POLARIS

INTEGRATED LIBRARY SYSTEM

What's New in Polaris® 4.1

This document summarizes what's new and different in the initial general release of Polaris 4.1. For detailed information, see Polaris 4.1 documentation and online Help.

Important:
For information about developments that may have occurred after this information was published, go to **www.polaristown.com**.

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.

PUG

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This document is written for Polaris 4.1 (initial general release).

Contents

Polaris 4.1 Requirements and Server Tools

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 4.1 works with the operating systems listed below. These requirements are unchanged from Polaris 4.0. 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

Polaris 4.1 is optimized for monitors with 1024 x 768 resolution.

- Windows XP 32-bit
  - Professional Edition
  - RAM: 512MB minimum/1GB recommended

    Note:
    Polaris versions after Polaris 4.1 will not support Windows XP.
- 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 4.1 from any version of Polaris 4.0; the latest 4.0 distribution build is recommended to speed the upgrade process. Customers using Polaris 3.5 or 3.6 must upgrade to Polaris 4.0 before installing Polaris 4.1.

Note:
Polaris 4.1 does not include or support ActivePAC; an ActivePAC upgrade is not available.

Organization Limit Increased

The number of organizations sharing a single Polaris installation has been increased from 512 to 1,000.

Automatic Re-Indexing at Upgrade

Libraries using Polaris 4.0 build 622 or later can set the system-level Cataloging parameter **MARC Re-index during next server upgrade** to **Yes** to trigger automatic re-indexing at no cost when they upgrade to Polaris 4.1. You will see no change in Polaris 4.0, although you must set the parameter in Polaris 4.0, *before* you upgrade to Polaris 4.1. When the upgrade to Polaris 4.1 and the re-indexing are complete, the parameter is automatically reset to **No** (the default setting).

Important:
Re-indexing can add a significant amount of time to the upgrade process and should be avoided if it is not necessary. However, if you must re-index, performing the process at upgrade may be both cost-effective and time-effective, since there is a fee associated with retroactive re-indexing and the server will be offline during the upgrade in any case.

When the parameter is set to **Yes**, the system sets a flag so that the server installation database update (DBUpdate) process performs a re-index comprised of the following general steps:

- Alerts the Polaris support engineer that a re-index will take place during the DBUpdate process
- Rebuilds indices and re-links bibs to authorities
- Defragments database tables
- Updates database statistics

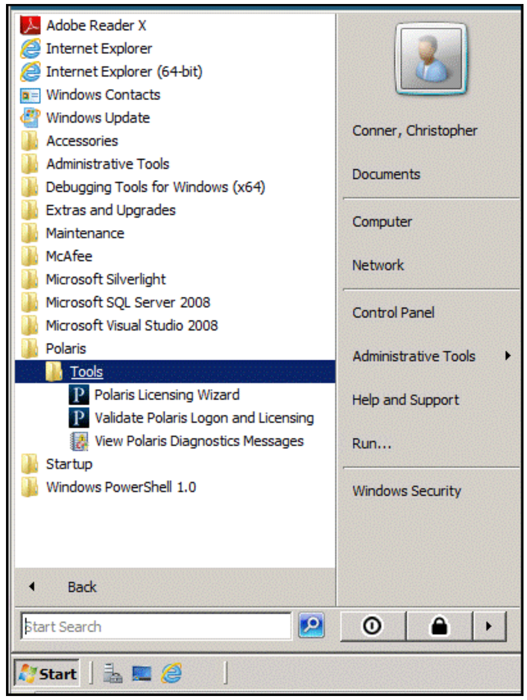
When the re-indexing has successfully completed, an alert is logged in the DBUpdate report.

To set the parameter in Polaris 4.1 (anticipating an upgrade to the next release), you need the new System Administration permission **Access MARC Re-index during next server upgrade: Allow** to set the new parameter. When the parameter is changed from **No** to **Yes**, you also receive a warning message regarding potential upgrade time.

New Tools Available in Polaris Server Software

The Polaris server installation offers three new features under a new Polaris Tools program entry in the Start menu:

- Polaris Licensing Wizard
- Validate Polaris Logon and Licensing
- View Polaris Diagnostic Messages



Polaris Licensing Wizard

In previous versions of Polaris, once Polaris made the appropriate licenses available to your site, you or the Polaris Support Engineer had to enter a command at the command prompt to place the licenses on your application server. You can now use the **Polaris Licensing Wizard** tool instead:

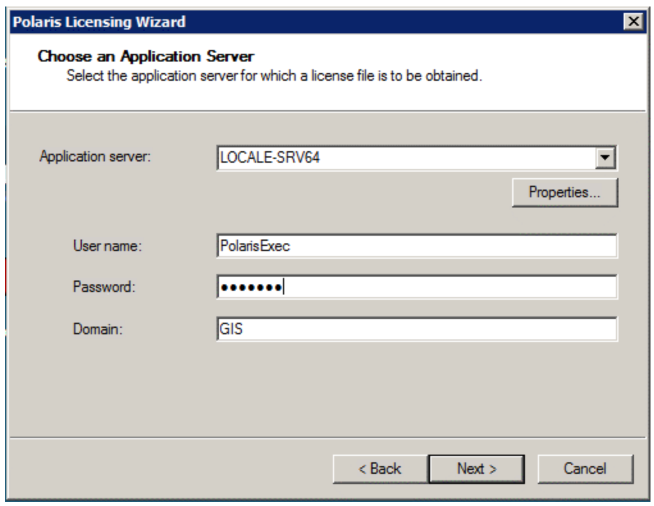
> **Note:**
> This procedure requires your Polaris site code and passphrase. Contact your Polaris Site Manager to obtain this information if necessary.

1. On the Start menu, click **Polaris, Tools, Polaris Licensing Wizard.**

   The Welcome window opens.

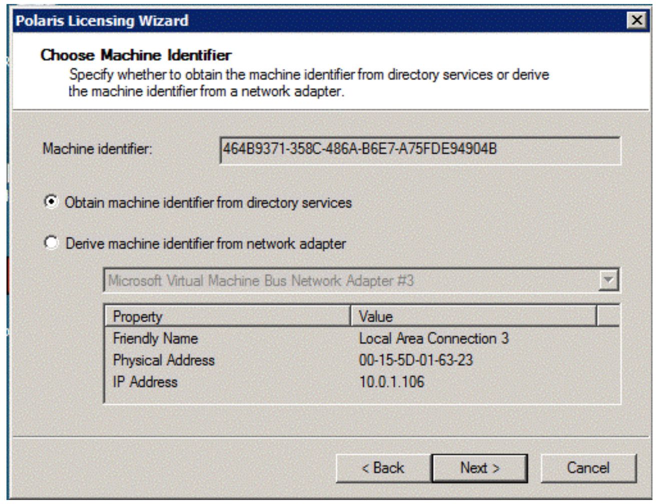
2. Click **Next**.

   The Application Server window opens.



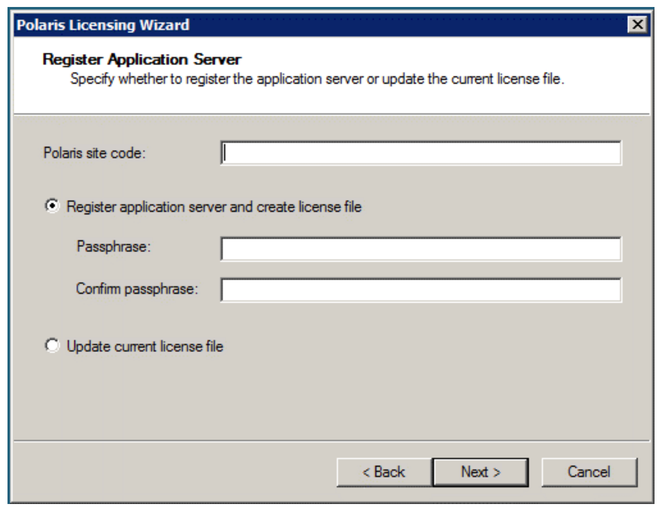
3. Select your application server, type your Polaris account logon information, and click **Next**.

   The Machine Identifier window opens.



4. Leave the Machine Identifier settings as they are, and click **Next**.

   The Register Application Server window opens.



5. Type your Polaris site code.

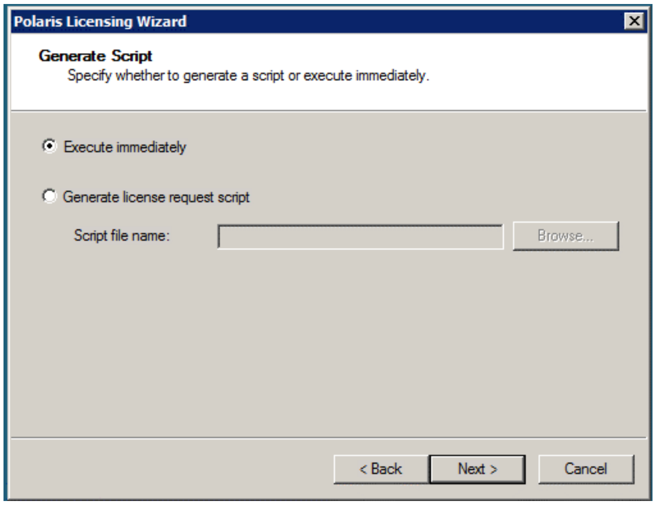
   Note:
   Contact your Polaris Site Manager to obtain this information if necessary.

6. Select one of the following options:
   - **First-time users** - Select **Register application and create license file**. Then type and confirm your passphrase.

     Note:
     Contact your Polaris Site Manager to obtain this information if necessary.
   - **Updates** - Select **Update current license file**.

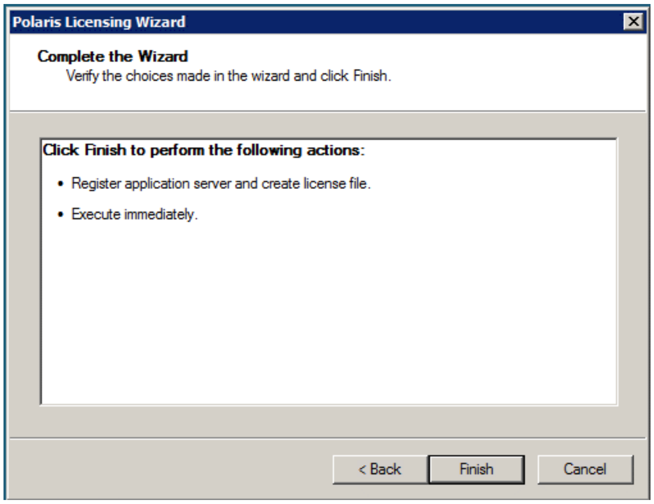
7. Click **Next**.

   The Generate Script window opens.



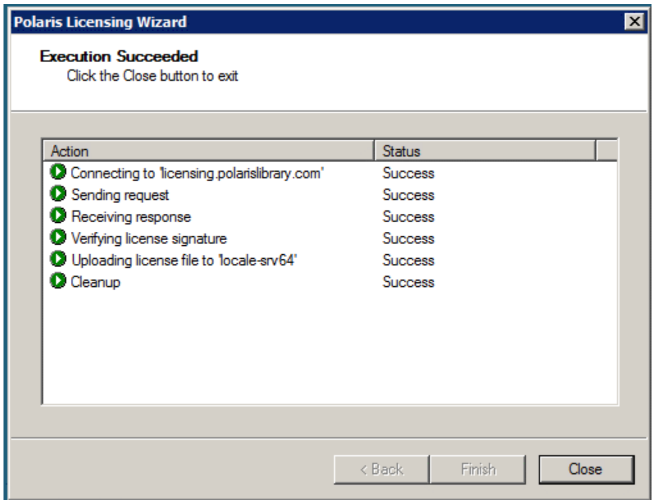
8. Select one of the following options:
   - **Application server with Internet access** - Select **Execute immediately**. This option will automatically generate the license file and place it on your server.
   - **Application server with no Internet access** - Select **Generate license request script and specify a script file name**. If you select this option, send your script file to your Polaris Site Manager so that Polaris can register your license. Polaris will send the license file back to you.
9. Click **Next**.

   The Complete the Wizard window opens.



10. Verify your choices and click **Finish** (or click **Back** to change your settings).

    The status window opens.



11. Click **Close**.

    If you chose to generate and receive your license file directly via the Internet, the license file is automatically created and placed in the Polaris directory.

Tip:
You may need to change the file extension to .txt to send it by e-mail.

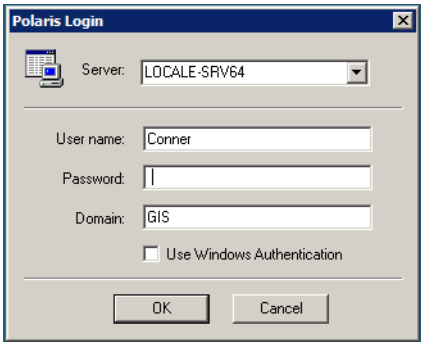
If you chose to generate the script and send it to Polaris by e-mail, Polaris generates the license file and sends it back to you. Place the file in the appropriate location, typically
C:\Program Files (x86)\Polaris\4.1\bin

Validate Polaris Logon and Licensing

Use this option to verify license information and test the logon without actually installing the Polaris staff client application.

1. On the Start menu, click **Polaris, Tools, Validate Polaris Logon and Licensing**.

   The Polaris Login dialog box opens.

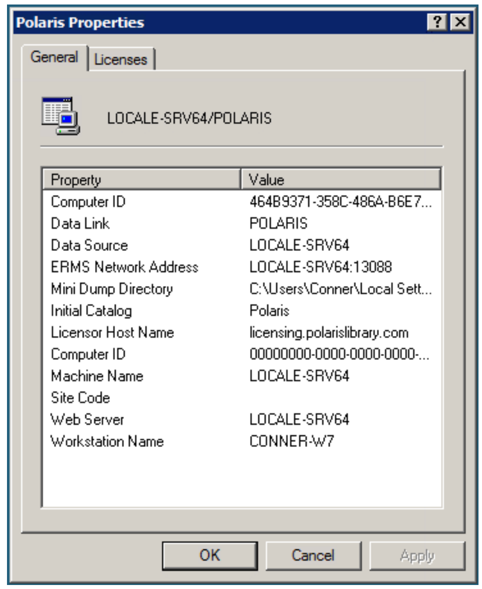


2. Supply the following information:
   - **Server** - Select your application server if necessary.
   - **User name** - Type the Polaris user name. The user name must be a user registered in the Polaris database.

- **Password** - Type the password associated with this user name.
- **Domain** - Type the network domain.
- **Use Windows Authentication** - Select (check) if appropriate.

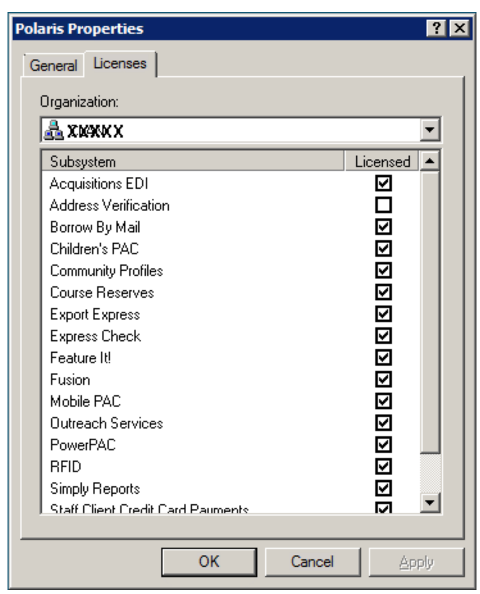
3. Click **OK**.

The Polaris Properties dialog box opens. The illustration is an example of the type of information the General tab displays.



In this example, the Site Code field is blank. This indicates that there is no license file.

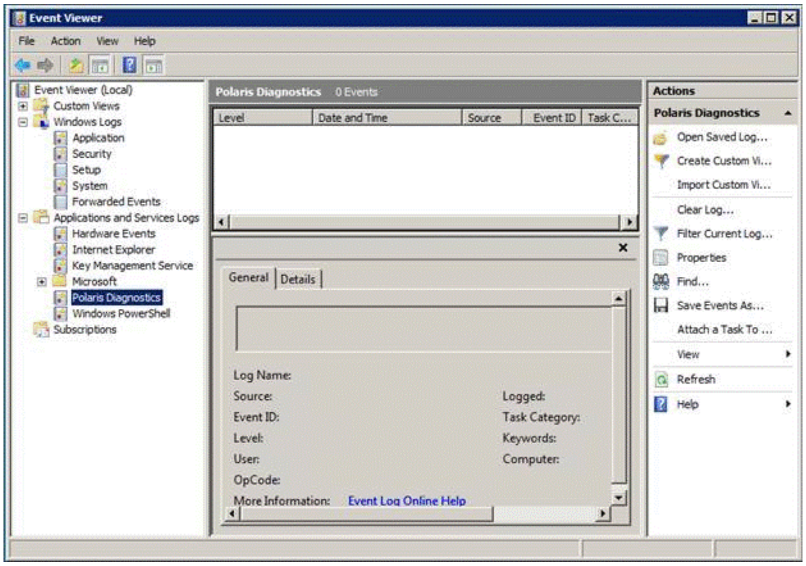
4. Click the Licenses tab to see your currently assigned licenses. The example shows a case where licenses have been assigned.



5. Click **OK** to close the Properties dialog box and exit the Validate Polaris Logon and Licensing tool.

View Polaris Diagnostic Messages

Use this tool to access the Polaris Diagnostics node in the event log, without having to open the Event Viewer and search for the node. On the Start menu, click **Polaris, Tools, View Polaris Diagnostic Messages**. The Event Viewer opens, and the Polaris Diagnostics log is automatically selected.



Administration

This section summarizes the Polaris Administration settings that support Polaris 4.1 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 4.1. For more information about new features, see the other sections of this document as listed in the table and Polaris 4.1 online Help (administration topics).

Profiles/Parameters/ Tables	*Purpose*	*Default*	*Level*	*More Info*
Cataloging Profiles				
Default shelving scheme for new item and holdings records	Renamed from Default shelving scheme for new item records. Sets the default shelving scheme for both new item records and new serial holdings records.	Dewey	System, Library, Branch	"Shelving Scheme in New Serial Holdings Records" on page 67
Maximum number of files to import	Specifies the maximum number of files that can be imported in a single import job	100	System	"Multiple Files in the Same Import Process" on page 57
Item records: Records with duplicate barcodes can be saved provisionally.	Specifies whether a provisional item record can be saved if it has a barcode that is a duplicate of an existing item's barcode	Yes	System, Library, Branch	"Prevent Provisional Items With Duplicate Barcodes" on page 65
Import blackout times	Specifies up to three daily and a single one-time blackout times when import processing cannot be done	No blackout times enabled	System	"Set Blackout Times for Importing" on page 61
Community Profiles				
Community Information: ContentXChange marketing message	Specifies a brief library marketing message for display on an organization's web site with any features the organization representative has added to the site using ContentXChange.	None specified	System, Library, Branch	"ContentXChange" on page 154

Profiles/Parameters/ Tables	*Purpose*	*Default*	*Level*	*More Info*
Community Information Display (Mobile PAC): Configure	Controls the community information displayed for community search results in Mobile PAC	N/A	System, Library, Branch	"Configuring the PAC Community Results Display" on page 163 and "Summary View" on page 184
Community Information Display (PowerPAC): Configure	Controls the community information displayed for community search results in PowerPAC	N/A	System, Library, Branch	"Configuring the PAC Community Results Display" on page 163 and "Summary View" on page 184
Days to continue showing event in PAC after event end date	Sets the default number of days to display an event in a PAC user's search results after the event end date, as specified in the staff client or PAC editor	7	System, Library, Branch	"Community Profiles" on page 138
Navigation (Mobile PAC): Community - Keyword Search	Displays Community search option in Mobile PAC	No	System, Library, Branch	"Community Profiles" on page 138
Navigation (PowerPAC): Community	Displays Community option on PowerPAC menu bar	No	System, Library, Branch	"Community Profiles" on page 138
Navigation (PowerPAC): Community - Browse Search	Displays Community Browse search option on PowerPAC Community menu	No	System, Library, Branch	"Community Profiles" on page 138
Navigation (PowerPAC): Community - Keyword Search	Displays Community Keyword search option on PowerPAC Community menu	No	System, Library, Branch	"Community Profiles" on page 138
Navigation (PowerPAC): My Community Profile	Displays Community option on the PowerPAC My Account menu when the authorized patron is logged in	Yes	System, Library, Branch	"Community Profiles" on page 138
Search settings defaults	For Community searches. Sets default keyword search access point, Limit by, and Sort by options; sets default browse Search by option and the sort option for Primary Name (heading) results.	Various	System, Library, Branch	"Community Profiles" on page 138
PAC Profiles				
Enriched data	API Key added for ChiliFresh Other Features	Blank- unique value required	System, Library, Branch	"ChiliFresh Reviews and Ratings Changes" on page 213
Patron eReceipts	Offers eReceipt options for patron self-registration and information updates if enabled by the registered branch	No	System, Library, Branch	"E-Mail and Text Message Receipts (eReceipts)" on page 96

Profiles/Parameters/ Tables	*Purpose*	*Default*	*Level*	*More Info*
Item availability: Display textual holdings notes	Offers options for displaying serials textual holdings notes: hover over icon to display; display text; or do not display	Icon displayed	System, Library, Branch	"New Serial Holdings Record Notes View" on page 68
Item availability: Display notes (modified)	Now includes options for item/issue display: hover over icon to display; display text; or do not display	Icon displayed	System, Library, Branch	"New Serial Holdings Record Notes View" on page 68
Patrons can remove reading history	Moved from PowerPAC tab - applies to both PowerPAC and Mobile Pac. Determines whether patrons can remove individual items from the patron account reading history.	No	System, Library, Branch	"Deleting Items from Mobile PAC Reading History" on page 239
Search settings defaults	New default sort options for searches that include at least one remote database	Relevance	System, Library, Branch	"Merged Results" on page 178
PAC Active client Profiles - Removed from Polaris Administration. Polaris 4.1 does not include or support ActivePAC.				
PowerPAC Profiles				
Feature It: Screen display options	Enable Feature It (promotions) and specify the position in the search results display.	Not enabled	System, Library, Branch	• "Feature It: Promotions in Polaris PowerPAC" on page 174 • "Promotion Records" on page 46
Google Preview: Enable on full display	Displays Google preview button on the title product page for titles that have Google previews.	Yes	System, Library, Branch	"Google Preview" on page 204
Google Preview: Enable on search results pages	Displays Google preview button on the brief search results pages for titles that have Google previews.	Yes	System, Library, Branch	"Google Preview" on page 204
In-house access definitions	Label for option **For patron inactivity timeout use** changed to **For patron actions use.**	N/A	System, Library, Branch	"Recently Viewed Titles" on page 201
Page header options	Specifies alternate logo URL; return link URL; background and branch name text colors; logo and branch name alignment	Various	System, Library, Branch	"Customizing the Header" on page 165
Portal page content carousels	Set up content carousels to display on PowerPAC portal page.	None defined	System, Library, Branch	"Content Carousels on the PowerPAC Portal Page" on page 168
Product page categories: Configure	Set default state of categories (expanded or collapsed) and determine their order on the Polaris PowerPAC product page for a title in search results.	N/A	System, Library, Branch	"PowerPAC Product Page" on page 199

Profiles/Parameters/ Tables	*Purpose*	*Default*	*Level*	*More Info*
Recently viewed titles	Set access locations (in-house/remote) and maximum number of titles to display.	Both locations enabled; maximum titles = 5	System, Library, Branch	"Recently Viewed Titles" on page 201
Theme dashboard position	Sets the dashboard display position regardless of theme selection	Left	System, Library, Branch	"Dashboard Position in Polaris PowerPAC" on page 165
Title Display: Configure	Completely redesigned for greater flexibility in displaying bibliographic information in PowerPAC search results.	Various	System, Library, Branch	"Configuring the PAC Title Display" on page 185
Mobile PAC Profiles				
Product page categories: Configure	Set the display order of information links on the Mobile PAC product page (Title page) for a title in search results.	N/A	System, Library, Branch	"Mobile PAC Product Page" on page 236
Title Display: Configure	Mobile PAC-specific settings for displaying bibliographic information in search results.	Various	System, Library, Branch	"Configuring the Mobile PAC Title Display" on page 235
Staff Client Profiles				
Automatic logon	Automatically log on the Windows-authenticated workstation user to the staff client	No	System, Library, Branch, Workstation	"Automatic Log-On" on page 24
Client visual alert configuration	Sets an alert message at staff client log-on and/or custom color title bars for a particular server; for example, a training server.	None	System	"Visual Cues for Staff Client Log-On Server" on page 20
Receipt printer control codes	**Selected** controls added to specify display	N/A	System	"Mailing Address in Uppercase Letters (Notices)" on page 123
Find Tool/record set-to-record-set creation: Record set size warning threshold	Renamed **Find Tool: Record set size warning threshold.** Now the warning message appears if the number of records exceeds the number specified, whether the record set is created from the Find Tool or from another record set.	1,000	System, Library, Branch, Workstation, Staff	"Create Record Sets from Other Cataloging Record Sets" on page 51.
Credit Card Payment Parameters				
Online payments: Configure	New tabbed page for Mobile PAC e-commerce options	None set	System, Library, Branch	"Credit Card Payments from Mobile PAC" on page 229
Acquisitions Parameters				
PO line item worksplips: Print on-order item data	Specify whether to print on-order item data on purchase order line item worksplips.	Yes	System, Library, Branch	"New Parameter for Purchase Order Line Item Worksplips" on page 44

Profiles/Parameters/ Tables	*Purpose*	*Default*	*Level*	*More Info*
Cataloging Parameters				
MARC Re-index during next server upgrade	Specify whether re-indexing occurs when a server is upgraded.	No	System	"Automatic Re-Indexing at Upgrade" on page 2
Notification Parameters				
Notice history: hold notices time threshold	Controls how long pick-up and cancelled hold notices are kept in the notice history.	90 days	System, Library, Branch	"Patron Notification History Improved" on page 121
Notice history: item and account notices time threshold	Controls how long overdue, fine, bill, and reminder notices are kept in the notice history.	90 days	System, Library, Branch	"Patron Notification History Improved" on page 121
Patron Services Parameters				
Associated patron options	Limit the number of records that can be associated with one patron record; set the default value for associated patron blocking	20; no blocking	System, Library, Branch	"Associated Patron Blocking" on page 76
Check in: auto-charge fine from item work form and Find Tool context menu	Determines whether a fine is automatically charged to a patron account when overdue items are checked in from the Item workform, Find Tool context menu, or Patron Status workform.	Yes	System, Library, Branch	"Fines at Check In - Auto-Charge Fines" on page 107
Check-out: Charge options	Enable charging for checkout and/or renewal; select material types and patron codes to be charged; staff client and PAC prompt options.	No	System, Library, Branch	"Charge for Checkout" on page 82
Check-out: optional patron data	Includes new option to display whether patron receives eReceipt in optional patron data (header area of Check Out and Patron Status workforms)	No	System, Library, Branch	"E-Mail and Text Message Receipts (eReceipts)" on page 96
Check-out: Receipt options	Includes new options: • Print receipts only with prompt • Additional content for eReceipts	No	System, Library, Branch	• "Optional Check-Out Receipts" on page 94 • "E-Mail and Text Message Receipts (eReceipts)" on page 96
Collection agency options	Output tab - New options for FTP transmission	No	System, Library, Branch \	"Collection Agency Reporting via FTP" on page 133
EReceipt options	Enables eReceipts (e-mail receipts and/or TXT receipts), eReceipts for renewal from PAC	No	System, Library, Branch	"E-Mail and Text Message Receipts (eReceipts)" on page 96

Profiles/Parameters/ Tables	*Purpose*	*Default*	*Level*	*More Info*
Express patron registration options	New options: • Enable eReceipts in new patron records by default during express registration • Plain text e-mail notices by default during express registration	No	System, Library, Branch	• “E-Mail and Text Message Receipts (eReceipts)” on page 96 • “Plain Text E-Mail Notices” on page 123
Fine receipts: Print duplicate receipt	Enables duplicate printed fine receipts	No	System, Library, Branch	“Duplicate Fine Receipts” on page 105
Holds pickup slips options	New options for vertical printing	Horizontal (existing configuration)	System, Library, Branch	“Vertical Holds Pickup Slips” on page 111
Hours of Operation	Identifies the days closed and hours opened for each organization. Now available at system and library levels as well as branch level.	N/A	System, Library, Branch	“Hours of Operation Settings at System and Library Levels” on page 137
In-transit slip options	Content options added	Various	System, Library, Branch	“In-Transit Slip Information Options” on page 106
Items out receipt options	Specifies optional content for Items Out receipt (printed version of Items Out list, Patron Status workform - Items Out view)	N/A	System, Library, Branch	“Items Out List - Content for Print” on page 105
Material type groups	Place check-out limits on groups of material types for specific patron codes	No groups	System, Library, Branch	“Check-Out Limits for Material Type Groups” on page 91
Offline: Include patron account balance	Determines whether the patron account balance is included in offline MDB files.	Yes	System	“Suppress the Patron Account Balance from Offline MDB Files” on page 119
Offline: Trap holds at check-in	Determines whether eligible items are trapped for holds when an offline file with check-in transactions is uploaded.	Yes	System, Library, Branch	“Option to Suppress Holds Checking on Offline Upload” on page 113
Patron registration options	New options: • Enable eReceipts in new patron records by default during normal registration • Plain text e-mail notices by default during normal registration	No	System, Library, Branch	• “E-Mail and Text Message Receipts (eReceipts)” on page 96 • “Plain Text E-Mail Notices” on page 123
Request Parameters				
ILL Options - Message tabbed page	Specified PAC message - removed; message moved to Polaris Language Editor	N/A		“ILL PAC Message Translatable” on page 127
ILL Options - Restrictions tabbed page	Options to block in PAC based on money owed	Block if patron owes any amount	System	“ILL Requests from PAC - Block for Fines” on page 126

Profiles/Parameters/ Tables	*Purpose*	*Default*	*Level*	*More Info*
SelfCheck Unit Parameters				
Polaris ExpressCheck: Options	Was Polaris ExpressCheck: Enable; new options: enable eReceipts; reminder messages; multiline titles; display TOMs	No	System, Library, Branch, Workstation	• "E-Mail and Text Message Receipts (eReceipts)" on page 96 • "Hold and Fine Message Options in Polaris ExpressCheck" on page 247 • "ExpressCheck Display Improvements" on page 246
Patron blocks	For SIP self-check units. Organizes existing parameters for patron blocks and includes new options for respecting/ ignoring library-assigned patron blocks and associated patron blocking.	Various	System, Library, Branch	"SIP Self-Check: Ignore Patron Library-Assigned Blocks" on page 243
Check-out: Charge options	For SIP self-check units. Allow checkout of chargeable material, allow renewal of chargeable material, auto-charge when all items are renewed.	No	System, Library, Branch	"Charge for Checkout" on page 82
Policy Tables				
Fee Descriptions	New options to display or suppress fee reasons and order the list; ability to edit all descriptions; new fee reason: Check-out charge	Various	Branch	• "Displaying Fee Reason Options" on page 113 • "Charge for Checkout" on page 82
NCIP User Privilege Types	Maps Polaris patron codes to NCIP public or academic user privilege types	None (no mapping)	System	"NCIP User Privilege Types Mapping" on page 259
PAC Community Limit By Display	For Community keyword searches. Change display names for Limit by options, enable or suppress options, set display order, add custom options	All system-supplied options enabled	System, Library, Branch	"Community Profiles" on page 138

New and Modified Permissions

Acquisitions

- With the new permission, **Receive ASN Shipments: Allow,** staff members can receive cartons of materials using the Receive ASN Shipments workform. See "Advanced Shipping Notice (ASN)" on page 34.
- The **Receive Shipment: Allow** permission was changed to **Check In shelf-ready materials: Allow**.

Cataloging

- New permissions, **Community records: Access, Create, Delete,** and **Modify**, control who can work with Community information records in the Polaris staff client. See "Creating/Editing Community Records in the Polaris Staff Client" on page 138.
- New permissions, **Promotion records: Access, Create, Delete**, and **Modify**, control who can work with Promotion records in the Polaris staff client. These permissions are available at the system, library, and branch levels. See "Promotion Records" on page 46.
- A new system-level Cataloging permission, **Override invalid item barcode message: Allow**, is required for staff members to save an item record with an invalid barcode. See "Permission to Save Records with Invalid Barcodes" on page 31.
- A new branch-level Cataloging permission, **Manage import jobs for this branch: Allow**, is required to manage import jobs that other staff members launched. See "Manage the Import Jobs Queue" on page 60.

Circulation

- A new system-level Circulation permission, **Create, return or forfeit a patron account deposit**, is required to work with deposits in a patron account. See "New Permission for Working with Deposits" on page 119.
- Several new system-level Circulation permissions that apply to specific blocks replace the system-level Circulation permission **Override circ blocks: Allow.** See "New Permissions for Overriding Circulation Blocks" on page 81.
- The system-level Circulation permission **Patron claims: reset total claim count: Allow** is required to reset the total claim count in a patron record. See "Reset a Patron's Total Claims Count" on page 115.
- The system-level Circulation permission **Override associated patron block: Allow** is required to override the check-out block on a primary (parent) record when an associated patron record is blocked. See "Associated Patron Blocking" on page 76.
- A new system-level Circulation permission, **Override invalid patron barcode message: Allow,** gives staff members the ability to save a patron record with an invalid barcode. See "Permission to Save Records with Invalid Barcodes" on page 31.

System Administration

- A new System Administration permission, **Access MARC Re-index during next server upgrade: Allow**, is required to specify automatic re-indexing during upgrade. See "Automatic Re-Indexing at Upgrade" on page 2.
- The new System Administration permission **Modify PAC Community limit by display table: Allow** is required to work with this policy table. See "Community Profiles" on page 138.
- These new System Administration permissions are required to configure PAC bibliographic and community information elements in PAC search results. For details, see "Configuring the PAC Title Display" on page 185.
  - **Modify bibliographic record title displays: Allow** - Controls access to the following profiles: PowerPAC profile **Title Display: Configure**; Mobile PAC profile **Title Display: Configure**
  - **Modify community record title displays: Allow** - Controls access to the following Community profiles: **Community Information Display (PowerPAC): Configure**; **Community Information Display (Mobile PAC): Configure**
  - **Modify and create display entities: Allow** - Controls access to the Entities Definition dialog box, where you can edit existing display elements (entities) or define custom entities (bibliographic entities only).
- The System Administration permission **Modify product page categories: Allow** is required to work with the PowerPAC profile **Product page categories: Configure** and the equivalent Mobile PAC profile **Product page categories: Configure**. See "PowerPAC Product Page" on page 199 and "Mobile PAC Product Page" on page 236.

  Note:
  The System Administration permissions **Modify PAC brief title display** and **Modify PAC full title display** are removed in Polaris 4.1.

- The System Administration permission **Modify NCIP User Privilege Types table: Allow** is required to work with the new policy table, NCIP User Privilege Types. This table maps Polaris patron codes to NCIP public and/or academic user privilege types. See "NCIP User Privilege Types Mapping" on page 259.
- The System Administration permission **Modify import blackout times: Allow** is required to set or change the time periods when importing is not permitted. See "Set Blackout Times for Importing" on page 61.

PAC Administration Changes - ActivePAC End-of-Life

Because Polaris 4.1 does not support ActivePAC, PAC Active client profiles have been removed from the Polaris Administration Explorer and from organization workforms. Related changes:

- **Profiles moved** - The following profiles have been moved from the PAC tab to the PowerPAC tab in Polaris Administration:
    - 3M PAMS: Enabled
    - Did you mean: Suggestions are to display even when hits returned
    - Item availability: Display last circ date
    - Item availability: Display local and system levels
    - Item availability: Display notes
    - Item availability: Display textual holdings notes
    - Local call number indexed field: Limit choice
    - Patrons can remove reading history
    - Perform a new search if a cross reference is selected
    - Scoping: Use MARC language scoping display table
    - Search options: Limit by collection enabled
    - Text: Headings count column for "see from" headings
- **Hold options** - Options related to ActivePAC have been removed from the Hold options dialog box - Requests tabbed page (Request parameters). On the Staff client & PAC tabbed page, the option **Display confirmation message in PAC** has also been removed because it applied only to ActivePAC.
- **NoveList Select setup** - ActivePAC options have been removed from the NoveList Select subtab in the PAC Enriched data setup dialog box.
- **Permission to close** - The permission **Close ActivePAC** has been removed, and no longer appears when searching for permissions or in the Security node of the system-level Administration Explorer.

Staff Client - General

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

Visual Cues for Staff Client Log-On Server

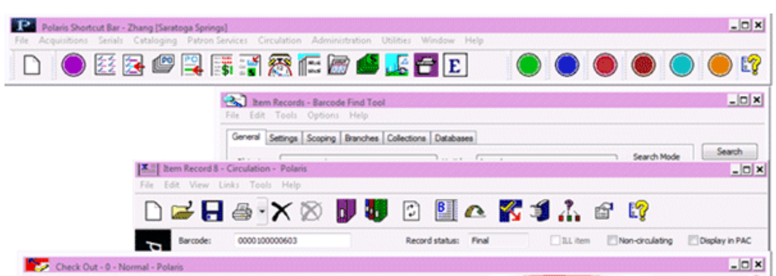
You can now set a message to alert the user that he or she is attempting to log on to the staff client on the training server, and set custom colors on the title bars of staff client workforms to indicate the log-on server once the user has logged on. The user can do such tasks as comparing data from a production and a training environment, easily identifying the data from each client. For example, the user may wish to display parallel workforms from both servers, so that Polaris Administration settings and data can be copied from one to the other.

Note:
These features were developed for use on training or non-production servers, but they are not limited to that situation. You can set the options described below on any Polaris application server.

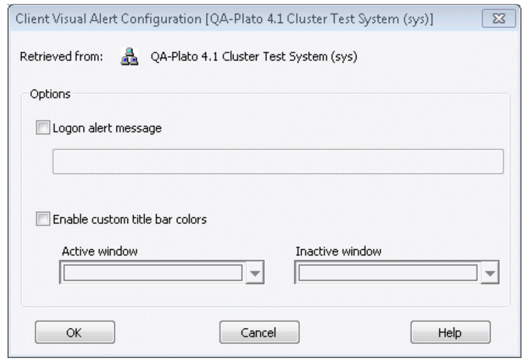
You can set an alert message, custom colors, or both features.

Important:
Your settings override the workstation's Windows display settings, such as color and transparency, because the purpose is to alert the user that he or she is logged into a "special use" server.

When you set custom colors, they appear on the Polaris Shortcut bar and workforms, dialog boxes, the Report Manager, and the Label Manager. The illustration shows some examples of Polaris workforms using the default custom color (visible when you view this document online or print in color):



On the training server or other non-production server (or any Polaris application server where you want to use these features), use the new system-level Staff Client profile **Client visual alert configuration** to set the alert message and/or custom title bar colors.

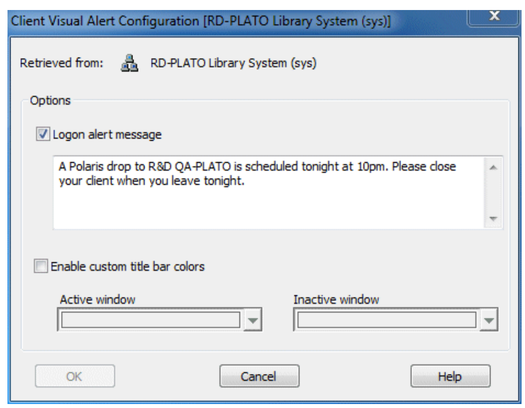


After you have set the alert message and/or custom colors as described below, you must log off the Polaris staff client and log on again for the changes to take effect.

Note:
Standard Microsoft dialog boxes such as Save As and Print, and a few Polaris windows such as Help do not use the custom colors settings. When custom colors are set, the title bars of these dialog boxes may appear translucent because neither the custom colors nor the workstation's Windows theme is used.

Alert Message

To specify an alert message, check **Logon alert message** and type the message (255 character maximum) in the box below the alert message option.

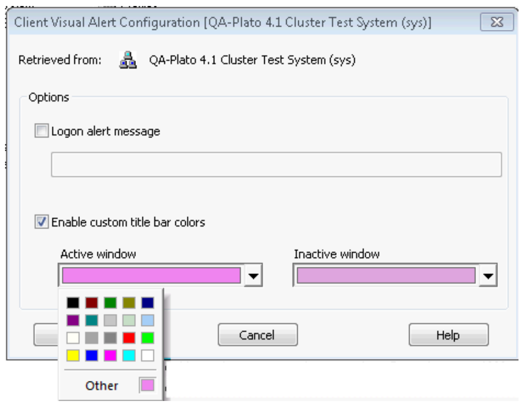


To clear a previously set message, clear the **Logon alert message** check box.

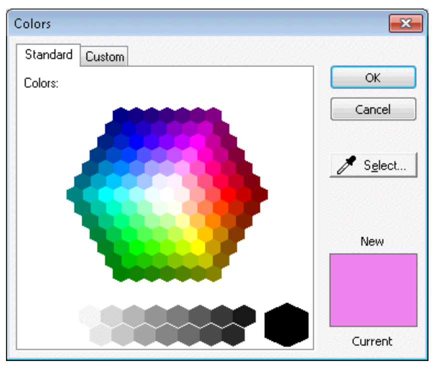
Custom Title Bar Colors

To use custom colors for the Polaris workform title bars, check **Enable custom title bar colors**. You can use the default violet and plum for the active and inactive windows, or specify custom colors. To specify your own custom colors:

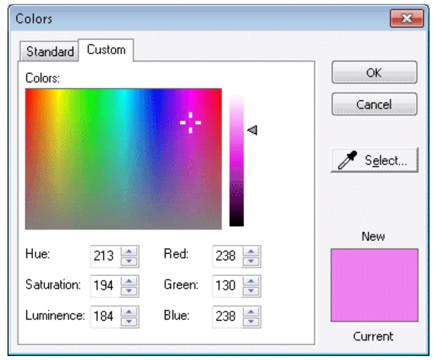
1. Select the drop-down arrow for the **Active window** or **Inactive window** to access the color picker.



2. Click a color, or click **Other** to open the color tool.



- To select a color on the Standard tab of the color tool, click **Select** and click a color or gray-scale value.
- Or click the Custom tab to select a color from a continuous palette. Alternatively, you can type standard RGB values.



3. Click **OK** to close the color tool, then click **OK** to close the Client Visual Alert Configuration dialog box.

Staff Client Log-On and Log-Off Transactions

Polaris 4.1 includes transaction logging for staff client log-on and log-off transactions. You can track currently logged-on users when performing upgrades, and generate reports of historical usage of the software by user and/or workstation to assess staff client use.

The Polaris Workstations table records whether a workstation is logged on to the Polaris staff client, and includes the server date and time of the log-on. The following transactions are posted in the Transactions database and are available for reporting:

Log-On (status = 1)

- Transaction TypeID = TR_SYS_LOGON (7200)
- OrganizationID - User's log-on branch
- Workstation ID
- User ID
- Transaction Client Date/Time
- Transaction SubtypeID = SUBSYSTEM_TYPE (235)
- Transaction SubtypeCode = Staff Client (33)

Log-Off (status = 0)

- Transaction TypeID = TR_SYS_LOGOFF (7201)
- OrganizationID - User's log-on branch
- Workstation ID
- User ID
- Transaction Client Date/Time
- Transaction SubtypeID = SUBSYSTEM_TYPE (235)
- Transaction SubtypeCode = Staff Client (33)

Log-off transactions include any way in which the user exits from the client, including but not limited to:

- Shortcut Bar - Click **X**
- Shortcut Bar - Select **File, Exit**
- Shortcut Bar - Select **File, Logoff**
- Shortcut Bar - Press **ALT+F4**
- Workform- Select **File, Exit**

Automatic Log-On

You can now set a staff client workstation for automatic log-on to the Polaris staff client using Windows Active Directory integrated security. When the Polaris staff client application is started, the log-on dialog box is skipped, and if the branch-level **Logon branch: Access** permission is set for the workstation, the user can select a log-on branch. If the permission is not set, the workstation is automatically logged on to the workstation's parent branch. Set the new Staff Client profile **Automatic logon** to **Yes** to enable this feature. The profile is available at the system, library, branch, and workstation levels; the default setting is **No**.

Important:
When the **Automatic logon** profile is set to **Yes** for the workstation, only the Windows-authenticated user can log into the staff client on that workstation. No other staff member using their own username and password can log on, because the Log On dialog box is not displayed.

Automatic Log-On and PCI Compliance

The library may require PCI compliance for credit card processing. If so, you must require unique domain user IDs and follow secure authentication best practices to log on to the workstation, since the automatic log-on feature restricts staff client use to the Windows-authenticated user on the workstation. A generic Windows log-on such as Circ1 would be out of compliance because it would not be possible to trace the transaction back to the staff member who performed it. Library policy also affects PCI compliance. When automatic logon is enabled and another staff user needs to work in the staff client on the same workstation, the library must require that the original user log off the workstation; the new user must log on with their own Windows credentials. For more information about PCI compliance, see the *Polaris E-Commerce Data Security Standard (PA-DSS/ PCI-DSS) Implementation Guide*, available on the Customer Extranet (**www.polaristown.com**).

Object Locks Cleared

When a Polaris record is open, an entry is automatically made in the Object Locks table so that no one else can change the record. When the record is closed, the entry is automatically removed from the Object Locks table. Occasionally a record remains locked when it does not close correctly, as may happen when the staff client has closed unexpectedly due to a computer problem or operating system logout. Object locks associated with a specific user/workstation log-on are now automatically cleared when the user logs back on. The Polaris administrator does not have to remove them manually.

In addition, a new process now automatically clears any object locks remaining in the Object Locks table when MS SQL Server has stopped and is restarted. When clients reconnect to the restarted server, all object locks are cleared. As part of this development, the SQL Agent job Delete Object Locks has been removed because it is no longer needed.

User Interface Modified for Increased Text Size & Resolution

For workstations running Windows Vista or Windows 7, you can now modify your computer's magnification setting from the default Small (100%) to Medium (125%) or Large (150%), and the Polaris UI will reflect these changes. (This is not supported in Terminal Services.) In addition, customers who have large monitors can change the screen resolution to 1024 x 768 or above for Windows XP, Windows Vista, or Windows 7.

However, when the resolution is set at 1024 x 768 or below, and you change the magnification from the default Small (100%) to Medium (125%) or Large (150%), some workforms may be partially obscured. If the resolution is set above 1024 x 768, you can increase the magnification above the default (100%) to enlarge the workforms while still fitting them on the screen.

The resolution and magnification settings also affect the page orientation when printing workform views. If the current resolution and magnification settings on a workstation make the workform view printout too large to fit in portrait, the view is printed in landscape orientation.

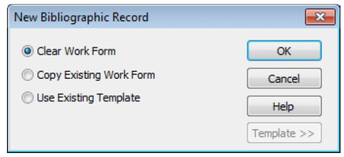
Multiple Internal Reports Can Be Viewed Simultaneously

You can now view more than one internal report simultaneously. This applies to internal reports only, such as purchase orders or import reports, and does not apply to standard reports available from the Polaris Shortcut Bar.

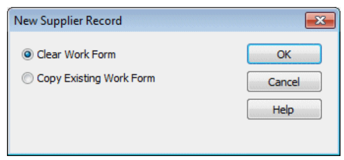
Option to Select Template for New Records

When you create new records in Polaris by selecting **File, New** from a workform, the option to select a template appears in the dialog box only for record types that have templates.

For example, when you select **File, New** from a Bibliographic Record workform, the option to use a template is in the dialog box.



When you select **File, New** from a Supplier Record workform, the option to use a template is not in the dialog box because supplier records do not have templates.



Records Listed in Polaris by License

Each of the following Polaris products require a separate license: Course Reserves, Feature It, and Community Profiles. If these products are not licensed, the records associated with the products do not appear in menus, Find Tool Objects lists, or New Record lists. If these products are licensed, the associated records are listed as selections in menus and lists.

Course Reserves

If the library has a license for Course Reserves, the associated records are displayed as follows:

- **Course Reserve Records, Reserve Item Records** - Listed in the Cataloging menu, the Find Tool, and the New Record dialog box.
- **Course Reserves** - Listed in the Patron Services menu.

Promotions

If the library has a license for Feature It, Promotion records are displayed in the Polaris staff client as follows:

- **Promotions** (staff client records for Feature It) - Listed in the Cataloging menu, the Find Tool, and the New Record dialog box.

Community

If the library has a license for Community Profiles, the associated records are displayed in the Polaris Staff Client as follows:

- **Community Records** - Listed in the Cataloging menu, the Find Tool, and the New Record dialog box.

