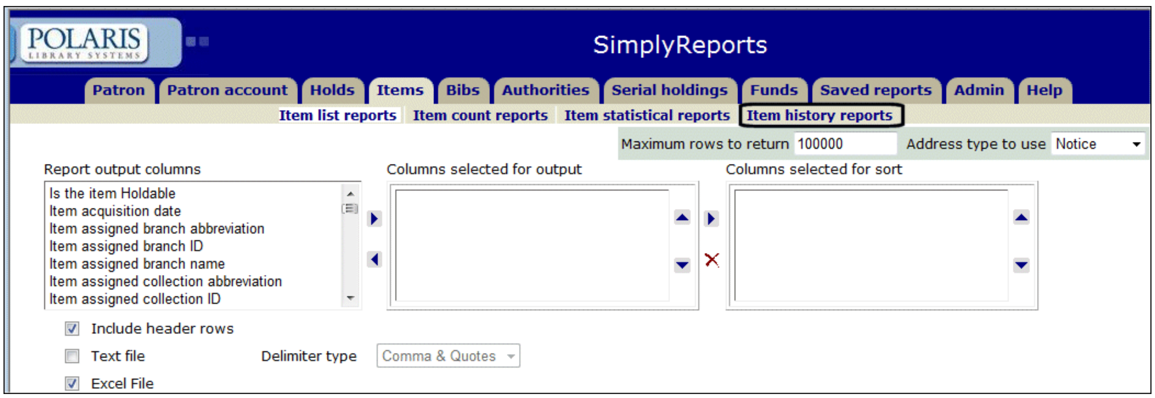
You can now create patron or item history reports in SimplyReports to see transactions (for a period of up to 95 days) involving specific patrons or specific items. For example, you could use an item history report to see the check-out, in-transit, and financial history for a missing or damaged item. You can use a patron history report to see financial, hold request, or library usage patterns for a certain patron.

SimplyReports has the following safeguards to protect patron privacy: the report parameters cannot be saved for patron and item history reports; the ad-hoc report files are not written to the disc on the server; and history reports cannot include more than 95 days of transactions. If you choose not to use these reports, your Polaris Site Manager can use an administration parameter to completely suppress these subtabs from the SimplyReports user interface.

If the parameter is set to allow patron history reports, and the SimplyReports user has the permission to use these reports, the Patron history reports subtab appears under the Patron tab.



The Item history subtab appears under the Items tab if the parameter is set to allow item history reports, and the user has the permission for these reports.

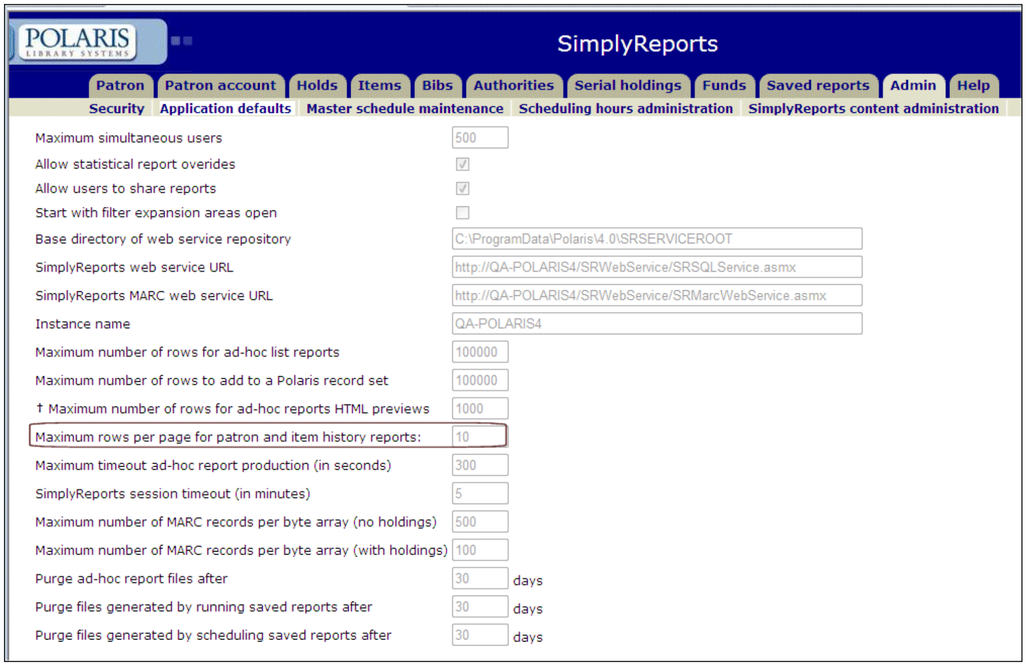


Security Settings for History Reports

The Security subtab under the Admin tab has new options for patron and item history reports. To give a SimplyReports user permission to create these reports, select the corresponding check box.

Application Default Settings for History Reports

On the Application defaults subtab of the Administration tab, you can specify the number of rows for each page of an item history or patron history report. To change the default of 10 rows per page on item history and patron history reports, type a different number in the **Maximum rows per page for patron and item history reports.**



To create an item history report or a patron history report, scan or enter the item's barcode or the patron's barcode. Then, select a start date and an end date with a span of not more than 90 days. You can use the **Quick pick** box to select a library and all its associated branches, or you can select a specific branch or branches in the **Limit branches** box. Next, use the filters to limit the types of transactions.

Displaying or Exporting History Reports

You can use the **Show History** button to display the report results at the bottom of the SimplyReports window, or you can export the report in Excel or Word format. If you click **Show History** for a patron history or item history report, the window expands to display the report information in a separate section of the window.

When you click **Show History** for a patron history report, the top portion of the window displays the patron's name and other information such as the outstanding credits, charges, number of items out, number of items currently overdue, number of items lost/claimed, and number of items being held. Depending on the types of transactions selected, the bottom portion of the window displays details such as: the transaction date and transacting organization; the transaction type; amounts (if applicable); the item record’s organization, call number, author, title, collection, material type, and barcode; and circulation dates such as check-in, check-out, and due dates.

When you click **Show History** for an item history report, the top portion of the window displays the item's title, author, call number, collection, assigned branch, status, material type, statistical code, last activity date, creation date, modification date, and price. Depending on the types of transactions you chose, the bottom portion of this section may display information such as the transaction date, transacting organization, transaction type, amount (if applicable), staff information, loaning organization, patron organization, patron’s name, patron code, patron barcode, and check-in, check-out and due dates.

SimplyReports Subfield Nine Report

You can create a bibliographic report from the Bibs tab that lists records with a subfield 9 that flags the tag as one used for automatic processing. For more information on the insertion of $9 and the utility to identify and delete tags already used in automatic processing, see “Automatically Remove Processed 852, 948, 949 or 970 Tags” on page 40.

New Options for Patron Mobile Phone & Text Messaging

You can now select the following output columns for Patron list reports or Patron count reports:

- **Mobile Phone**
- **TXT Messaging**

TXT Messaging is also a Miscellaneous Filter for patron list or count reports. In addition, you can select **Mobile Phone** as a Notification Option filter in patron list or count reports.

Borrow By Mail Filters and Columns Added

You can select new filters and columns related to Borrow By Mail.

Added Filters and Columns for Serial Holdings Reports

The following filters and columns were added to the Serial Holdings tab in SimplyReports:

- Public note filter
- Public note column
- Compressed holdings column
- Retention note column

Polaris Fusion

The following enhancements were made to Polaris Fusion for release 4.0.

Support for Polaris Fusion added to Polaris Mobile PAC

Polaris Fusion digital media resources are now searchable and accessible in Polaris Mobile PAC. For any digital resource that requires the user to purchase access, the user is given a link to the full catalog.

Phone Notification (Outbound Telephony)

The following changes have been made to Polaris telephone notification.

Note:
For more information about setting up Polaris outbound telephony, see the *Polaris Telephony Administration Guide* or staff client online Help.