Find Tool

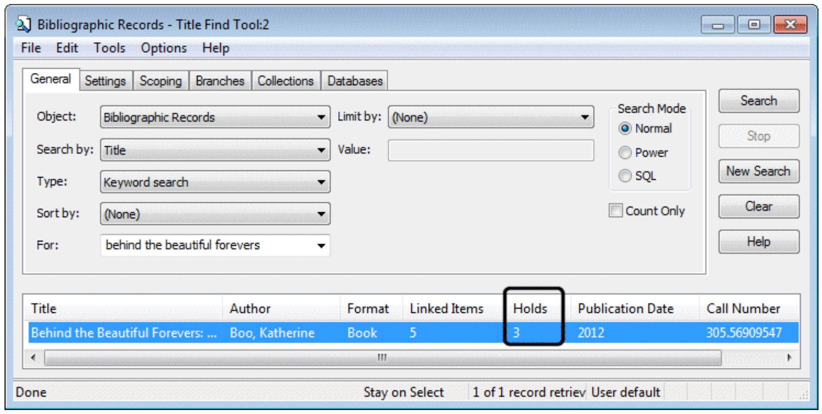
New Search by and Limit by Options

> **Note:**
> The Find Tool displays only those objects that are part of a licensed product. Therefore, Community Records, Promotions, Course Reserve Records, and Course Reserve Items appear in the Objects list only if the library is licensed for these products. A separate license is required for Community Profiles, Feature It (Promotions), and Course Reserves.

- **Bibliographic Records** - Search by **Invalid LCCN** to find records with 010 tag subfield z.
- **Funds and Fiscal Years** - New limit by option **Status, Encumbrances closed**.
- **Auto-suggest for Community Records** - If Auto-suggest is turned on, suggestions appear when you search for Community Records.
- **Community Records** - Search by and limit by options: **Address and contact person, All keyword indexed fields, Control number, Event name, Event start date, Event expiration date, Language, Notes, Organization name, Postal code, Record owner, Record status, Services available, Subject, Type of organization**
- **Community Records sort by options** - **Control number, Event date (earliest first), Event date (earliest last), Event expiration date, Event name, Organization name, Postal code, Relevance, Type of organization**
- **Community Records results** - The records are displayed in the Find Tool results list with the following columns: **Organization Name, Event Name**
- **Promotions** - Search by and limit by options: **All keyword indexed fields, Control number, Footline, Midline, Headline, Name**
- **Record sets** - Search for patron, item, bibliographic, or authority record sets by Record set ID.

New Holds Column for Bibliographic Records

The **Holds** column was added to the bibliographic search results list. It shows a count of hold requests linked to the bibliographic record including: active holds, pending holds, shipped holds, and ILL requests.

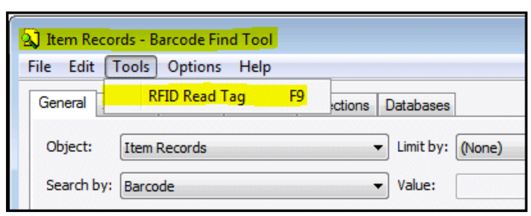


SQL Searches

When you enter an SQL search in the Polaris Find Tool, you no longer need to enter **AS RecordID** or **WITH (NOLOCK)**.

RFID Read Tag for Item/Bib Searches

You can use the RFID reader to search for an item record or its linked bibliographic record. The Find Tool now has a **Tools** menu with the new **RFID Read Tag** option (or press **F9**). When the RFID Read Tag option is selected, the **Search by** selection automatically changes to **Barcode**.



If more than one barcode is found, a list box opens where you can select the record.

Keyboard Shortcut for Item Records

You can now press **CTRL+F9** to bring up the Find Tool with Item Records selected in the **Objects** box.

Creating and Deleting Collection Records

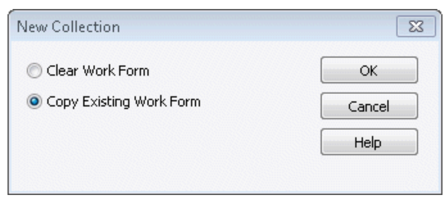
In previous versions of Polaris, you could create a new collection from the Polaris Shortcut Bar by selecting **File, New, Collection**, or by right-clicking the collection in the Administration Explorer and selecting **New Collection** in the context menu. In addition to these methods, you can now create a new collection record from an existing collection record by copying the record or clearing the record. You must save the current collection record before creating the new one. You can also delete a collection record from the workform provided associated branch conflicts are resolved.

Note:
The Collection workform has been enlarged to reduce scrolling for libraries with many branches.

Creating a Collection Record By Copying

1. To copy an existing collection, open the Collection Record workform and save it.
2. Open the New Record dialog box using one of these methods:
   - Select **File, New** or click on the toolbar.
   - Press **CTRL+N**.
   - **Press ALT+F+N**.

   The New Collection dialog box opens.

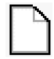


3. Select **Copy Existing Work Form** and click **OK**, or press **P+ENTER**.
4. The new Collection record is displayed with the original record's data, including collection name, abbreviation, branches, and floating branches.
5. Edit any data elements as necessary and select **File, Save**, click , or press **CTRL+S.**

   Before the new record is saved, the system checks for duplicate records based on these criteria:
   - Identical collection name
   - Identical collection abbreviation
   - At least one of the same assigned branches as the existing Collection

If all three of these conditions are detected, you see an error message. Close the message box and correct the data as necessary; then save the record again.

Creating a Collection Record by Clearing

1. To create a collection by clearing an existing collection, open the Collection Record workform and save it.
2. Open the New Record dialog box using one of these methods:
   - Select **File, New** or click  on the toolbar.
   - Press **CTRL+N**.
   - **Press ALT+F+N**.

   The New Collection dialog box opens.
3. Select **Clear Existing Work Form** and click **OK**, or press **c+ENTER**.

   The system clears all values from the collection previously saved.
4. Enter the appropriate data and save the new collection.

Deleting a Collection

In previous versions of Polaris, you could delete a collection record only from the Administration Explorer, by choosing the Collection context menu option. You can now delete a collection record from the Collection workform, using one of the following methods:

- Select **File, Delete.**
- Click the Delete icon  on the toolbar.
- Press **CTRL+D**.
- Press **ALT+F+D**.

The system checks for linked objects that use the Collection, which may prohibit the deletion of the Collection. These links prevent the collection from being deleted, and you must resolve the conflicts before deleting the collection. The message lists the number of linked objects:

- Item Records
- Reserve Item Records
- Item Templates
- Reserve Item Templates
- Serial Holdings Records
- Quick-circ Item records
- Standing Order Part Records

The system also displays a warning message and the count of linked objects if any of these features use the collection:

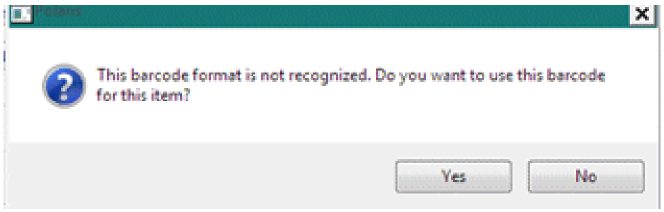
- Children's PAC Search Limit
- Selection List Line Item Segments
- PO Line Item Segments
- Invoice Line Item Segments

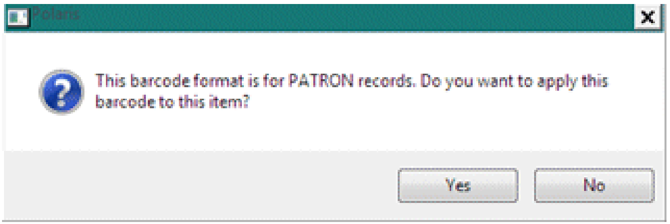
For these links, you can click **No** (the collection is not deleted) or **Yes** (the collection is deleted). If you click **Yes**, the deleted collection is replaced by **[None]** in the linked objects.

Permission to Save Records with Invalid Barcodes

In previous versions of Polaris, when a staff member attempted to save an item or patron record with an invalid barcode, an invalid barcode message appeared, but they could continue to save the record. Using new permissions, you can now prevent a staff member from continuing to save item or patron records after the invalid barcode message has been displayed. As part of this development, barcode validity is now checked for serial item records generated when serials are checked in or created from the issue record.

Examples of invalid barcode messages for item records are illustrated below:





Separate permissions control the ability to continue to save an item (including a serial item) or patron record when the invalid barcode message is displayed:

- **Override invalid item barcode message: Allow** (system-level Cataloging permission)

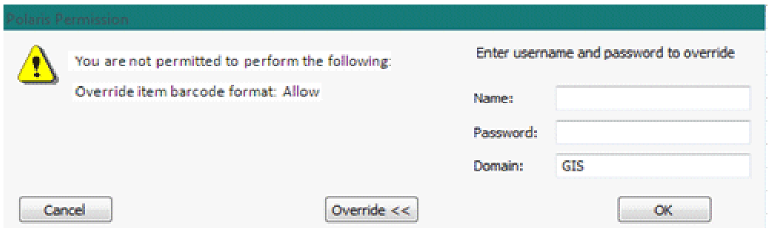
  Note:
  This permission also controls the ability to generate or create a serial item record with an invalid item barcode.

- **Override invalid patron barcode message: Allow** (system-level Circulation permission)

At upgrade, the permissions are set to **Yes** by default, so you will see no change in functionality unless you change the permission settings.

Important:
Customers who prefer to assign the permissions only to selected staff members should set the system level Staff Client profile **Permissions: Use Polaris-defined new permission defaults** to **No** before upgrading to Polaris 4.1.

When the appropriate permission is set to **No** and the staff member clicks **Yes** on the invalid barcode message to continue to the save the record, a permission block message is displayed.



An authorized staff member must supply a valid username, password, and domain, then click **Override** to allow the record to be saved with the invalid barcode.

Note:
The following records and operations are not affected by this development:

-- Saving ILL items
-- Saving course reserve items
-- System-created "PACREG" temporary patron barcodes (created when a patron registers from PAC)
-- Generating on-order or in-process items

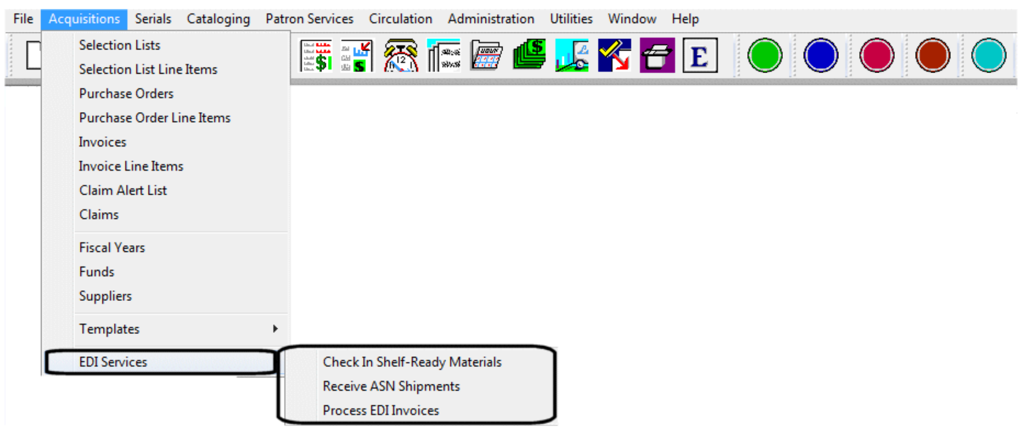
Acquisitions

The following changes were made in the Acquisitions subsystem for Polaris 4.1.

Acquisitions Menu Now Has EDI Services Menu Item

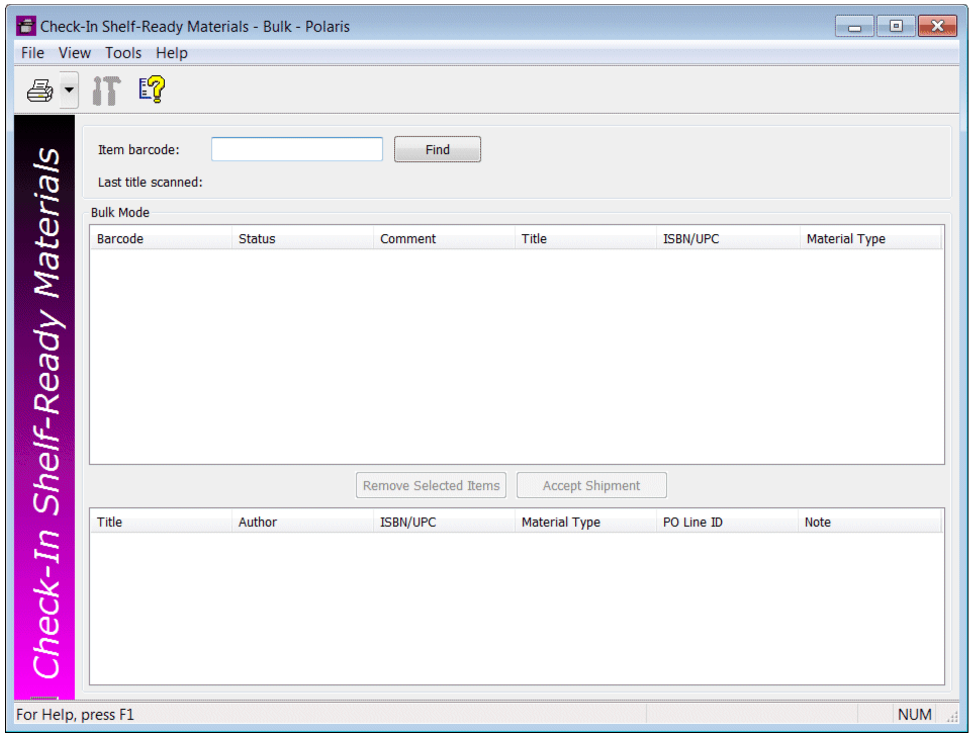
As part of the Advanced Shipping Notice development (see "Advanced Shipping Notice (ASN)" on page 34), the **Receive Shipment** and the **Process EDI Invoices** menu items were removed, and a new **EDI Services** submenu was added with the following selections:

- **Check In Shelf-Ready Materials** - keyboard shortcut **Alt A + E + S**,
- **Receive ASN Shipments** - keyboard shortcut **Alt A + E + M**
- **Process EDI Invoices** - keyboard shortcut **Alt A + E + E**.



Receive Shipment Now Check In Shelf-Ready Materials

The Receive Shipment workform was renamed Check In Shelf-Ready Materials. In addition, the name of the Acquisitions report, Receive Shipment Log, was changed to Check In Shelf-Ready Materials, and the permission was changed from **Receive Shipment: Allow** to **Check In shelf-ready materials: Allow**.

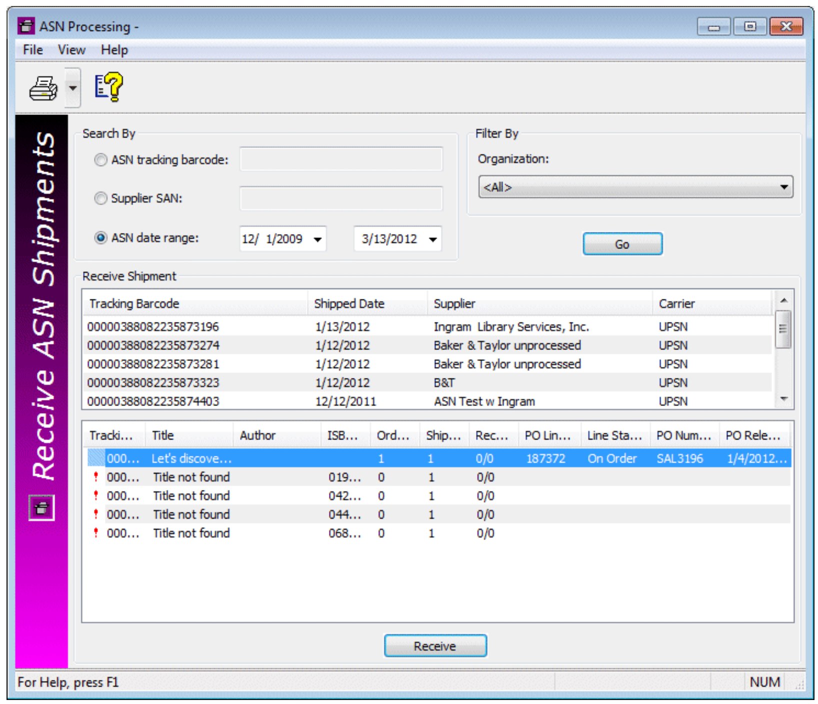


Advanced Shipping Notice (ASN)

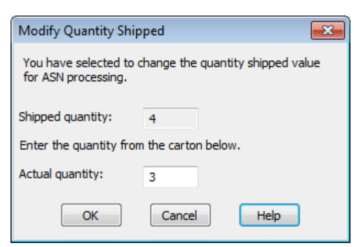
For libraries that send EDI orders but want to handle the shipment before automatically receiving the order in Polaris, a new type of EDI transaction, the Advanced Shipping Notice (ASN), is available. With this new feature, libraries can use data from the vendor's ASN to bulk receive shipments of materials by scanning a barcode on the outside of the carton. Polaris has implemented the ASN with Baker & Taylor and Ingram Library Services.

After the vendor receives an EDI order, and prepares the items for shipment, the vendor produces an ASN (X12 transaction set 856) file composed of order data related to the shipment. As with EDI acknowledgements (confirmations) and invoices, the ASN is output to the vendor's FTP server. When the Polaris EDI Agent runs, it scans the library's directory on the vendor's site, retrieves all files that are in the directory (purchase order acknowledgments, EDI invoices, and ASNs), and loads them into Polaris.

Later, the shipment arrives at the library with a UCC-128 barcode affixed to the outside of the carton. The user selects **Acquisitions, EDI Services, Receive ASN Shipments** to open the new Receive ASN Shipments workform in Polaris. With the workform open, the user scans the barcode, enters the supplier's SAN, or selects the from and to dates for the ASN date range, and clicks **Go**. The matching ASN data, which the EDI Agent previously loaded into Polaris, appears in the workform; the top section displays shipment information, and the bottom section of the workform displays the purchase order line item data. To receive all line items in the carton, the user clicks the **Receive** button.



If fewer copies are shipped for a title than were in the order, an exclamation mark appears next to a title in the bottom portion of the workform. To split receive the title, right-click and select **Adjust, Shipped Quantities**. If the actual quantity is different from the number in the **Shipped** column, type the number in the **Actual quantity** box.



When you click the **Receive** button, the purchase order line item will be updated with the quantity received and the quantity still on order. The **Alert** check box is checked automatically in the linked purchase order line item when the quantity shipped is adjusted in the Receive ASN Shipments workform. You can link to the purchase order line item by right-clicking on the tracking barcode in the bottom section of the workform and selecting **Links, Purchase order line item**. You can also print a purchase order line item workslip by selecting a line item in the bottom portion of the workform, and selecting **File, Print, POLI workslip**.

Advanced Shipment Notification Log

The new Acquisitions report, Advanced Shipment Notification Log, lists all ASN files loaded into the system. For each ASN, the report lists the purchase order number, purchase order suffix, title, author, ISBN or UPC, purchase order ID, quantity ordered, quantity sent, quantity received and any notes.

Advanced Shipment Notification Log

PO# / Suffix	Title / Author / ISBN (UPC)	POLI ID	Qty Ord / Sent / Rec	Note
ASNXPO2 / JR	If... / Perry, Sarah. / 0892363215 :	184162	5 / 11 / 0	
ASNXPO2 / JR	Made in Hanford: The Bomb That Changed the World / Williams, Hill / 9780874223071 :	184161	1 / 4 / 1	
ASNXPO2 / JR	Made in Hanford: The Bomb That Changed the World / Williams, Hill / 9780874223071 :	184161	3 / 4 / 3	
ASNXPO2 / JR	Zoom / Banyai, Istvan. / 0670858048 :	184163	4 / 8 / 0	
ASNXPO2 / JR	Zoom / Banyai, Istvan. / 0670858048 :	184163	4 / 8 / 4	
BCPL_ASN1 /	Canadian Currency / Glass, Leslie. / 0446364282x (pbk.) :	183191	2 / 7 / 0	
BCPL_ASN1 /	Canadian Currency / Glass, Leslie. / 0446364282x (pbk.) :	183191	5 / 7 / 0	
BCPL_ASN1 /	Love's encore / Brown, Sandra, 1948- / 0446364282 (pbk.) :	183192	3 / 3 / 0	
BCPL_ASN2 /	Little Black, a pony. / Farley, Walter, 1915-1989 / 0394900219 (lib bdg.) :	183186	3 / 3 / 0	
BCPL_ASN2 /	The world's most famous detective : [sound recording] four cassette Sherlock Holmes mystery collection / Doyle, Arthur Conan, Sir, 1859-1930. / 4445588795lll	183188	1 / 3 / 0	Shipped quantity adjusted
BCPL_ASN2 /	The world's most famous detective : [sound recording] four cassette Sherlock Holmes mystery collection / Doyle, Arthur Conan, Sir, 1859-1930. / 4445588795lll	183188	3 / 3 / 0	Shipped quantity adjusted
BCPL_ASN2 /	Yamsi / Hyde, Dayton O. / 7155qqqqqq	183187	1 / 1 / 0	
BCPL_ASN3 /	Canadian Currency / Glass, Leslie. / 0446364282x (pbk.) :	187336	2 / 7 / 0	
BCPL_ASN3 /	Canadian Currency / Glass, Leslie. / 0446364282x (pbk.) :	187336	5 / 7 / 0	
BCPL_ASN3 /	Love's encore / Brown, Sandra, 1948- / 0446364282 (pbk.) :	187337	3 / 3 / 0	
BCPL_ASN4 /	Little Black, a pony. / Farley, Walter, 1915-1989 / 0394900219 (lib bdg.) :	187338	3 / 3 / 3	
BCPL_ASN4 /	The world's most famous detective : [sound recording] four cassette Sherlock Holmes mystery collection / Doyle, Arthur Conan, Sir, 1859-1930. / 4445588795lll	187340	1 / 1 / 1	Shipped quantity adjusted
BCPL_ASN4 /	The world's most famous detective : [sound recording] four cassette Sherlock Holmes mystery collection / Doyle, Arthur Conan, Sir, 1859-1930. / 4445588795lll	187340	3 / 1 / 0	Shipped quantity adjusted
BCPL_ASN4 /	Yamsi / Hyde, Dayton O. / 7155qqqqqq	187339	1 / 1 / 0	

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ASN Shipments Option Added To Supplier Record Workform

As part of the ASN changes, the **Accepts ASN shipments** check box was added to the Supplier Record workform, and the EDI orders options were reordered and relabeled as follows:

Accepts: [ ] EDI orders [ ] Enriched EDI orders [ ] ASN shipments

If the **ASN Shipments** box is checked, the EDI invoice linked to that supplier will not be created automatically. If the utility pulls in an invoice file and the system attempts to create an invoice automatically in Polaris, but the ASN file has not yet been received, an e-mail is sent to the staff member's e-mail address on the supplier record with the following message:

ASN processing must be done before EDI Invoice # BTSAL3304 can be created.

Removed File Requirements for EDI POAs/Invoices

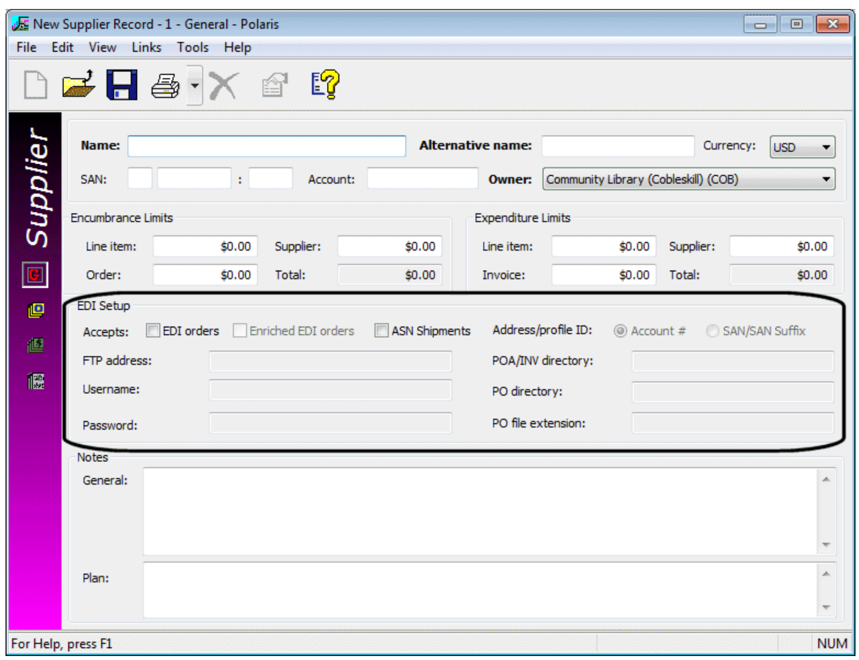
Polaris removed requirements for EDI vendors to include file extensions and segment terminators in their files. Before these changes, Polaris required vendors who accept EDI orders to use a specific file extension format for electronic purchase order acknowledgments and invoices. We also required these suppliers to add eye-readable segment terminators in their 810, 855 and 856 (ASN) files.

Removing these restrictions will make it easier to implement EDI with other vendors in the future, and it will not affect any current mappings with vendors already supported.

File Extension Fields Removed from Supplier Record

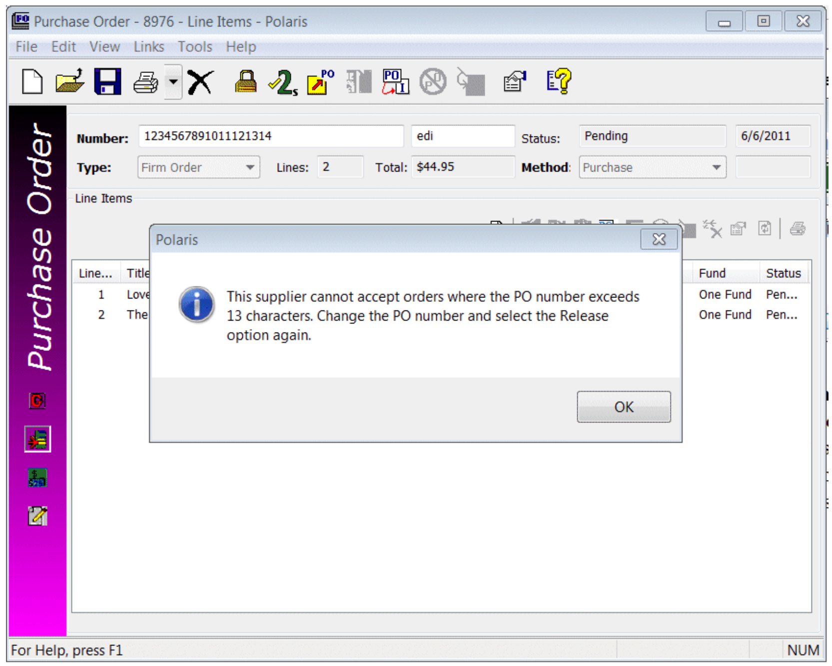
The following updates were made to the Supplier record:

- Removed the **File extensions: PO, POA, INV** fields; renamed and moved the **PO file extension:** field
- Removed the **Data phone number** field, and the **Production PO: Yes/No** radio buttons
- Expanded the **General** notes field



Check for Supplier Limit on EDI Purchase Order Numbers

Some suppliers who accept EDI orders have a limit on the number of characters in an EDI purchase order number. If the number is exceeded, the EDI invoice matching can fail. To minimize this mismatching, Polaris now checks the supplier's SAN to see if there are any purchase order number limits defined. If a limit is defined and a user attempts to release a purchase order with a number that exceeds this limit, a message tells the user to change the number and release the purchase order again.



Two Concurrent Fiscal Years

You can now continue to receive, cancel, and invoice in the current fiscal year while ordering, receiving and invoicing in the new fiscal year. Money can be expended from the old fiscal year's funds, and the new fiscal year's funds can be used to place new orders. This allows libraries to invoice the titles that were ordered using the old funds while ordering using the new funds.

Note:
If there is money left in a fund with a status of Encumbrances closed, the library can continue to expend from the fund, even if the amount was never encumbered. For example, an invoice that was created without a purchase order can be paid using money from a fund with a status of Encumbrances closed.

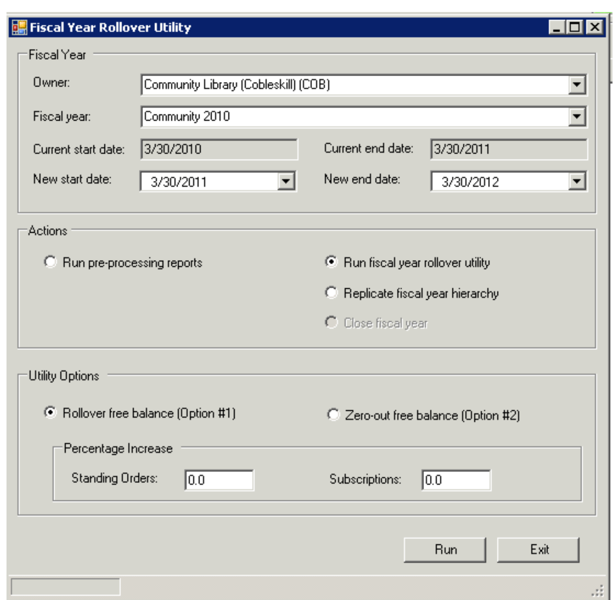
The following new statuses were added to fiscal year and fund records and as access points in the Find Tool:

- **Encumbrances closed**
- **All activity closed** (displays as **Closed** in the Find Tool)

The following new options were added to the Fiscal Year Rollover Utility:

- **Replicate fiscal year hierarchy**
- **Close fiscal year**

When the Fiscal Year Utility opens, fiscal year records with a status of **Open** or **Encumbrances Closed** are displayed in the drop-down list box. The current start and end dates are based on the first fiscal year displayed, and the new start and end dates are increased by one year. You can roll over or replicate a fiscal year with a status of **Open**, or close a fiscal year with a status of **Encumbrances closed**.



Replicate a Fiscal Year

When a fiscal year's hierarchy is replicated, the fund structure is exactly as it was in the old fiscal year, but the new fiscal year's fund allocations must be added manually. The status of the current fiscal year record and all linked funds are updated from **Open** to **Encumbrances closed**. You can modify the name and general note or create a new fiscal year from the existing fiscal year if it has a status of **Encumbrances closed**, but you cannot modify the fiscal year start date, end date, or owner. You cannot create a fund or delete the fiscal year.

If the fund has a status of Encumbrances closed, you can modify the fund name, alternative name, external name, fund source, encumbrance and expenditure limits, notes, and donor information. You can also adjust fund balances, transfer money, and expend from the fund (whether or not the money was previously encumbered). However, you cannot create a subfund, copy the fund, modify the fund type, or modify the owner.

After the fiscal year is replicated, the old funds with the status of **Encumbrances closed** are updated with the new open funds in:

- (Open) Selection List Line Item Segments, Fund drop list
- (Pending) PO Header, Fund drop list
- (Pending) PO Line Item Segments
- PO Template, Header, Fund drop list
- PO Template, PO Line Item Segment, Fund drop list
- (Open) Subscription Records, view 1
- SA profile - Acq Fund drop-down list box (Selection List Funds)
- SA profile - Selection List (Line Item) Defaults

The funds with a status of **Encumbrances closed** do display in:

- (Open) Invoices at the header level
- (Open) Invoice Line Item segments
- System Administration profiles: EDI Invoice Defaults

Note:
The old fund with a status of Encumbrances closed remains in the EDI Invoice Defaults profile until it is updated to Closed. This allows EDI invoices for orders already placed (and funds encumbered), to be paid using the old fund.

Close a Fiscal Year

This option is available when the selected fiscal year's status is set to **Encumbrances closed**. When this option is selected, the utility updates the fiscal year's status and all linked funds' statuses to **Closed**.

Important:
Be sure you want to close the fiscal year because undoing these changes would be extremely time-consuming.

When a fiscal year is closed, the fund in the EDI Invoice Defaults profile is updated to the new open fund. Funds with a status of **Closed** are not displayed in drop-down list boxes in open or pending selection lists, purchase orders, invoices, or subscription records or in Polaris Administration profiles. You can receive purchase order line items and segments regardless of the status of the funds. Any reports that display funds or have a fund limit-by setting now display the new **Encumbrances closed** status.

Close a Purchase Order

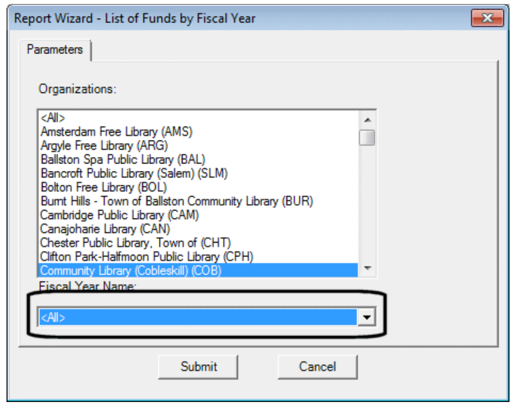
You can close a purchase order from the Purchase Order workform when the order type is Firm, Gift or Donation and all purchase order line items have a status of Received, Cancelled or PartRec. If you attempt to close a purchase order with line items that have been received, but not paid, a warning message appears: **One or more lines have been received but not yet paid. Are you sure you want to close this purchase order?**

New Purchase Order Line Item Status

A new purchase order line item status of **Not yet published** was added. You can also search for purchase order line items in the Polaris Find Tool using this status.

Fiscal Year Parameter Added to List of Funds by Fiscal Year Report

A Fiscal Year Name parameter was added to the List of Funds by Fiscal Year report so that the fiscal years available for selection are listed based on the selected Organization.

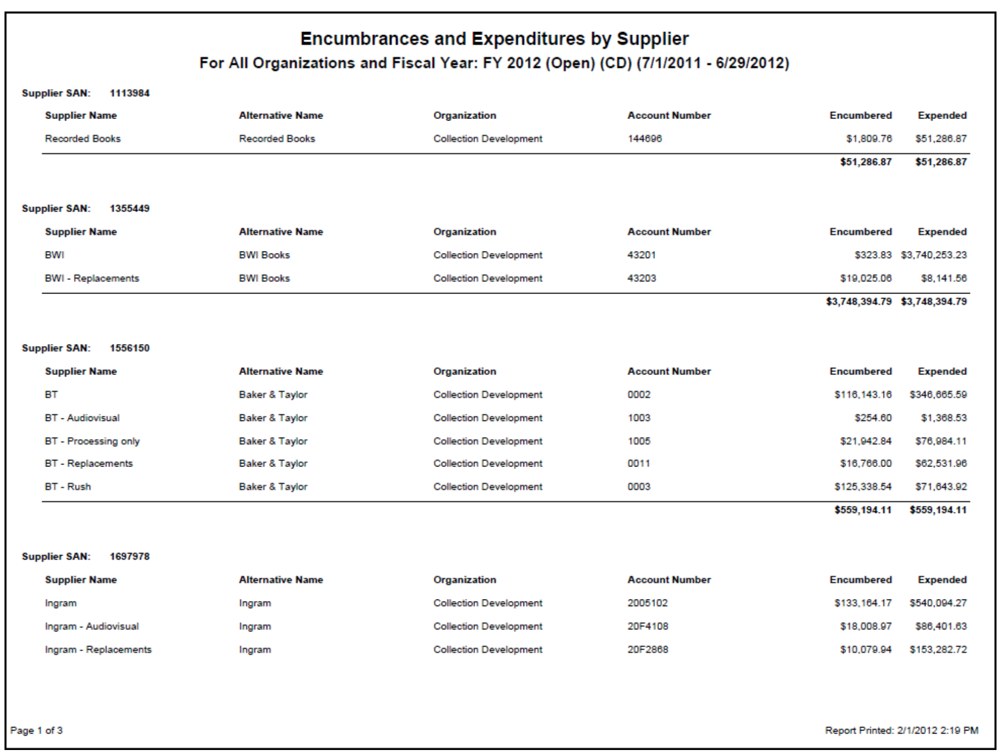


Improvements to Printed Claim Alert List

The printed Claim Alert List is now landscape, the columns were resized, the purchase order line item is included in the purchase order line item ID column, and the **Total Number of Claims** label was changed to **Total Number of Records**.

Encumbrances and Expenditures by Supplier Report

The new Acquisitions report, Encumbrances and Expenditures by Supplier, can be used to inform book jobbers how much money has been spent (expenditures) and how much money the library plans to spend (encumbrances) for a fiscal year.



Encumbrances and Expenditures by Supplier

For All Organizations and Fiscal Year: FY 2012 (Open) (CD) (7/1/2011 - 6/29/2012)

Supplier SAN: 1113984

Supplier Name	Alternative Name	Organization	Account Number	Encumbered	Expended
Recorded Books	Recorded Books	Collection Development	144696	$1,809.76	$51,286.87
				$51,286.87	**$51,286.87**

Supplier SAN: 1355449

Supplier Name	Alternative Name	Organization	Account Number	Encumbered	Expended
BWI	BWI Books	Collection Development	43201	$323.83	$3,740,253.23
BWI - Replacements	BWI Books	Collection Development	43203	$19,025.06	$8,141.56
				$3,748,394.79	**$3,748,394.79**

Supplier SAN: 1556150

Supplier Name	Alternative Name	Organization	Account Number	Encumbered	Expended
BT	Baker & Taylor	Collection Development	0002	$116,143.16	$346,665.59
BT - Audiovisual	Baker & Taylor	Collection Development	1003	$254.60	$1,368.53
BT - Processing only	Baker & Taylor	Collection Development	1005	$21,942.84	$76,984.11
BT - Replacements	Baker & Taylor	Collection Development	0011	$16,766.00	$62,531.96
BT - Rush	Baker & Taylor	Collection Development	0003	$125,338.54	$71,643.92
				$559,194.11	**$559,194.11**

Supplier SAN: 1697978

Supplier Name	Alternative Name	Organization	Account Number	Encumbered	Expended
Ingram	Ingram	Collection Development	2005102	$133,164.17	$540,094.27
Ingram - Audiovisual	Ingram	Collection Development	20F4108	$18,008.97	$86,401.63
Ingram - Replacements	Ingram	Collection Development	20F2868	$10,079.94	$153,282.72

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To generate the report, select **Encumbrances and Expenditures by Supplier** from the list of Acquisitions reports, and select a single branch or all branches (you cannot select multiple branches) under Parameters. The fiscal year records for the selected branch (or all branches) are listed. Select a fiscal year from the list, and click **Submit**.

Tip:
If library supports more than one fiscal year hierarchy, the report should be run for each period.

Suppliers are listed on the report if they are linked to:

- Purchase orders with line items and/or header charges for which amounts have been encumbered in funds linked to the selected fiscal year.
- Invoices with line items and/or header charges for which amounts have been expended from funds linked to the selected fiscal year.

The report lists suppliers by Standard Address Number (SAN), with suppliers that share the same SAN grouped together and listed in alphabetical order. If any suppliers do not have a SAN, they are grouped under the heading **Unknown SAN**. The encumbrances and expenditures amounts are sub-totalled for each supplier account, and then totalled for the supplier group.

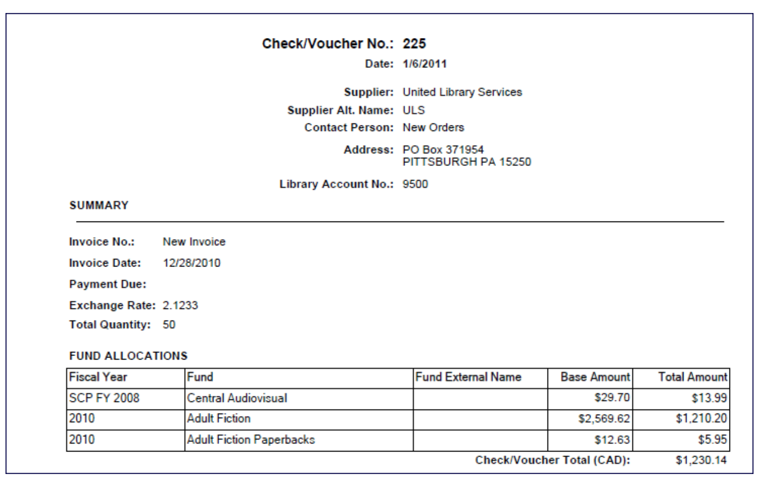
Initial Articles Ignored in Title Sort for Acquisitions Reports

Initial articles are now ignored for title sorting in the following reports:

- Canceled Titles by Supplier
- Invoice Title Status and Fund
- PO Title Status and Fund
- Uncataloged Titles with Holds

Invoice Voucher Columns Resized

The Fiscal Year column in the invoice voucher is now narrower to allow for a wider Fund column.



Check/Voucher No.: 225
Date: 1/6/2011

Supplier: United Library Services
Supplier Alt. Name: ULS
Contact Person: New Orders
Address: PO Box 371954
PITTSBURGH PA 15250
Library Account No.: 9500

SUMMARY

Invoice No.: New Invoice
Invoice Date: 12/28/2010
Payment Due:
Exchange Rate: 2.1233
Total Quantity: 50

FUND ALLOCATIONS

Fiscal Year	Fund	Fund External Name	Base Amount	Total Amount
SCP FY 2008	Central Audiovisual		$29.70	$13.99
2010	Adult Fiction		$2,569.62	$1,210.20
2010	Adult Fiction Paperbacks		$12.63	$5.95
			Check/Voucher Total (CAD):	$1,230.14

New Parameter for Purchase Order Line Item Workslips

A new Polaris Administration Acquisitions parameter, **PO line item workslips: Print on-order item data**, can be set at the system, library, or branch level to specify whether data from linked on-order items or data from the purchase order line item segments will be printed on purchase order line item workslips. When the parameter is set to **Yes**, and the purchase order line item has linked on-order items for each of its segments, the data from the linked on-order items will be printed. The segment data is printed only if no on-order items are linked to the purchase order line item. If a purchase order line item has some segments with on-order items and other segments without them, the item data is printed where it exists and a blank line appears for each segment that does not have on-order items. When the parameter is set to **No**, only the purchase order line item segment data will be printed on the purchase order line item workslip, regardless of the presence of on-order items.

Added Support for New On-Order Item Template Code

Polaris now supports copy-level codes in 970 tag $h for on-order item template matching in the automatic generation of on-order items. If the user opts to generate on-order items, and the copy-level code is in the 970 $h of the bibliographic record linked to the purchase order line item, the items are created using an on-order item template with this code in the template name.

Follow these general steps to use this new feature:

1. In Polaris, set up on-order item templates in Polaris with the code somewhere in the template name following "on-order." The codes can be alpha or numeric, and they can vary in length.
2. In the vendor's online selection tool, set up the item template codes. Some vendors allow you to set up these codes in advance and assign them during selection.
3. In the vendor's online selection tool, select the titles and include the template code as well as the other order data: $p (price), $l (branch), $f (fund). If the new code is included in the $h, the collection code and material type are not necessary because this information is pulled from the matching on-order item template.
4. In Polaris, import the bibliographic records to a record set, and bulk add them to a purchase order. If the order data includes this new code in the 970 $h, the code is stored in the purchase order line item segment table. The contents of the $h is not visible in the purchase order line item.

5. In Polaris, release the purchase order and select the option to create on-order item records. The system looks for an item template with all of these characteristics:
   - the template's name begins with On-order (with or without the hyphen);
   - the item template code in the template's name matches the code stored in the purchase order line item segment table;
   - and the branch in the **Assigned field** in the on-order item template matches the branch in the **Destination** field in the purchase order line item segment

If no on-order item template has these characteristics, an error message appears and no item record is created.

This new code is optional, and your library can continue to use the same on-order item templates as before if the 970 data does not include the $h.

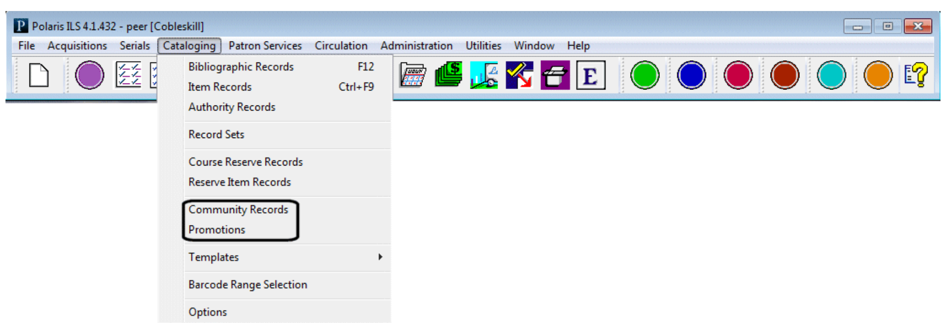
Cataloging

Polaris 4.1 offers the following changes in the Cataloging subsystem.

Changes to Cataloging Menu

If your library has licenses for Community Profiles and Feature It, the following new menu selections appear on the Cataloging menu: **Community Records** and **Promotions**. For more information, see "Community Profiles" on page 138 and "Promotion Records" on page 46. If your library does not have licenses for these products, the records are not listed.

This display by licensed product also applies to Course Reserves so that Course Reserve Records and Reserve Item Records do not display on the Cataloging menu unless your library has a license for Polaris Course Reserves. For more information, see "Records Listed in Polaris by License" on page 26.



Promotion Records

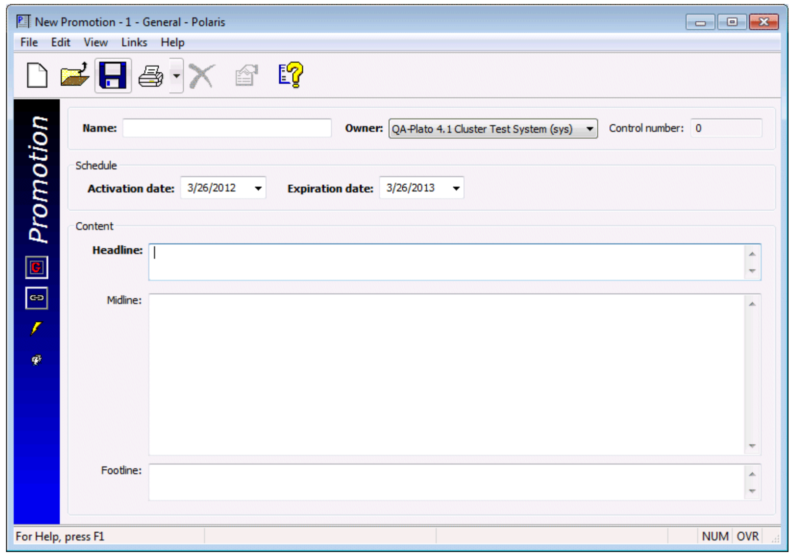
Promotion records are used to enter data for Feature It, a separately-licensed product that enables libraries to feature library materials, community organizations, events, or URLs in Polaris PowerPAC. Feature It can be used with or without community records, but your library must have a license for Community Profiles in order to feature community resources. For more information, see "Feature It: Promotions in Polaris PowerPAC" on page 174.

Multiple resources can be featured in the same promotion record, but the resources must be of the same type. For example, URLs and bibliographic records cannot be featured using the same promotion record. However, you could enter the same search triggers in several promotion records so that all the various featured resources appear in the PowerPAC when users enter those search terms.

Tip:
Promotion records appear in the Find Tool Objects box and the New dialog box only if the library has a license for Feature It.

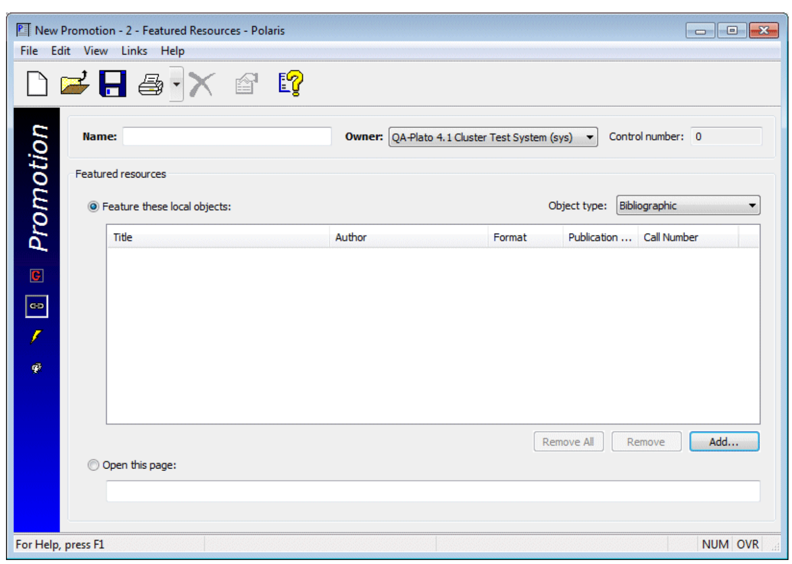
To create a new Promotion record, select **File, New** on the Polaris Shortcut Bar. The Promotion workform consists of the following views:

- **General** - This view contains the promotion record's name, owner, activation date, expiration date, headline, midline, and footline. The name, expiration date, activation date, headline, and owner are required fields. An overnight job uses the activation and expiration dates to determine whether the resources featured in the promotion should appear in Polaris PowerPAC.



Tip:
You cannot search remote databases when searching for resources to feature.

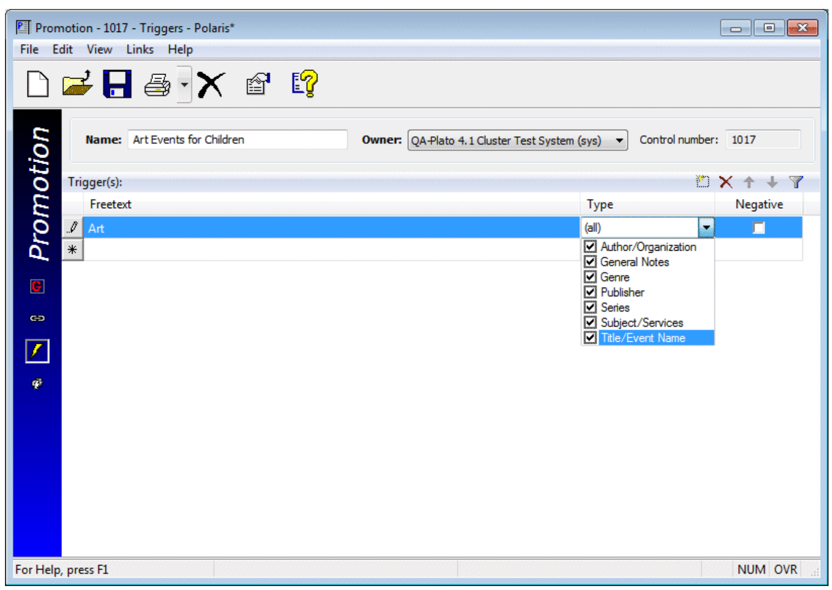
- **Featured Resources** - This view is used to specify bibliographic records, community records, event records, or web sites to feature in the Polaris PowerPAC. A promotion record can include community organization and event records, but not a mixture of community records and bibliographic records. To feature local resources, select **Feature these local objects**, select the type of resource to feature in the **Object type** box, click **Add** to open the Find Tool, and search for bibliographic or community records. To feature a web site, select **Open this page**, and type the URL.



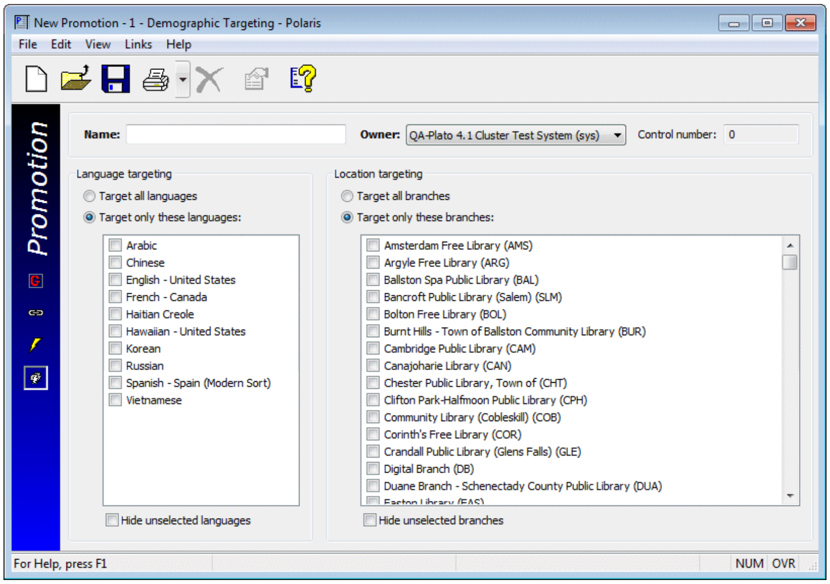
- **Triggers** - Use this view to define the PAC search terms and types of searches that trigger the display of the featured resources. This view can also be used to specify negative search terms that do *not* trigger the display of the featured resources.

  If the library has a license for Community Profiles, the following search types are available in the **Type** list box:
  - **Author or Organization**
  - **General Notes**
  - **Genre**
  - **Publisher**
  - **Series**
  - **Subject or Services**
  - **Title or Event Name**

- If the library does not have a license for Community Profiles, the following search types are available in the **Type** list box:
  - **Author**
  - **General Notes**
  - **Genre**
  - **Publisher or**
  - **Series**
  - **Subject**
  - **Title**



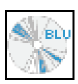
- **Demographic Targeting -** Use this view to target the resources to certain PAC users based on language or branch location. If a language or languages are selected, PAC users will see the featured resources only if they select one of these languages in the multilingual PowerPAC. If a branch location or locations are selected, PAC users will see the featured resources only if they select one of these branches in the PowerPAC **Switch branches** list.



Replacing Bibs Linked to Promotion Records

When you replace a bibliographic record, if it is linked to a promotion record, the links are transferred to the new record.

TOM Icon for Blu-ray Discs Changed

The Type of Material (TOM) format icon for Blu-ray™ discs now includes the letters **BLU** to make it easier for PAC users to distinguish Blu-ray discs from DVDs. 

Standardized Coding for E-book Type of Material (TOM)

The coding that produces a primary TOM of E-book was changed to conform to standard cataloging guidelines. In addition, the order of precedence was reversed for electronic resources and e-books. These changes eliminate problems such as e-books appearing with a primary TOM of electronic resource, and audio-ebooks and playaways appearing in search results for e-books.

A primary TOM of e-book and the icon  appears when the bibliographic record is coded as follows:

LDR06 (type of record) = a (language material)

AND

006/00 (form of material) = m (computer file/electronic resource)

AND

007 field containing both:

- **007/00 (category of material) = c (electronic resource)**

AND

- **007/01 (specific material designation) = r (remote)**

AND EITHER

- **008/23 (form of item for all materials except cartographic or visual materials) = o (online)**

OR

- **008/29 (form of item for cartographic or visual materials) = o (online)**

If your catalogers have changed coding in order to generate the e-books TOM, they will need to use bulk change to make sure the records conform to the new e-book definition.

A value of **o** (online) in 008/23 (or 008/29 for cartographic and visual materials) was first introduced with MARC Update No. 11 in 2010. Since then, the e-book TOM definition allowed either an **o** or an **s** in that position. With release 4.1, only a value of **o** will be associated with the e-book TOM.

Before this change, a search for e-books would retrieve audio-ebooks and also musical and non-musical sound recordings that are cataloged according to national standards for playaways.

This is because of the presence of the 007/00=c value as an *OR* condition in the definition. In the new definition for e-books, the presence of 007/00=c is being changed from *OR* to *AND*. Therefore, audio-ebooks and playaways will no longer meet the TOM coding requirements for e-books and won't be retrieved with an e-book search.

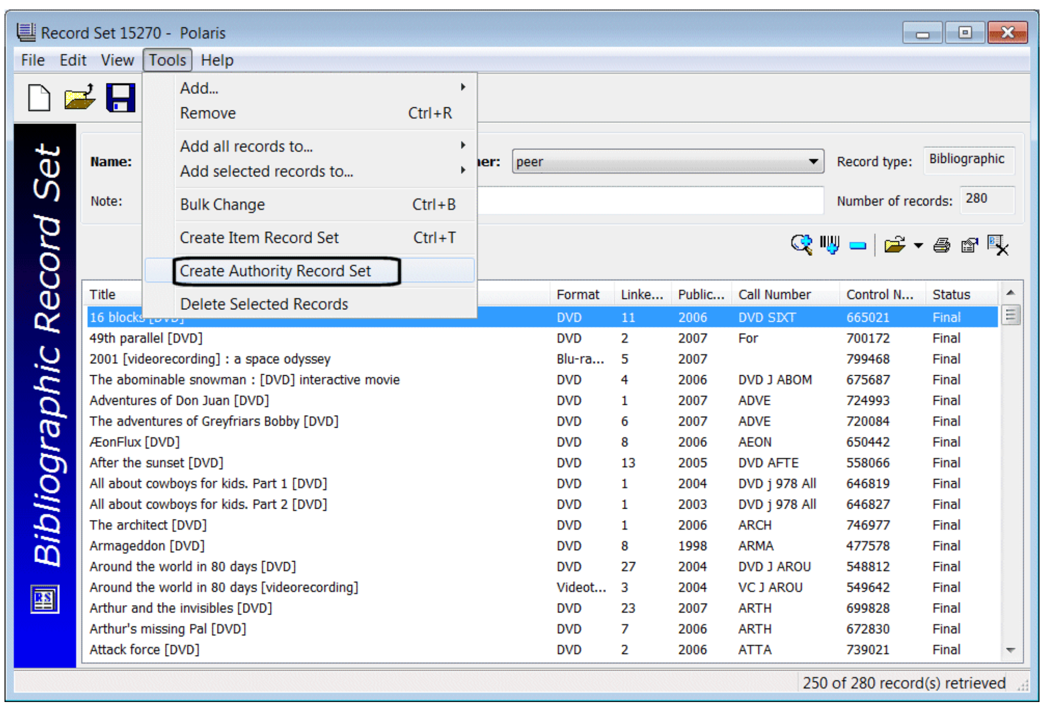
However, a search for electronic resources does retrieve any e-books that contain 07/00=c. Correcting this problem would require a change to the electronic resources TOM definition, which is not being done in release 4.1. But, you can exclude e-books from searches for electronic resources using the PAC Limit By Display definition for electronic resources.

To assist libraries in cleaning up their data, Polaris Library Systems will provide an alter script that will run during the upgrade process to identify all bibliographic records whose primary TOM is e-book, and place those records in a bibliographic record set named **Ebook Type Of Material, Pre-4.1 Definition (sys)** owned by the system. After the upgrade, libraries can open the record set and use bulk change to adjust the fixed fields, so the records conform to the new definition.

Create Record Sets from Other Cataloging Record Sets

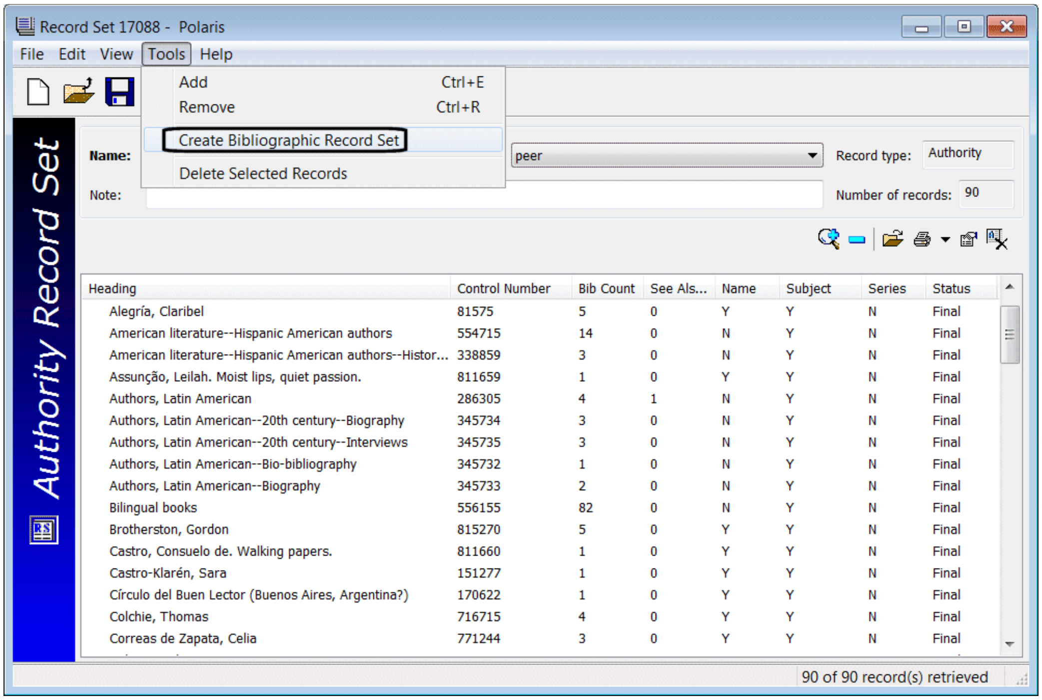
You can now create an authority record set from a bibliographic record set and a bibliographic record set from an authority record set.

From the Bibliographic Record Set workform, select **Tools, Create Authority Record Set**. The new authority record set contains all the authority records linked to any of the bibliographic records in the bibliographic record set.



A dialog box appears where you enter the name of the new authority record set.

From the Authority Record Set workform, select **Tools, Create Bibliographic Record Set**. The new bibliographic record set contains all the bibliographic records linked to any of the authority records in the record set.



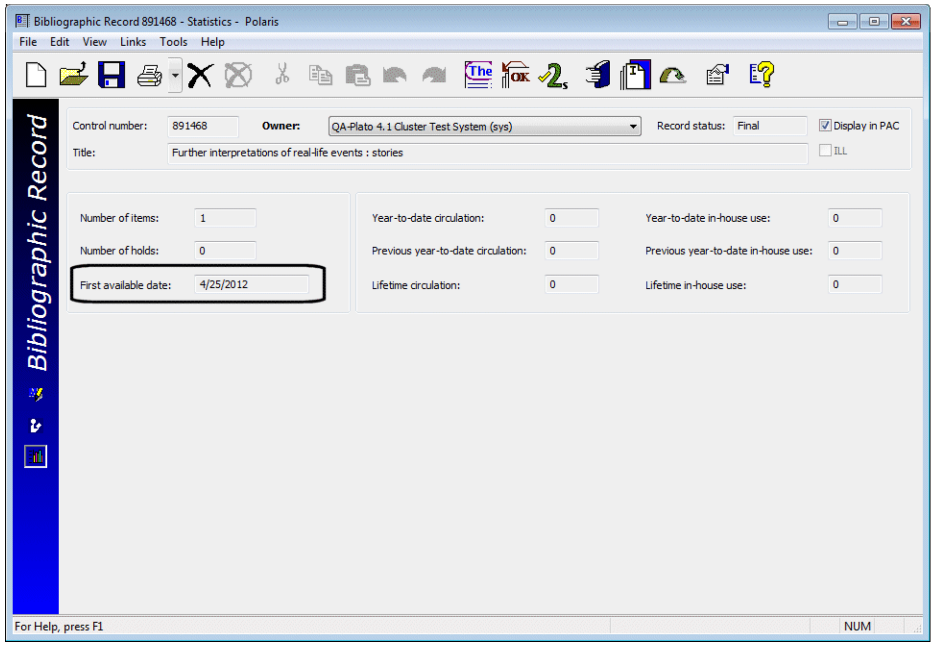
A dialog box appears where you enter the name of the new bibliographic record set.

Staff Client Profile Renamed

As part of this change, the staff client profile **Find Tool: Record set size warning threshold** was renamed to **Find Tool/record set-to-record-set creation: Record set size warning threshold** because the limit also applies to record sets created from other record sets. A warning message will now appear if the number of records will exceed the number specified in the profile when you create an item record set from a bibliographic record set; a bibliographic record set from an item record set or an authority record set; or an authority record set from a bibliographic record set.

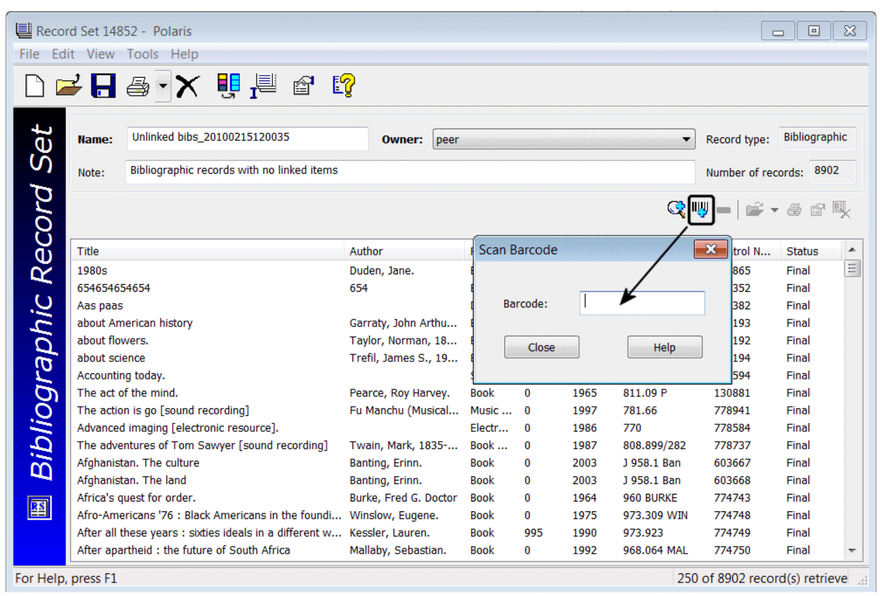
First Available Date Added to Bib Record Statistics View

The Statistics view of the Bibliographic Record workform now displays the **First Available Date**.



Add Bibs to a Record Set by Scanning Item Barcodes

On the Bibliographic Record Set workform, you can scan an item's barcode to add the linked bibliographic record to the record set.



Item Record Sets

You can new select **Tools, Add..., RFID Read Tags** from an item record set. When this option is selected, all tags on the RFID pad are read, and the items are added to the record set.

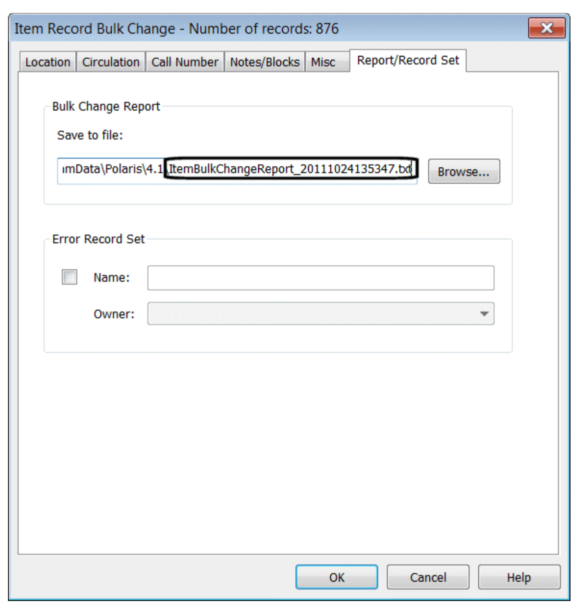
Creating Content Carousels Using Record Sets

You can create record sets in the Polaris Staff Client and use them to display visual “content carousels” in the PAC. These content carousels can be displayed on the PAC portal page. If your library has Community Profiles, content carousels created from record sets can be displayed in the community profile in the PAC.

For more information, on displaying content carousels in the portal page, see “Setting Up Content Carousels for the Portal Page” on page 170. For information on displaying content carousels for community records, see “Creating/Editing Community Records in the Polaris Staff Client” on page 138.

Bulk Change Report

The Item Bulk Change dialog now uses a default report name so a report name does not need to be entered. The default report name is ItemBulkChange with a 16-character representation of the current date and time.



If you specify barcodes to be added to items during bulk change, and the system cannot assign barcodes to some or all the records, an error message appears, and the report shows the reason barcodes could not be assigned, and the number of barcodes that were not assigned for each reason.

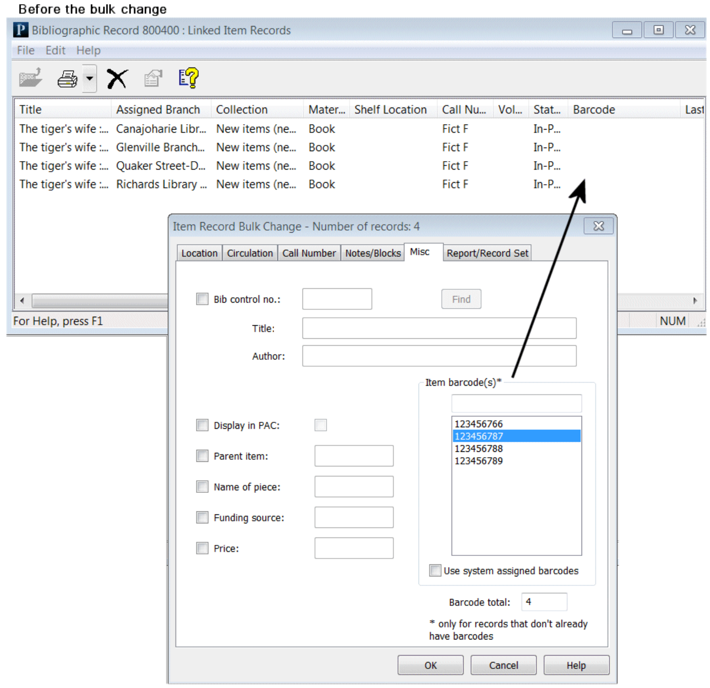
> Number of barcodes not assigned because of detected duplicates:
>
> Number of barcodes not assigned because of incorrect format:
>
> Number of items not assigned a barcode because not enough barcodes specified:
>
> Number of items not assigned a barcode because item already had a barcode:

In the details section of the report, each item that could not be assigned a barcode is listed along with the reason.

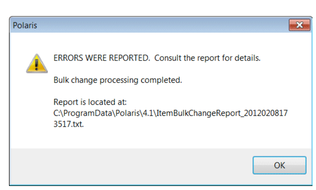
Refresh Item List After Ad Hoc Bulk Change

When items in a list box are bulk changed using the **Ad hoc bulk change** function, the list view is refreshed immediately.

Before the bulk change

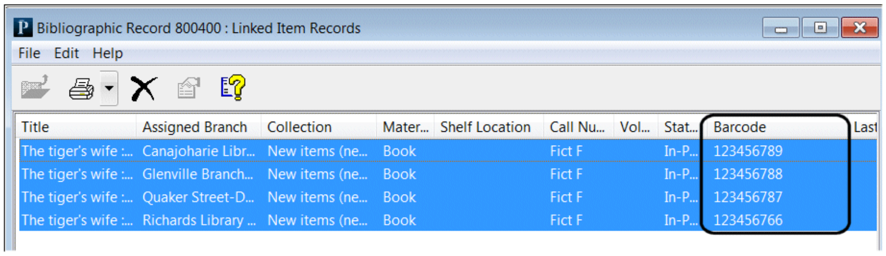


A message notifies you when the bulk change process is complete, and it includes a warning if there were any errors in the bulk change process.



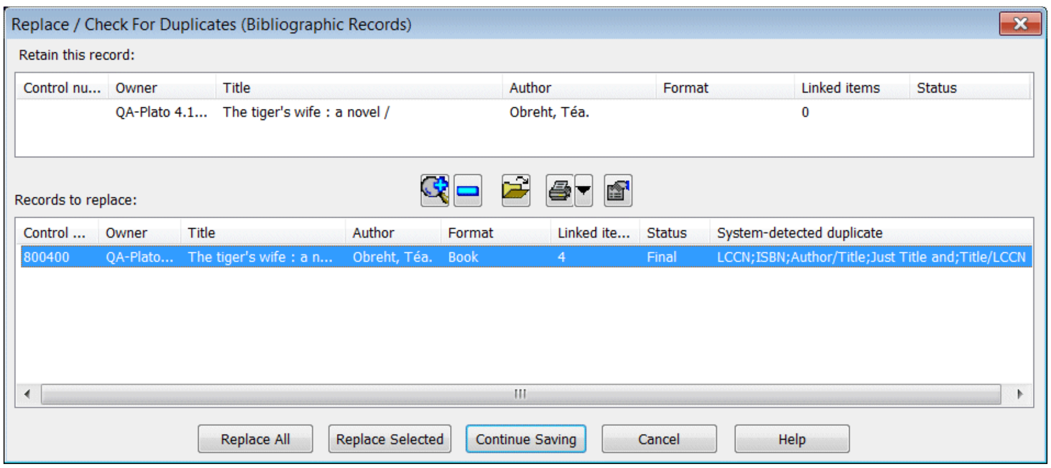
After you click **OK** on the message box, the item record list view is refreshed automatically. If you made changes to fields displayed in the list view, the changes are displayed immediately. The title is also updated immediately if you bulk changed the bib control number.

After the bulk change



Widened Column for Duplicate Reason Display

When a duplicate bibliographic record is displayed in the Replace/Check For Duplicates dialog box, the **System-detected duplicate** column is expanded to display the reason the record was determined to be a duplicate.



Changes to Importing

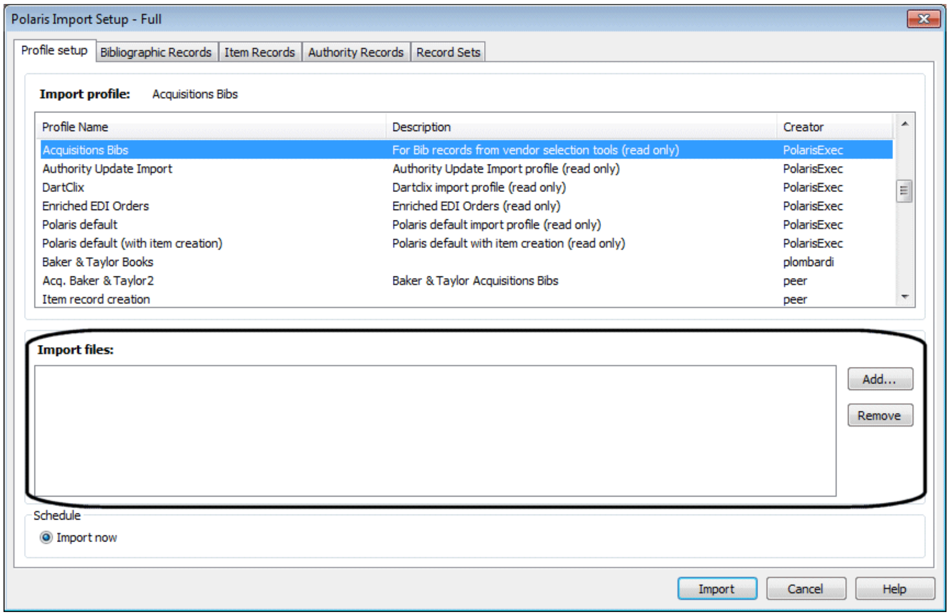
Significant changes were made to the import process that allow users more control over when import jobs run and allow multiple files to be added to the same import process. In addition, we updated import profiles to include more options for handling duplicates, and changed the way embedded holdings tags are marked as processed.

Import Process Moved from Staff Client to Server

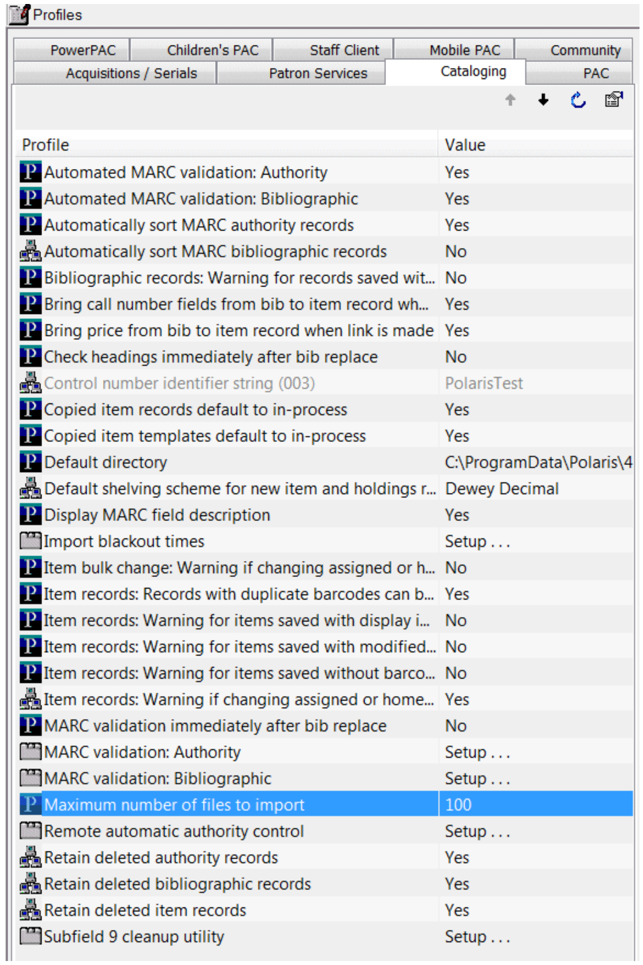
The actual import process now takes place on the server. This allows staff members to initiate an import and then continue doing other tasks using the Polaris staff client.

Multiple Files in the Same Import Process

On the Profile setup tabbed page of the import profile, you can now specify multiple files to import in one import process. Click **Add** to browse and select up to 50 files at once to add to the list. If you need to add more than 50 files, click the **Add** button again and select the files. To remove a file from the list, select a file and click **Remove**.



The default maximum number of files that can be imported at once is 100, but you can change the default in the Polaris Administration Cataloging profile **Maximum number of files to import**.



Added Two SQL Jobs for Importing

With the addition of these new importing jobs, the number of SQL jobs for importing is now three. These jobs will run every three minutes with one minute apart from each other. No single user can have more than one import job running at a time, which allows multiple users to import more efficiently.

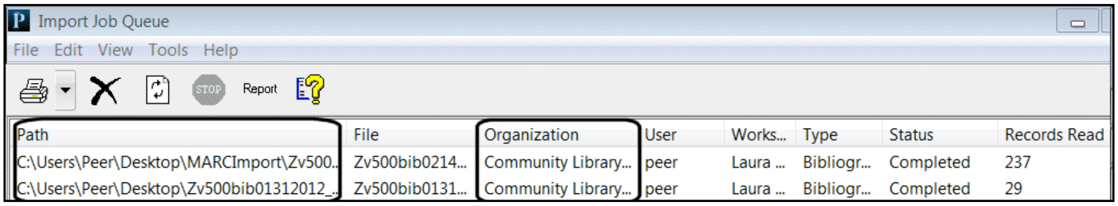
Updates to Import Reports

Users no longer need to enter a report filename or location in the import profile; all import reports are available from the Import Job Queue. In addition, the import error messages were improved to include the reason the record failed. For example, **Record{0} not created. Error creating subfield data**. Import reports are available from the Import Jobs Queue. Select the import file to print and click the **Report** button. Multiple reports can be open simultaneously.

You can now print a report for an import job that is currently running. Since the report data is written on a record-by-record basis, the file can be printed at any point during the import process.

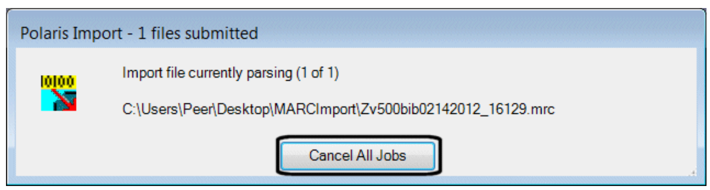
New Columns in the Import Job Queue

Two new columns were added to the import jobs queue: the **Path** column displays the entire path of the imported file, and the **Organization** column displays the branch where the import was initiated.

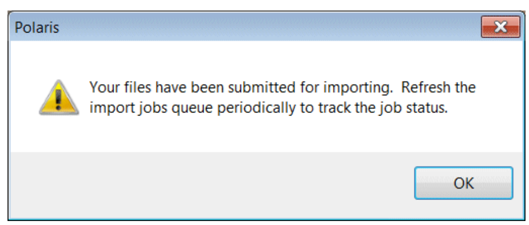


Cancel an Initializing Import Job

When you launch an import, the initial file parsing takes place on the staff client. During this brief initializing period, you can cancel the import process from the message box by clicking the **Cancel All Jobs** button.



After this initializing step is complete, the following message appears:



When one of the three import jobs detects the import submission, it processes the files in the order in which they were entered. If you have selected multiple files for importing, they are processed individually. A total of three import jobs can run concurrently on the same server, but only one import job can run at the same time for a single user. To check the status of the import, go to the Import Jobs Queue and refresh it periodically.

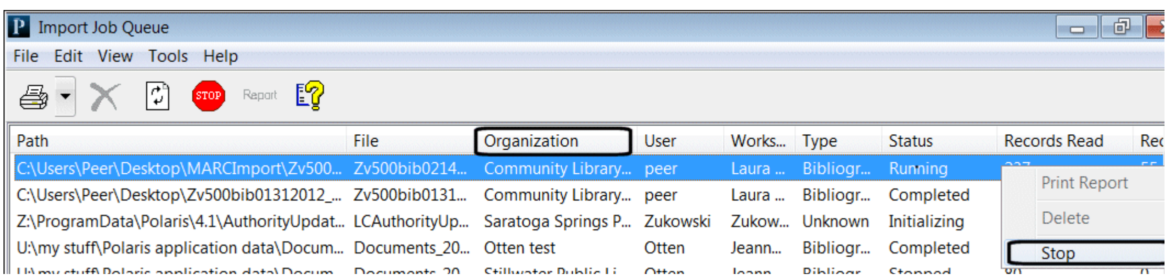
Manage the Import Jobs Queue

Import jobs have one of the following statuses in the Import Jobs Queue:

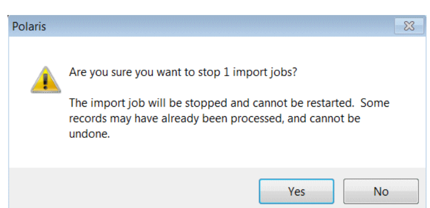
- **Pending** - Initializing is completed, but processing has not begun
- **Running** - Import processing is occurring
- **Completed** - Import processing has finished successfully
- **Stopped** - Stopped by an authorized user
- **Blacked out** - Automatically paused by the system because the job was running when a blackout period arrived. The job resumes automatically when the blackout period is over.

If you have permission to do importing, either **Import bibliographic, item and authority records** or **Express importing**, you can stop or delete your own import jobs from the Import Jobs Queue. However, to stop or delete import jobs initiated by other staff members, you need the permission **Manage import jobs for this branch: Allow** for the branch organization where the job was initiated. Staff members who require control over importing for multiple (or all) branches must be granted the **Manage import jobs for this branch: Allow** permission for each branch.

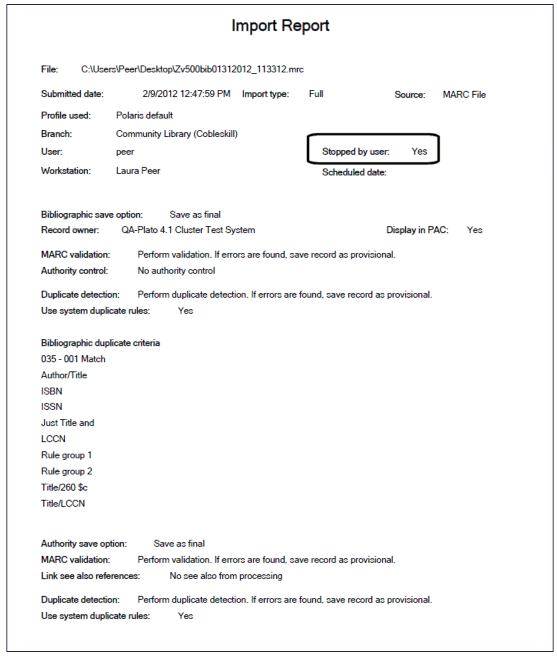
To stop a running or pending import job from the Import Jobs Queue, select the import job, and click the **Stop** button in the toolbar, or right-click, and select **Stop** from the context menu.



A message informs you that a stopped import job cannot be restarted and asks you to confirm that you want to stop the import.



Click **Yes** to stop the import. The import report indicates the import job was stopped.


Import Report

File: C:\Users\Peer\Desktop\Zv500bib01312012_113312.mrc

Submitted date: 2/9/2012 12:47:59 PM Import type: Full Source: MARC File

Profile used: Polaris default
Branch: Community Library (Cobleskill)
User: peer Stopped by user: Yes
Workstation: Laura Peer Scheduled date:

Bibliographic save option: Save as final
Record owner: QA-Plato 4.1 Cluster Test System Display in PAC: Yes

MARC validation: Perform validation. If errors are found, save record as provisional.
Authority control: No authority control

Duplicate detection: Perform duplicate detection. If errors are found, save record as provisional.
Use system duplicate rules: Yes

Bibliographic duplicate criteria
035 - 001 Match
Author/Title
ISBN
ISSN
Just Title and
LCCN
Rule group 1
Rule group 2
Title/260 $c
Title/LCCN

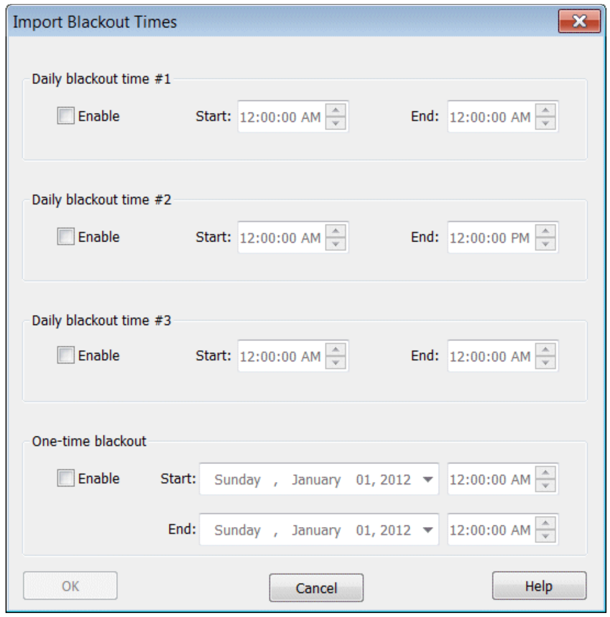
Authority save option: Save as final
MARC validation: Perform validation. If errors are found, save record as provisional.
Link see also references: No see also from processing

Duplicate detection: Perform duplicate detection. If errors are found, save record as provisional.
Use system duplicate rules: Yes

Set Blackout Times for Importing

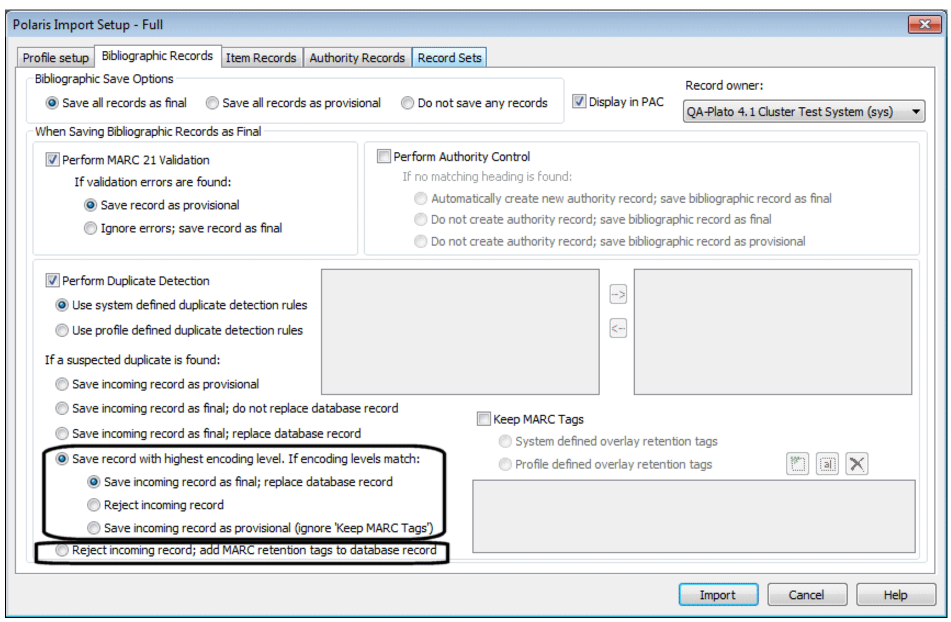
The Polaris system automatically imposes blackout times when importing cannot be done because critical overnight jobs are running. With a new system-level Cataloging profile, **Import blackout times**, the library can now specify up to three daily blackout times as well as a one-time blackout period. If a user attempts to launch an import job during a blackout time, the file is initialized and then added to the queue with a status of pending. If an import job is running and fails to complete before the beginning of a blackout time, the job is paused with a status of “blacked out”. When the blackout period is over, the job automatically resumes.

You must have the system-level Cataloging permission, **Modify import blackout times: Allow**, to use the profile. To set blackout times, select **Administration, Explorer, System, Profiles, Cataloging**. Then double-click the **Import blackout times** profile to open the Import blackout times dialog box. Specify up to three daily blackout times and/or a one-time blackout time by selecting the **Enable** box and setting the start and end times for the daily blackout times and a start and end dates and times for the one-time blackout period.



New Import Options for Handling Duplicate Records

On the Bibliographic Records tab of the Polaris Import Setup window, you can now specify how to handle duplicate records when the encoding level of the incoming record matches the encoding level of the existing database record.



The following options were added:

- **Save record with highest encoding level. If encoding levels match:**
  - **Save incoming record as final; replace database record**
  - **Reject incoming record**
  - **Save incoming record as provisional (ignore 'Keep MARC Tags')**

If you select **Save incoming record as final; replace database record** or **Reject incoming record**, you can select **Keep MARC tags** (either system- or profile-defined) to retain specific tags from the replaced database record.

Important:
Check your library's import profiles to make sure that the duplicate detection and replacement options are set to take advantage of this development. For example, if you have selected the option **Save incoming record as final; automatically replace database record using encoding level restrictions**, the new option **Save record with highest encoding level. If encoding levels match** will be selected and underneath that, the **Save incoming record as final; replace database record** will be selected. You could leave the option to save the record with the higher encoding level, but select **Reject incoming record** if the encoding levels match.

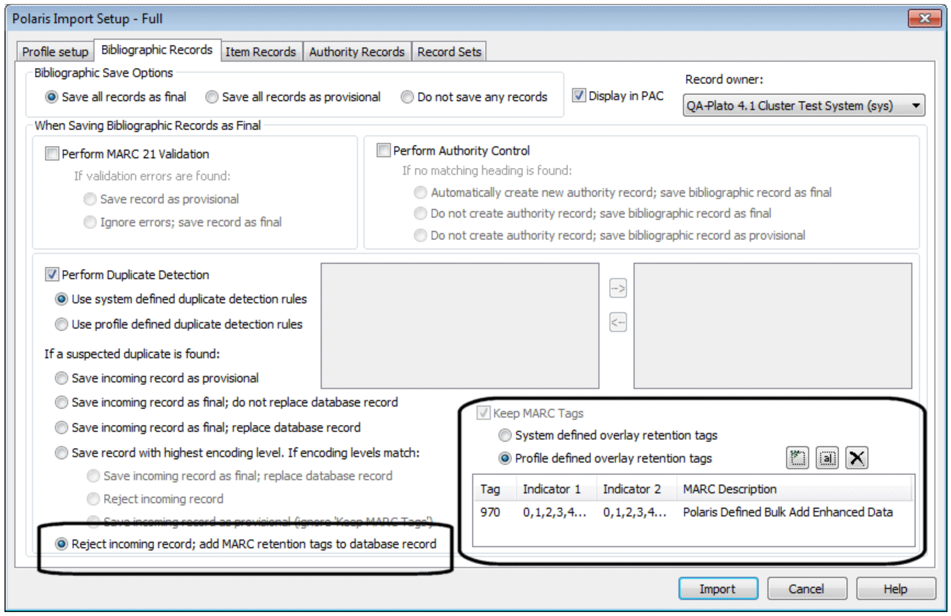
In addition, the label **Reject incoming record; automatically add specific MARC retention tags** to database record was shortened to: **Reject incoming record; add MARC retention tags to database record**.

Pre-existing Holdings Tags Marked With $9 and Text

Before item records are created from embedded holdings data in imported bibliographic records, the system first checks for the presence of existing embedded holdings tags. If embedded holdings tags are found and they are not already marked with a $9 subfield, the tags are marked with the subfield 9 and the text **Tag retained from duplicate overlaymmm dd yyyy hh:mm[AM/PM].** The marked tags are not used to create item records. This occurs without a Polaris Administration parameter. As with other tags marked with a system-supplied $9 and text, these tags can be removed using the **Subfield 9 cleanup utility** Cataloging profile in Polaris Administration.

Read-Only PolarisExec Acquisitions Bibs Profile Changed

The Acquisitions Bibs profile was changed to reject all incoming bibliographic records that are determined to be duplicates of existing database records, while retaining the 970 tags from both the incoming rejected records and the database records. When you use the Acquisitions Bibs profile, the **Reject incoming record; add MARC retention tags to database record** option is selected.



If your library has renamed this profile, no changes will be made to your copied profile; this change was made to the PolarisExec read-only profile.

If your library uses the Acquisitions Bibs profile without renaming it, and this change to reject all incoming duplicates while retaining the 970 tags does not meet your library’s needs, rename the profile and change the settings.

Read-Only PolarisExec DartClix Profile Deleted

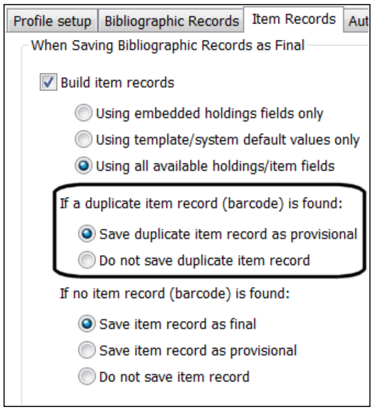
The DartClix import profile was deleted and no longer appears in the list of PolarisExec import profiles.

Prevent Provisional Items With Duplicate Barcodes

A new Polaris Administration Cataloging profile, **Item records: Records with duplicate barcodes**, can be set to **Yes** or **No** at the system, library, or branch level to allow or prevent the creation of provisional items if a duplicate barcode is detected.

When you create a new item or save an existing item, and its barcode is a duplicate of a barcode for an existing item, the new profile is checked. If the profile it is set to **No**, the item cannot be saved provisionally.

The profile setting does not affect bulk item creation, bulk change, or item creation during importing. When barcodes are assigned during bulk creation or bulk change, duplicate barcodes are never assigned. In the import profile, users with the appropriate permissions can still select the import option to create provisional item records when duplicate barcodes are encountered.



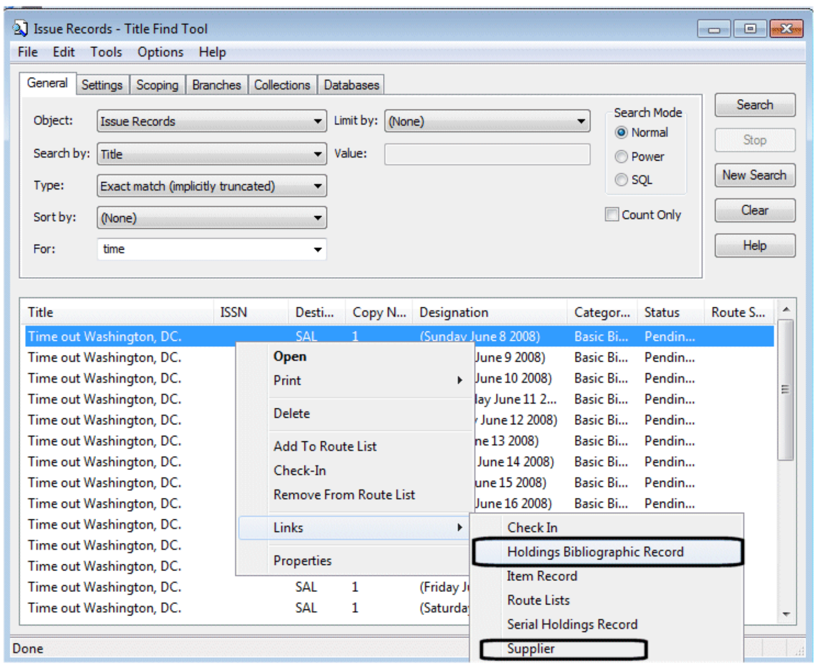
Serials

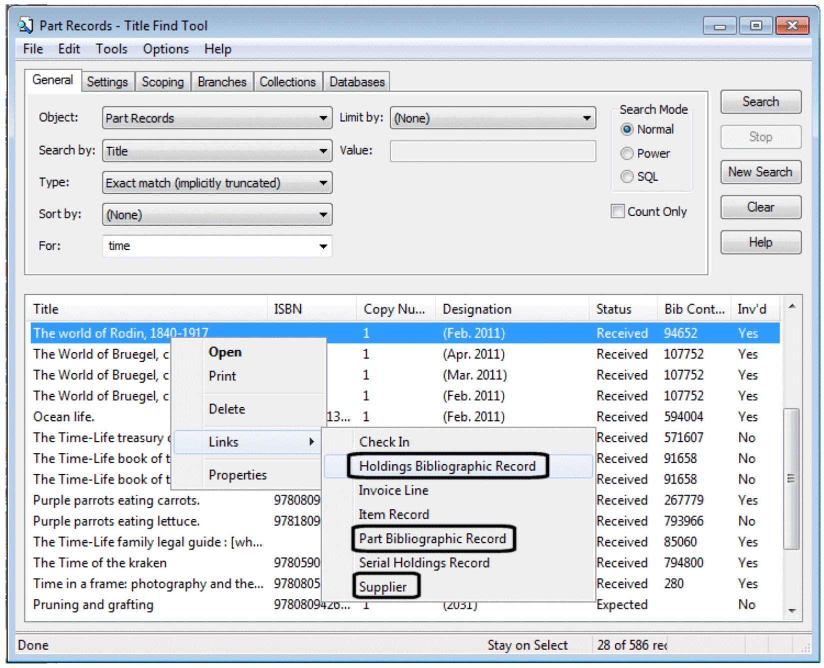
The following changes were made to Polaris Serials.