Immediate Hang-Ups Retained in Call Queue

The situation where a patron answers a telephone notification call but immediately hangs up is now handled in a better way. In previous versions of Polaris, if the initial connection detected an immediate hang-up (loop current drop), the call was considered a successful contact even though no notification message was played, and the call was dropped from the queue. A sample log entry looked like this:

09:05:20 AM: Phone line 1; Refreshing the data for Patron = 32194
09:05:20 AM: Phone line 1; Phone number = 9,6344535; Patron 32194; STARTING CALL
09:05:45 AM: Phone line 1; Phone number = 9,6344535; Loop Current Drop.
09:05:45 AM: Phone line 1; Phone number = 9,6344535; CPAResult = 10, CPAReason = 0
09:05:45 AM: Phone line 1; Phone number = 9,6344535; Patron 32194; Call Failed
09:05:45 AM: Phone line 1; Phone number = 9,6344535; Deleting Call Status entry
09:05:45 AM: Phone line 1; Phone number = 9,6344535; DONE WITH PHONE CALL

Now an immediate hang-up (loop current drop) is considered an incomplete call. The call is not removed from the queue, and will be retried later. A sample log entry with retries looks like this:

01:00:27 PM: Phone line 1; Refreshing the data for Patron = 2991
01:00:27 PM: Phone line 1; Phone number = 9,3156341234; Patron 2991; STARTING CALL
01:10:13 PM: Phone line 1; Phone number = 9,3156341234; Loop Current Drop.
01:10:13 PM: Phone line 1; Phone number = 9,3156341234; CPAResult = 10, CPAReason = 0
01:10:16 PM: Phone line 1; Phone number = 9,3156341234; Hangup detected
01:10:16 PM: Phone line 1; Phone number = 9,3156341234; Updating Call Status entry
01:10:16 PM: Phone line 1; Phone number = 9,3156341234; DONE WITH PHONE CALL

01:43:05 PM: Phone line 1; Refreshing the data for Patron = 2991
01:43:05 PM: Phone line 1; Phone number = 9,3156341234; Patron 2991; STARTING CALL
01:44:15 PM: Phone line 1; Phone number = 9,3156341234; Loop Current Drop.
01:44:15 PM: Phone line 1; Phone number = 9,3156341234; CPAResult = 10, CPAReason = 0
01:44:18 PM: Phone line 1; Phone number = 9,3156341234; Hangup detected
01:44:18 PM: Phone line 1; Phone number = 9,3156341234; Updating Call Status entry
01:44:18 PM: Phone line 1; Phone number = 9,3156341234; DONE WITH PHONE CALL

01:54:41 PM: Phone line 1; Refreshing the data for Patron = 2991
01:54:41 PM: Phone line 1; PatronID 2991; Not enough time has elapsed for this patron

02:29:41 PM: Phone line 1; Refreshing the data for Patron = 2991
02:29:41 PM: Phone line 1; Phone number = 9,3156341234; Patron 2991; STARTING CALL
02:30:16 PM: Phone line 1; Phone number = 9,3156341234; Positive voice.
02:30:16 PM: Phone line 1; Phone number = 9,3156341234; Processing Human voice.
02:30:20 PM: Phone line 1; Phone number = 9,3156341234; dx_playiottdata() ended. End of Data reached on playback
02:30:21 PM: Phone line 1; Phone number = 9,3156341234; dx_playiottdata() ended. End of Data reached on playback
02:30:24 PM: Phone line 1; Phone number = 9,3156341234; dx_playiottdata() ended. End of Data reached on playback
02:30:24 PM: Phone line 1; Phone number = 9,3156341234; Playing overdues message
02:30:27 PM: Phone line 1; Phone number = 9,3156341234; dx_playiottdata() ended. End of Data reached on playback
02:30:30 PM: Phone line 1; Phone number = 9,3156341234; dx_playiottdata() ended. End of Data reached on playback
02:30:32 PM: Phone line 1; Phone number = 9,3156341234; dx_playiottdata() ended. End of Data reached on playback
02:30:32 PM: Phone line 1; Phone number = 9,3156341234; Playing and processing menu.
02:30:34 PM: Phone line 1; Phone number = 9,3156341234; dx_playiottdata() ended. End of Data reached on playback
02:30:37 PM: Phone line 1; Phone number = 9,3156341234; dx_playiottdata() ended. End of Data reached on playback
02:30:38 PM: Phone line 1; Phone number = 9,3156341234; TM_LCOFF: Hangup detected.
02:30:38 PM: Phone line 1; Phone number = 9,3156341234; Connection time (seconds): 22
02:30:38 PM: Phone line 1; Phone number = 9,3156341234; CPAResult = 10, CPAReason = 0
02:30:38 PM: Phone line 1; Phone number = 9,3156341234; Deleting Call Status entry
02:30:38 PM: Phone line 1; Phone number = 9,3156341234; DONE WITH PHONE CALL