Link from Serial Issue/Parts to Bib and Supplier Records

The following additional options are now available for linking from serials records to bibliographic and supplier records:

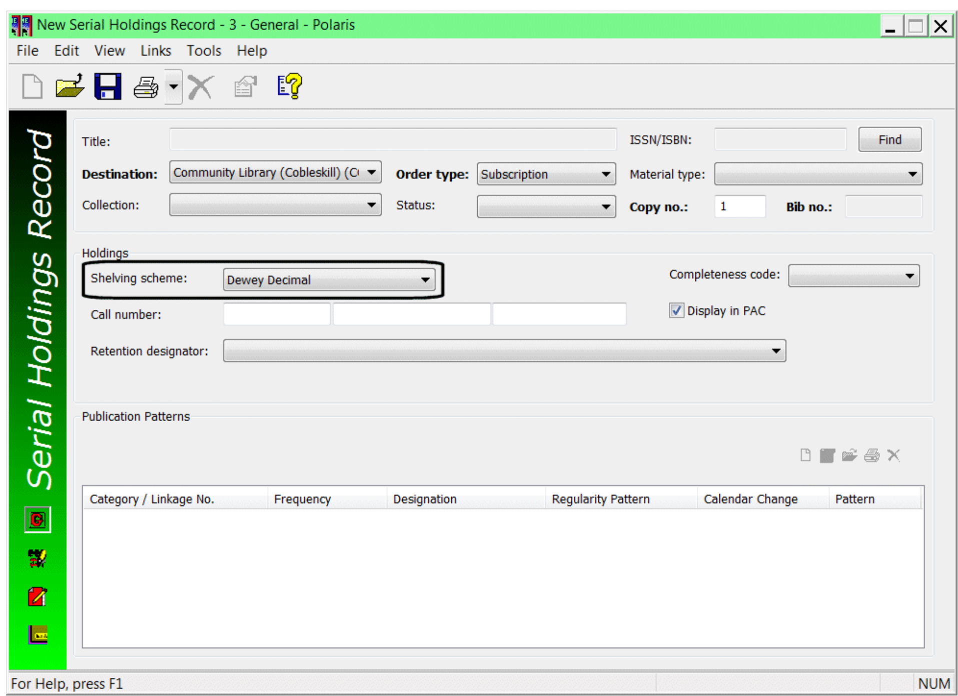
- Link to the serial holdings record's bibliographic record from the serial issue or part displayed in the Issue or Part workform or listed in the Find Tool results or a list box.
- Link to the supplier record from the serial issue or part displayed in the Issue or Part workform or listed in the Find Tool results or a list box.





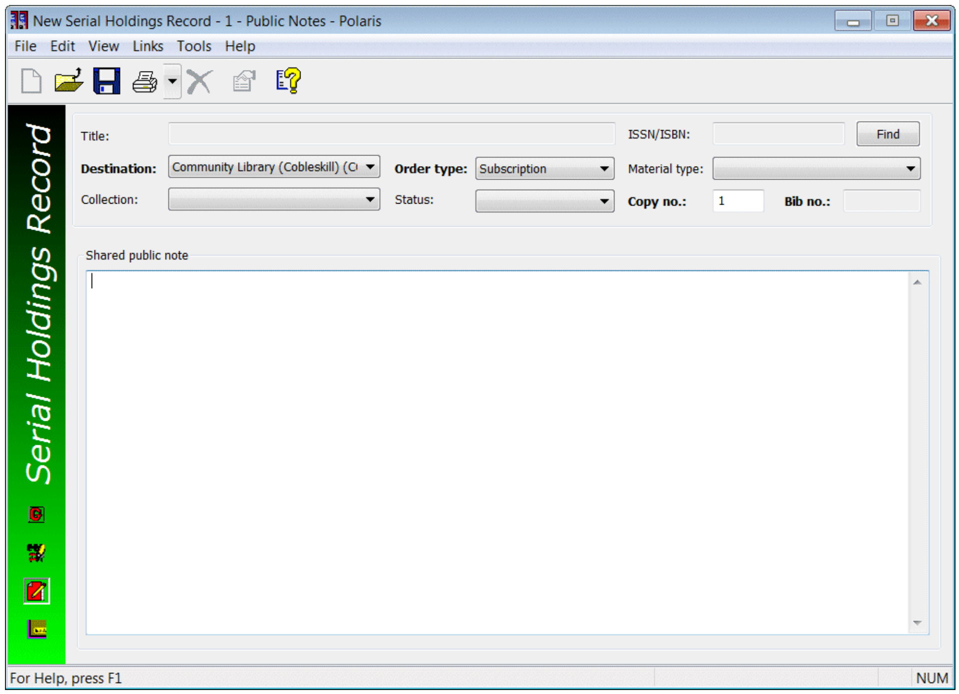
Shelving Scheme in New Serial Holdings Records

The default shelving scheme in a new serial holdings record will now use the shelving scheme defined in the Cataloging profile: **Default shelving scheme for new item and holdings records**. This profile was renamed from **Default shelving scheme for new item records.**



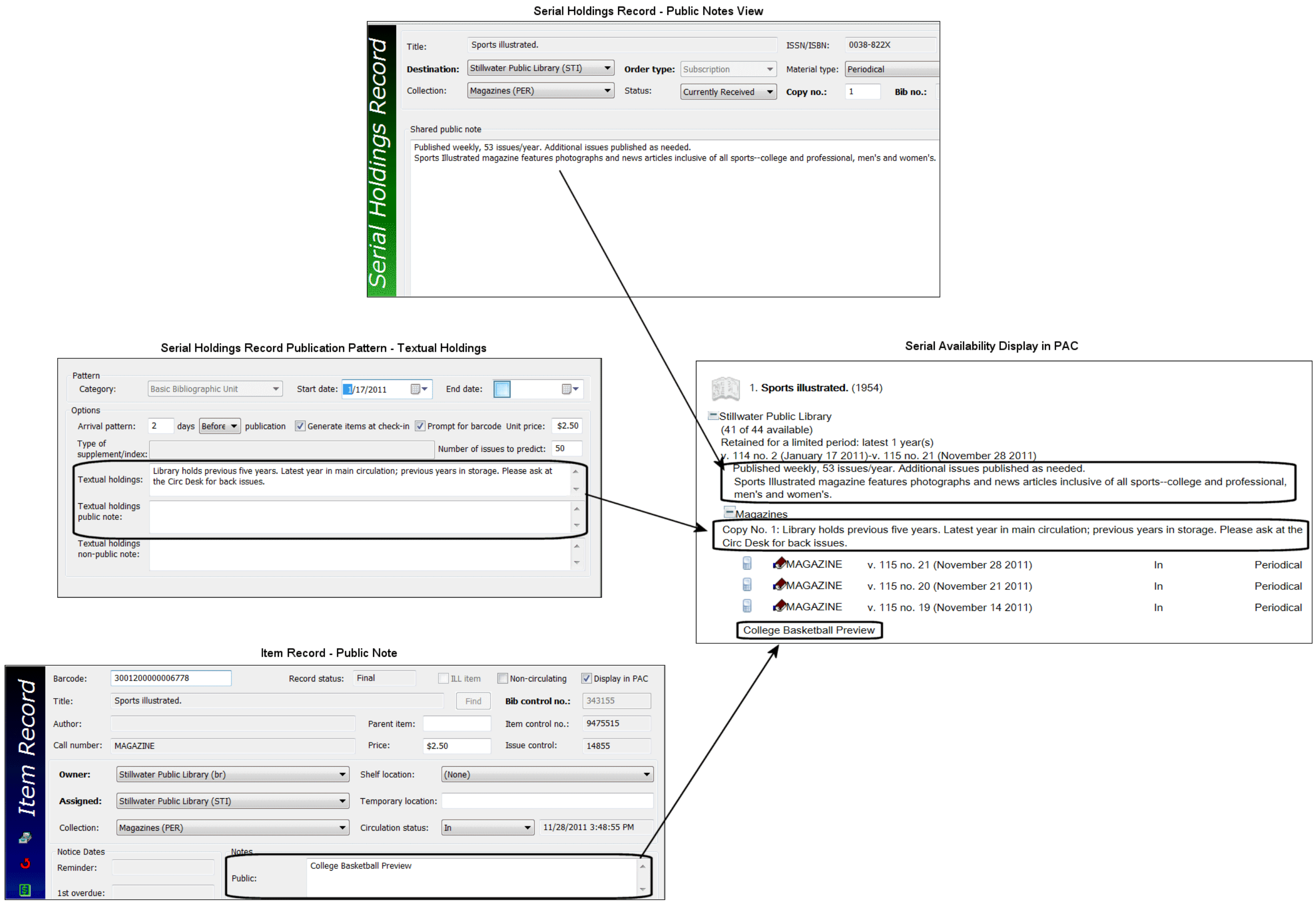
New Serial Holdings Record Notes View

To allow users more flexibility in displaying serials in the Polaris PowerPAC, a new Public Notes view was added to the Serial Holdings Record workform, and the current notes view was relabeled. The existing Notes view was changed to Staff Notes. The **Shared public note** box on the Public Notes view allows up to 4,000 characters in a multi-line text box. When you enter line breaks in this box, they will be included in the PAC display. The Serial Holdings Record now has four views: **General**, **Staff Notes**, **Public Notes**, and **Orders**.



In addition, libraries can now specify whether to display the textual holdings notes from the serial holdings record, and if so, whether to display them when the user hovers over the pushpin icon  , or to display them immediately without the icon. Before this change, these notes displayed only with the pushpin icon. To define the display of serials in the PAC, a new PowerPAC profile **Item availability: Display textual holdings notes** was added and an existing profile **Item availability: Display notes** was changed. Both profiles offer the options of **Icon**, **Do not display** or **Text** for the Availability view. See "PAC Profiles" on page 11.

The example below shows serials notes in PAC with the profiles set to **Text**.



Item Barcode Format Now Checked for Serial Items

When serial items are created from serial issues at check in or from the Serial Issue workform (Tools, Create Item), the item barcode is now checked for valid format. If the barcode format is invalid, a message now appears, and only users with permission to override this message can continue saving the serial item. For more information, see "Permission to Save Records with Invalid Barcodes" on page 31.

Initial Articles Ignored in Title Sort in Serials Reports

Initial articles are now ignored in the following Serials reports:

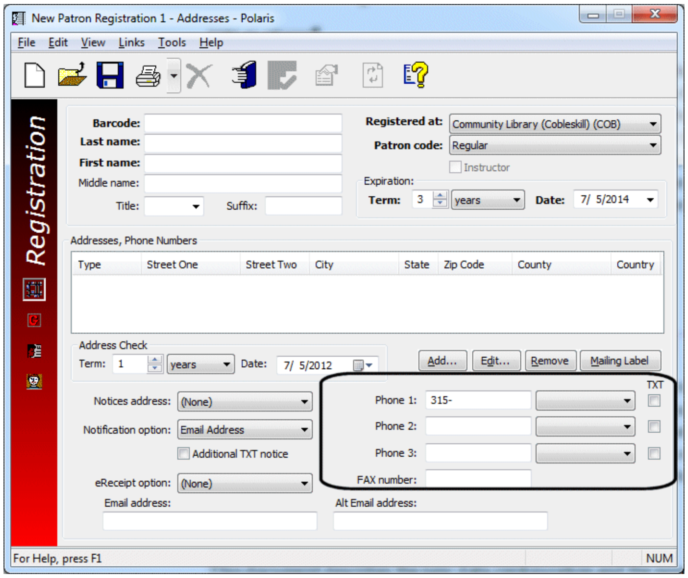
- Issues or Parts Not Received
- Serial Holdings Records by Branch
- Titles Not Automatically Renewed

Patron Services/Circulation

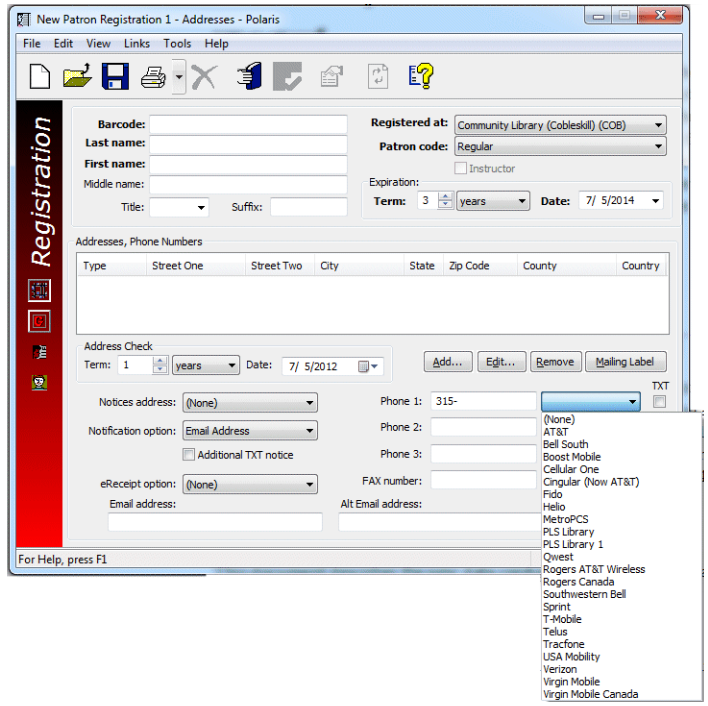
Polaris 4.1 includes the following improvements in patron services and circulation.

Patron Phone Number Fields

The Mobile Phone field has been removed from the patron record, the Patron Registration workform, and other locations in the Polaris application. The Patron Registration workform now contains three **Phone** fields, which replace the **Telephone** fields of previous versions. (The **Fax number** field is unchanged.)



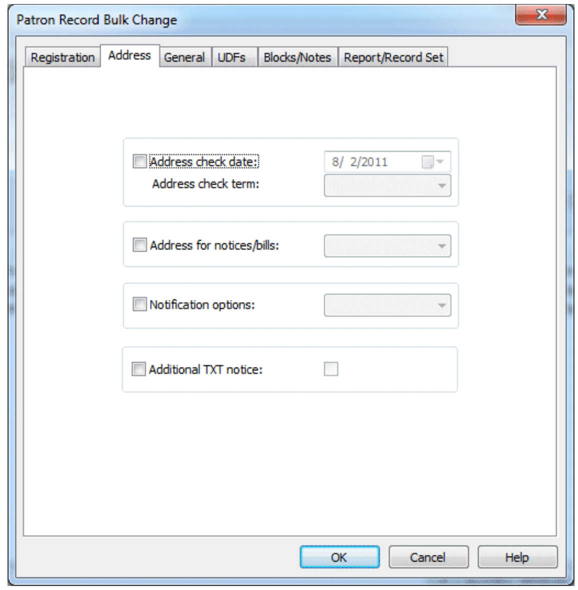
A mobile phone service **Carrier** field is available for each **Phone** field, and any or all of the phone numbers can be a mobile number. Any one **Phone** number can be designated as **TXT**, allowing for text notification to that number. You must specify a carrier for the phone number if the **TXT** option is selected for that number.



The patron's preferred **Notification option** can be set to **Phone 1**, **Phone 2**, or **Phone 3** for telephone notification. If the selected phone number is a mobile phone and the corresponding phone field has a carrier, telephone notices go to the mobile phone.

The **TXT** check box located next to each **Phone** field indicates which number, if any, will be used for text message notification if the **Notification option** is set to **TXT messaging.** Only one phone can be designated for text messages, but a phone that has been selected for telephony can also be selected for additional TXT notices. If the **Additional TXT notice** option is checked, the phone number with the **TXT** check box selected receives the additional text notice. A phone number with **TXT** check box selected must also have a carrier.

On the Patron Record Bulk Change workform - Address tab, the **Additional TXT message** field has been renamed **Additional TXT notice.** (The address fields for monthly statement and invoice have been removed from the Address tab, since they are not used.)

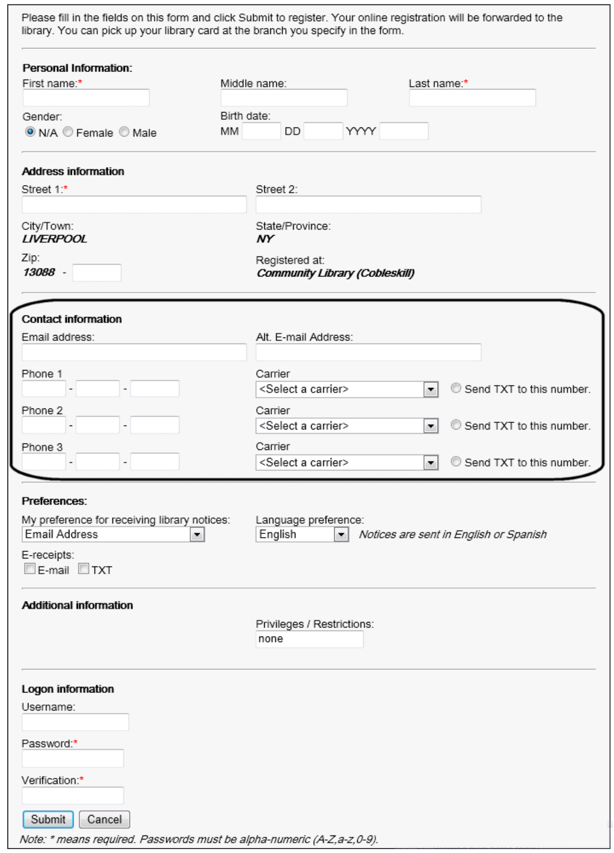


Searching for Patron Records - Phone Access Point

A single Find Tool search access point and limit-by option called **Phone** searches all three **Phone** fields in the patron record. (In previous versions of Polaris, the **Telephone** access point searched all three **Telephone** fields as well as the **Mobile phone** field. The **Mobile phone** access point searched the **Mobile phone** field only.)

Phone Numbers in PAC Patron Account

Patrons can now indicate which of three **Phone** fields in the PAC self-registration form should be used for TXT messages, TXT notification, or TXT eReceipts (see "E-Mail and Text Message Receipts (eReceipts)" on page 96). If the TXT option is selected, the patron must select a carrier for that phone number. The patron can select the same phone number or another phone number to receive voice phone notices if you offer that notification option.



The Update Preferences page in the PAC patron account offers similar options. If a patron registration **Phone** field has been selected for TXT notification and a carrier is specified, that phone number is the default phone number displayed when the patron selects the **Text it!** icon in the PAC item availability display to send a call number by text message. When a patron updates a phone number, the system now performs a validation check:

- The phone number may have either 7 digits or 10 digits.
- The digits can be separated with periods, hyphens, or spaces, or may exist without separation.
- Valid patterns are ### #### or ### ### ####
- The first three digits of a 10-digit number may be enclosed in parentheses.

The validation takes place in any of the three phone number fields, only if the patron has changed the phone number.

For more information about setting up self-registration and account updates in Polaris PowerPAC, see "Setting Patron Access Options" in the *Polaris Public Access Administration Guide*. For more information about setting up text messaging, see "Delivering Notices by Text Message" in the *Polaris Patron Services Administration Guide* or the equivalent topics in staff client online Help.

Converting Mobile Phone Numbers At Upgrade

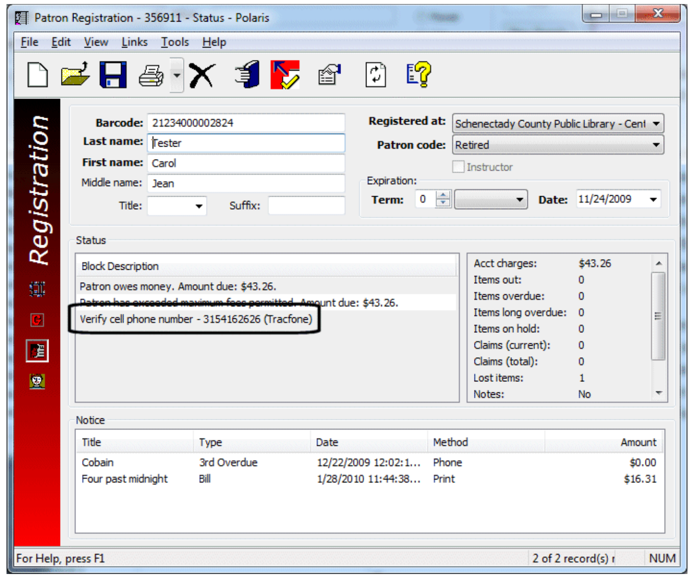
When you upgrade to Polaris 4.1, existing patron records that contain a mobile phone number are converted to the new data configuration. Because the data requirements for the old **Mobile Phone** field were different from the **Telephone** field (now **Phone**), a data conversion routine is applied.

If the patron record contains a mobile phone number and carrier, and if any one of the **Phone** fields is empty, the mobile phone number is copied to the first available **Phone** field along with the carrier. Typically the patron record will already contain a number for **Phone 1** (**Telephone 1** in previous versions of Polaris), so the mobile phone number is copied to **Phone 2**. If **Phone 2** already has an entry, the mobile phone number is copied to **Phone 3**. If all three **Phone** fields already contain data, the mobile phone is copied to a temporary database table where it can be reported and managed manually.

If the patron record contains a mobile phone number but no carrier, the mobile phone number is copied to the first available **Phone** field. No additional action is taken.

If the mobile phone number is identical to **Phone 1**, **Phone 2**, or **Phone 3**, then the mobile number is removed, the corresponding number in the **Phone** field is left unchanged, and the carrier is moved to the corresponding **Phone** number. Matching is based on an exact, character-for-character match of the normalized numeric string. For example, the mobile phone number **3185370810** is considered the same as Phone **318-537-0810**. But **3183552268** is not the same as **355-2268**, and **313-510-5743** is not the same as **1 313 510-5743**. Alpha characters are ignored for matching purposes and remain in the appropriate field after conversion.

Polaris automatically creates a patron record set for each branch, consisting of the branch's patron records containing mobile phone numbers that could not be converted. The record set name is **4-1 [branch abbreviation] patron phone not normalized**; the record set owner is the patrons' branch. A free text block is also added to the patron record: **Verify cell phone number - [mobile number/carrier]**



Patron Last Name Field

You can now enter last names consisting of one character in the Patron Registration workform. (Previous versions of Polaris required at least two characters.)

Right-Click Menu for Patron Addresses

In the Patron Registration workform-Addresses view, you can right-click an address to open a context menu with options for editing, generating a mailing label, and removing the address.

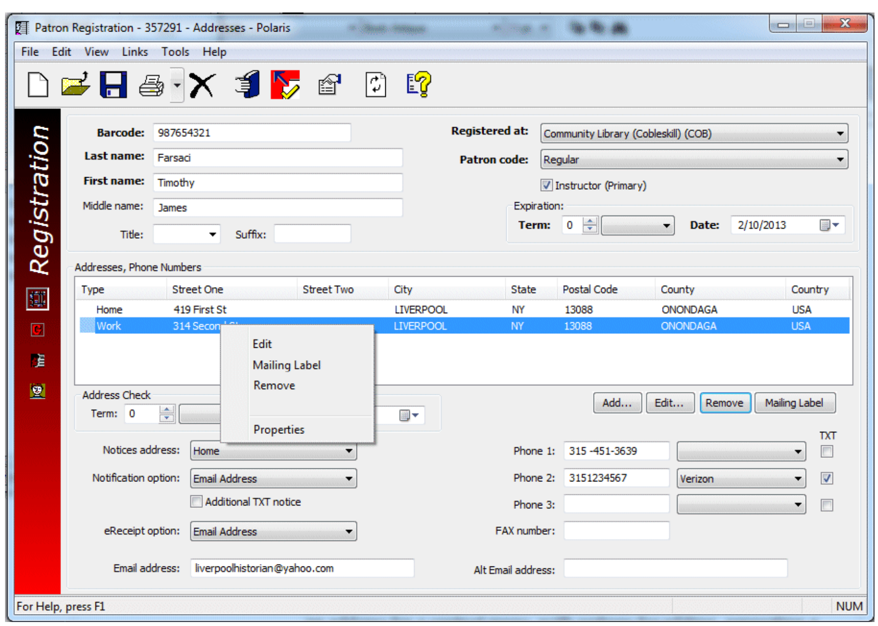
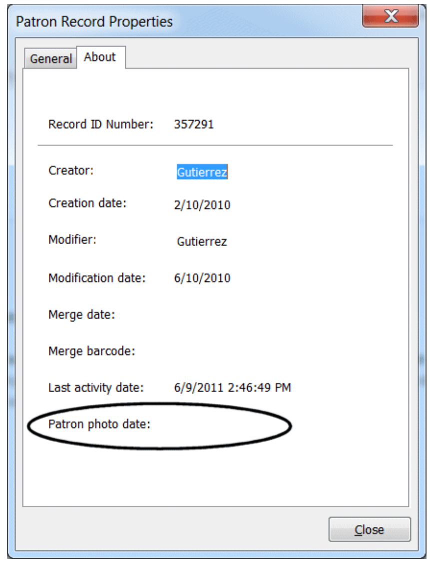
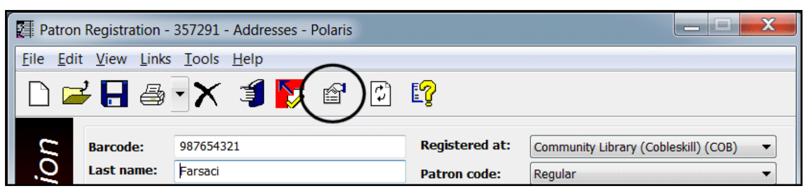


Photo Date in Patron Properties

If a patron record includes a photo, the date of the photo is now available in the Properties sheet of the patron record, About tabbed page.



To open the Properties dialog box from the Patron Registration or Patron Status workform, press **F8**, select **File, Properties**, or click the Properties icon on the toolbar.



Associated Patron Blocking

You can now choose to block a parent or primary record at checkout and renewal when an associated secondary or child record is blocked at checkout. (You can also associate patrons for convenience, with no blocking relationships, as in previous versions of Polaris.)

- One primary record may be linked to multiple secondary records. If any of the secondary records is blocked, the primary record is blocked.
- One secondary record may be linked to multiple primary records. If the secondary record is blocked, all the linked primary records are blocked.
- Two primary records may be linked to each other. If either is blocked, the other is blocked.

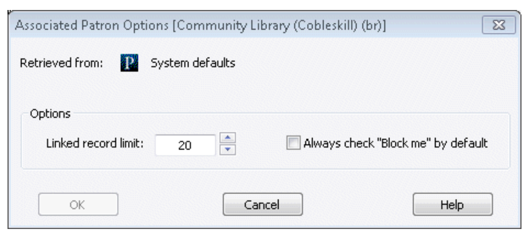
- Block checking is only one level deep. For example, primary A and primary C are linked to secondary B. If B is blocked A and C will be blocked, because they each are one link away from B. But A will not be blocked if C is blocked.

Associated patrons can be from any branch, not necessarily from the same registered branch. However, a Polaris Administration setting limits the number of records that can be linked in a blocking relationship, since large numbers may affect system performance during checkout.

Setting Up Associated Patron Blocking

Use the new Patron Services parameter **Associated patron options** to set limits on the number of records that can be associated with one patron record. The parameter is available at the system, library, or branch level. Valid values are 0-999; the default setting is 20. The system uses the setting for the patron's registered branch.

This parameter also offers the option to set the **Block me** default value when a new association is created between two patron records. The default is unchecked (do not block). When creating an association, the staff member checks the **Block me** option to set up a blocking relationship between associated records (see "Adding and Editing Associations" on page 78), or unchecks the option to create an association without blocking.



Permissions

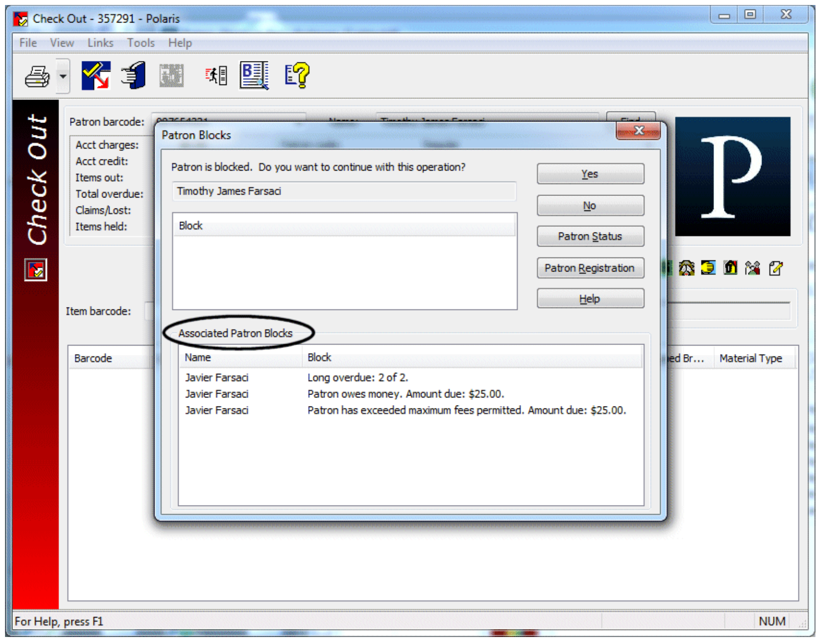
At staff client circulation, a new system-level Circulation permission **Override associated patron block: Allow** is required to continue the checkout if an associated patron is blocked. It is not granted by default. Existing permissions to create, modify, or remove associations govern the ability to work with patron associations, whether or not they are blocking relationships.

Note:
Transaction 9001 logs supervisor overrides for the **Override associated patron block** permission override.

Staff Client Check-Out and Renewal Processing

Associated patron blocking applies to checkout from the Check Out workform, renewal from the Check Out workform, and renewal from the Patron Status workform - Items Out view. If associated patron blocking has been enabled and at least one patron record associated with the transacting patron is blocked, a dialog box shows the linked patrons and the type of block. The same conditions that would block the associated record directly during checkout will block the primary patron record checkout.

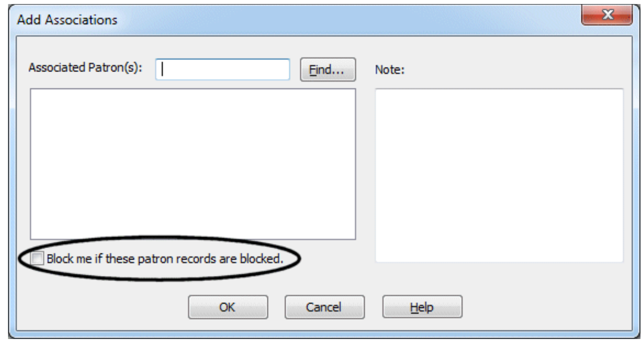
The block dialog box lists each block on a separate line. Each entry in the Associated Patrons list is a link to the associated patron's record.



If one or more associated patrons are blocked for any reason that requires an override, both the permission to override the specific block and the permission **Override associated patron block: Allow** are required to continue checkout.

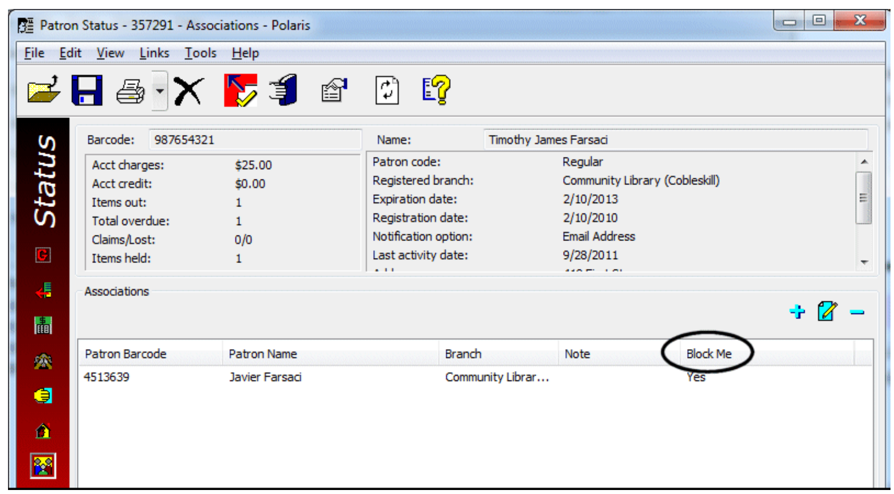
Adding and Editing Associations

As in previous versions of Polaris, staff members use the Patron Status workform - Associations view to add or remove associations. When the staff member adds an association to a patron record, the Add Association dialog box includes a new option, **Block me if these patron records are blocked**. The open patron record is the primary record. When **Block me** is checked, the primary record will be blocked when the newly associated record is blocked.

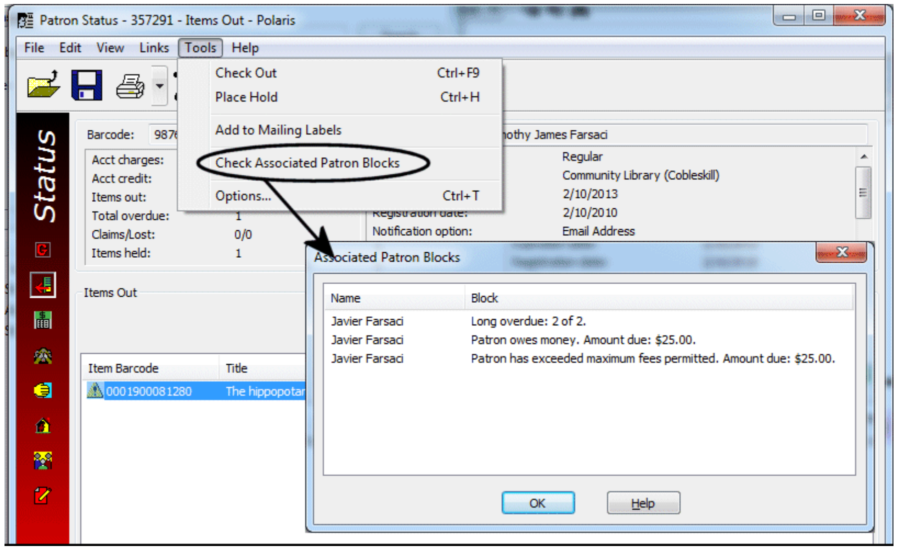


As patron records are added, the text box displays each patron barcode and full name. A message is displayed if the staff member attempts to add a record that would exceed the limit on linked records set in Polaris Administration.

The Patron Status workform - Associations view displays the list of associated patrons. A new column indicates a blocking relationship.



In addition, the Patron Status workform offers a new Tools menu option, **Check Associated Patron Blocks**. Select this option to display a list of the blocks on the associated patrons' records.



- **Two-way blocking relationships** - If you want the block to work both ways - that is, Patron A is blocked when patron B is blocked, and Patron B is blocked when Patron A is blocked - set up the association with patron B from Patron A's record and check **Block me**. Then open Patron B's record and edit the association with Patron A, checking **Block me**.
- **Merging patron records** - The "winning" patron record retains any associated patron links it already has, but the winning record is not affected by any links in the losing record.
- **Deleting patron records** - When a patron record with associations is deleted, the link is removed from the associated records. A warning message displays with a breakable link, but there is no additional message if the linked patrons are blocked.
- **Offline checkout** - If a blocked associated patron is detected when offline check-out transactions are uploaded, a message is written to the upload log file. The message includes the associated patron name and barcode, and the block text. If the patron is blocked for more than one reason, each block is listed; if more than one patron is blocked, each is listed in a separate message.

PAC and Polaris ExpressCheck Check-Out and Renewals

From PAC, the primary (parent) record is stopped from renewal if an associated patron record has exceeded the 2nd level fine amount as determined by the governing library for patron blocks, or if the associated patron record has exceeded the maximum overdue item limit as determined by the governing library for patron blocks.

In Polaris ExpressCheck, the primary (parent) record is also stopped from checking out and renewal if an associated patron record has exceeded the 2nd level fine amount as determined by the governing library for patron blocks, or if the associated patron record has exceeded the maximum overdue item limit as determined by the governing library for patron blocks. The block message can be edited in Polaris Language Editor (WebAdmin).

- **Default header text** – **Polaris ExpressCheck - Associated Patron Blocks**
  String ID **EC_TEXT_COURTESY_ASSOCIATED_ACCTBLOCKED_TITLE**
- **Default message text** – **One or more records linked to your library registration is blocked. Click Show Details to see more information.**
  String ID **EC_TEXT_COURTESY_ASSOCIATED_ACCTBLOCKED_MSG**

SIP Self-Check

A setting in the new SelfCheck Unit parameter **Patron blocks** controls whether a patron is blocked at checkout when an associated patron has exceeded the 2nd level fine amount as determined by the governing library for patron blocks, or if the associated patron record has exceeded the maximum overdue item limit as determined by the governing library for patron blocks. The parameter is available at the system, library, or branch level, and is set to **No** (do not block) by default. The system uses the setting of the workstation's branch.

Associated Patron Groups Report

A new Polaris toolbar report, Associated Patron Groups, lists all patron records that are linked in associations (whether or not these are blocking relationships). In the Polaris Reports Manager, select **Public Services, Patron Services** to access the report.You can select one, many, or all patron registration branches. The report lists all patron records from the selected branches that have one or more associated patron records, and lists the associated records for each patron. Each patron's full name, patron code, and barcode is included. Patrons are listed in alphabetic order by last name.

New Permissions for Overriding Circulation Blocks

In previous versions of Polaris, a staff member with the system-level Circulation permission **Override circ blocks: Allow** could override circulation blocks of many types and continue the circulation operation. In Polaris 4.1, several new Circulation permissions replace **Override circ blocks: Allow** to provide finer control over block overrides:

- **Override claimed item limits: Allow**
- **Override item assigned blocks: Allow**
- **Override item free-text blocks: Allow**
- **Override item limit blocks: Allow**
- **Override overdue limit: Allow**
- **Override patron assigned blocks: Allow**
- **Override patron blocking note: Allow**
- **Override patron free-text blocks: Allow**
- **Override request limits: Allow**

At upgrade, if you have set the system-level Staff Client profile **Permissions: Use Polaris-defined new permission defaults** to **Yes**, users and groups who had the **Override circ blocks: Allow** will have the new permissions.

Circulation Messages Improved

More information has been added to certain messages that may appear during circulation processes. The additional information can help staff resolve circulation issues.

- The declare lost item dialog box now includes the due date, billed date, item title, patron name, and other information.
- The resolved billed item dialog box includes the billed date, lost date if the item was lost, or due date if the item was out.
- The number of renewals has been added to the message displayed when a staff member attempts to renew an item that has reached the renewal limit.
- The item due date has been added to the overdue item dialog box.

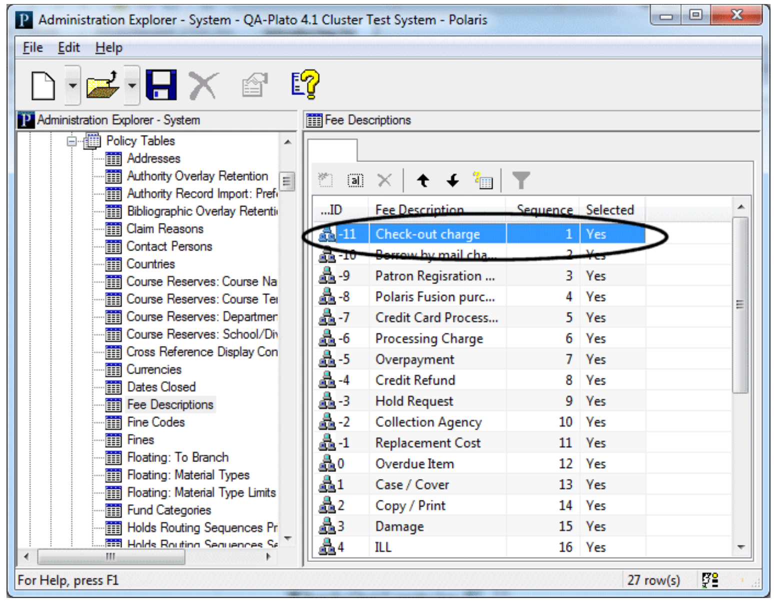
Charge for Checkout

You can now charge patrons for checking out items of specified material types, and optionally for renewing them, or charge only for renewal. You can also choose to waive the charge for certain patron codes. The charge policy is applied according to the settings of the item's assigned branch. Separate settings determine how the charge policy affects transactions at Polaris ExpressCheck and SIP self-check workstations.

Enabling the Fee Description

A new system-assigned fee description **Check-out charge** has been added to the Fee Descriptions policy table in Polaris Administration. If the organization plans to charge for checking out certain types of material, set this fee description to **Yes**. This setting displays the fee description on views and dialog boxes that list charges on the patron account. (The default setting is **No**.) For more information about setting fee descriptions, see "Defining Fee Descriptions" in the *Patron Services Administration Guide* or the equivalent topic in staff client online Help. If you enable charging for check-out (see "Setting Up Charges" on page 83), the charge transactions are logged with the Fee Description code **-11**. They are included in all Polaris toolbar reports of charge transactions and are available for reporting in Polaris SimplyReports.

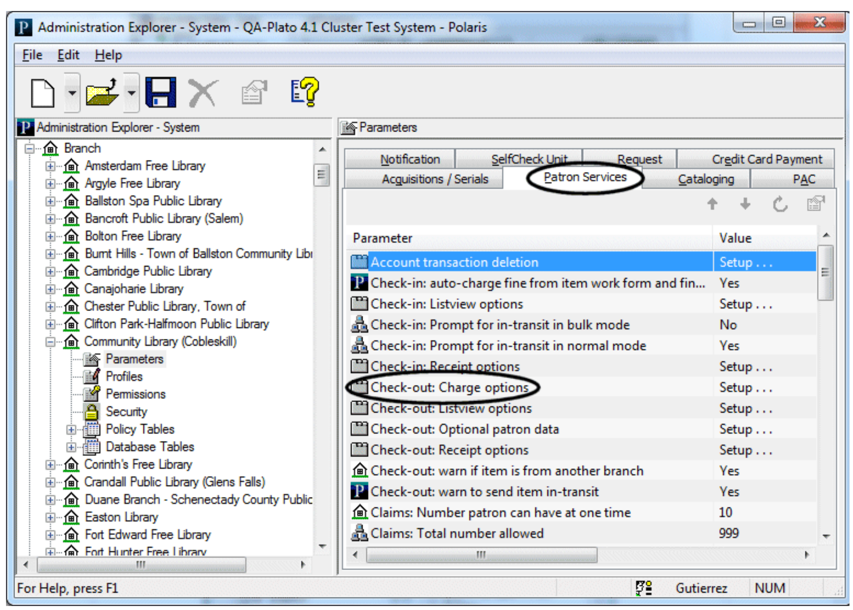
> **Note:**
> You can now modify the description of system-assigned entries, as well as organization-assigned fees, in the Fee Descriptions policy table. You can also set the display order and suppress unused descriptions from display. See "Displaying Fee Reason Options" on page 113.



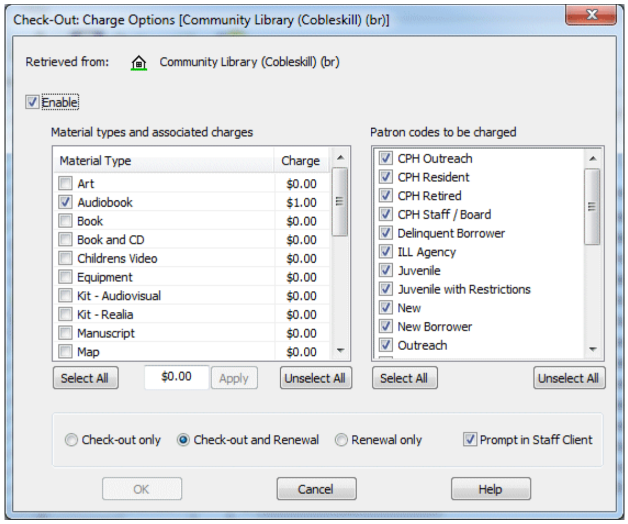
Setting Up Charges

Tip:
Consider placing physical labels on your chargeable items so that patrons can readily identify them on the library shelves, before they reach the circulation desk.

Double-click the new Patron Services parameter **Check-out: Charge options** to enable the charge and specify the appropriate material types, charge amounts, and patron codes. The parameter is available at the system, library, and branch levels; the system uses the settings of the item's assigned branch.



The Check Out: Charge options dialog box opens.



1. Select (check) **Enable**.
2. Select (check) a material type to which a check-out charge should be applied.
3. Specify the amount to be charged for the selected material type and click **Apply**.

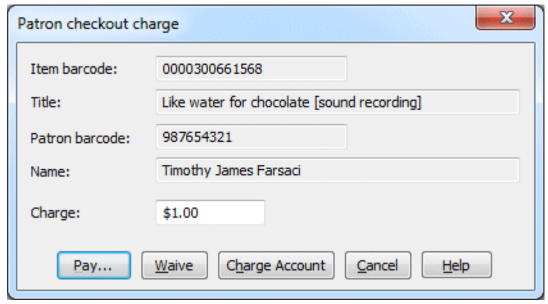
   You can also click several material types or **Select All**, specify a single amount, and click **Apply**.

   Note:
   It is possible to select a material type and leave the amount at $0.00, or to set an amount for a selected material type and then uncheck that material type. In either case, no charge will be applied.
4. Select (check) the patron codes that should be charged the specified check-out charges.

   You can also click **Select All**.
5. Select one option for applying charges:
   - **Check-out only** - Apply the charge only at checkout
   - **Check-out and Renewal** (default) - Apply the charge at checkout and again if the item is renewed
   - **Renewal only** - Apply the charge only when the item is renewed
6. If you want a message to appear when a staff member attempts to check out or renew a chargeable item to a patron, select (check) **Prompt in Staff Client**. For this option, the system uses the setting of the transacting workstation's log-on branch.
7. Click **OK**.

Staff Client Transactions

When a chargeable item is scanned at check-out or selected for renewal, checks have passed for item blocks, holds, and patron item limits, and you have set the system to display a prompt, a Patron checkout charge dialog box is displayed. (The checkout charge dialog box also appears during bulk check-out of Borrow by Mail or Outreach Services items.)



The staff member can choose to charge the patron's account and continue the check-out, pay the charge, waive the charge, or cancel the transaction. The appropriate permissions are required to pay or waive the charge. If the staff member chooses to pay the charge, a standard Pay dialog box is displayed. If you have chosen not to display the prompt, the charge is automatically applied to the patron account. If the same item is checked out again to the same patron before the library closes, the patron is not charged again. Check-out charges are not listed on the check-out receipt.

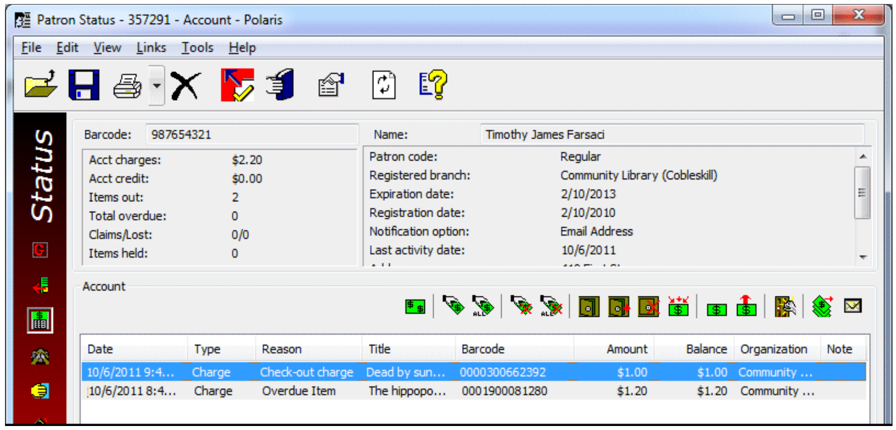
Renewal from the Check Out workform follows a similar process, if the option to charge at renewal is set for the item's assigned branch. If the item is overdue and the option to charge when renewed is enabled, the prompt for the overdue appears before the Patron checkout charge dialog box. The charge is written to the patron account only if the item renewal is completed. Renewal from the Patron Status workform - Items Out view is similar. If multiple items are selected for renewal, the Patron checkout charge dialog box is displayed for each item as appropriate.

When a chargeable item is checked out offline, the charge is applied to the patron account and a message is written to the upload log file.

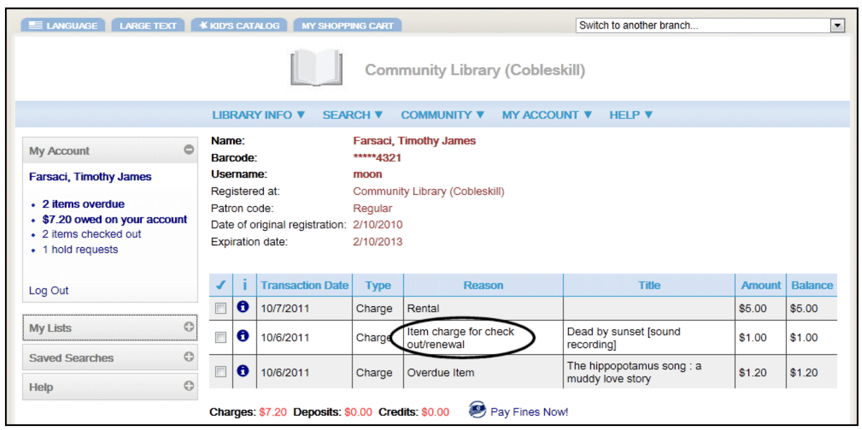
Note:
In systems that use floating collections, the chargeable settings for an item may change as the item's assigned branch changes.

Patron Account Display

In the Patron Status workform - Account view, check-out charges are listed with the description defined in the Fee Description policy table. The organization listed with the charge is the item's assigned branch.

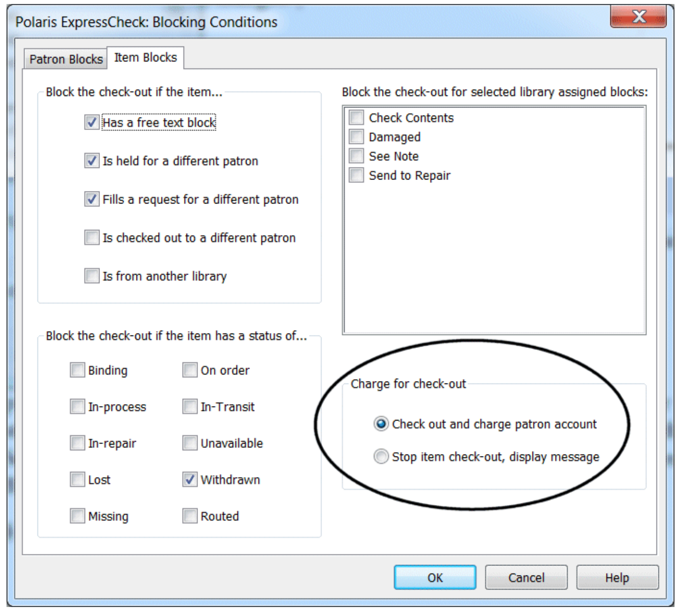


In the PAC My Account - Fines & Fees page, check-out charges are also listed with the description defined in the Fee Description policy table.



Polaris ExpressCheck Transactions

Your charge policies also apply to check-out and renewal from Polaris ExpressCheck. You can choose to allow the transactions and have the patron's account charged appropriately when the transactions occur, or stop the transactions and display a message. The option is available in the SelfCheck unit parameter **Polaris ExpressCheck: Blocking conditions** (Item Blocks tabbed page).



To allow check-outs of chargeable materials from Polaris ExpressCheck, select **Check out and charge patron account** (default).When this option is selected and the patron scans a chargeable item, a message is displayed. The default message text is **There is a charge of [$] to check out this item. Your account will be charged. Do you want to continue?** The patron can choose to continue the check-out and charge the patron account, or stop the transaction. You can edit the message in Polaris Language Editor (WebAdmin). The string ID is **EC_TEXT_CHARGE_WARNING**.

If you want to prevent check-outs of chargeable materials from Polaris ExpressCheck, select **Stop item check-out, display message**. When this option is selected and the patron scans a chargeable item, the transaction is stopped and the default message is **Please take this item to the circulation desk**. You can also edit this message in Polaris Language Editor (WebAdmin). The string ID is **EC_TEXT_CHARGE_STOPCHECKOUT**.

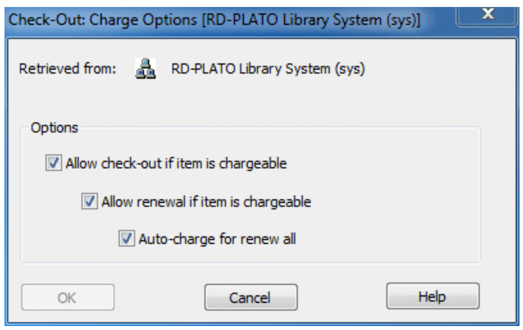
If a chargeable item is renewed during ExpressCheck check-out, a message offers the option to cancel or continue the renewal. The default text is T**here is a charge of [$] to renew this item. Your account will be charged. Do you want to continue? Y/N** The message text can be edited in Polaris Language Editor (WebAdmin). The string ID is **EC_TEXT_CHARGE_RENEW_WARNING**. If the patron chooses not to continue, no charge is created and the item remains out to the patron, but not renewed. If one or more chargeable items are selected for renewal from the patron account Items Out view, the message is displayed for each item as appropriate.

SIP Self-Check Transactions

Your charge policies also apply to check-out and renewal from SIP self-check units. You can choose to allow checkout and have the patron's account charged appropriately when the transactions occur, allow renewal and have the patron's account charged, automatically charge when the patron chooses to renew all items out, or stop the transactions and display a message.

Note:
If the material type is blocked from check-out at SIP self-check units, that setting takes precedence over any chargeable policies and the transaction is stopped.

Use the new SelfCheck Unit parameter **Check-out: Charge options** to set these options.



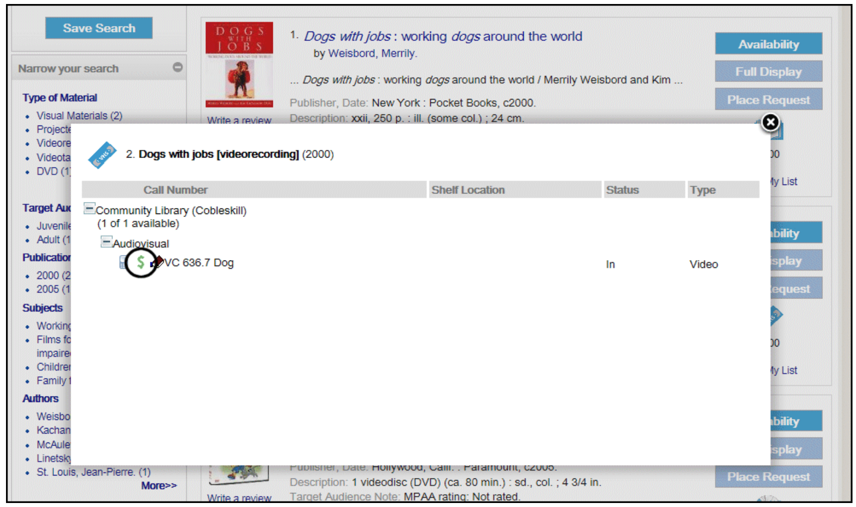
To allow check-outs of chargeable materials from SIP self-check units, select (check) **Allow check-out if item is chargeable**.

When you check **Allow check-out if item is chargeable**, the option **Allow renewal if item is chargeable** becomes available. If you check the renewal option, you can also select **Auto-charge for renew all**.

The transactions are allowed or stopped according to the SelfCheck Unit parameter settings of the workstation's branch, but whether the item is chargeable and the amount of the charge is determined by the item's assigned branch.

PAC Availability Display

The PAC item availability display shows a dollar sign icon next to an item if the item's assigned branch has defined the item's material type as chargeable.



PAC Courtesy Message for Hold Requests

When a patron places a bibliographic-level hold request in PAC, and at least one item eligible to fill the request would incur a check-out charge, a courtesy message is displayed. (The request may actually be filled by a non-chargeable item, depending on which items trap for the request.) After the request is placed, if new items become available from a branch that does not charge for checkout, or holds policies change, the message may no longer be accurate. It is a courtesy message only.

The default message is **If your request is filled you may be charged to check out the item according to the policy of the library owning the item. Do you want to place this request?** For PowerPAC, the Polaris Language Editor string ID is **PACML_CHARGECKOREQ**. For Mobile PAC, the Polaris Language Editor string ID is **MP_MSG_HOLDS_CHARGE_WARNING**.

Renewing Items From PAC

If renewing an item is chargeable according to the settings of the item's assigned branch, a message is displayed when the patron attempts to renew the item from the patron account. The patron can choose whether to continue or cancel the renewal. The default messages can be edited in Polaris Language Editor (WebAdmin).

PowerPAC String ID	*Default Message*
PACML_CHARGE_RENEW	There is a charge to renew this item.
PACML_CHARGE_RENEW_MULTIPLE	There is a charge to renew the following items.
PACML_RENEWITEMS_1347	If you renew these items your account will be charged
PACML_RENEWITEMS_1348	To accept these charges and continue with the renewal, press 'OK'.
PACML_RENEWITEMS_1349	Your account has been charged

Mobile PAC String ID	*Default Message*
MP_MSG_ITEMSOUT_CHECKOUT_CHARGE_WARNING	There is a charge of {0} to renew this item. Your account will be charged. Do you want to accept this charge?
MP_MSG_ITEMSOUT_CHECKOUT_CHARGE	Your account has been charged

Phone Renewal

The Polaris Phone Attendant also supports charges for item renewals, according to the policies of the item's assigned branch. The patron is notified of any renewal charges and prompted to accept them. If both overdue and renewal charges will be applied, the notification is combined in a single message. If the patron chooses to renew all items at once (option #6), a status message informs the patron that the "renew all" process is underway, since the process may take a few seconds to gather information. In Polaris Language Editor (WebAdmin), the following language strings have been added for the new messages:

String ID	*Default Message*
PA_TEXT_PATREC_RENEWITEMS_CHARGE	Your account will be charged $%3.2f to renew these items.
PA_TEXT_PATREC_RENEWITEM_CHARGE	Your account will be charged $%3.2f to renew this item.
PA_TEXT_PATREC_RENEWITEM_OVDANDCHARGES	Overdue and renewal charges will apply. Your account will be charged $%3.2f.
PA_TEXT_PATREC_RENEW_WAIT	Please wait while we process your renewals.

Check-Out Limits for Material Type Groups

You can now create groups of material types and place check-out limits on the group as a whole for specific patron codes. The group limit may be different from the individual limit on each material type that is part of the group. For example, a patron code may have individual limits of DVD = 5 and Blu-Ray discs = 2. A patron with that code may check out up to five DVDs and 2 Blu-Ray discs. (These individual limits are set in the Material Type Loan Limits policy table, as in previous versions of Polaris.) However, if both material types are assigned to a "Media" group with a group limit of 5, and the patron's code is specified for the Media group, the patron will be blocked if he already has 4 DVDs and 1 Blu-Ray disc or a similar combination.

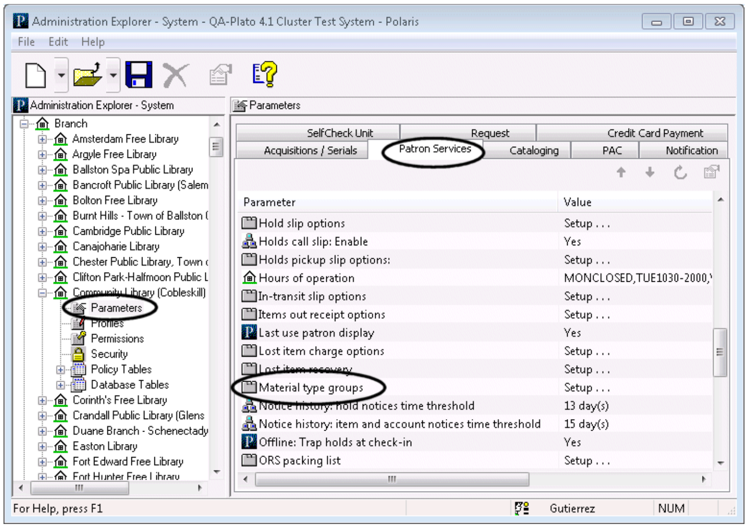
If the individual material type limits and group limit conflict, the patron is blocked according to the group limit. For example, a "Media" material type group consisting of Video Cassette and DVD may be set to 0 for a patron code "Child," while the individual Video and DVD limits are set to 5 each. In this case, the patron code Child would be stopped at 0—that is, not allowed to check out Videos or DVDs. If the patron code Child is removed from the group, the patron code Child may have up to 5 each of both Videos and DVDs (total of 10 items) because the system then uses the individual material type limits.

Limits on material type groups affect checkout from the staff client, including bulk checkout for Outreach Services or Borrow by Mail, Polaris ExpressCheck, and checkout from third-party workstations via SIP or NCIP, where block messages appear at checkout. The group limit is also checked when offline circulation transactions are uploaded, and an appropriate message is written to the offline upload report. The message includes the group name.

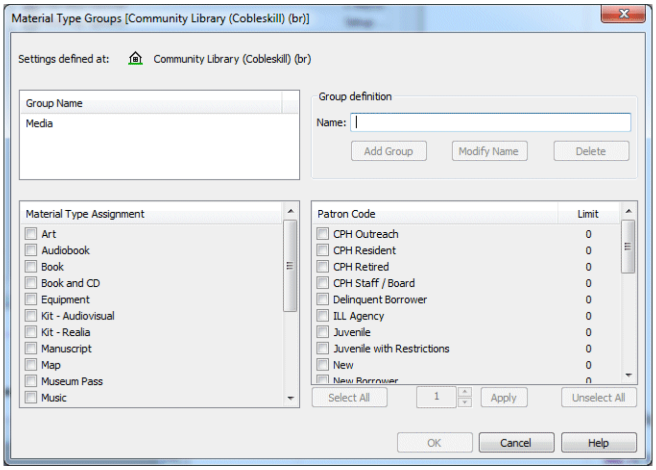
At normal checkout in the staff client, if the patron would exceed the group limit for the patron code, a block message appears. The staff member must have the new Circulation permission **Override item limit blocks: Allow** to override the block and continue the transaction. For more information about new permissions for overriding blocks, see "New Permissions for Overriding Circulation Blocks" on page 81.

Setting Up Material Type Groups

To set up group limits, double-click the new Patron Services parameter **Material type groups**. The parameter is available at the system, library, and branch levels. As with other loan limit blocks, the system uses the setting for the governing library for patron blocks, which may be the transacting branch or the patron's registered branch (set in the system-level Patron Services parameter **Consortium circulation**).



The Material Type Groups dialog box opens.

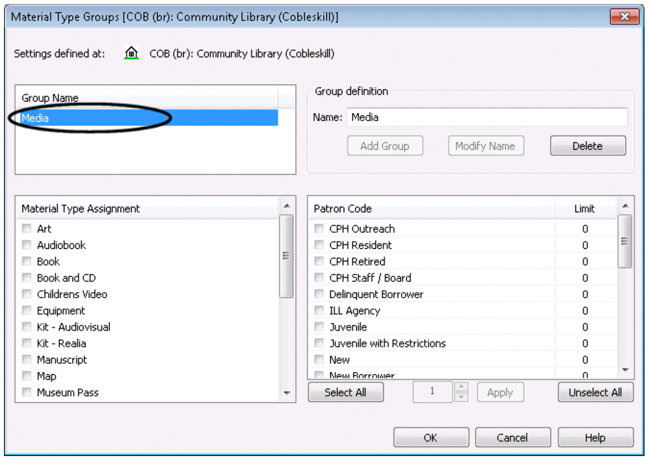


1. Define a material type limit group:

   a) Type a name for the group in the **Group definition** box.

   b) Click **Add Group**.

   The new group appears in the Group name list at the top left portion of the dialog box.



2. Assign material types to the group:

   a) Select the new group name in the Group Name list.

   b) In the Material Type Assignment list, check the material types that should be included in the group.

   Because a material type can belong to only one group, the list displays the material types not already assigned to another group for this organization.

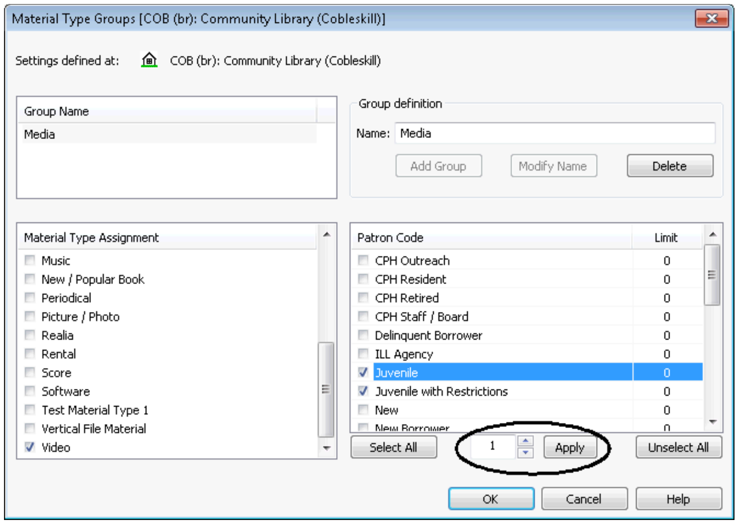
   Note:
   You cannot add all material types to a group.

3. Assign patron codes and patron code limits to the group:

   a) Select the group in the Group Name list.

   b) In the Patron Code list, check the patron code that should have a limit for this group. If several patron codes should have the same limit, select the appropriate codes. If all patron codes should have the same limit, click **Select All**.

   c) In the number control, specify the number of items allowed for the selected patron codes, and click **Apply**.



d) Repeat steps a and b to set different limits for different patron codes.

4. Click **OK** to save your group settings.

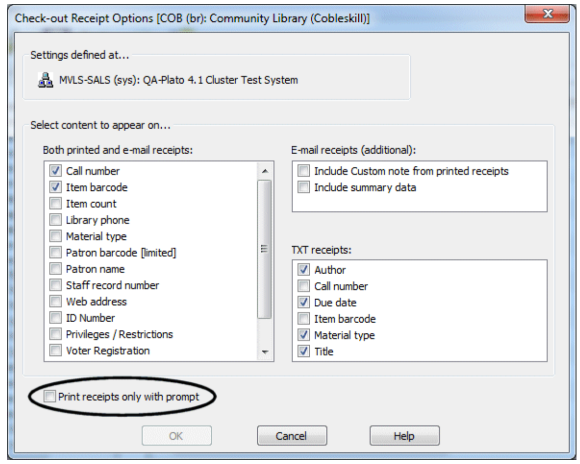
Optional Check-Out Receipts

Library staff can now offer a printed check-out receipt only if the patron requests one, reducing unnecessary printing. (Polaris 4.1 also offers e-mail and text message receipts; see “E-Mail and Text Message Receipts (eReceipts)” on page 96.)

As part of this development, receipt printing at checkout has changed. A fine receipt is printed when all transactions are finished for the patron, and the check-out receipt is printed at the end of the check-out process, not as items are scanned. This gives staff the opportunity to determine if the patron wants a printed receipt while the checkout is occurring.

> **Note:**
> Patrons could choose to not receive a printed receipt from Polaris ExpressCheck in previous versions of Polaris. This feature is unchanged in Polaris 4.1.

A prompt to print a receipt is displayed if the **Check out receipt option** is checked on the workform **Tools, Options** menu and the option to prompt for the optional check-out receipt has been enabled for the workstation branch. The prompt to print a receipt is displayed when the **Enter** key is pressed to signal the end of the check-out transaction. To enable the prompt, a new option has been added to the Patron Services parameter **Check-out: Receipt options**.



The option is available at the system, library, and branch levels. Select (check) **Print receipts only with prompt** to display the prompt for the printed receipt. If the option is not checked (the default), no prompt is displayed and the receipt always prints when check-out receipts are enabled for the workform.

Note:
Certain receipt options have been renamed:
Include item count is now **Item count**
Item material code is now **Material type**
Item call number is now **Call number**
The user-defined field options are now grouped at the end of the list.
These changes were also made to Check In receipt options, Fine receipt options, and Items Out receipt options.

If you enable the prompt option, the prompt to print a check-out receipt is displayed during the following processes:

- Normal item check out from the staff client Check Out workform
- Reserve item check out
- RFID check out
- Media dispenser unit check out. The receipt prompt displays after the messages for the dispensing unit.
- Offline check out

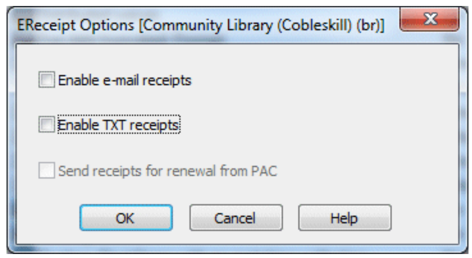
The receipt prompt is not displayed for renewals from the Patron Status workform - Items Out view. However, staff can optionally print a "receipt" from this view by suppressing check-out receipt printing from the workform **Tools** options, and then printing receipts on demand by selecting the "print items out" option (**CTRL+ALT+P**). You can now specify the information included in the printed version of the Items Out list. See "Items Out List - Content for Print" on page 105.

E-Mail and Text Message Receipts (eReceipts)

In Polaris 4.1, you can send e-mail and text message receipts to patrons who prefer either of these options. E-mail and/or text message receipts are available for check-out, renewal, and fine receipts from the staff client, and renewals from PAC and Polaris ExpressCheck. No overnight processing is required, so these receipts are sent within a few moments of the transaction. All eReceipts are sent in plain text format.

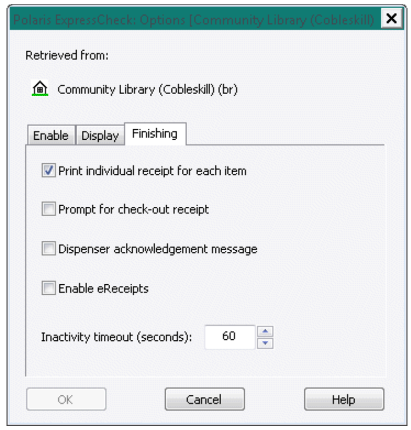
Enabling eReceipts

To enable e-mail receipts, TXT receipts, or both, use the new Patron Services parameter **EReceipt options**. The parameter is available at the system, library, or branch level.



Select (check) **Enable e-mail receipts**, **Enable TXT receipts**, or both. When at least one eReceipt option is selected, you can also opt to send receipts for renewal from PAC. When at least one option is selected for the patron's branch, the option is also available for selection on the patron registration workform (see "Patron Record Settings for eReceipts and TXT Receipts" on page 99). At checkout, eReceipts must be enabled for *both* the patron's branch and the check-out (log-on) branch in order for the patron to receive the check-out eReceipt.

To enable eReceipts for Polaris ExpressCheck check out and renewal, use the SelfCheck Unit parameter **Polaris ExpressCheck: Options** (Finishing tabbed page). Select (check) the new **Enable eReceipts** option. Once this option is checked, the patron will receive eReceipts if both the patron's branch and the ExpressCheck workstation's branch have enabled eReceipts in the **EReceipt options** parameter, and an eReceipt option is set in the patron's record. The eReceipt is sent when the patron selects **Exit** in Polaris ExpressCheck.



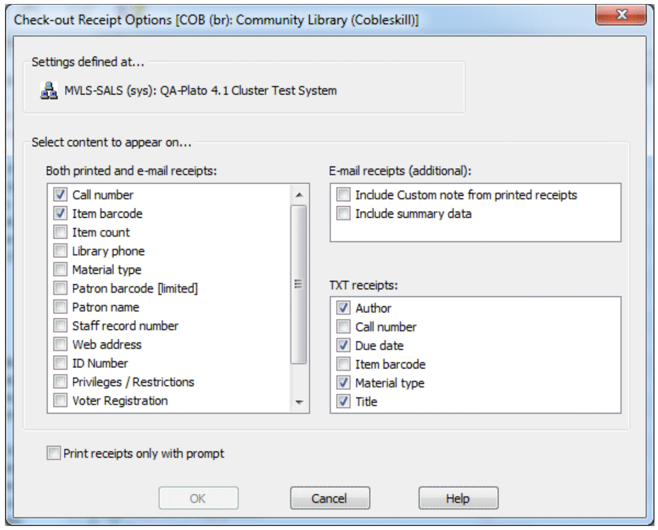
Check-Out eReceipt Content

Your settings for the check-out branch determine the content of e-mail receipts and TXT receipts.

For e-mail receipts, the From field is determined by the PAC profile **Email notification: Email address of sender**. The subject line is **Checked out from your library**. The default introductory text is **The following items were checked out by you on [date, time] from [Branch name]**, where the branch name is the **Display Name** specified in the branch record. The default footer text is **Please do not reply to this message**. The subject line, introduction, and footer text can be modified in Polaris Language Editor (WebAdmin). See "Editing eReceipts in Polaris Language Editor (WebAdmin)" on page 98.

For TXT receipts, the subject line is **Checked out from your library**. The footer text is **Access your library account for additional information**. Both can be modified in Polaris Language Editor (WebAdmin). See "Editing eReceipts in Polaris Language Editor (WebAdmin)" on page 98. One checked out or renewed item is listed per TXT message to limit the length of the message.

Use the Patron Services parameter **Check out receipt options** to specify the optional additional content for e-mail receipts and TXT receipts.



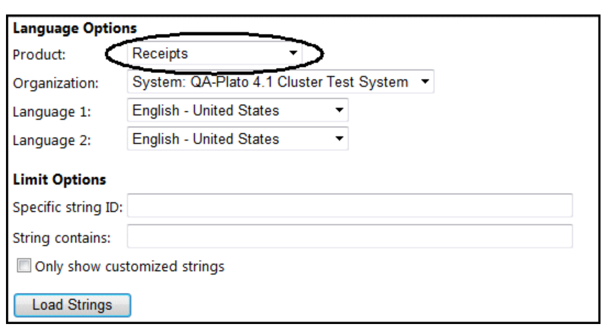
Options in the left column apply to *both* printed and e-mail receipts. For e-mail receipts, you can additionally include custom receipt note and/or summary data. Summary data includes the following patron account information: number of items currently checked out; number of open requests (the total number of Hold requests with a status of Active, Inactive, or Pending, and the number of ILL requests with a status of Active or Inactive); number of items (ILL or Hold) with a status of Held; total amount of unpaid charges.

Note:
To set up a custom receipt note, select **Circulation, Options** from the Polaris Shortcut Bar and type your text in the Circulation Options dialog box - Receipt Printer Options tabbed page.

Because text messages must be brief, the **Check out receipt options** parameter provides a separate, more limited set of content options for TXT receipts.

Editing eReceipts in Polaris Language Editor (WebAdmin)

Polaris Language Editor includes a new "product," **Receipts**. Select this product to edit the content of e-mail and text message receipts. Your settings for the check-out branch determine the content of e-mail receipts and TXT receipts.



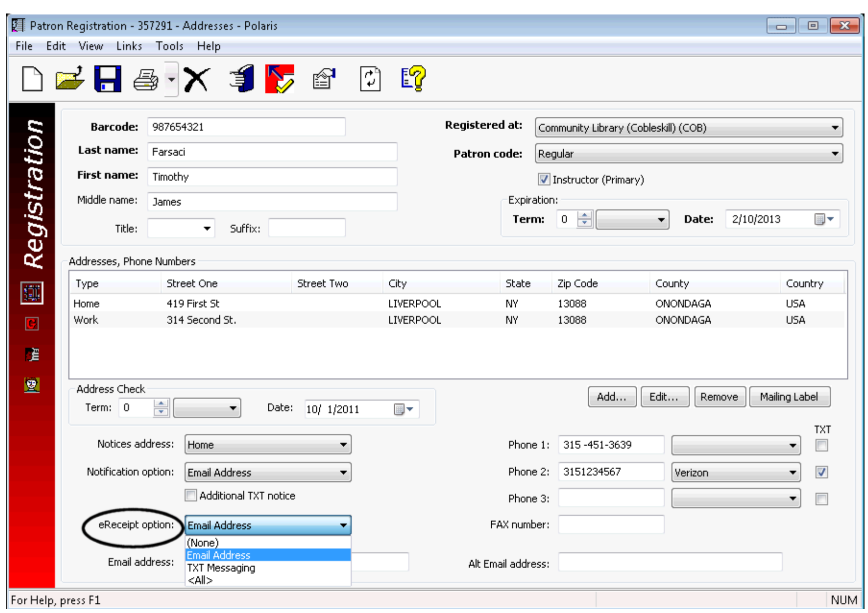
The table lists the string IDs.

Receipt Type	*Mnemonic (String ID)*	*Default Text*	*Context*
E-Mail Check-Out Receipts	RECEIPT_CHECKOUT_EMAIL_SUBJECT	Checked-out from your library	Subject
	RECEIPT_CHECKOUT_EMAIL_INTRO	The following items were checked out by you on [DATE] from [BRANCH]	Introduction
	RECEIPT_EMAIL_FOOTER	Please do not reply to this message.	Footer
E-Mail Renewal Receipts	RECEIPT_RENEWAL_EMAIL_SUBJECT	You renewed library items	Subject
	RECEIPT_RENEWAL_EMAIL_INTRO	Items renewed on [DATE].	Introduction
Text Message Check-Out Receipts	RECEIPT_CHECKOUT_TXT_SUBJECT	Checked-out from your library	Subject
	RECEIPT_TXT_FOOTER	Access your library account for additional information.	Footer
Text Message Renewal Receipts	RECEIPT_RENEWAL_TXT_SUBJECT	You renewed library item	Subject

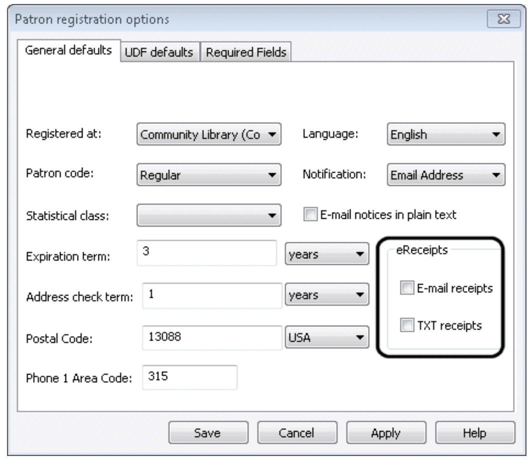
For more information about using Polaris Language Editor, see the *Polaris Language Editor (WebAdmin) Guide* or Language Editor online Help.

Patron Record Settings for eReceipts and TXT Receipts

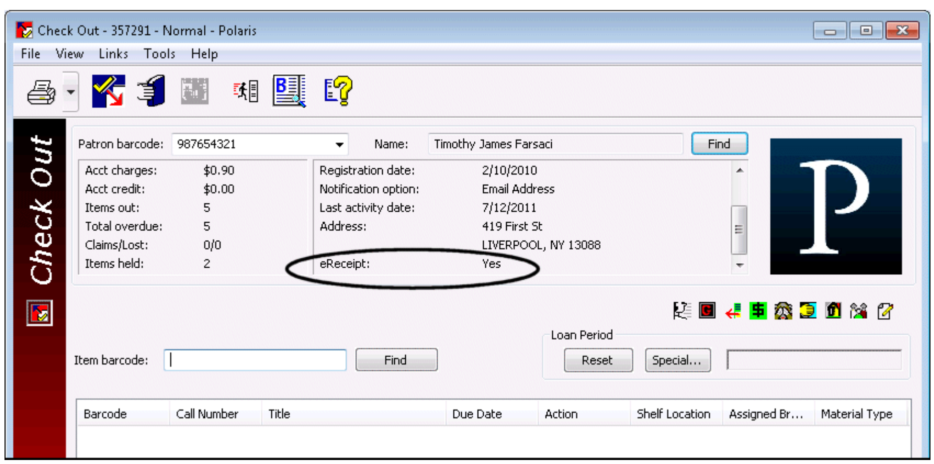
Set the new **eReceipt option** on the Patron Registration workform - Addresses view to specify the patron's preference for e-mail receipts, TXT message receipts, or both (**All**). The option is available if eReceipts have been enabled for the patron's branch (see "Enabling eReceipts" on page 96).



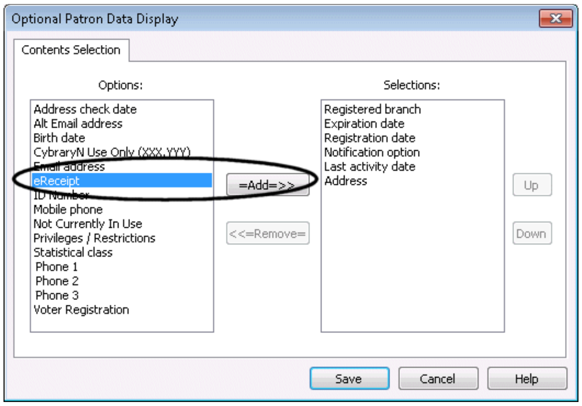
You can also set either or both of these options as defaults for normal and express patron registration. Use the Patron Services parameters **Patron registration options** and **Express patron registration options** respectively. The illustration shows the Patron registration options dialog box.



If a patron record specifies eReceipts, you can choose to display the setting in the optional patron data that is displayed in the header area of the Check Out and Patron Status workforms.



Use the Patron Services parameter **Check-out: Optional patron data** to display the eReceipts setting in the optional patron data area.

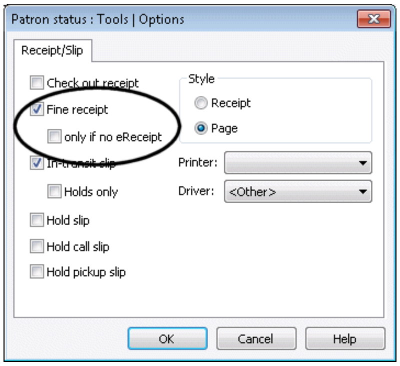


Fine eReceipts

Patrons receive e-mail or TXT receipts for fine payments if eReceipt options have been enabled for both the workstation's branch where the receipt would be printed and the patron's branch, and the patron record is set to receive e-mail receipts, TXT receipts, or both.

Note:
The new features do not apply to credit card payments, because e-mail receipts are already sent for these payments as a separate process.

Staff members can also print a fine receipt even if the patron receives an eReceipt. The **Tools, Options** menu on any workform where staff members can take fine payments offers a new fine receipt option.

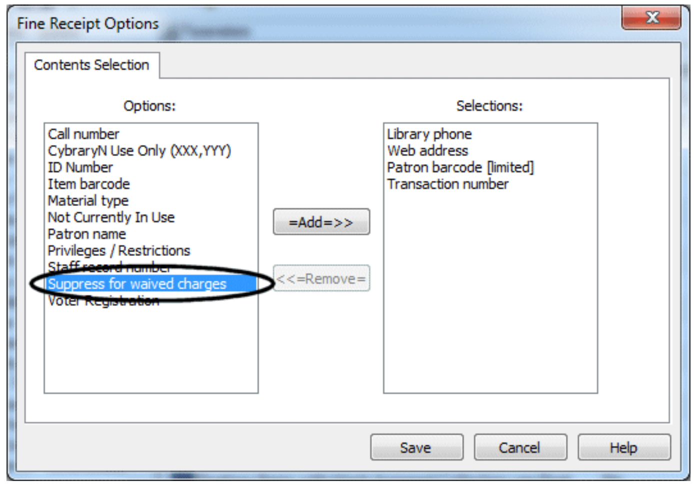


When eReceipts are enabled and **Fine receipt** is checked in the Options dialog box, the new option **only if no eReceipt** is available. If the new option is not checked, printed receipts are produced in addition to eReceipts for patrons who have opted to receive eReceipts. If the new option is checked, fine receipts are printed only when the patron does not receive eReceipts.

Note:
The Options dialog box settings affects fine receipt printing only. A patron who has opted to receive eReceipts will always receive eReceipts for fines, regardless of these settings.

Waive eReceipts

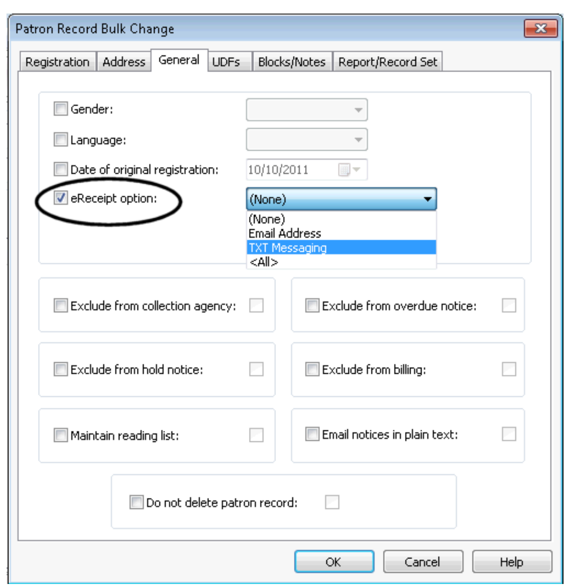
An eReceipt is sent for waived charges if all the conditions for sending a fine eReceipt are met, and if the **Suppress for waived charges** option (Patron Services parameter - **Fine receipt options**) is *not* selected for the workstation's branch.



A receipt for waives is printed in addition to the eReceipt if all the conditions for printing a fine receipt are met (see "Fine eReceipts" on page 101) and if the **Suppress for waived charges** option is not selected for the workstation branch.

eReceipt Options and Bulk Change

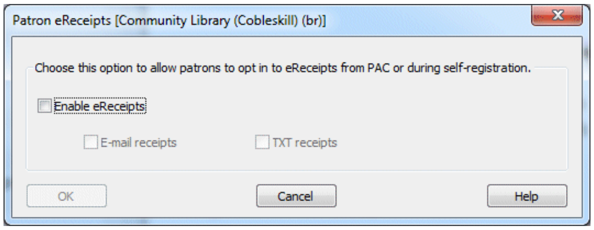
You can set eReceipt options in bulk for a patron record set. The Bulk Change dialog box - General tabbed page includes a new setting for **eReceipt option**. You can select **None** (default), **E-mail**, **TXT**, or **All**.



The system changes a record in the record set if that change would be allowed for a single record. For example, if a branch has not enabled eReceipts, the bulk change does not affect records from that branch and an error is written to the bulk change report. If a branch has enabled one type of eReceipt but not both, no change is made for the receipt type that is not enabled. But in this case, if **All** is selected for bulk change, the system does set a record to the supported eReceipt type.

eReceipt Options in Polaris PowerPAC and Mobile PAC

If the patron's registered branch has enabled eReceipts, that organization can also offer the option for e-mail receipts, TXT receipts, or both for patron self-registration and account updates from PAC. To enable eReceipt options in PAC, use the new PAC profile **Patron eReceipts**, available at the system, library, or branch level.



In the PAC, the patron can then select e-mail receipts, TXT receipts, or both, as enabled by the registered branch. The patron will receive eReceipts for renewals from PowerPAC and Mobile PAC, and check-out and fine eReceipts at the circulation desk, if both the check-out branch and the patron's branch have enabled eReceipts.

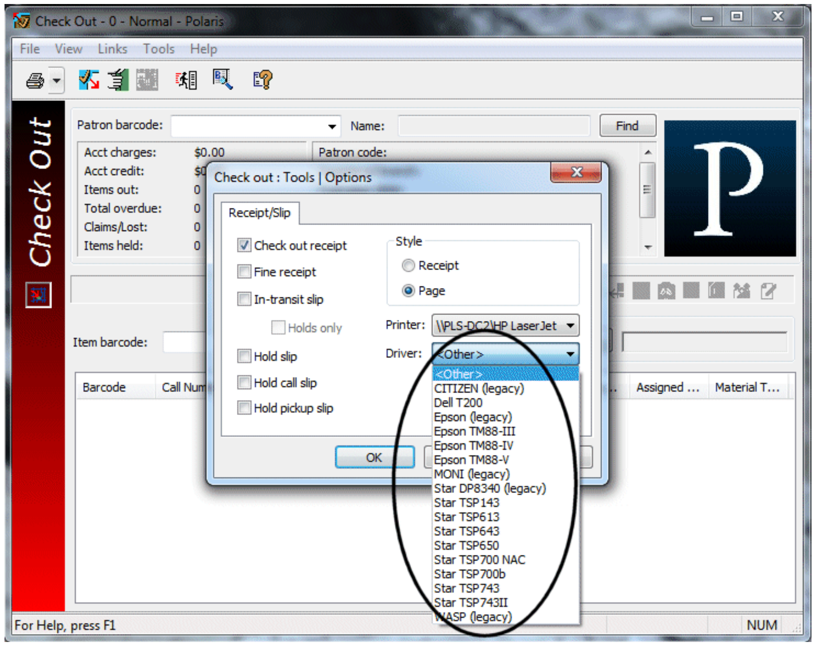
Important:
The eReceipt options are available for patron account updates from PAC only if you also allow patrons to update the e-mail address or phone number from PAC. These settings are available in the PAC profile **Patron access options**.

Logging and Reporting eReceipts

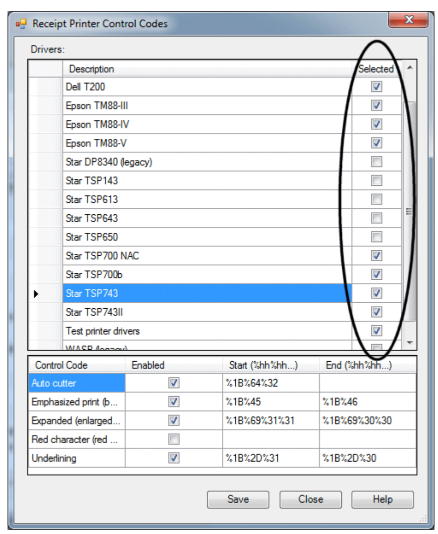
E-mail and TXT receipt messages are logged in the Polaris Transactions database, and failures are included in the new **Receipt delivery failure** report. To access this report, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and open the **Circulation** folder in the Polaris Reports window. For a specified time period and organizations (sending branches), the report lists the transactions where an e-mail or TXT receipt failed to be sent for a check-out or renew transaction.

Specifying Printer Drivers for Display

You can now specify which printer drivers should be displayed in the list of options when a staff member selects **Tools, Options** to set up receipt printing from a Polaris workform. The illustration shows the list from the Check Out workform.



In Polaris Administration (system level only), double-click the Staff Client profile **Receipt printer control codes**. In the new **Selected** column, clear the check boxes for printer drivers that you do not want to display for selection. You must click **Save** after each change.



Your settings affect the list of receipt printer drivers for all Polaris workforms at all organizations.

For more information about setting up receipt printing from Polaris workforms, see "Setting Up Receipt Printing from Workforms" in the *Polaris Patron Services Guide*. For more information about Polaris Administration settings that affect receipt printing, see "Setting Up Circulation Receipts" in the *Polaris Patron Services Administration Guide*, or the equivalent topics in staff client online Help.

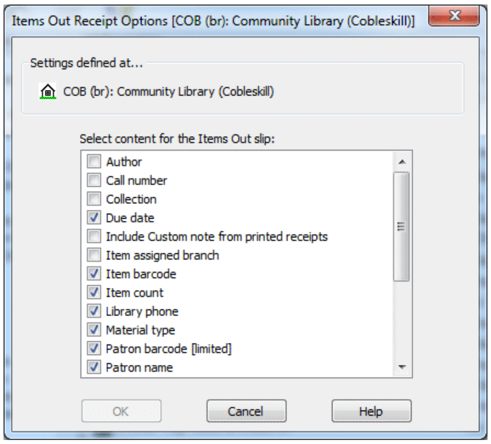
Note:
This feature was also added to Polaris 4.0, build 460 and later.

Duplicate Fine Receipts

If you choose to print fine receipts, you can now automatically print a duplicate fine receipt as required by some agency audit policies. Set the new Patron Services parameter **Fine receipts: Print duplicate receipt** to **Yes**. The parameter is available at the system, library, and branch levels; the default setting is **No** (when printing fine receipts, do not print duplicate receipts). This parameter also controls duplicate waive receipts if waive receipts are enabled for the branch.

Items Out List - Content for Print

As in previous versions of Polaris, a staff member can print a patron's Items Out list from the Patron Status workform - Items Out view. In Polaris 4.1, you can specify the information included in the printed version of the Items Out list. In Polaris Administration, use the new Patron Services parameter **Items out receipt options** to specify the optional content. The parameter can be set at the system, library, or branch level. The system uses the settings for the workstation's log-on branch.

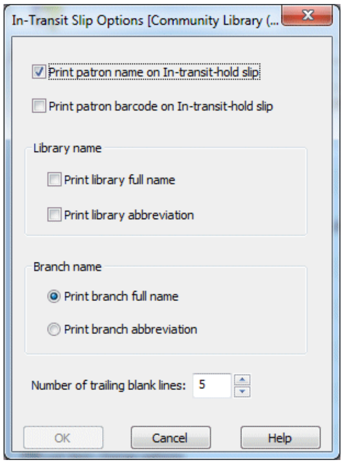


The header of the Items Out list always includes the library name and date/time. The new parameter offers the following optional header data: author, call number, collection, due date, any custom note set for printed receipts, item's assigned branch, item barcode, item count, library phone, material type, limited patron barcode, patron name, renewals left, title, library Web address, and user-defined fields. Your library's user-defined fields appear at the end of the list of options.

Note:
To specify custom note text for receipts, select **Circulation, Options** from the Polaris Shortcut Bar and type your text in the Circulation Options dialog box - Receipt Printer Options tabbed page.

In-Transit Slip Information Options

If enabled for a circulation workform, an in-transit slip is printed when an item circulation status changes to In-Transit (to return an item to its assigned branch) or Transferred (to send an item to the pick-up library to fill a hold request). In Polaris 4.1, additional options have been added for in-transit and in-transit-for-hold slips. Use the Patron Services parameter **In-transit slip options** to set the new options at the system, library, or branch level.



The option to print the patron's name on the in-transit hold slip has been renamed **Print patron name on In-transit hold slip** to more accurately reflect its purpose. You can also select the new option **Print patron barcode on In-transit hold slip to** print the patron's barcode on the in-transit hold slip. By default, this option is not selected.

Note:
As in previous version of Polaris, you can choose to print in-transit slips *only* for holds. Select **Tools, Options** on the workform tool bar to set this option.

The new options **Print library full name** and **Print library abbreviation** apply to all in-transit slips. You can select either or both of these options to print the parent library of the destination branch. They are both unchecked (not selected) by default.

The existing **Branch name options** for the destination branch have not changed. You must select one branch name option (full name or abbreviation) but you cannot select both.

> **Note:**
> Lengthy library and branch full names break at the end of the line and resume on the next line.

A new option to specify the number (0-999) of trailing blank lines has also been added. The default value is 5. Use this setting to control the length of the in-transit slip.

Fines at Check In - Auto-Charge Fines

A new Patron Services parameter, **Check in: auto-charge fine from item work form and find tool context menu,** controls whether overdue fines are automatically charged to the patron account when overdue items are checked in from the Item workform, the Find Tool context menu, or the Patron Status workform - Items Out view. The parameter is available at the system, library, and branch levels and is set to **Yes** by default. (If it is set to **No**, the staff member resolves the fine during the transaction as in previous versions of Polaris.)

> **Note:**
> The order of the prompts during check-in has changed in Polaris 4.1. If the Resolve Fine dialog box is set to display, it is displayed after the prompt for the hold request. If the Resolve Fine dialog box is not displayed, the system takes action on the fine after the action on the hold.

Overdue items - When the new parameter **Check in: auto-charge fine** is set to **Yes** and an overdue item is checked in, the item is checked in and the fine is automatically charged to the patron account. If an overdue item can fill an active hold request, the hold request message appears as in previous versions of Polaris. The staff member takes action on the hold request message:

- **Cancel** - The check-in process stops, the item remains Out, and the hold request remains Active. No charges are written to the patron account.
- **No** - The item is not trapped for the hold, the request is reactivated, and the item becomes In. The overdue fine is automatically charged to the patron account.
- **Yes** - The item becomes Held. The overdue fine is automatically charged to the patron account.