Note:
This change is also available in Polaris version 3.6.305 and later.

Improved Log File

The phone notification service log file has been changed to .csv format to facilitate importing the file into Excel or other tools where entries can be sorted. The following fields are recorded:

Field	Description
Date	YYYY-MM-DD
Time	HH:mm:ss.fff. 24 hour format
Type	EVENTLOG_INFORMATION_TYPE - 4 EVENTLOG_ERROR_TYPE - 1
EventID	EVMSG_DEBUG - 101 EVMSG_GENERAL - 100

Field	*Description*
State	SERVICE_INITIALIZING = 1 SERVICE_TERMINATING = 2 SERVICE_CMDPROCESSING = 3 LINE_INITIALIZING = 4 LINE_TERMINATING = 5 QUEUEING = 6 PREPARING = 7 CONNECTING = 8 DISCONNECTING = 9 NOTIFYING = 10 POSTING = 11 WAITING = 12
Line #	Dialogic phone line number
Patron ID	Patron ID
Phone Number	Calling phone number
Comment	Details/Message. This field is wrapped with quotes.

Note:
Each time the service is started, a comment line is written that describes the fields.

Sample Log

#[Date],[Time],[Type],[EventID],[State],[Line #],[Patron ID],[Phone Number],[Comment]

2010-10-28,13:24:16.392,4,100,1,0,0,"","Service started"

2010-10-28,13:24:16.423,4,101,1,0,0,"","Telephony Server Name: PHONE-SRV64"

2010-10-28,13:24:16.470,4,101,4,0,0,"","Starting Main Thread"

2010-10-28,13:24:16.548,4,101,4,0,0,"","Server ID = 29"

2010-10-28,13:24:16.548,4,101,4,0,0,"","NSPARMPHONEAVAIL = true"

Phone Attendant (Inbound Telephony)

The following changes have been made to the Polaris Phone Attendant.

Note:
For more information about setting up the Polaris Phone Attendant, see the *Polaris Telephony Administration Guide* or staff client online Help.

Renew All Items

The option to renew all items has been added to the items out submenu, so a patron can renew all items without listening to the detailed list of items out. After the patron enters her barcode and password and presses 2 to hear a list of items out, a submenu offers the new message **To renew all items press 6** after the "press 5" message to renew a single item. When the patron presses 6, the Phone Attendant responds in the following ways:

- If all items can be renewed, the Phone Attendant responds with a confirmation message stating that all items were renewed.
- If certain items cannot be renewed, the Phone Attendant responds with the message **X items cannot be renewed**, lists the items that have been renewed with the new due date, and lists the titles of the items that could not be renewed.
- If no items can be renewed, the Phone Attendant replies with the message **It is not possible to renew these items at this time**.

You can edit the message string **To renew all items press 6** using the Polaris Language Editor. The string mnemonic is **PA_TEXT_PATREC_RENEW_ALL**. For more information, see the *Polaris Language Editor Guide* or Language Editor online help.

Translate the Language Option Message

A new message string has been added that allows you to translate the phrase **For English, press 1** message. Previously the entire message **1 for English** and **2 for Spanish** was supplied by the system and could not be edited. In Polaris Language Editor, the new string mnemonic is **PA_LANGUAGE_MENU_OPTION**. The default message is **For %s, press %d**. (Do not edit the elements **%s** and **%d**. These values are supplied by the system.) For more information, see the *Polaris Language Editor Guide* or Language Editor online help.