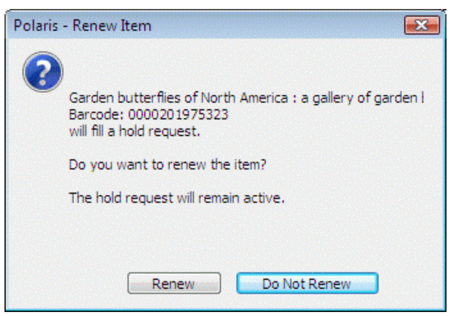
Billed items - When the parameter is set to **Yes** and a billed item is checked in, the Resolve lost/billed item dialog box appears as in previous versions of Polaris. The staff member resolves the billed charges and the item is checked in. If the billed item can fill a request, the hold request message appears before the Resolve lost/billed item dialog box. The staff member takes action on the hold request message first:

- **Cancel** - The check-in process stops, the item remains Out, and the hold request remains Active. No charges are written to the patron account.
- **No** - The item is not trapped for the hold, the request is reactivated, and the item becomes In. The patron account is updated according to whatever action the staff member took on the Resolve lost/billed item dialog box.
- **Yes** - The item becomes Held. The patron account is updated according to whatever action the staff member took on the Resolve lost/billed item dialog box.

If the parameter is set to **No**, the Check In - Fine dialog box appears as in previous versions of Polaris when the item is overdue, and the staff member resolves the fine accordingly. However, if the item can fill a hold request, the hold request message always appears first.

Renewing Overdue or Billed Items with Holds

In Polaris 4.1, the staff client workflow has changed for renewing items from the Check Out workform or the Patron Status - Items Out view when the item would fill a hold request and is overdue or billed. The prompt to renew now appears before the prompt to manage any charges (the Patron Services parameter **Overdues: Clear fine if recovered at renewal** is set to **No**), and the prompt to manage the hold request is removed from the workflow. If there is an active hold request on the item, a new dialog box informs the staff member of the hold request, but the hold remains active. The user must manage the hold separately. The illustration shows an example.



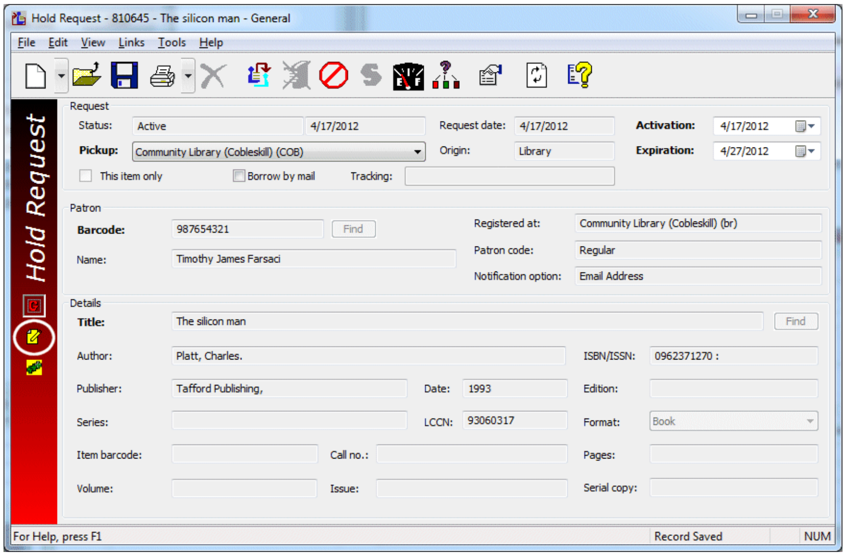
This change does not apply to lost items, which cannot be renewed. There is no change to Offline or SIP processing, where the renewal is allowed, the request remains active, and if there are overdue fines, the patron account is charged. Also, renewals from Polaris PowerPAC and Mobile PAC are blocked if the item will fill a hold request, as in previous versions of Polaris. In Polaris ExpressCheck, as in previous versions, if the option to block the checkout when the item fills a request for a different patron is set (Self-Check parameters, **Polaris ExpressCheck: Blocking conditions**), the checkout is stopped.

Hold Request Deleted If Non-Holdable Item Is Checked Out

When a non-holdable item is checked out to a patron who has a title-level hold request that the item would otherwise fill, the hold request is now deleted instead of cancelled. "Non-holdable items" include any item that is prevented from binding to the request. For example, such items include those where the **Holdable** option is not checked in the item record, or other item settings related to holds prevent the item from being trapped; the item is restricted by status, such as Lost; or the item's assigned branch is not in the routing table.

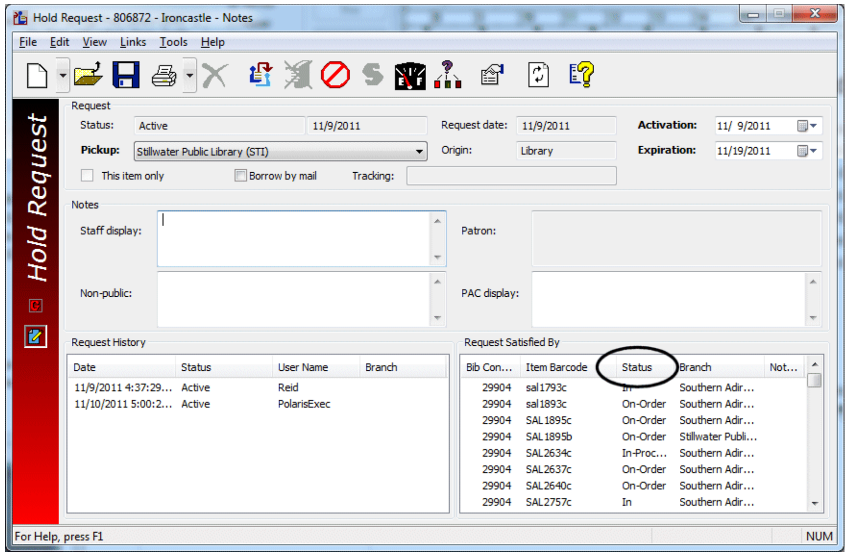
Hold Request Notes Icon

If a hold request includes a note, the Notes icon on the Hold Request workform is now yellow. If there are no notes, the icon is blue.



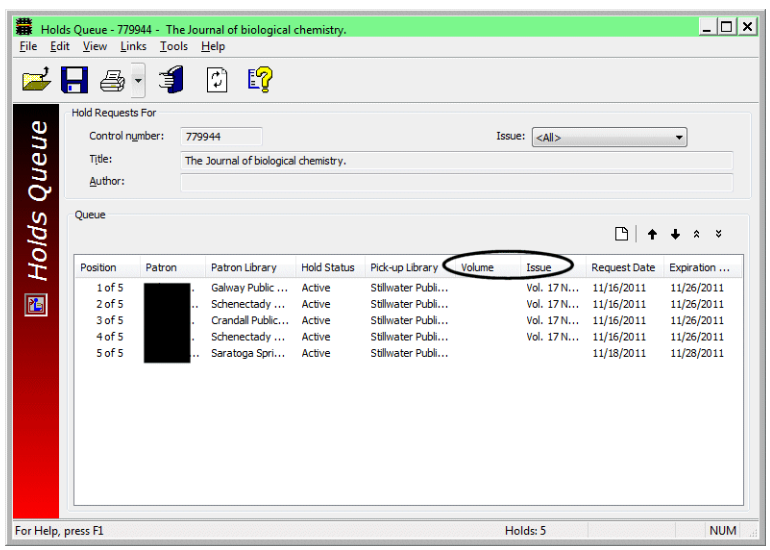
Hold Request Workform - Item Circulation Status

The Request Satisfied By list of items that can fill the hold request (Hold Request workform - Notes view) now includes a column for item circulation status.

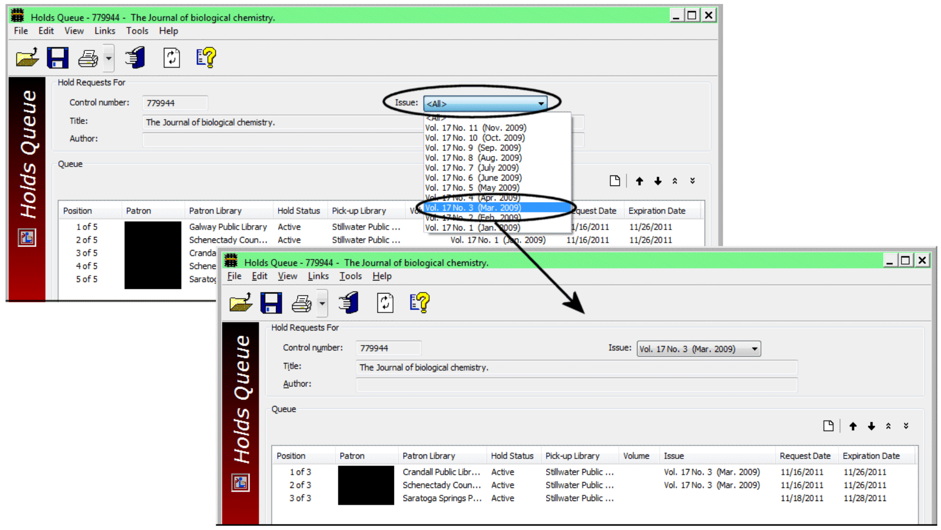


Holds Queue Display for Multi-Volume and Serial Requests

The Holds Queue workform now includes columns for Issue and Volume that display the appropriate information when the request is for a serial issue or a volume in a multi-volume set.



You can filter the queue by volume or issue to display the queue only for the specified volume or issue. The **Volume** filter is available when the holds queue is opened for multi-volume sets. The **Issue** filter is available for serials. Using the filter, you can select a specific volume or issue and display the queue only for that volume or issue. The illustration shows the **Issue** filter.

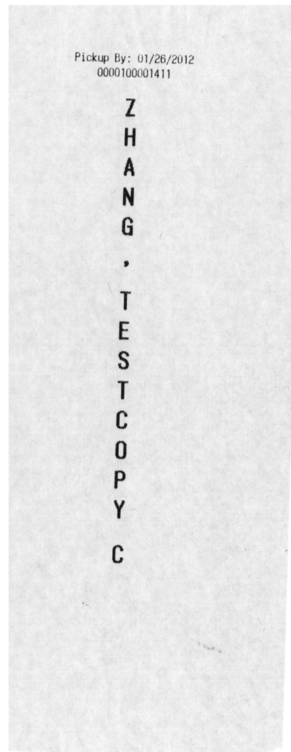


Also, the Patron Status workform - Requests view now accurately displays the queue position for the specific volume or issue as appropriate, as if the filter were applied.

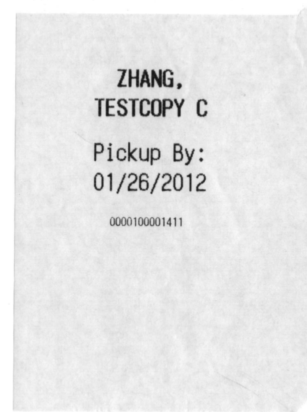
Vertical Holds Pickup Slips

Polaris now provides vertical hold pickup slip options, in addition to the existing horizontally printed hold pickup slips. Two options are available:

- **Vertical** - The hold pickup slip is a wrapper that is typically taped to the spine of the material. The pickup date is printed horizontally at the top and the patron's name is printed vertically down the slip. Any additional content is printed in small type under the pickup date.
- **Tag** - The hold pickup slip is inserted into the material. When the slip is inserted, the patron name and pickup date are exposed at the top of the slip, printed horizontally, and the "tail" of the slip is inside the material. Any additional content is printed in small type under the item barcode.

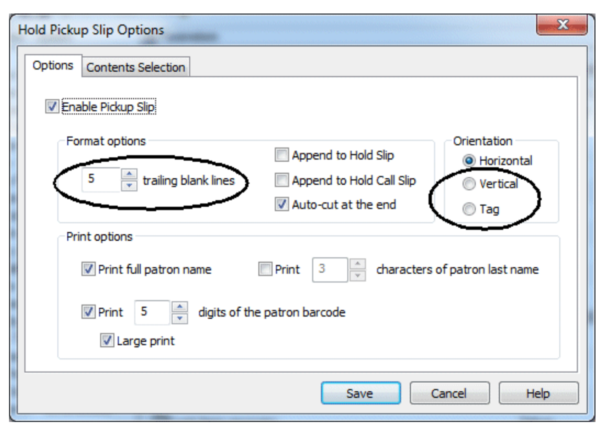


Vertical



Tag

In Polaris Administration, use the Patron Services parameter **Holds pickup slip options** to specify vertical pickup slips. You can select **Vertical** or **Tag**, as described above. Specify the number of trailing blank lines to determine the length of the printed vertical slip.



Other pickup slip options—for example, content selection, printing full or partial patron name, barcode digits, and appending to the hold slip or hold call slip—also apply to vertically-printed hold pickup slips.

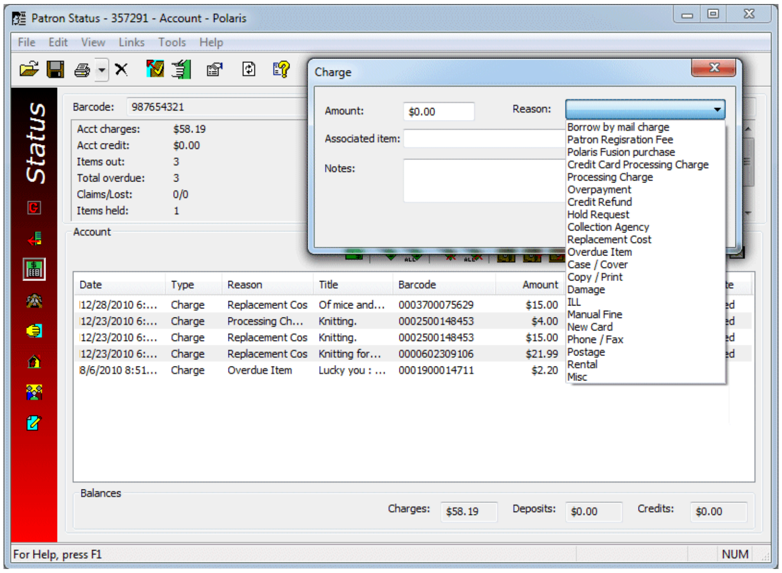
Note:
The **Horizontal** option is the default selection. This option retains the horizontally-printed hold pickup slips available in previous versions of Polaris.

Option to Suppress Holds Checking on Offline Upload

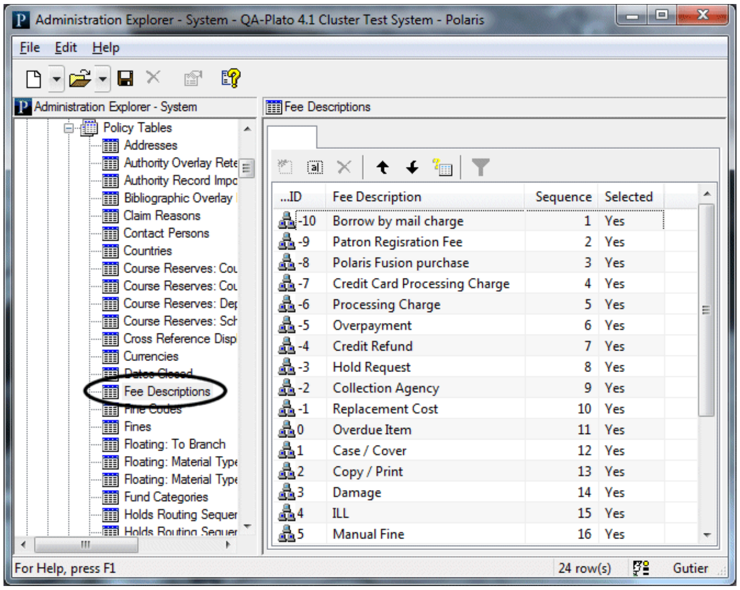
In previous versions of Polaris, when an offline file with check-in transactions was uploaded, eligible items were trapped for holds. This was a problem for some libraries, where staff might overlook the upload report indicating that an item had been trapped, and put the items back on the shelves instead of holding them. Using the new Patron Services parameter **Offline: Trap holds at check-in**, you can now suppress any holds processing when offline check-in transactions are uploaded by setting the parameter to **No**. The default setting is **Yes**, which allows holds processing at upload as in previous versions of Polaris. The parameter is available at the system, library, and branch levels.

Displaying Fee Reason Options

When a staff member adds a charge to a patron account from the Patron Status workform - Account view, the staff member must select a reason for the charge in the Charge dialog box.



Using the Fee Descriptions policy table, you can now suppress unused fee reasons from the Reason list, and determine the list order for the fee reasons that are set to appear. These features are available at the branch level only, and apply to the branch for which they are set.



To set whether a fee reason displays, select the reason and click **Yes** or **No** for the reason in the Selected column. To change the position of a fee description in the Reason list, select the reason and click the appropriate arrow icon at the top of the table.

Tip:
If the ID numbers are not visible in the Fee Descriptions table, click the left border of the **Fee Description** column header and drag it to the right.

In addition, you can modify the description for a fee reason at the system, library, or branch level for both library-defined fee reasons (those that have a positive ID number) and system-supplied reasons (ID number of 0 or a negative number). Select the reason and click the update icon. However, your description changes affect all organizations that choose to display that fee reason.

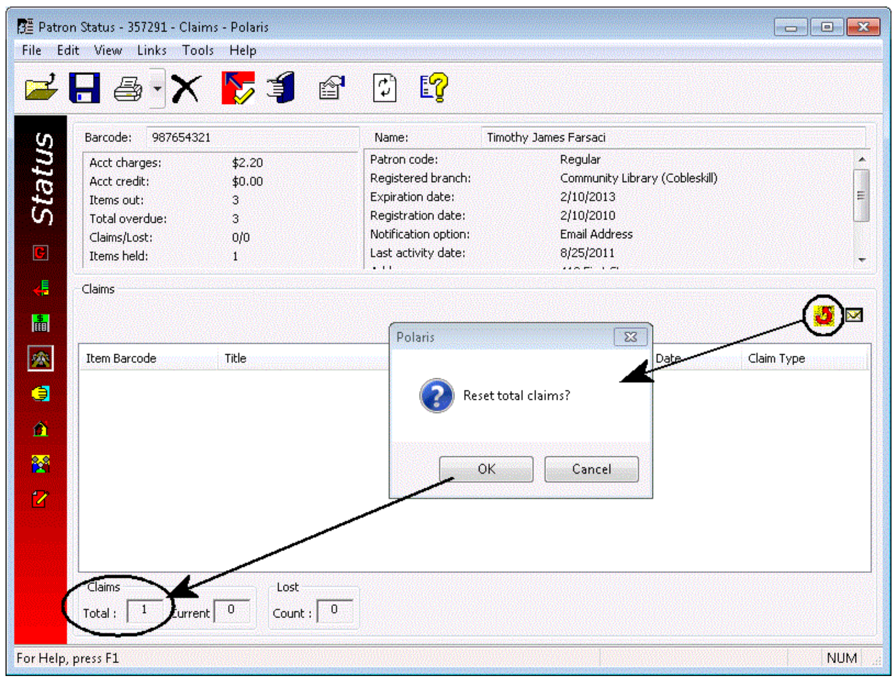
You can add new entries to the Fee Descriptions table at the system and library levels. To add a new entry, click the insert icon. By default, the new entries are set to display for subordinate branches, and are added at the end of the display sequence.

At upgrade to Polaris 4.1, system-supplied reasons are set to display by default. For new customers, system-supplied reasons are initially suppressed by default.

Reset a Patron’s Total Claims Count

Staff members with the appropriate permission can now reset a patron’s total (lifetime) claim count to 0. This prevents a problem in previous versions of Polaris, where a patron record could be permanently blocked for exceeding the total claim limit because there was no way to forgive the claims or reset the counter.

The new system-level Circulation permission, **Patron claims: Reset total claim count: Allow**, is set to No by default. When the permission is set to Yes for the staff member and workstation, the counter can be reset from the Patron Status workform - Claims view. Click the icon above the claims list. (The option is not available if the total claims count is 0.)

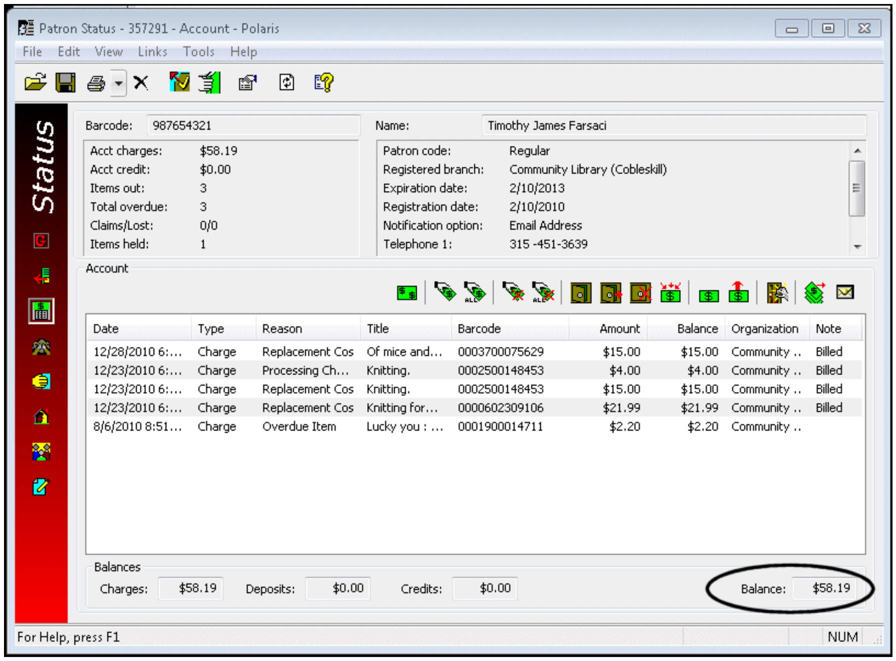


If the patron has current claims when the total is reset, the total will be 0; the total does not include the count of current claims. (In previous versions of Polaris, the total claim count included the current claims.)

Note:
Polaris 4.1 also includes a new, separate permission to override the claim block at circulation. See “New Permissions for Overriding Circulation Blocks” on page 81.

Balance Added to Patron Account Display

The Patron Status workform - Account view now displays the balance remaining on the patron account.



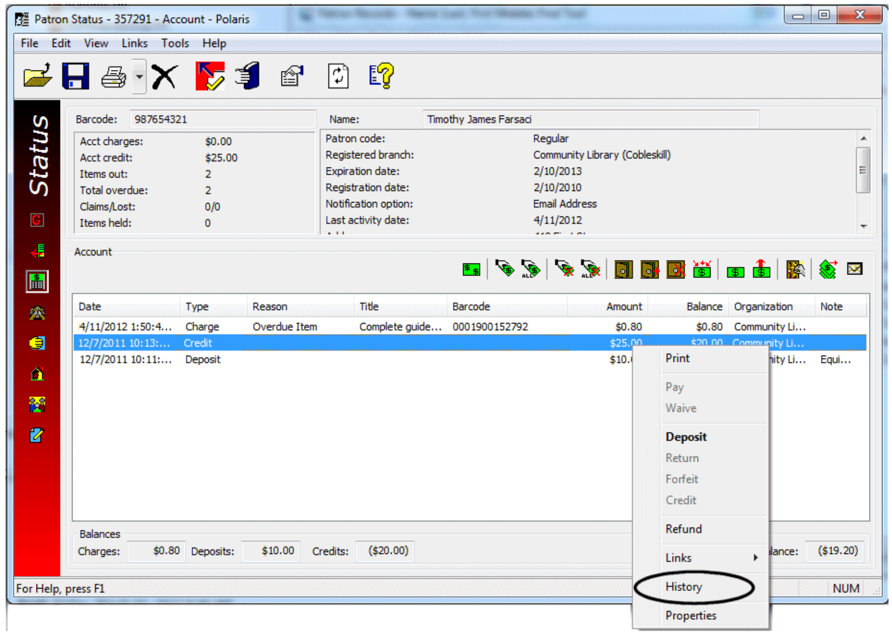
The amount of the balance is the total of all charges minus the total of any credits. If the patron's charges exceed any credits, the amount is displayed as a positive number. If the total credit amount is greater than the total charges, the amount is displayed in parentheses.

Note:
Deposits are not included in the balance calculation.

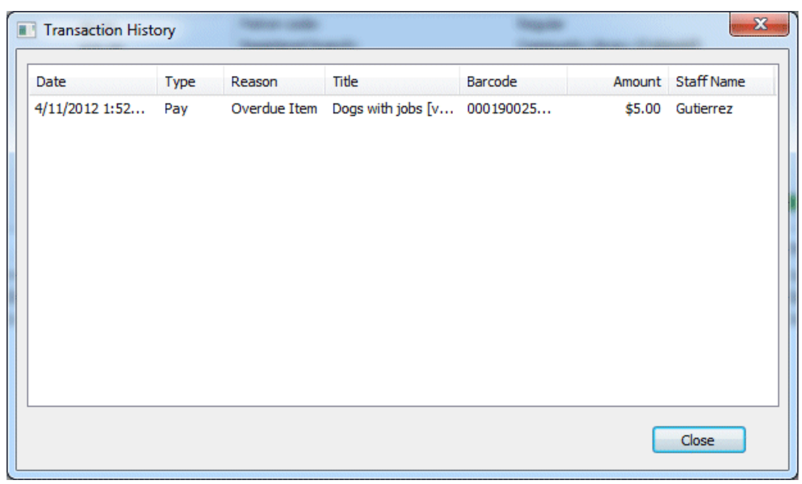
As part of this development, the superfluous account summary frame has been removed from the Patron Status workform - General view, and the Notices history list has been repositioned (see "Patron Notification History Improved" on page 121).

Credit Transaction History in Patron Account

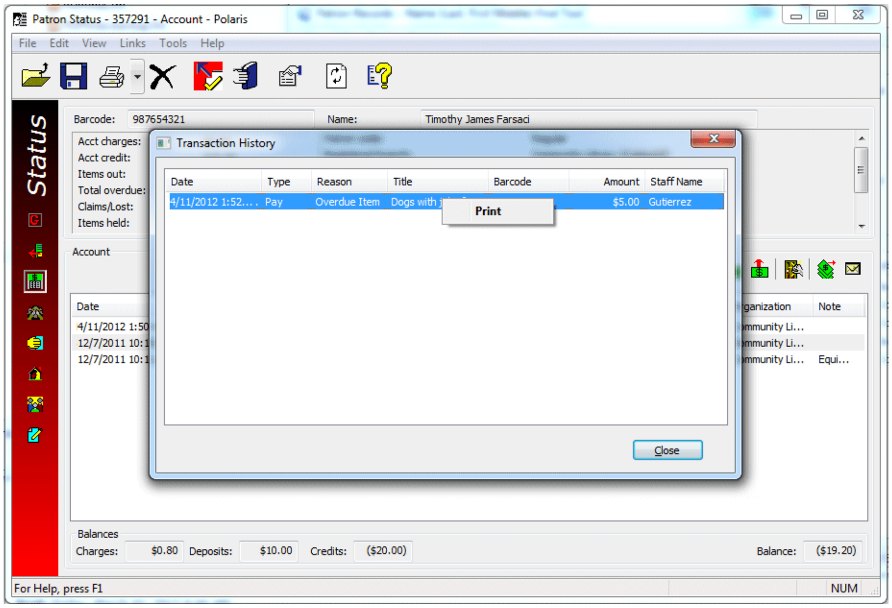
A transaction history is now available for a credit balance in a patron's account. The history logs transactions made from the credit balance. To see the history, right-click the credit entry in the Patron Status workform - Account view and select **History** from the context menu.



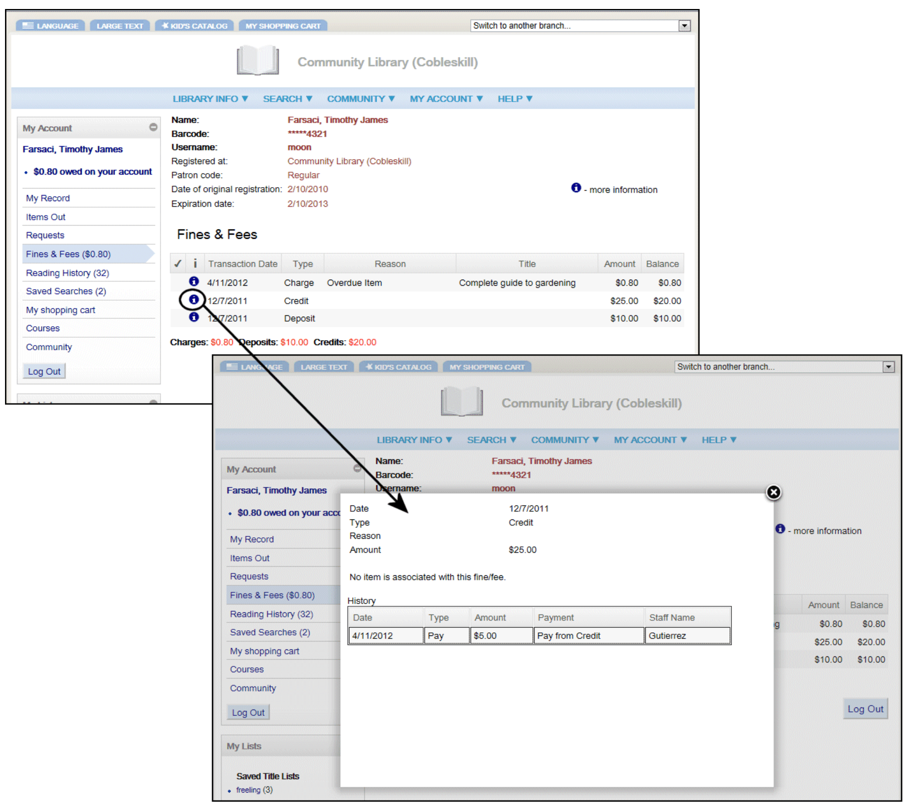
The Transaction History dialog box opens for the credit. For each transaction against the credit, the dialog box lists the following information: transaction date; type of transaction (Pay, Return, or Deposit); reason (for example, Overdue, Copy/Print, Credit Refund); title and barcode of any associated item; the amount paid or refunded from the credit; and the staff member who handled the transaction.



You can right-click a line item in the credit transaction history to print the transaction details. The selected data is formatted for a receipt printer and sent to the printer specified for the Patron Status workform.



Patrons can also view the transaction history for a credit on the Fines & Fees page in the PAC patron account. The patron clicks the information icon for the credit to display the transaction history in a lightbox.

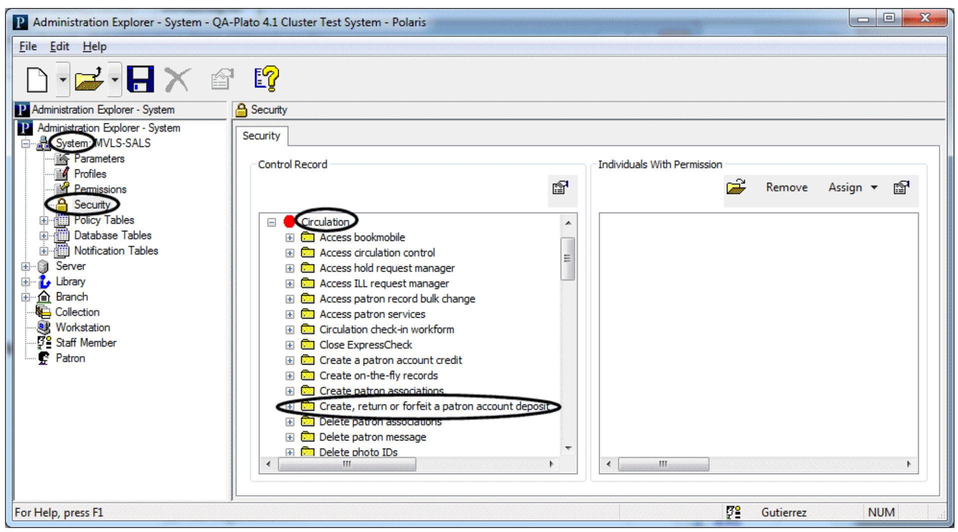


Suppress the Patron Account Balance from Offline MDB Files

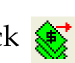
Use the new system-level Patron Services parameter **Offline: Include patron account balance** to determine whether the patron account balance is included in the offline MDB files. The default setting is **Yes**; that is, the patron account balance is included in the files. The parameter does not affect offline circulation operations.

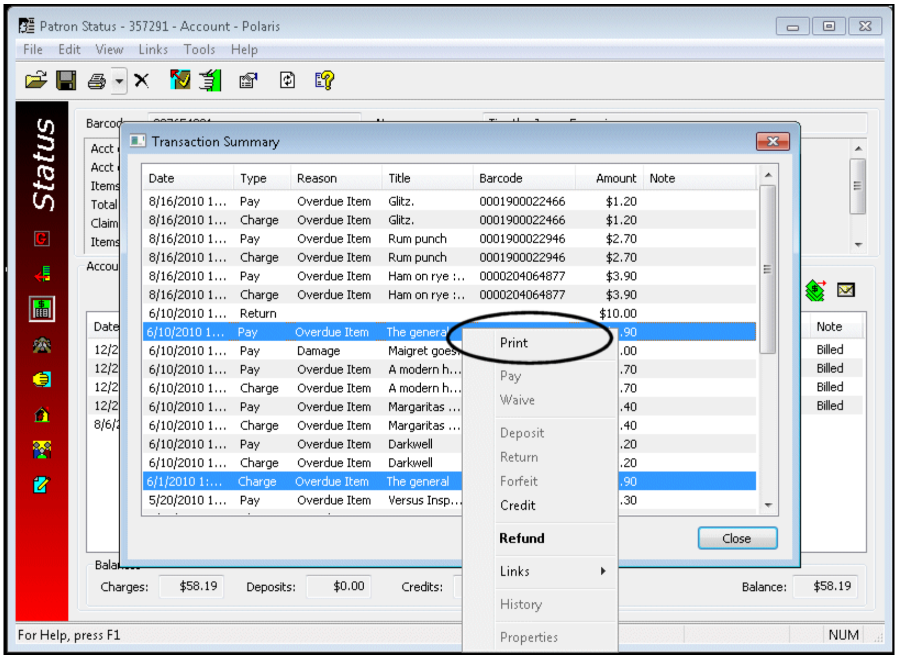
New Permission for Working with Deposits

A new Circulation task permission, **Create, return or forfeit a patron account deposit**, is required to work with deposits in a patron account. If a staff member without the permission selects a deposit function, the standard permission error message appears. The message includes the option for supervisor override. By default, the permission is not granted at installation or upgrade. The permission is not branch-specific; to set this permission, go to Polaris Administration and expand Security for the system organization.



Transaction Summary Dialog Box Improved

The Transaction Summary dialog box is displayed when you click  in the Patron Status workform - Account view. The dialog box is now resizable, and you can select multiple items from the dialog box to print. Only the selected items are printed.



Staff Client Credit Card Payments - Swipe Method

All but the last 4 digits of the patron's credit card number are now masked when a staff member swipes the credit card to accept a credit card payment in the staff client.

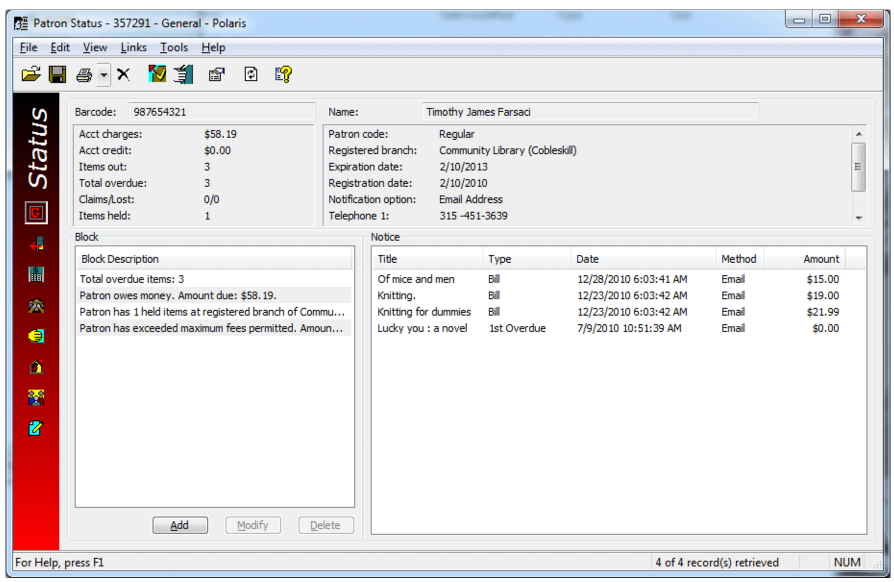
Note:
The entire number is displayed when the card number is entered manually.

Patron Notification History Improved

The patron notification history has been improved in several ways.

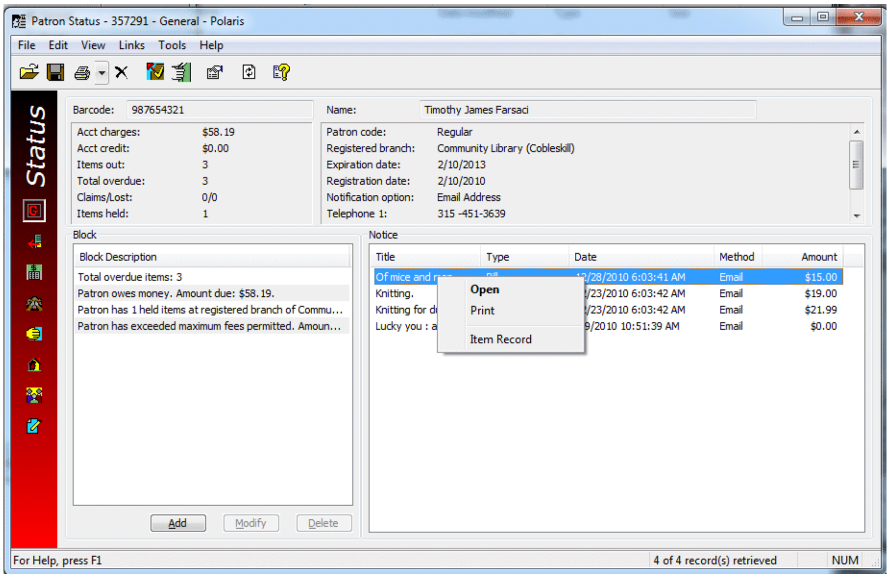
- Hold notices (pick-up and cancelled) are included in the notification history.
- Fine notices are included in the notification history. The fine notice entry includes the total amount indicated on the notice.
- Reminder notices (inactive and expired patron records) are included in the notification history.
- The notification method includes text message (TXT) where appropriate. The date is the Sent date of the message. If the text message was sent in addition to another notification method, both methods are displayed. Additional text messages are recorded as separate entries.
- The default sorting order for the list of notices is now by date (not item title).

The notification history in the Patron Status workform - General view and Patron Registration workform - Status view has been changed to accommodate these developments. The illustration shows the Patron Status workform.



Entries are retained in the notification history for a library-specified period (see "Retaining Entries in the Notification History" on page 122), so numerous entries may accumulate. A maximum of 250 entries is initially displayed. You can scroll down to load another 250 entries at a time, or press **CTRL+SHIFT+A** to load all the entries.

You can select multiple entries, right-click, and select a new **Print** option from the context menu to print multiple entries, without opening individual notification histories. An **Item Record** option is also available for overdue, bill, overdue reminder, and hold notices. Select this option to open a linked item record.



Retaining Entries in the Notification History

In previous versions of Polaris, entries were removed from the patron's notification history when the related items were returned or charges were resolved. In Polaris 4.1, you additionally specify how long notices are kept in the notice history with two new Polaris Administration Notification parameters, available at the system, library, or branch level.

- **Notice history: hold notices time threshold** - Controls how long pick-up and cancelled hold notices are kept in the notice history. The default setting is 90 days; the maximum value is 9,999 days.
- **Notice history: item and account notices time threshold** - Controls how long overdue, fine, bill, and reminder notices are kept in the notice history. The default setting is 90 days; the maximum value is 9,999 days.

An entry is kept in the notification history if it falls within the specified period of time, the related item is checked out, claimed or lost by the current patron, and current charges are not resolved. The entry is kept under these circumstances even if the related item is purged or deleted from the database; in this case, the title is prefixed by **[DELETED]**.

Calculating the Number of Days to Keep the Notice History

The number of days to keep the notice history is counted from the date following the date of the notice through and including the number of days you specify in Polaris Administration. The notice is then cleared from the history during overnight processing.

Example:

The **Notice history: hold notices time threshold** parameter is set to **10**. A hold notice was generated on the 1st day of the month. The notice history will be cleared on the 12th when the overnight process runs after midnight, counting from the 2nd of the month (the date following the date the notice was generated) through the 11th.

Related Information

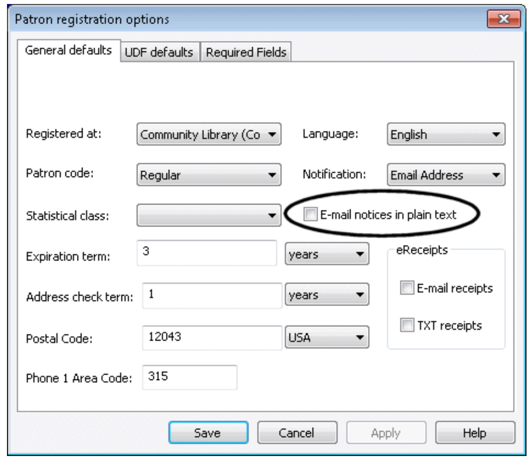
Setting up notification - See "Managing Notification" in the *Polaris Patron Services Administration Guide* or the equivalent topic in staff client online Help.

Mailing Address in Uppercase Letters (Notices)

The mailing address on printed notices is now produced in uppercase letters, in accordance with the U.S. Postal Service standard.

Plain Text E-Mail Notices

In previous versions of Polaris, staff members could specify plain text format for e-mail notices in the patron record, and patrons could specify this preference from the PAC patron account. In Polaris 4.1, you can specify plain text e-mail format for notices as a normal or express registration default. (eReceipts are always sent in plain text format. See "E-Mail and Text Message Receipts (eReceipts)" on page 96.) Use the Patron Services parameters **Patron registration options** and **Express patron registration options** respectively. The system uses the settings for the patron's registered branch. The illustration shows the Patron registration options dialog box.



TXT Notice Failure Report

A new TXT Delivery Failure Report is available from the Polaris Shortcut Bar. To access the report, select **Utilities, Reports and Notices** (Notices folder). The report lists all failed TXT notices for a specified time period for selected or all organizations. The organizations are the notification branches (the branches responsible for sending the notices).

TXT notice failures may be detected for empty e-mail body content or SMTP server failure. A message that cannot be delivered because the address has changed or the remote server does not respond (a delivery failure) is not included in this report.

For each failure, the report lists the patron's barcode, branch, and name; the phone carrier and the carrier's SMS e-mail address; the failure reason and failure date. If multiple failed notices were generated to the same patron during the specified time period, the patron is listed multiple times.

For more information about text message notification, see "Managing Notification" in the *Polaris Patron Services Administration Guide* or the equivalent topic in staff client online Help.

Deleting ILL Records

Bibliographic and item record deletion for ILL requests now honors the settings for the Cataloging profiles **Retain deleted bibliographic records** and **Retain deleted item records** for the item's assigned branch.

The bibliographic and item records for ILL requests are deleted automatically when the ILL request is deleted:

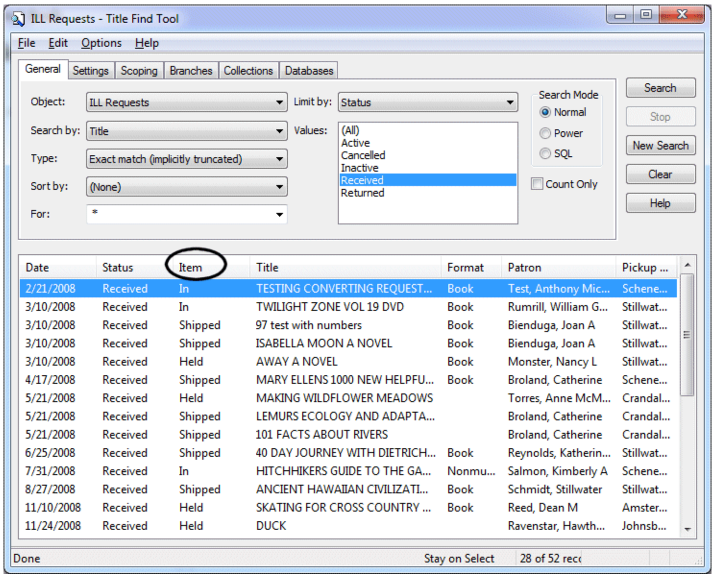
- If both **Retain deleted bibliographic records** and **Retain deleted item records** for the item's assigned branch are set to Yes, the items are retained (deleted provisionally) until purged. They cannot be undeleted, however.
- If one of the profiles is set to No and the other is set to Yes, both the bibliographic and item record will be immediately deleted and purged.
- If both **Retain deleted bibliographic records** and **Retain deleted item records** for the item's assigned branch are set to No, the items are immediately deleted and purged.

When an ILL record is marked for deletion, the "marked for deletion" transaction is now logged instead of the ILL delete transaction. When an ILL record is purged (physically deleted), the transaction is logged is an "ILL delete."

Note:
As in previous versions of Polaris, bibliographic and item records for ILL items cannot be deleted manually.

Linked Item Status in ILL Find Tool Results

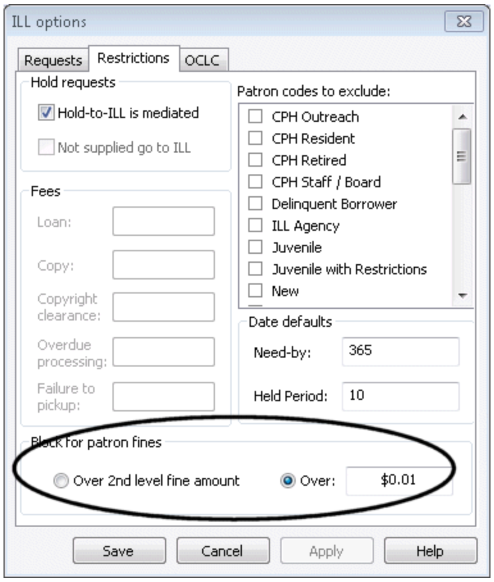
A new column for item status is now displayed in the Find Tool when you search for ILL requests, limiting the search by status (**Received** or **All**).



ILL Requests from PAC - Block for Fines

In previous versions of Polaris, a patron with any outstanding charge amount was blocked from placing an ILL request from PAC. In Polaris 4.1, the library can choose whether to allow or block ILL requests from PAC when the patron owes money.

To set this option, use the Request parameter **ILL options**, Restrictions tabbed page (system-level only).



Choose a block option:

Over 2nd level fine amount - The patron is blocked if the money owed is over the 2nd level fine amount set by the patron's registered branch, and a block message is displayed in PAC.

Over [amount] - Select this option and set an amount. The patron is blocked if the money owed is *greater than or equal to* the amount you specify, and a block message is displayed in PAC. This is the default setting. The default amount is $0.01, which blocks the request if the patron owes any money at all.

ILL PAC Message Translatable

When a patron requests a title from remote database (Z39.50) search results and logs on, a message regarding ILL requests is displayed according to the setting for the patron's registered branch. The default message is **You are about to place an Inter-Library Loan request for an item from a remote library system. If your library charges for Inter-Library Loan requests, your account will be charged accordingly. Do you want to place this request?**

In previous versions of Polaris, you edited the message text in Polaris Administration with the Requests parameter **ILL options** (Messages tabbed page). You could customize the message but you could not offer multilingual versions for PAC. This tabbed page has been removed from the ILL Options dialog box, and you can now customize and translate the message using Polaris Language Editor (WebAdmin). The message string ID is **ILL_TEXT_REQINFO** (ILL "product"). For more information about using Polaris Language Editor to customize and translate messages, see the *Polaris Language Editor (WebAdmin) Guide*, or Language Editor online Help.

The default message has not changed. At upgrade, if you have already customized the message text in Polaris Administration, your customized text is maintained in the Polaris Language Editor as a custom English string.

Note:
This change was also added to Polaris 4.0, build 535 and later.

Multiple Ratings for Single Reading History

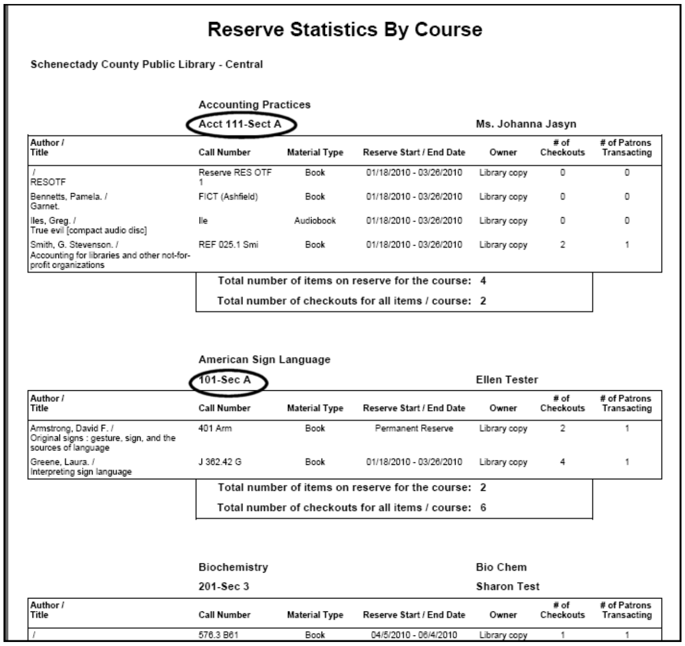
An Outreach Services patron's reading history now accommodates different ratings and notes for the same title if the patron has checked out and rated the title multiple times.

Item Shelf Location Included in Circulation Transactions

If an item has a shelf location, the information is now logged in check-out and check-in transactions for reporting purposes.

Reserve Statistics Report Improved

The course and section numbers have been added to the course names in the drop-down list of courses for the Reserve Statistics by Course report to make reporting more precise. The report is available from the Polaris Shortcut bar (**Utilities, Reports and Notices, Circulation**).



Reserve Statistics By Course

Schenectady County Public Library - Central

Accounting Practices

Acct 111-Sect A — Ms. Johanna Jasyn

Author / Title	Call Number	Material Type	Reserve Start / End Date	Owner	# of Checkouts	# of Patrons Transacting
/ RESOTF	Reserve RES OTF 1	Book	01/18/2010 - 03/26/2010	Library copy	0	0
Bennetts, Pamela. / Garnet.	FICT (Ashfield)	Book	01/18/2010 - 03/26/2010	Library copy	0	0
Iles, Greg. / True evil [compact audio disc]	Ile	Audiobook	01/18/2010 - 03/26/2010	Library copy	0	0
Smith, G. Stevenson. / Accounting for libraries and other not-for-profit organizations	REF 025.1 Smi	Book	01/18/2010 - 03/26/2010	Library copy	2	1

Total number of items on reserve for the course: 4

Total number of checkouts for all items / course: 2

American Sign Language

101-Sec A — Ellen Tester

Author / Title	Call Number	Material Type	Reserve Start / End Date	Owner	# of Checkouts	# of Patrons Transacting
Armstrong, David F. / Original signs : gesture, sign, and the sources of language	401 Arm	Book	Permanent Reserve	Library copy	2	1
Greene, Laura. / Interpreting sign language	J 362.42 G	Book	01/18/2010 - 03/26/2010	Library copy	4	1

Total number of items on reserve for the course: 2

Total number of checkouts for all items / course: 6

Biochemistry — Bio Chem

201-Sec 3 — Sharon Test

Author / Title	Call Number	Material Type	Reserve Start / End Date	Owner	# of Checkouts	# of Patrons Transacting
/	576.3 B61	Book	04/5/2010 - 06/4/2010	Library copy	1	1

For more information about course reserve reports, see "Circulation Reports" in the *Polaris Basics Guide* or the equivalent topic in staff client online help.

New Patron Financial Reports

Two new Patron Financial reports provide data for improved cash flow accounting. To access these reports, select **Utilities, Reports and Notices** from the Polaris Shortcut Bar. In the Polaris Reports dialog box, select **Patron Financial** from the **Public Services** folder.

Financial Transaction Summary by Fee Reason

This report lists and summarizes patron financial transactions, organized by transaction (fee) reason. You can select one, many, or all branches (transacting organizations) and set a transaction date range. If the transaction is a payment, waive, or refund, the transaction is included even if the initial charge was prior to the date range. You can also choose to include or exclude credit card transactions.

The following patron financial transactions are included:

- **Charges** - A charge may be created manually by staff, created automatically by a process such as an overdue or hold request, or created by a third-party device.
- **Payments** - A payment may be made by staff in the staff client, by the patron from PAC, or via a third-party device.

- **Waives** - Waives may be created manually, or automatically when a lost item is returned. A total of all waives is included in a separate summary at the end of the report, but individual waive transactions are not included in the detail section of the report.
- **Refunds** - Cash or check refunds. These are summarized at the end of the report but are not included in the detail section of the report.
- **Credits** - Amounts are credited to a patron account under certain circumstances, such as when a lost and paid for item is recovered. Staff members with appropriate permission can manually create a credit.

Note:
Deposits and deposit returns are not included in the reported patron financial transactions.

The detail section of the report lists transactions grouped by transaction reason (such as overdue item) and the total payments for that reason. Transaction details include the date, amount, payment method, operator, and patron barcode, and are sorted by transaction date/time.

Note:
The payment method **Stored value** appears in the report if you use a third-party payment system such as Envisionware to take payments.

The illustration shows an example page from the report detail section.

Financial Transaction Summary by Fee Reason From 1/1/2011 to 7/31/2011

Saratoga Springs Public Library

Borrow by mail charge

Transaction Date	Payment Method	Operator	Patron Barcode	Amount
1/12/2011 4:45:01 PM	Cash	Zhang	[redacted]	$2.50
7/1/2011 8:55:31 AM	Cash	Zukowski	[redacted]	$2.50
			Total Borrow by mail charge:	5.00

Collection Agency

Transaction Date	Payment Method	Operator	Patron Barcode	Amount
1/21/2011 2:07:35 PM	Cash	Zukowski	[redacted]	$10.00
			Total Collection Agency:	10.00

Overdue Item

Transaction Date	Payment Method	Operator	Patron Barcode	Amount
1/21/2011 2:07:34 PM	Cash	Zukowski	[redacted]	$0.80
1/21/2011 2:07:34 PM	Cash	Zukowski	[redacted]	$0.80
1/21/2011 2:08:17 PM	Cash	Zukowski	[redacted]	$5.00
1/21/2011 2:08:47 PM	Cash	Zukowski	[redacted]	$5.75
1/21/2011 2:08:55 PM	Cash	Zukowski	[redacted]	$5.75
1/21/2011 2:09:09 PM	Cash	Zukowski	[redacted]	$5.00
1/21/2011 2:09:19 PM	Cash	Zukowski	[redacted]	$5.75
1/21/2011 2:09:35 PM	Cash	Zukowski	[redacted]	$5.00
7/1/2011 8:55:17 AM	Cash	Zukowski	[redacted]	$5.00
7/1/2011 8:55:31 AM	Cash	Zukowski	[redacted]	$5.00
			Total Overdue Item:	43.85

Page 1 of 34 Report Printed: 8/9/2011 3:38:55 PM

The summary section of the report lists the totals for all branches included in the report, with the total amounts for each transaction reason.

A separate summary reports the total of all debit transactions. These include refunds from payments, refunds from deposits, and credits from deposits. (Individual debit transactions are not included in the report detail.)

A separate summary for waive transactions is also included. The waive total section is divided into summaries by the following types of waives:

- **Waive** - Created during check out, renewal, or check in by a staff member in response to a system prompt to resolve a patron’s charges.
- **Waive Existing Charge** - Direct waive of an existing charge by a staff member working in the patron account
- **Autowaive: Lost Item Recovery or Offline** - Waive created by a system process, not confirmed by a staff member

The illustration shows an example of the report summary section.

Financial Transaction Summary by Fee Reason From 1/1/2011 to 7/31/2011

Revenue Totals	
Borrow by mail charge	$5.00
Collection Agency	$188.00
Copy / Print	$8.00
Credit Card Processing Charge	$18.00
Damage	$10.50
ILL	$11.00
Manual Fine	$58.00
None given	$220.54
Overdue Item	$4,948.88
Patron Regisration Fee	$19.70
Polaris Fusion purchase	$79.72
Processing Charge	$196.64
Rental	$0.25
Replacement Cost	$1,804.13
	$7,568.36

Total Debits	
Credit from Deposit/Pay	$199.06
Deposit	$12.00
Refund from Payment	$142.64
Return from Deposit	$114.42
	$468.12

Total Waives	
Auto-waive	$274.99
Waive	$271.45
Waive Existing Charge	$10,888.70
	$11,435.14

Grand Total - Selected Branches	
Cash	$5,971.06
Check	$519.42
Collection Agency	$378.57
Credit card	$676.31
Pay from Credit	$23.00
	$7,568.36

Financial Transaction Summary by Payment Type

This report is similar to the Financial Transaction Summary by Fee Reason report, but lists only payment transactions. All payment methods are included.

The detail section of the report lists the transaction date, transaction reason, item barcode and title if applicable, operator, workstation, patron barcode, and amount. This section is grouped by payment method and sorted by transaction date/time. The illustration shows an example page from the report detail section.

Financial Transaction Summary by Payment Type From 6/1/2011 to 7/31/2011

Saratoga Springs Public Library

Cash

Transaction Date	Transaction Reason	Item Barcode	Title	Operator	Computer Name	Patron Barcode	Amount
7/1/2011 8:55:17 AM	Overdue Item	3364100000013816	Zeitoun	Zukowski	Zukowski-WS	[redacted]	$5.00
7/1/2011 8:55:31 AM	Borrow by mail charge	3364100000013816	Zeitoun	Zukowski	Zukowski-WS	[redacted]	$2.50
7/1/2011 8:55:31 AM	Replacement Cost	3364100000013816	Zeitoun	Zukowski	Zukowski-WS	[redacted]	$19.45
7/1/2011 8:55:31 AM	Overdue Item	0001100205747	Autumn	Zukowski	Zukowski-WS	[redacted]	$5.00
						Total Cash:	$31.95

Credit card

Transaction Date	Transaction Reason	Item Barcode	Title	Operator	Computer Name	Patron Barcode	Amount
7/1/2011 3:29:00 PM	Polaris Fusion purchase			PolarisExec	SYSTEM	[redacted]	$43.75
						Total Credit card:	$43.75
						Total Transactions For Saratoga Springs Public Library:	$75.70

The summary section of the report includes the total for each payment method, the total for all payment methods per branch, and grand totals for all selected branches. The illustration shows example pages from the report summary section.

Financial Transaction Summary by Payment Type From 6/1/2011 to 7/31/2011

Grand Total - Selected Branches

Payment Method	Total
Cash	$683.83
Credit card	$174.11
Total	$857.94

Financial Transaction Summary by Payment Type From 6/1/2011 to 7/31/2011

Grand Totals - By Payment Method

Cash

Transaction Reason	Total
Borrow by mail charge	$2.50
Collection Agency	$39.50
Manual Fine	$10.00
Overdue Item	$482.75
Patron Regisration Fee	$7.80
Processing Charge	$15.30
Replacement Cost	$125.98
Total	$683.83

Credit card

Transaction Reason	Total
Collection Agency	$13.50
Credit Card Processing Charge	$5.75
Overdue Item	$16.10
Patron Regisration Fee	$3.95
Polaris Fusion purchase	$43.75
Processing Charge	$15.06
Replacement Cost	$76.00
Total	$174.11

Note:

These reports were also added to Polaris 4.0, build 568 and later.

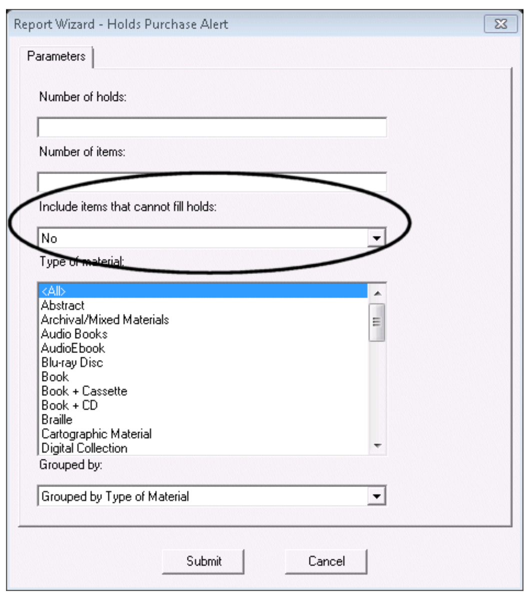
Holds Purchase Alert Report Improvements

The Holds Purchase Alert report, available in standard Polaris toolbar reports (**Circulation, Holds**), lists bibliographic records with hold requests on them, the number of requests, and the number of items with a record status of Final that can fill the request. You set minimum levels for the number of holds on a bibliographic record and the number of items attached to a bibliographic record in the report parameters, and the report returns results based on the ratio of number of holds to number of items. This report provides an indication of which titles are most frequently requested and have too few items to meet the demand, and is useful for making purchasing decisions. Certain improvements were made to this report in Polaris 4.0, build 407 and later, including the ability to filter the report by type of material, the inclusion of the UPC code (if any) when no ISBN is available, and format improvements.

The report is now further improved in these ways:

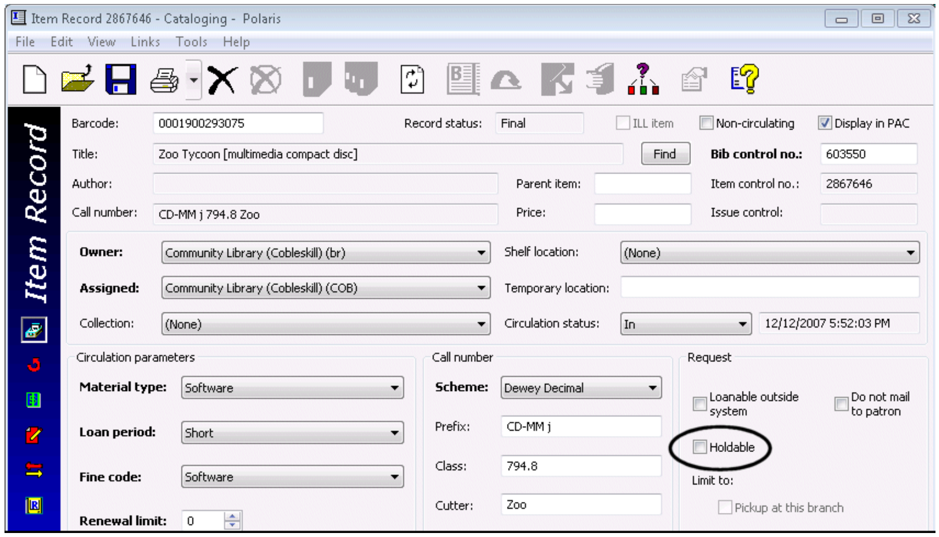
Bib call numbers - The report now includes bibliographic record call numbers (browse call numbers).

Items that cannot fill holds - The report now offers an option to include or omit items that cannot fill holds. In previous versions, only items with a status of Withdrawn and those that were not Final were omitted from the report.

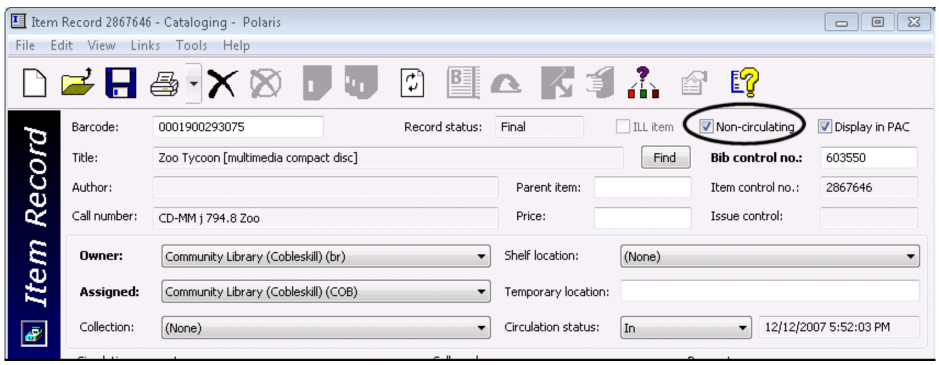


The default setting is **No** (do not include items that cannot be held). Items that cannot be held include the following:

- Item records with a circulation status of Withdrawn, Missing, Unavailable, Lost, In-repair, Claim Returned, Claim Never Had
- Item records where the **Holdable** option is not checked



- Item records where the **Non-circulating** option is checked



- Items records that are not Final

When the parameter is set to **Yes**, there is no change in the way the report previously functioned. That is, only Withdrawn items and items that are not Final are omitted from the report.

Note:
These improvements were also added to Polaris 4.0, build 580 and later.

Collection Agency Reporting via FTP

You can now transmit Submission and Update reports to your collection agency via FTP (File Transfer Protocol), instead of or in addition to e-mail.

FTP is a method of sending data files to (or retrieving them from) specified locations on remote servers. In Polaris Administration, the library specifies the FTP address on the collection agency server. When the process runs, the Submission and Update files are automatically placed on the remote server.

Depending on the collection agency's requirements, the FTP file location for multiple branches may require individual folders for each branch or library, or a single folder containing the data files from all locations. For example, UMS prefers a single folder since the files for individual branches are distinguished by file name.

Secure FTP and Third-Party FTP software

Polaris also supports SFTP (Secure FTP), a secure way to transmit the data. If the library chooses to use SFTP, you must install a third-party SFTP program on the library network. You can also use third-party FTP software that does not support SFTP. In either case, you specify the program executable and any associated parameters in Polaris Administration.

Note:
Some networks may have restrictions on FTP or on file sizes, and there may be firewall settings that prevent FTP. The library is responsible for clearing the way for FTP on the local network.

Active FTP

Some collection agencies may support Active FTP. Active FTP allows the remote service to initiate the connection to begin the transfer. However, the firewall on some networks will not allow this, so Passive mode is used. If the remote server accepts Active FTP, you can select the option in your Polaris Administration setup. As with Passive mode, the remote service will need to provide the parameters necessary to connect via Active FTP.

E-Mail Summary

As part of this development, the Polaris Administration e-mail setup for collection agency processing includes a new option to send an e-mail summary only. When this option is selected, the program sends a summary to the specified e-mail addresses instead of a full report. The summary e-mail includes the summary data normally included in the full report. (This summary data is not included in the FTP files.) The header of the summary includes a mapping of the UDFs included in the files. The summary option should be used in connection with FTP transmission to alert the designated recipients that the reporting process ran.

Important:
The e-mail summary option is intended to be used with the FTP option. If the library sends files to the agency via e-mail but does not use FTP, do not select this option.

The e-mail summary feature is also valuable if there are transmission errors. If the FTP transmission fails for any reason, the summary e-mail message indicates that the process failed. The message includes the filename of the document to be sent, and a reason for the failure if one can be determined.

Sending the Files

When you enable FTP transmission, the Submission and Update reports are automatically sent to the designated file location, and a copy of the report file is automatically saved to a local directory on the server:
\[Polaris Data Path]\[Version No.]\Logs\SSIS\CollectionAgency\Reports

If you report by branch or library, each location has a subdirectory:
SSIS\CollectionAgency\Reports\AMS-3

> **Note:**
> If both e-mail and FTP output options are selected, only one copy is sent to the local directory.

Setting Up FTP Transmission in Polaris Administration

Before you begin setting up FTP transmission in Polaris Administration, contact your collection agency to determine the following:

- FTP server location
- FTP port
- FTP folder name
- Your user name and password for the agency's FTP server

Then follow these steps:

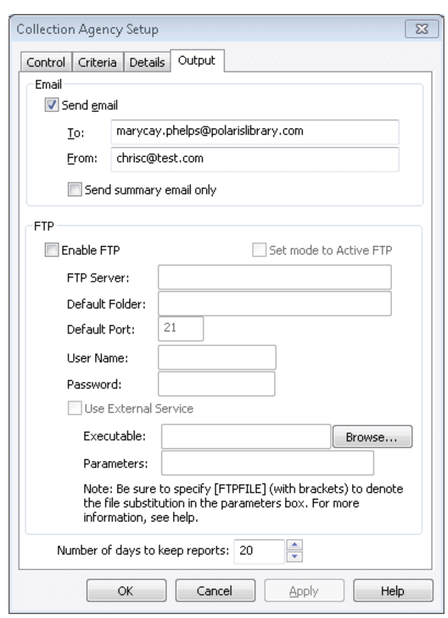
1. In the Administration Explorer tree view, select **Parameters** for the organization, and click the **Patron Service**s tab in the details view.

   You can set FTP options at the system, library, or branch level.

2. Double-click **Collection agency options**.

   The Collection Agency Setup dialog box opens.

3. Click the **Output** tab.



4. To send e-mail summary reports only (see "E-Mail Summary" on page 134):

   a) Select (check) **Send email**.

   b) Specify the e-mail address where the report is sent in the **To** box, and specify the reply e-mail address in the **From** box.

   Note:
   As in previous versions of Polaris, you can specify multiple **To** e-mail addresses. Separate them with a semicolon (;). However, the e-mail fields are limited to 255 characters, including the characters that separate multiple addresses. If you have multiple e-mail addresses that require more characters, set up a distribution group on the e-mail server, and type the distribution group name in the e-mail address field.

   c) Select (check) **Send summary email only**. If you leave this option unchecked, the full collection agency reports will be sent by e-mail to the specified e-mail addresses, and via FTP to the collection agency (see step 5).

   Note:
   The e-mail summary option is intended to be used with the FTP option. If the library sends files to the agency via e-mail but does not use FTP, do not select this option.

5. Select (check) **Enable FTP**.

6. If the collection agency uses Active FTP (see "Active FTP" on page 134), select (check) **Set mode to Active FTP**. If you leave this option unchecked, Passive mode is used.

7. Supply your agency's server information in the following fields:
   - **FTP server** - Type the complete URI for the agency's FTP server.
   - **Default Folder** - Type this organization's folder name as it exists on the agency's FTP server.
   - **Default port** - Type the port number for the agency's FTP server.
   - **User Name, Password** - Supply your user name and password for the agency's FTP server.

8. If you use a third-party service for FTP transmission (see "Secure FTP and Third-Party FTP software" on page 134), follow these steps:

   a) Type the executable name (for example, **ftp.exe**) or click **Browse** to browse for and select the executable.

   b) Enter the FTP parameters. Your entry must include **[FTPFILE]**.

   Example:
   -s -file [FTPFILE]

   Note:
   Some of the parameters may duplicate the values you entered in the Username, Password, or other fields.

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

Related Information

For more more information about setting up collection agency processing, see "Managing Collection Agency Services" in the *Polaris Patron Services Administration Guide* or the equivalent topic in staff client online Help.

Collection Agency Synchronization Report Improved

A Balance Due System column has been added to the Collection Agency Synchronization report, which runs on demand and is automatically sent by e-mail to Unique Management Systems. The existing Balance Due column has been re-labeled Balance Due Org.

The Balance Due System is the amount a patron owes to all reporting organizations. In most cases the amounts in Balance Due System and Balance Due Org will be the same. However, it is possible that the patron may be reported on behalf of more than one library; for example, if the reporting options are set to Item's Branch. In this case the patron would appear twice in the report, once for each reporting organization. In this case, the Balance Due System is the total amount owed to both organizations. Also note that the patron may have an actual account balance greater than the Balance Due System. This would happen if the patron owed additional charges to a third library that did not report to the collection agency. That larger amount, the sum of amounts due to the two reporting libraries and the one that did not report, is not included in the Synchronization report because it does not impact any collection agency processing.

Note:
This improvement was also added to Polaris 4.0, build 611 and later.

Hours of Operation Settings at System and Library Levels

The Patron Services parameter **Hours of Operation** is now available at the system and library levels, as well as the branch level. If you set hours at the system level, for example, Polaris PowerPAC users connected to the system organization will see the hours you set for the system. At upgrade, if you have already set hours at the branch level, then set hours at the system level, your previous branch-level settings are not changed.

Note:
This feature was also added to Polaris 4.0, build 423 and later.

Community Profiles

With Polaris Community Profiles, libraries can link, centralize, and promote resources by making community information easily accessible from Polaris PowerPAC. When combined with ContentXChange, Community Profiles can further extend the library's services by distributing targeted relevant information from the library to community web sites.

Community Profiles is a separately licensed feature. For more information, see the *Polaris Community Profiles Guide* or the equivalent topics in staff client online Help.

Creating/Editing Community Records in the Polaris Staff Client

Library staff members use a labeled editor in the Polaris staff client to create, edit, and delete community records. Community records are stored as MARC records in the same Polaris database as the bibliographic information, but in a set of separate tables. After a staff member has created a community record and selected a patron to be the organization representative, the patron can edit the records in the Polaris PowerPAC.

If the library creates event records through a third-party application such as Evanced Solutions, those events can be imported so they appear in the Polaris PowerPAC.

Note:
If the library already has community records in MARC format, they can be imported by Polaris Conversion Services. The ability to import community records is not included in the Polaris staff client for release 4.1.

If your library has a license for Polaris Community Profiles, you can search for existing community records in the Polaris Find Tool, and create new community records by selecting **File, New, Community Records** from the Polaris Shortcut Bar or by copying an existing community record.

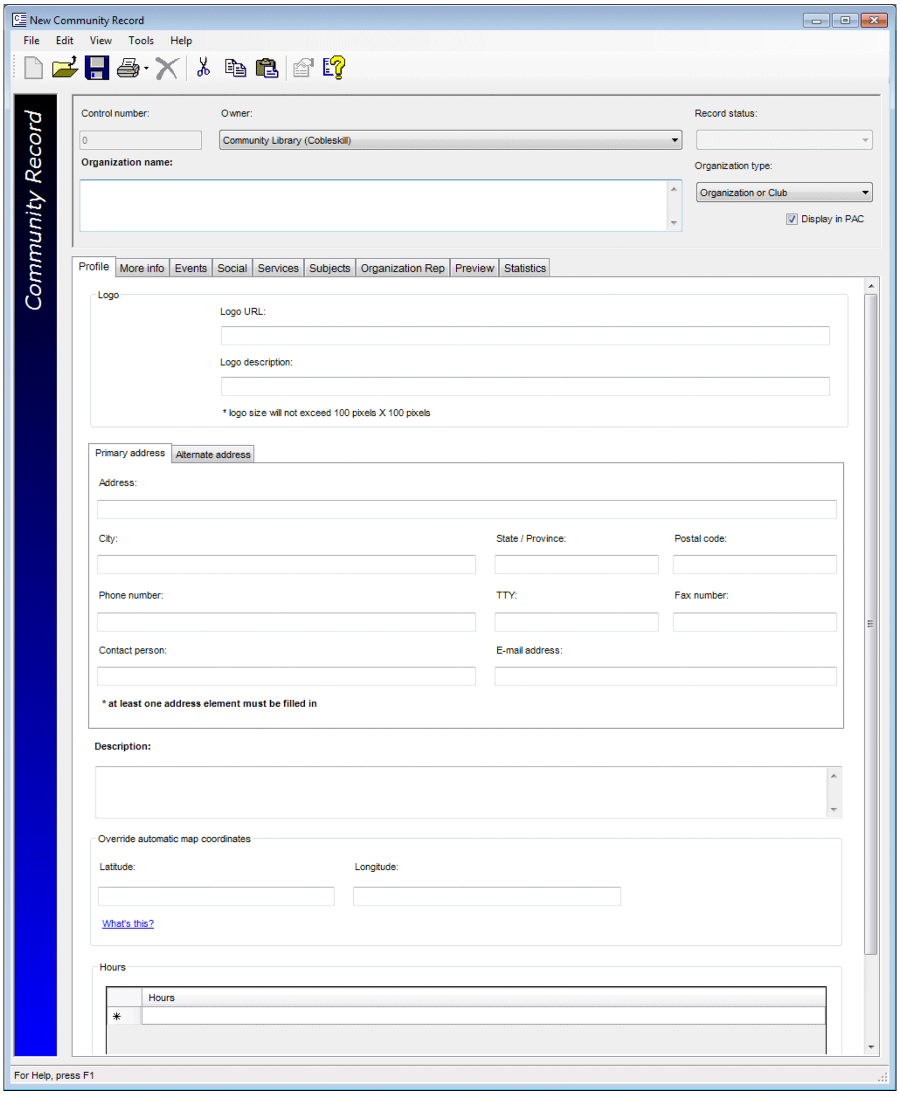
Staff members can create, edit, or view community records in Polaris Cataloging using a tabbed Community Record workform consisting of the following tabbed pages: Profile, More info, Events, Social, Services, Subjects, Organization Rep, Preview, and Statistics. After a community record is created, a staff member can designate a patron as a community representative who can update and modify the record from Polaris PowerPAC. See "Editing Community Records in Polaris PowerPAC" on page 147.

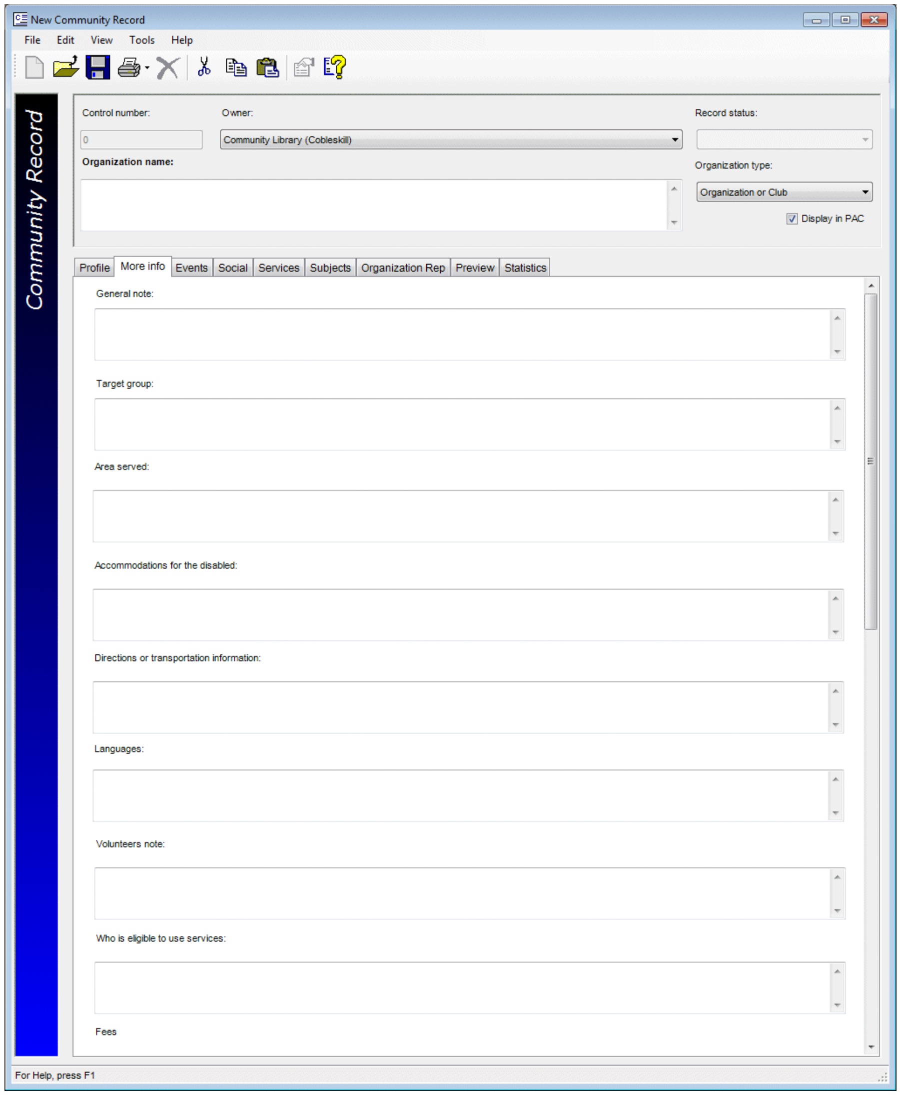
Note:
Community records security in the Polaris staff client is governed by the following permissions: **Community records: Access, Create, Modify, Delete**

Community Records can be printed in various formats. See “” on page 146. In addition, standard Community reports are available from the Polaris Shortcut Bar. See “Community Reports” on page 147.’

Staff Client Community Record - Profile and More info

Enter the basic information for the organization on the Profile and More info tabs.



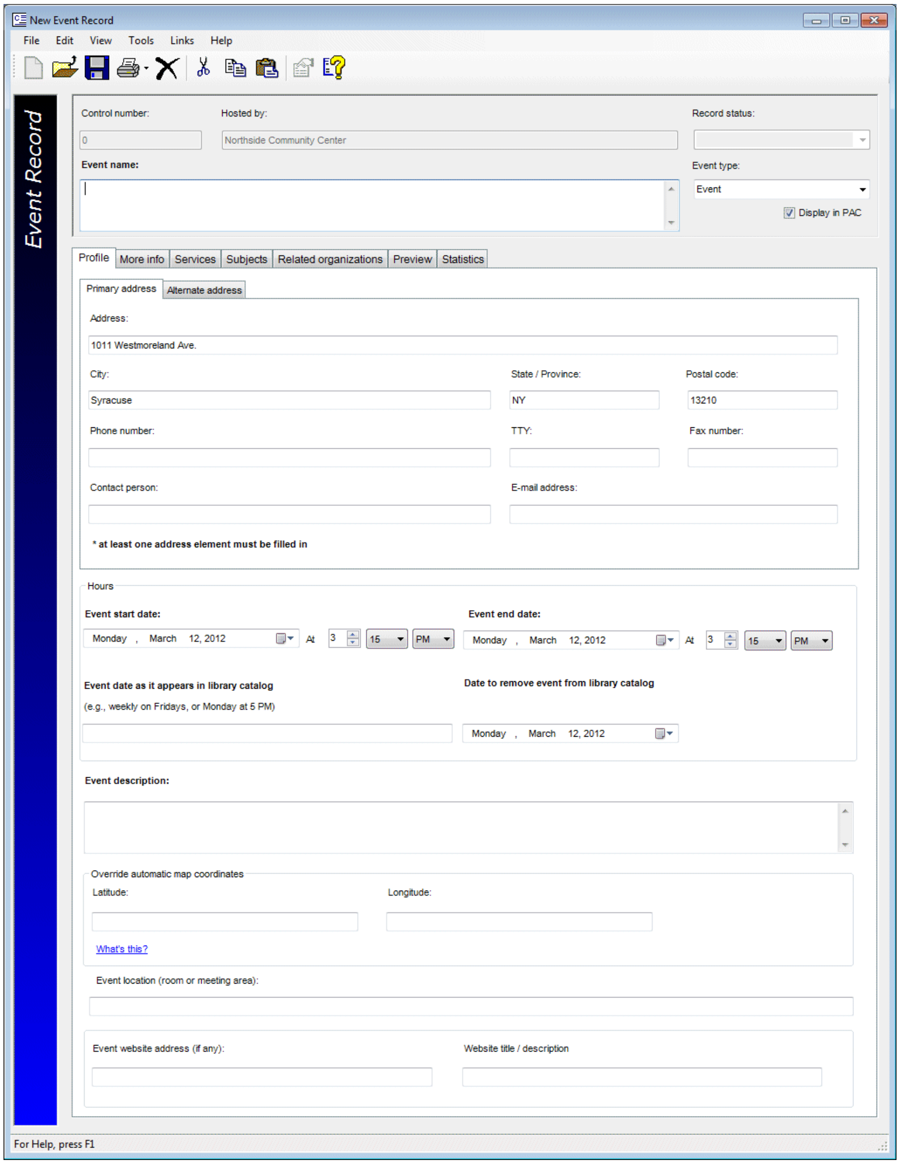


Staff Client Community Record - Events

When an event is added on the Events tab, an Event record is created. The information in the Profile, More info, Services, and Subjects tabbed pages in the Community Record workform is copied to the Events Record workform, but you can change the information without changing the information in the associated Community Record workform.

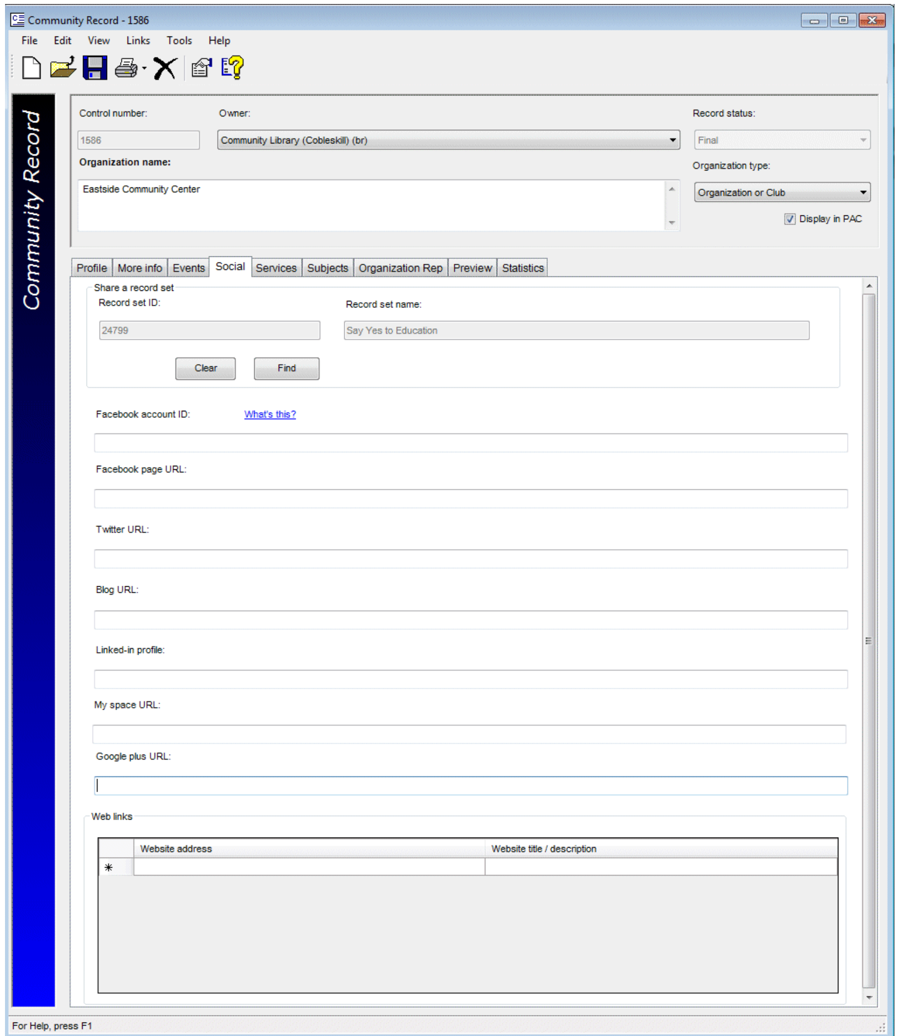
The Event's **End date** is used to automatically set the **Date to remove event** from the library catalog date. The default setting is 7 days, but this can be changed in the Polaris Administration Community profile **Days to continue showing event in PAC after event end date**.

To share the event with other community organizations, click the **Related organizations** tab, click the **New related organization** button, and use the Find Tool to search for and select other community records. The event will display in the related organization's calendar of events and in the list of events on the product page.



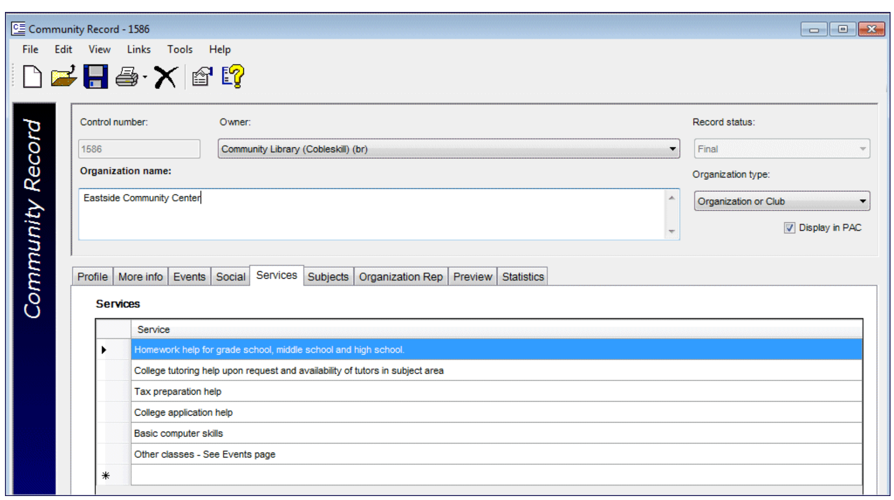
Staff Client Community Record - Social

Use the Social tab to set up web links to social media sites and include other URLs. In addition, you can specify a record set to be shared as a "content carousel" for the organization in Polaris PowerPAC. See "Content Carousels on the PowerPAC Portal Page" on page 168.



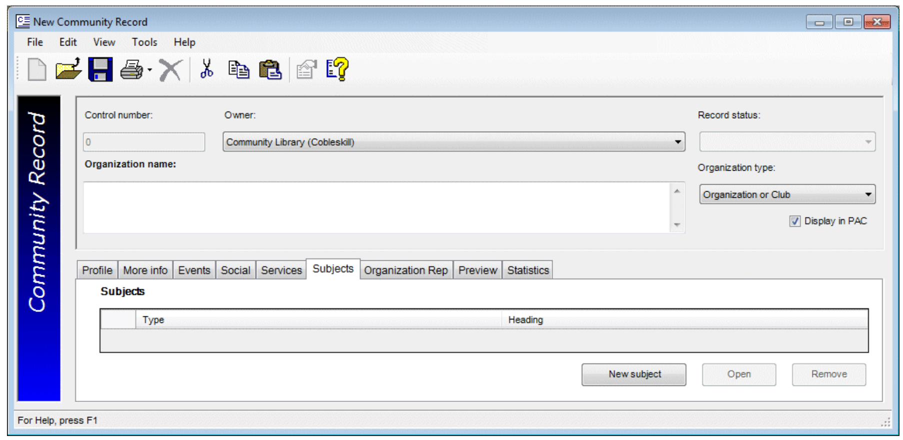
Staff Client Community Record - Services

On the Services tab, enter the services offered by the community organization.

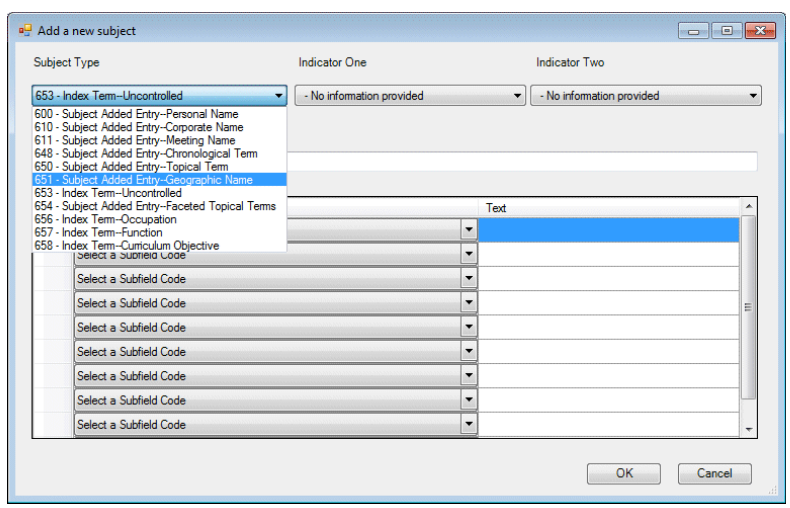


Staff Client Community Record - Subjects

On the Subjects tab, select the subjects by which the community record can be found in the PAC by selecting subject types (tags) and indictors. The drop-down lists for indicator and subfield values are populated automatically depending on the selected tag. Headings in community records (names and subjects) are not under authority control.

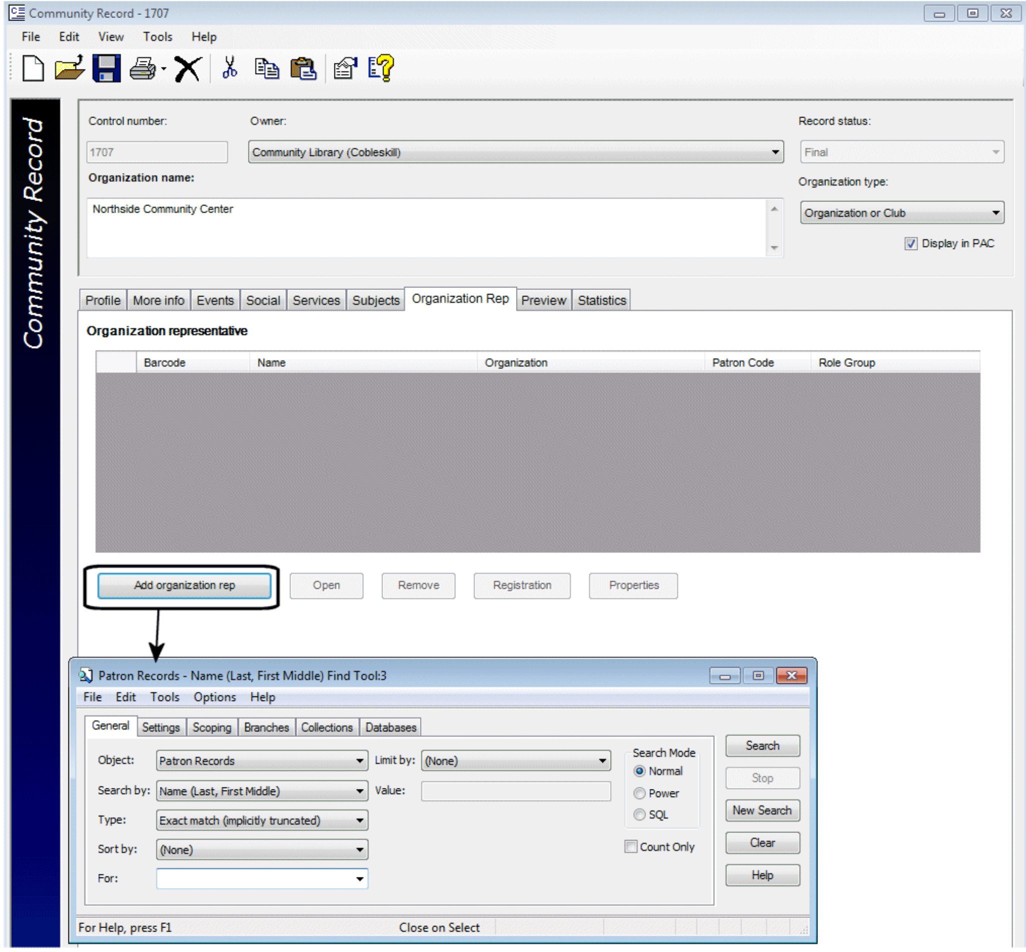


When you click on the **New subject** button, the Add a new subject dialog box appears where you can select the subject type, indicators, and subfield codes.



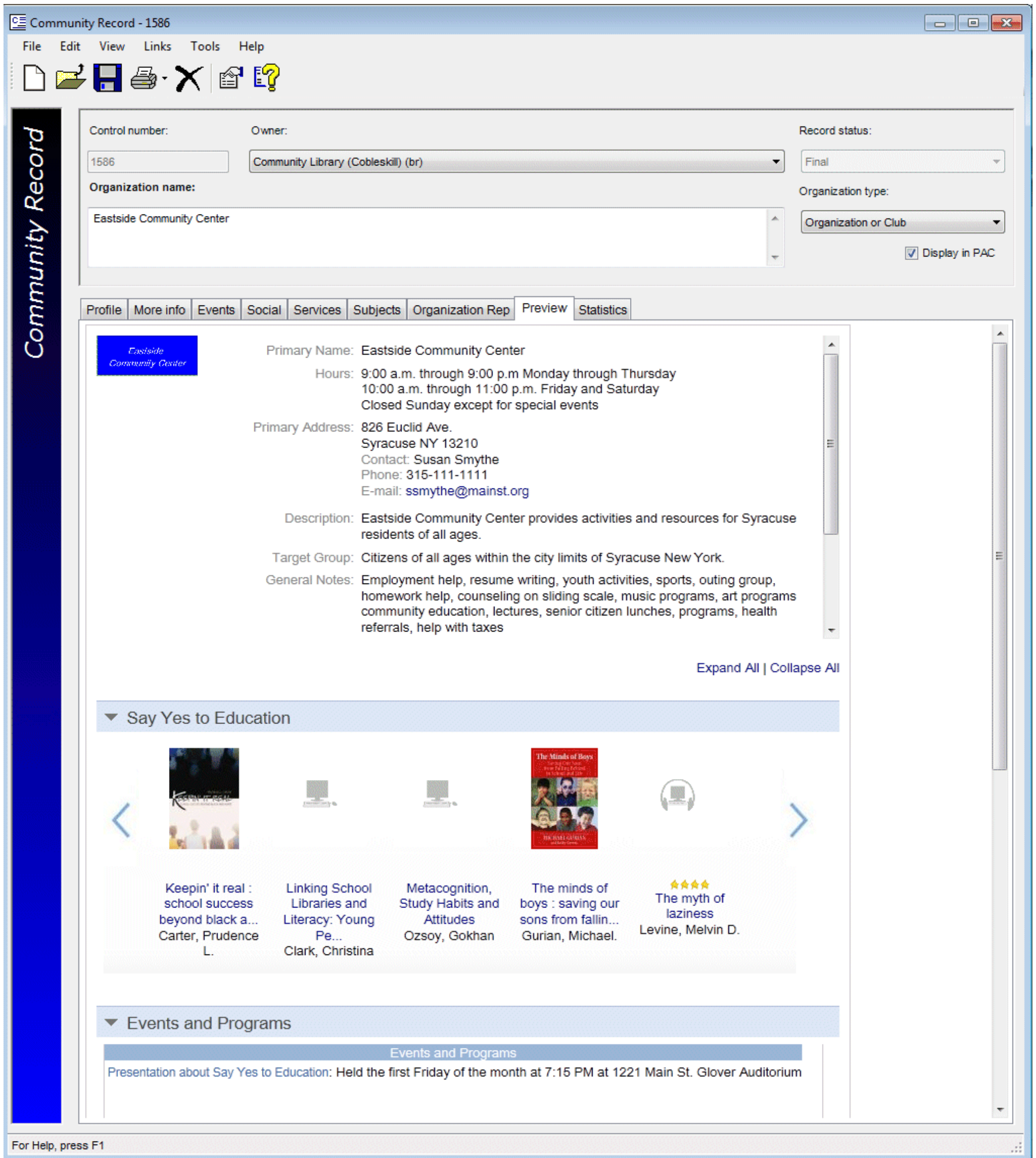
Staff Client Community Record - Organization Rep

On the Organization Rep tab, select a patron record to designate the organization’s representative who is authorized to modify the record through Polaris PowerPAC. Once the organization representative is selected, he or she can edit the record. See “Editing Community Records in Polaris PowerPAC” on page 147.