Note:
These changes are also available in Polaris version 3.6.270 and later.

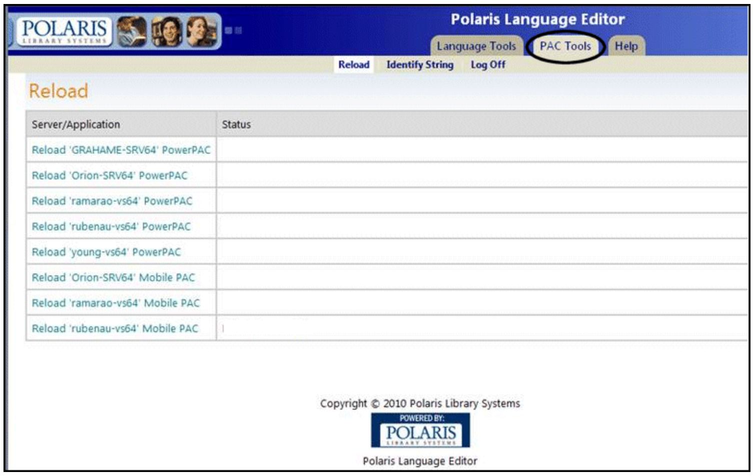
Polaris Language Editor (WebAdmin)

The following changes have been made to Polaris Language Editor (WebAdmin).

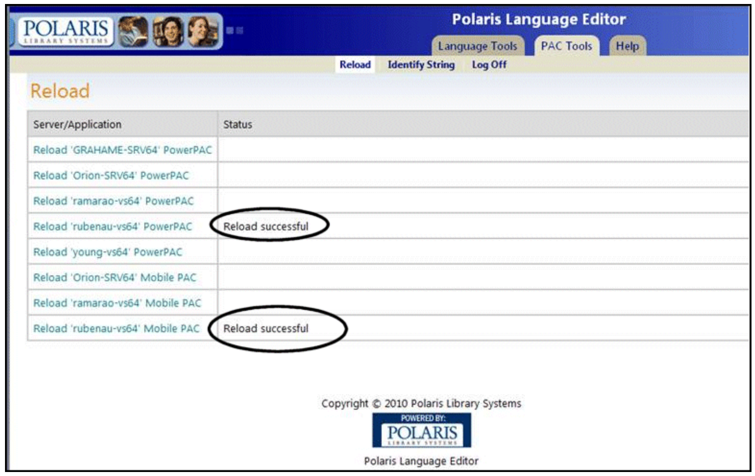
Support for Multiple Web Servers

Polaris Language Editor is automatically installed when you install Polaris Web server software, but no longer has to be installed on the PowerPAC server. This means if you have multiple Web servers for Polaris PowerPAC and Mobile PAC, you can reload page caches for any of the applications in the Language Editor. In Polaris Administration, each server record must have a Web connection defined, and a value defined for the PAC parameter **URL of the Mobile PAC's root** or **URL of the PowerPAC's root**. As in previous versions of Polaris, each server must be registered as a workstation in Polaris Administration, and both the workstation and staff user must have the Polaris permission **WebAdmin access: Allow**.

The **PowerPAC Tools** tab has been renamed **PAC Tools** to describe the new feature. You can reload page caches for Polaris PowerPAC and Polaris PowerPAC Children's Edition or Mobile PAC on a specified server. (As in previous versions, when you reload Polaris PowerPAC pages, Polaris PowerPAC Children's Edition pages are also reloaded.)



You click the appropriate Server/Application link for each application instance you want to reload. After a few moments a confirmation message is displayed in the Status column.



Reloading XSLT Files

The cached xslt files used for layouts and other Polaris PowerPAC programming are now cleared as part of the reload function in Polaris Language Editor, making changes more convenient for those who customize Polaris PowerPAC at the program level.

URL Detective

The URL Detective will now check the tag 510 Citation/Reference Note and verify the subfield $u, Uniform Resource Identifier (URI), that provides a link to the electronic bibliography cited, or to a citation within the electronic bibliography.

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