Community Record - 1707
File Edit View Tools Help
Community Record
Control number:
1707
Owner:
Community Library (Cobleskill)
Record status:
Final
Organization name:
Northside Community Center
Organization type:
Organization or Club
Display in PAC
Profile More info Events Social Services Subjects Organization Rep Preview Statistics
Organization representative
Barcode Name Organization Patron Code Role Group
Add organization rep
Open
Remove
Registration
Properties
Patron Records - Name (Last, First Middle) Find Tool:3
File Edit Tools Options Help
General Settings Scoping Branches Collections Databases
Object: Patron Records
Limit by: (None)
Search by: Name (Last, First Middle)
Value:
Type: Exact match (implicitly truncated)
Sort by: (None)
For:
Search Mode
Normal
Power
SQL
Count Only
Search
Stop
New Search
Clear
Help
For Help, press F1
Close on Select

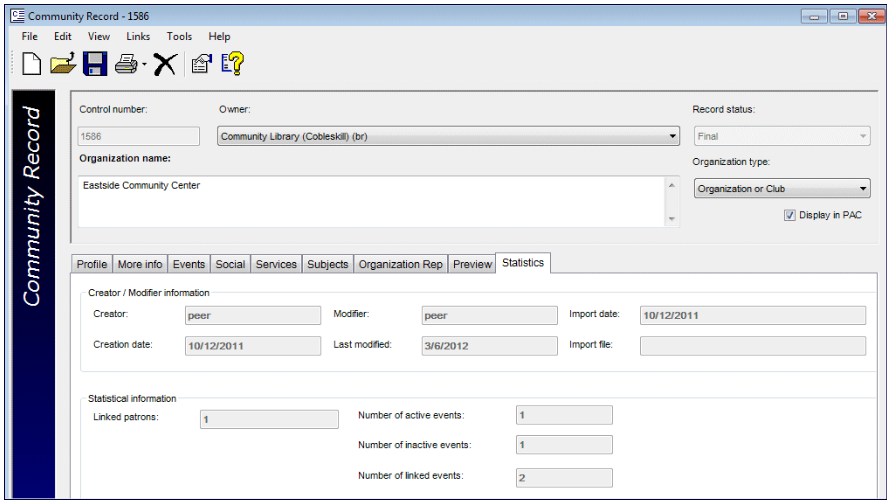
Staff Client Community Record - Preview

To see how the community record displays in PAC, select the Preview tab.



Staff Client Community Record - Statistics

To see statistical information about the community record, select the Statistics tab.



Printing Community Records in the Staff Client

In the Polaris Staff Client, you can print community information from the Find Tool results list or from the Community Record or Event workforms.

From the Find Tool results list:

- **Print a list of community records** - Select the records, right-click and select **Print, List View**
- **Print brief or full community records** - Select the record or records, right-click and select **Print, Community Full** or **Community Brief**.

From the Community Record or Event Record workform:

- **Print the current view of the workform** - Select **File, Print, Current view.**
- **Print all views of the workform** - Select **File, Print, All views.**
- **Print the brief or full community record** - Select **File, Print, Community Full** or **Community Brief**.

The Adobe Reader window displays a preview of the record printout. Select **File, Print** or click the printer icon in the Adobe Reader window to print the record.

Community Reports

To access Community reports, select **Utilities, Reports and Notices, Cataloging, Community**. The new reports, New Community Records and Updated Community Records, are listed.

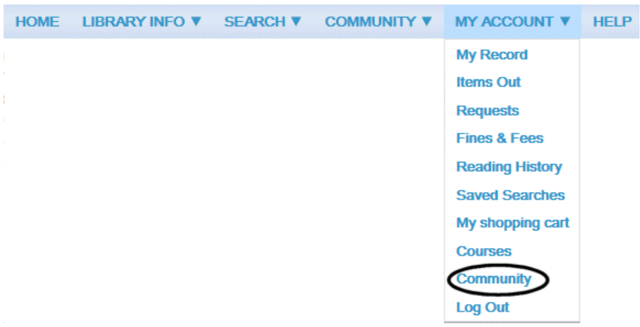
Select the report, and select the organization(s) for which you want to see the new or updated records. Select a date in the **Changes Made Since** box (for an Updated Community Records report) or the **Records Created After** box (for a New Community Records report). Then click **Submit**.

If pdf (the default) is selected as the report output type, the report appears as a pdf in the Adobe Reader window. The new or updated community records are grouped by the organizations selected in the Report Wizard. The report shows the library branch name, record ID, type, modification or creation date, the community organization's name, and the community organization's address.

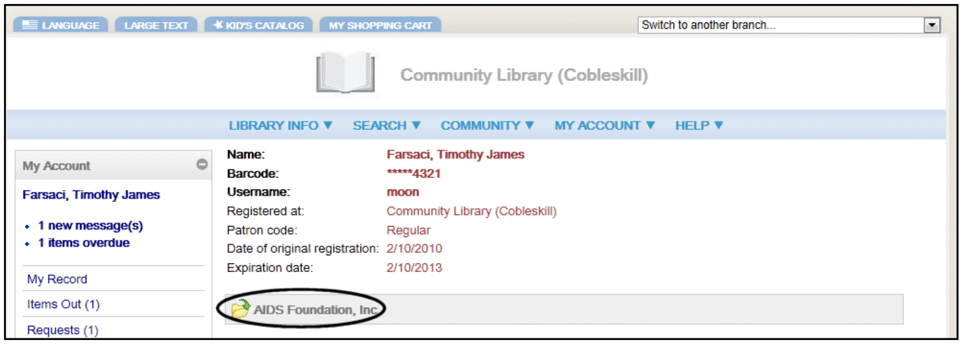
Editing Community Records in Polaris PowerPAC

Patrons designated as organization representatives can log in and edit specific community records in Polaris PowerPAC. Members of the public, library staff members, or volunteers—anyone authorized in the Polaris community record—can edit community records in the PAC, but the representative must have a patron account (Polaris patron record).

To make the editing options available in PAC, set the **Community** profile **Navigation (PowerPAC): My Community Profile** to **Yes**. This setting displays a **Community** option on the **My Account** menu when the authorized patron is logged in.



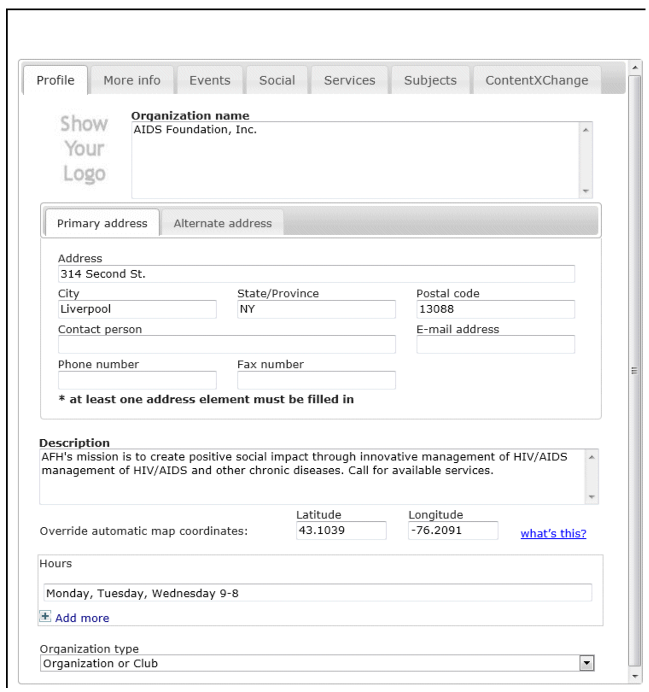
The organizations that the patron is authorized to represent are listed below the account summary information.



The patron clicks the organization name to display the organization editor in a lightbox. The editor is organized in tabbed pages:

Profile Tabbed Page

The representative uses this page to update basic information about the organization. You can also add a logo image to the organization's display in PAC search results.



- **Provide a map** to your location in a user's search results - If the address information is sufficient, the Latitude and Longitude boxes are filled in with the coordinates for the organization's geographic location. Otherwise, you can click **what's this?** for **Override automatic map coordinates** and find the appropriate coordinates.

The representative can also add or edit the organization's schedule information and description, and specify the type of record (**Individual, Organization or Club, Other, Sponsor or donor).**

More Info Tabbed Page

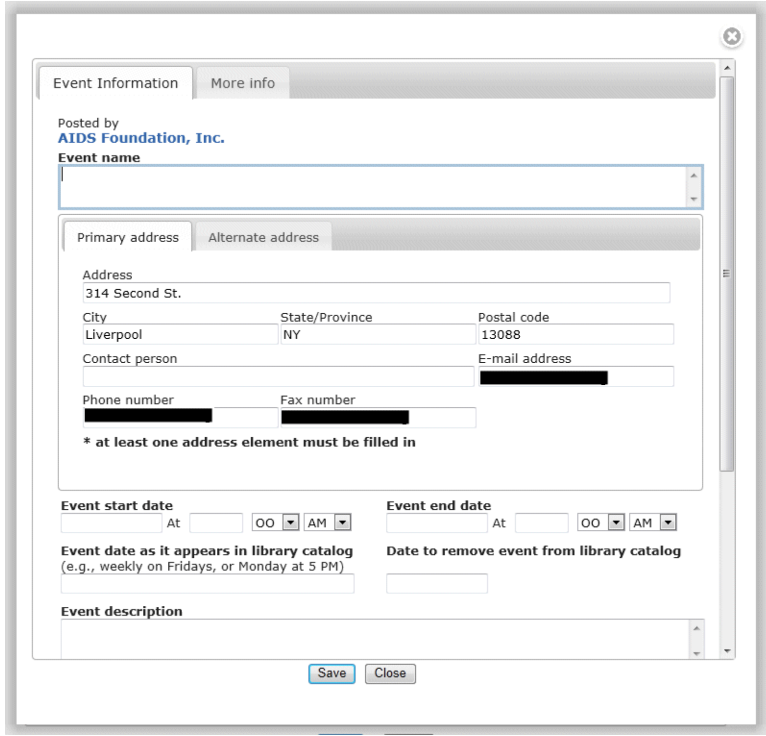
Use the More Info tab in the organization editor to provide in-depth information about the organization. The information is displayed with the organization information when people search for community information in the library's catalog:

- **General note**
- **Target group**
- **Area served**
- **Accommodations for the disabled**
- **Directions or transportation information**
- **Languages**
- **Volunteers note**
- **Who is eligible to use the services**
- **Fees**
- **Affiliations**
- **Licenses or accreditations held**
- **Funding source** (for example, **Nonprofit**)
- **Public information about your budget**
- **Information about persons who administer the organization**
- **Historical or biographical information**
- **Programs note**
- **Publications that you issue**
- **Performer note**

Events Tabbed Page

Users can search for community information by event name or programs and services. The representative uses the Events tab in the organization editor to provide information about timed events or programs and services that the organization sponsors.

To add an event, click **Add a new event**. The Event Information window opens.



The primary and alternate address information is taken from the organization record, but it can be edited for the event, if necessary, without affecting the organization record.

Event dates - To set the dates for this event:

- **Event start date** - Type the date and time for when the event starts.
- **Event end date** - Type the actual date and time the event ends.
- **Event date as it appears in the library catalog** - Type the date information that users should see when they find your event in the library catalog.
- **Date to remove event from library catalog** - If necessary, type the date when the event should no longer appear in a user's catalog search results. The library sets a value based on the event's end date with the Community profile **Days to continue showing event in PAC after event end date**, but you can change the date if necessary. If the date is later then the **Event end** date, the event will be displayed after the event has actually ended.

Tip:
Scroll the Event Information box to see additional options.

Latitude and longitude - These coordinates are used to provide a map to your event in a user's search results. They are automatically supplied from the Primary Address information for this event. If no **Latitude** and **Longitude** coordinates appear, or if you want to change the coordinates, click **what's this?** for **Override automatic map coordinates**.

Event location - (Optional) Type the room, meeting area, or additional location information in the **Event location** box.

Event website address - If you offer online registration or more information about the event online, type the URL for event or program sign-up. The URL must begin with **http://**. Then type descriptive text for the URL in the **What is it?** box.

Share a title list - If you want to share a title list in the event record's full display in community search results, click the **Share a title list** arrow and select a list from those you have saved in your library account. The title list will be displayed as a "content carousel," a rotating graphical representation of the titles in your list in the library catalog. The user can click a title in the carousel to search for it in the library catalog.

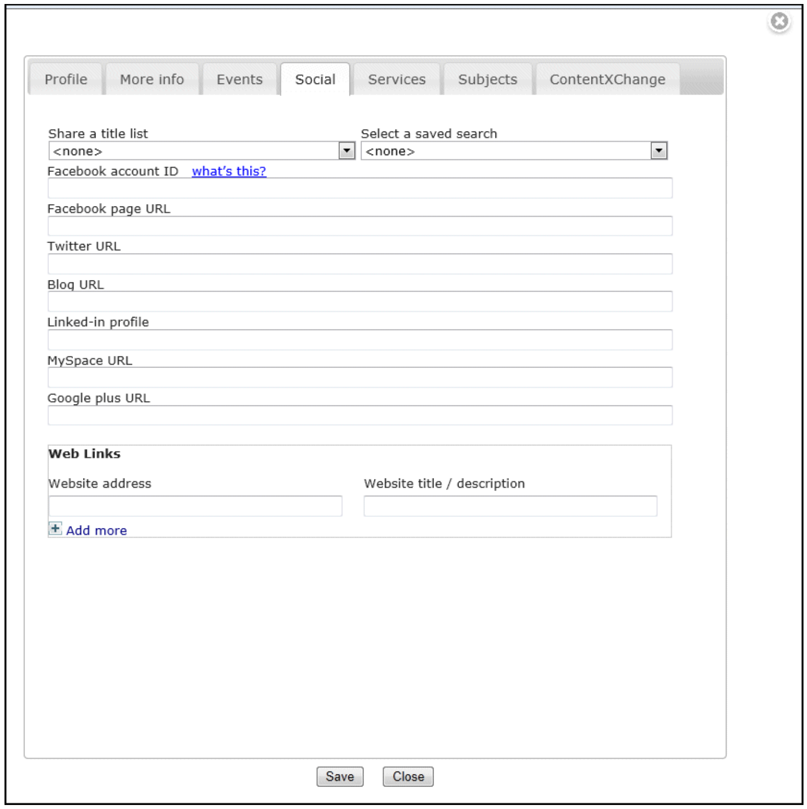
Select a saved search - If you want to share a saved search in the event record's full display in community search results, click the **Select a saved search** arrow and select a search from those you have saved in your patron account. The saved search will be displayed as a "content carousel," a rotating graphical representation of the titles in the library catalog returned by your saved search. The user can click a title in the carousel to search for it in the library catalog.

Event Type - Select **Event** or **Program or service**.

More Info - This information is taken from the organization record, but you can change it for this specific event or program without affecting the organization record.

Social Tabbed Page

The organization representative uses the Social tabbed page to provide content carousels for the organization and display links to the organization's social Web sites when people find the organization in their search results. You can also provide any other Web links that might be of interest.



- **Share a title list** - To share a title list in the organization's full display in community search results, click the **Share a title list** arrow and select a list from those saved in the library account. The title list will be displayed as a rotating content carousel; the user can click a title in the carousel to search for it in the library catalog.
- **Share a saved search** - To share a saved search in the organization's full display in community search results, the representative clicks the **Select a saved search** arrow and selects a search from those saved in the library account. The saved search will be displayed as a rotating content carousel of the titles in the library catalog returned by the saved search. The user can click a title in the carousel to search for it in the library catalog.

  Note:
  Title lists and saved searches shared from the Social tabbed page are displayed for the organization as a whole in the user's search results. The representative can share a different title list or saved search for a specific event. See "Events Tabbed Page" on page 149.

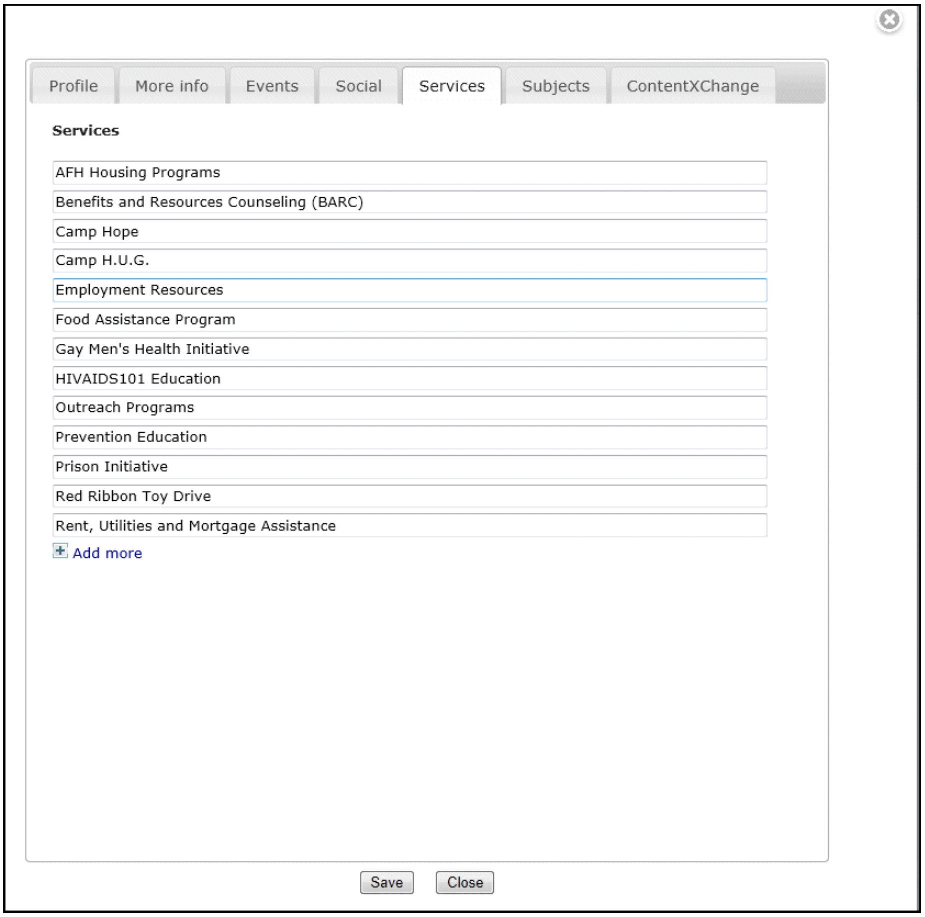
- **Social media sites** - To link to social media sites, the representative enters enters the appropriate IDs and/or URLs for Facebook, Twitter, blog, and Linked-In Profile. These entries are displayed in a **Connect with us** section for your organization in a user's search results.

  Note:
  The **Facebook account ID** entry will display a Like button, so a user can "like" your organization from the catalog search results. The **Facebook page URL** option displays a link to your organization's Facebook page.

- **Web links** - To provide a Web link, you type the URL in the **Website URL** box and adds brief descriptive text for the URL in the **What is it?** box. To add additional Web links, you click **Add more** in the Web Links box. Additional URL and What is it? boxes are displayed. These entries are also displayed in the **Connect with us** section for your organization in a user's search results.

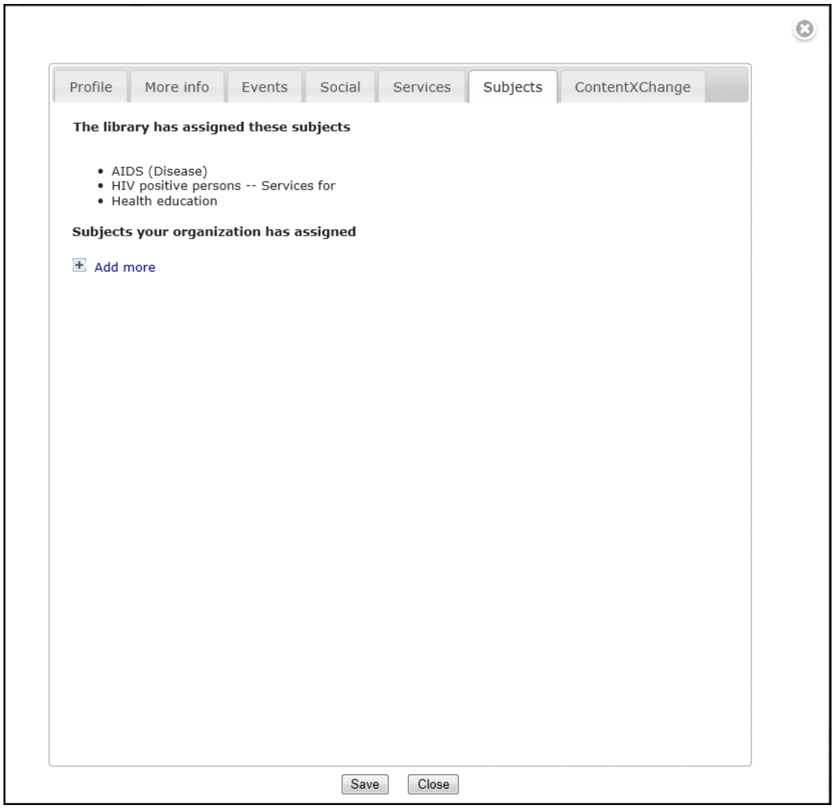
Services Tabbed Page

Users can search for community information by Services. The organization representative can use the Services tabbed page to list the services the organization provides, and help users find the organization in community search results.



Subjects Tabbed Page

Users can search for community information by subject. The staff client user assigns certain standard subjects to the organization record, and the representative can use the Subjects tabbed page to list additional subjects that will help users find the organization in community search results.

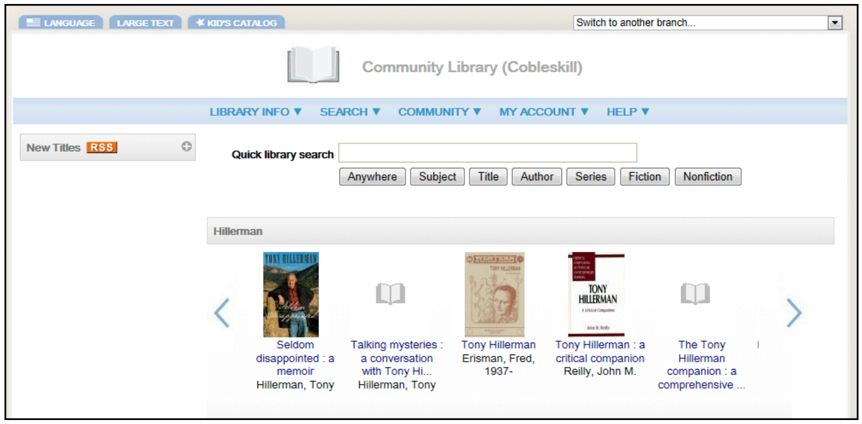


ContentXChange

Libraries that use Polaris Community Profiles can offer their community partners ContentXChange. ContentXChange consists of a set of widgets that provide an easy way to incorporate features from the library or the organization's library record into the organization's own web site.

Note:
The library can set a brief (255 character maximum) marketing message that displays on the organization's web page with any features the organization representative has added to the site using ContentXChange. In Polaris Administration, use the Community profile **Community Information: ContentXChange marketing message** to specify the message; for example, **Powered by Your Library**.

Content carousel - A content carousel is a rotating graphical representation of selected materials in the library catalog.



The organization representative can set up a content carousel for a title list or a saved search associated with the representative’s patron account, and display one carousel of each type on the organization’s web site. A visitor to the web site can click a title in the carousel to search for it in the library catalog. The link takes the user to the search results page for the record in the library’s PowerPAC, where the selected title information is displayed. If the carousel is based on a saved search, the search is launched in the library catalog when the user clicks the link. In either case, a new browser window opens for the catalog content so that the user does not navigate away from the organization’s web site. If a title is added to or deleted from a saved title list, the carousel is automatically updated. Carousels for saved searches are automatically updated when the library adds relevant materials to the catalog.

Note:
The organization representative can also select a title list and/or saved search to display a content carousel when users view the organization’s record or an event in Polaris PowerPAC. See “Editing Community Records in Polaris PowerPAC” on page 147.

Community calendar - Displays a calendar that lists the events associated with the organization record in the library database. The organization representative can add events using the Events tabbed page. See “Editing Community Records in Polaris PowerPAC” on page 147.

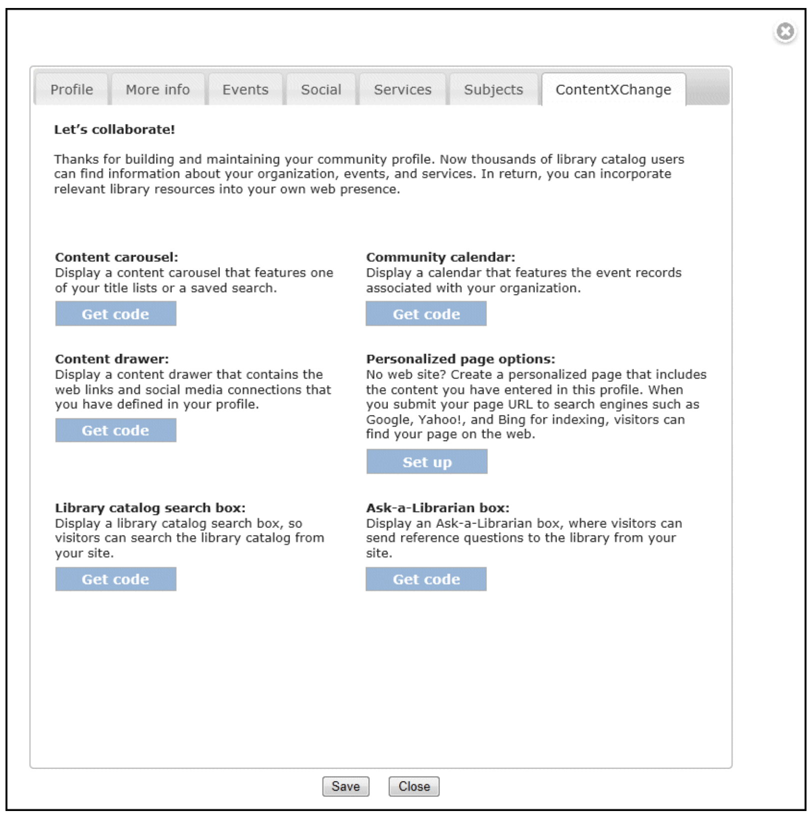
Content drawer - Displays the web links and social media connections that the representative has defined for the organization on the Social tabbed page.

Library catalog search box - Displays a search box on the organization’s web site from which a user can search the library catalog. The search results are displayed in the library’s PowerPAC in a separate browser window, so the user does not lose the organization’s web site page.

Ask-a-Librarian box - Visitors to the organization's web site can send a reference question to the library. This feature is available only if the library has enabled Ask Us (PowerPAC profile **Navigation: Ask Us** set to **Yes**) and does not require the user to log in (PowerPAC profile **Ask us: Require login** set to **No**).

Personalized page - If the organization does not have a web site, the organization representative can create a personalized page based on the organization's library record. The provided code allows users to find organization information using web search engines such as Google™, Bing™, or Yahoo®.

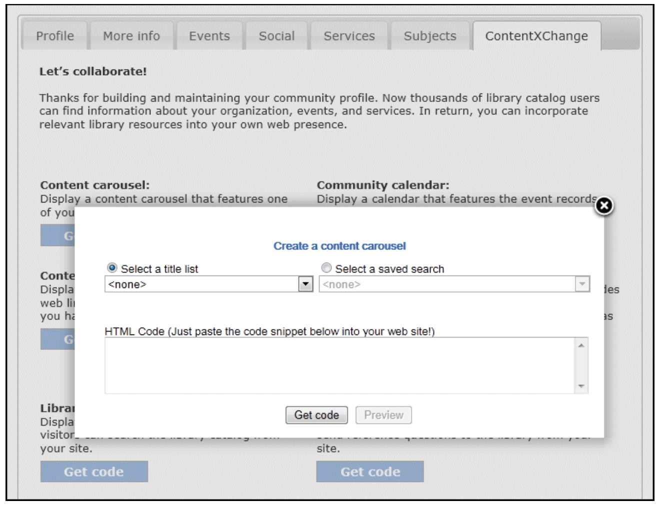
To use ContentXChange, the organization representative logs on to the library account in Polaris PowerPAC and selects the organization to work with. See "Editing Community Records in Polaris PowerPAC" on page 147. The ContentXChange tabbed page displays the available widgets.



The user clicks **Get Code** for a widget and receives an HTML code snippet to copy and paste into the organization's web page, which should be open in a separate editor. For example, to set up content carousels:

1. Under Content Carousel, click **Get Code**.

   The Create a content carousel dialog box opens.



2. To place a content carousel based on a title list on the organization web site, click the **Select a title list to share** arrow and select a title list from those saved in the library account.

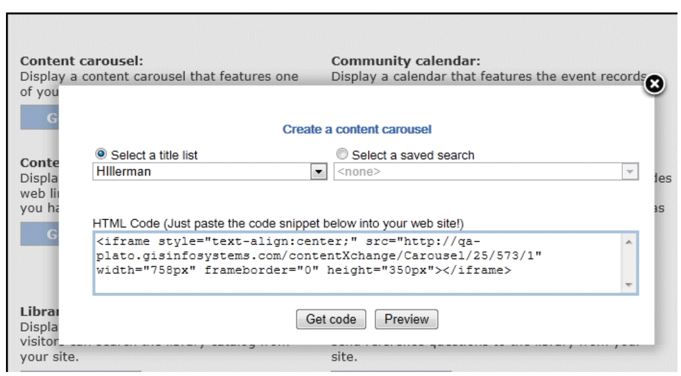
   Note:
   To create a title list, the user searches the catalog for relevant titles, selects the titles to add to the list, and saves the list in association with the library account. Be sure to enable title lists for the library's PowerPAC.

3. To place a content carousel based on a saved search on the organization's web site, click the **Select a saved search** arrow and select a search from those saved in the library account.

   Note:
   To save a search, the user sets up and runs the search in the library catalog, then clicks **Save search**. The search is saved in association with the library account. Be sure to enable saved searches (search agent) for the library's PowerPAC.

4. Click **Get code** on the dialog box.

   The code snippet is displayed in the HTML code box.



5. Copy the code and paste it in the organization's web page displayed in your HTML editor.

ContentXChange Installation

ContentXChange is an optional Web component of Polaris server software and must be selected when Polaris Web server software is installed. After installation, select the appropriate server in Polaris Administration and, in the PAC parameter **URL of the ContentXChange root**, specify the URL of the server where ContentXChange is installed:

http://<servername>/ContentXChange/

The location is typically your PAC server, and if so, you can simply copy the servername portion of the URL from the parameter **URL of the PowerPAC's root**.

Community Searching in PowerPAC and Mobile PAC

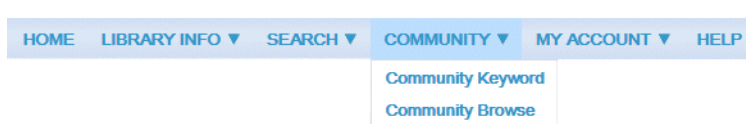
When PAC community search options are enabled, PAC users can search for community record information from those community records designated as **Display in PAC**. In Polaris Administration, **Community** profile settings determine the available community search options. Community Keyword searches are available in Polaris PowerPAC and Mobile PAC, and Community Browse searches are available in PowerPAC. Like PAC bibliographic searches, you can set up default values for Community Keyword and Community Browse search settings. Community search settings are available at the system, library, or branch level.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **Community** tab in the details view.
2. To display the **Community** option on the Polaris PowerPAC menu bar, set **Navigation (PowerPAC): Community** to **Yes**.

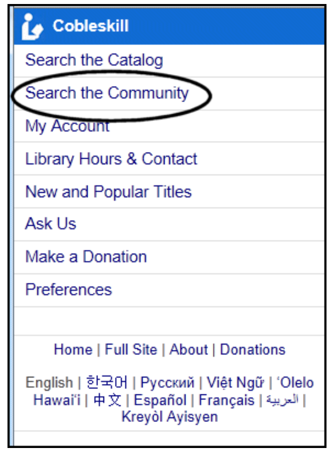
3. Set Community search options:

   a) To display the the **Community Browse** search option on the Polaris PowerPAC **Community** menu, set **Navigation (PowerPAC): Community - Browse Search** to **Yes**.

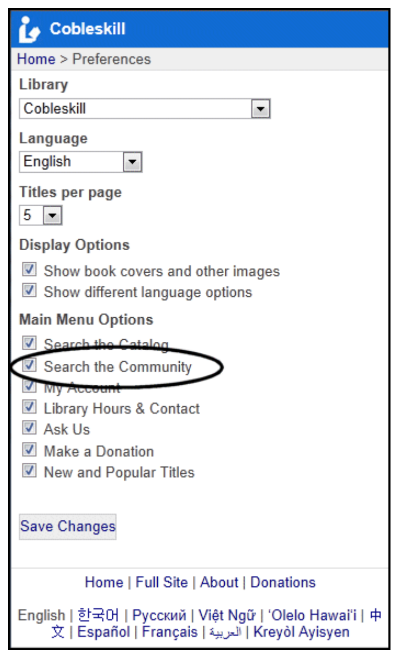
   b) To display the the **Community Keyword** search option on the Polaris PowerPAC **Community** menu, set **Navigation (PowerPAC): Community - Keyword Search** to **Yes**.



c) To display the the **Community** search option in Mobile PAC, set **Navigation (Mobile PAC): Community - Keyword Search** to **Yes**.



This setting also displays the option on the Mobile PAC Preferences page.

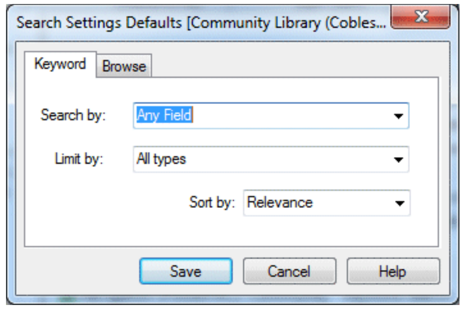


4. If you have enabled Community Keyword searches, double-click **Search Settings Defaults** to specify the default keyword search settings:

> **Note:**
> These settings apply to PowerPAC and Mobile PAC.

a) On the Keyword tabbed page, set the default **Search by** (access point) option. Users can keyword-search community information by **Any Field, Organization Name, Event Name, Services, Address and contact person,**

Postal code, **Subject**, or **Notes**. These options look for information in the corresponding fields of community records. Your setting determines the default choice.



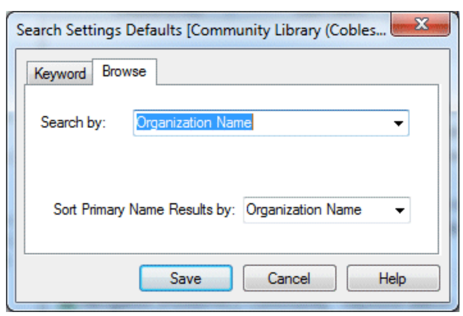
b) Set the default **Limit by** (search filter) option. Users can limit their keyword community searches by **All types** (no filter), **Organizations or Clubs**, **Events**, **Programs or services**, **People**, **Sponsor or donor**, or **Other**.

You can change the display names of Limit by options, set their display order, suppress them from display, and set your own custom filters. See step 7 below.

c) Set the default **Sort by** option. Users can sort their keyword community search results by **Relevance, Organization Name, Type of Organization, Event Name, Event Date (earliest first)**, or **Event Date (latest first)**.

5. If you have enabled Community Browse searches, double-click **Search Settings Defaults** to specify the default browse search settings:

a) On the Browse tabbed page, set the default **Search by** option. Users can browse-search community information indexes by **Organization Name**, **Event Name**, **Services**, or **Subject**.



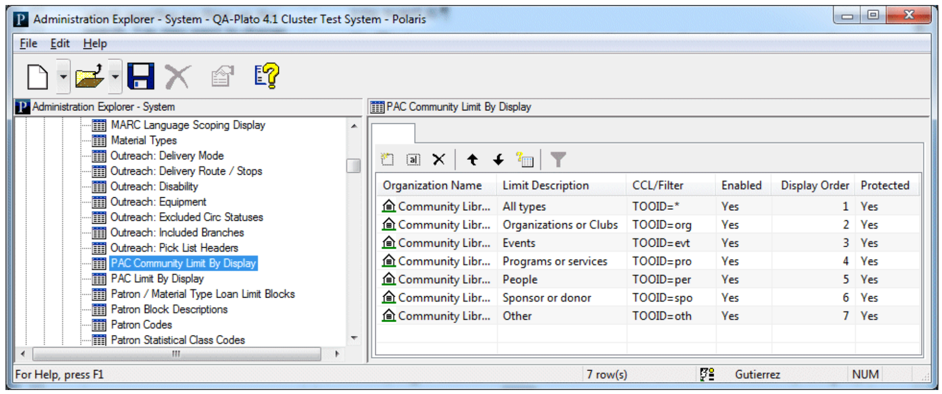
b) Select a sort option for Primary Name (heading) results. The options are **Relevance**, **Organization Name, Event Name,** and **Event Date (earliest first),** and **Event Date (latest first)**. These are not displayed to PAC users, so your choice applies to all community browse searches.

6. Click **Save**.

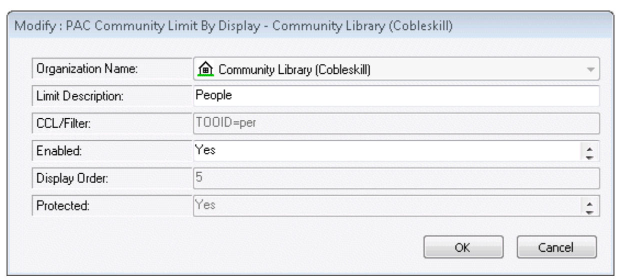
7. To change the display names of community Limit by options, set their display order, suppress them from display, or set your own custom filters, follow these steps:

> **Note:**
> You need the new System Administration permission **Modify PAC Community limit by display table: Allow** to do this step.

a) In the Administration Explorer tree view, open the Policy Tables folder for the organization, and select **PAC Community Limit by Display**. The PAC Community Limit by Display table appears in the details view.

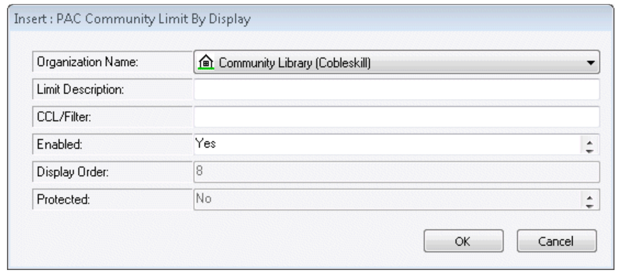


b) To work with a standard Limit by option, select the option and click . The Modify PAC Community Limit by Display dialog box appears.



To change the name of the option as it is displayed in PAC, type the new name in the **Description** box. To display or suppress the filter in the PAC Community Keyword **Limit by** list, select **Yes** (display) or **No** (suppress) in the **Enabled** box. (Set *all* the table entries to **No** to suppress the **Limit by** list from display.) Click **OK**. The Modify PAC Community Limit by Display dialog box closes, and the table displays your changes.

c) To set up a custom filter, click  in the PAC Community Limit By Display table. The Insert PAC Community Limit By Display dialog box appears.



Type the filter name in the **Description** box. This name will appear in the **Limit by** list in PAC. Type the CQL search command for the filter in the **CCL Filter** box. You can type any valid CQL command. Refer to "CQL Access Points for Community Information" in the *Polaris Community Profiles Guide 4.1* or in staff client online Help. Click **OK**. The Insert PAC Community Limit by Display dialog box closes, and the table displays your changes.

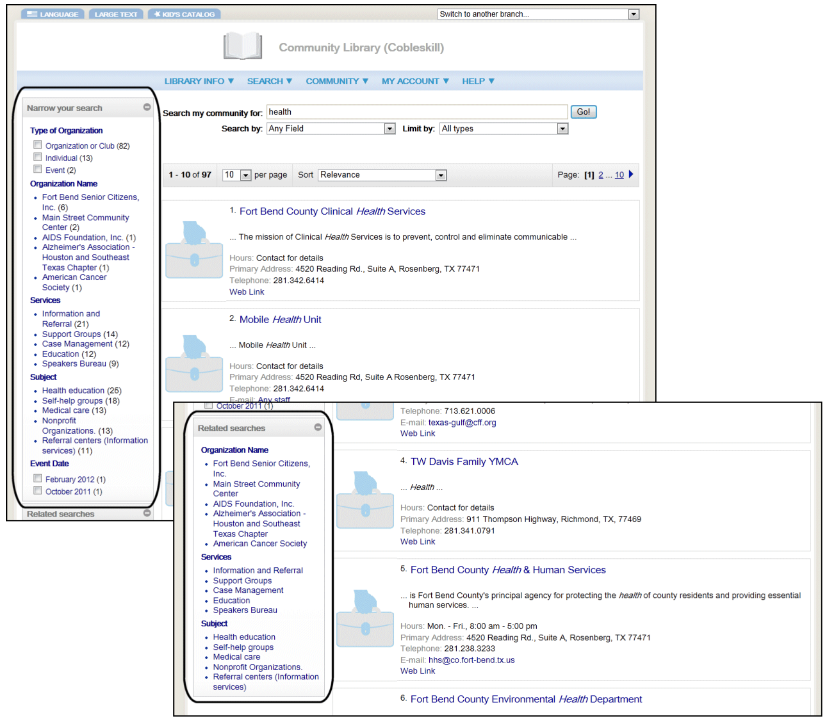
d) To set the order of options in the **Limit by** list, select a filter in the table and click or . Repeat this step until the list is ordered the way you want it. The higher an enabled item is positioned in the table (the lower the **Display Order** number), the closer to the top the item appears in the **Limit by** list. The first enabled item in the table is the top item in the **Limit by** list.

e) Select **File, Save**.

Community Search Results Facets in Polaris PowerPAC

Using the new Community profile **Dashboards: Narrow your search & related searches**, you can configure the facets displayed in the dashboard with community information search results. The profile is similar to the PowerPAC profile available for PowerPAC bibliographic search results in Polaris 4.1 and previous versions, but the available elements apply specifically to community information records.

As with PowerPAC bibliographic search results, the **Narrow your search** Web part offers links to filter the current search results; the **Related searches** Web part offers links to launch other, related searches.



The following elements are available for narrowing community information search results and for related searches:

- Type of Organization (**Narrow your search** only)
- Organization Name
- Services
- Subject
- Event Date (**Narrow your search** only)

For more information, see "Community Records in PAC" in the *Polaris Community Profiles Guide* or the equivalent topic in staff client online Help.

Configuring the PAC Community Results Display

You can specify the information displayed for entries in community search results in Polaris PowerPAC and Mobile PAC, much as you configure the title display for bibliographic searches in these applications.

In Polaris Administration, the **Community** profiles **Community Information (PowerPAC): Configure** and **Community Information (Mobile PAC): Configure** control the results display in PowerPAC and in Mobile PAC respectively, so you can configure the display separately for each application. However, the setup procedure is the same for both profiles and works similarly to the profiles that control the bibliographic results display in PAC. See "Configuring the PAC Title Display" on page 185. For detailed procedures, see "Configuring the PAC Community Results Display" in the *Polaris Community Profiles Guide* or the equivalent topic in staff client online Help.

Polaris PowerPAC

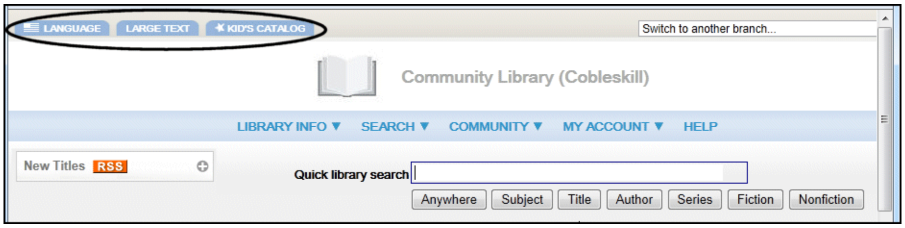
Polaris 4.1 includes the following improvements in Polaris PowerPAC.

Note:
Polaris 4.1 does not include or support ActivePAC. As a result, certain changes have been made in Polaris Administration. For details, see "PAC Administration Changes - ActivePAC End-of-Life" on page 19. In addition, the following obsolete features have been removed from Polaris PowerPAC: MSNBC headlines; weather.com; DiscoverySchool; dictionary; thesaurus.

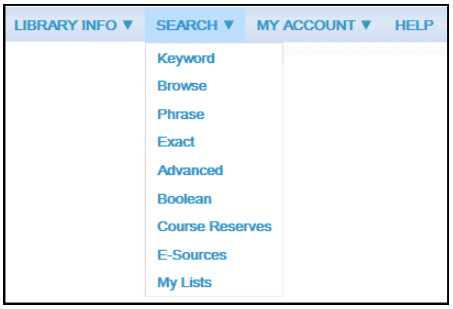
Polaris PowerPAC User Interface Redesign

The user interface has been redesigned to be easier to use, more familiar to current web users, and more readily customizable.

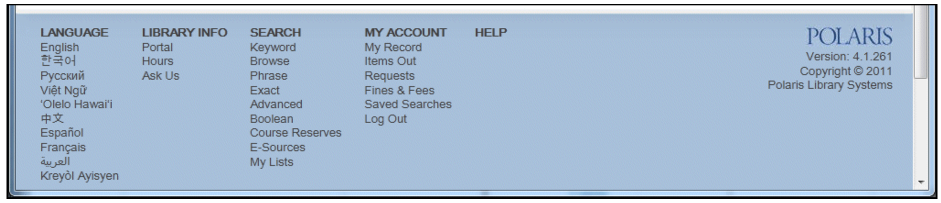
The Language list for multi-lingual versions, the Large Text option, and the link to Children's PAC have been moved to the top of the page.



The user clicks an option on the menu bar to display submenu options.



The bottom of each page offers a site index to increase accessibility. Items in the index are clickable links.



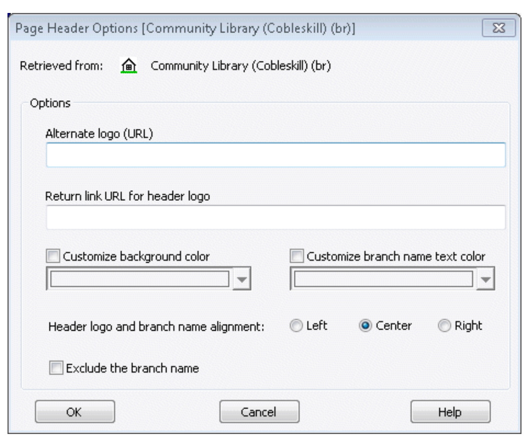
For detailed information about other changes to the PowerPAC user interface and the features available, see the topics in this section.

Dashboard Position in Polaris PowerPAC

In previous versions of Polaris PowerPAC, the dashboard display position (left or right side of the page) was determined by the theme selected for display, and special coding was necessary to change the dashboard position for a particular theme. You can now set the dashboard position independently from your theme selection, using the new PowerPAC profile **Theme dashboard position**. The profile is available at the system, library, and branch levels; the default setting is **Left**. At upgrade, your 4.0 dashboard configuration for a theme is preserved unless you change the new profile.

Customizing the Header

The header for all PowerPAC pages is now more readily customizable through a new PowerPAC profile in Polaris Administration, **Page header options**. The profile is available at the system, library, and branch levels; the system uses the setting for the PowerPAC connection organization.



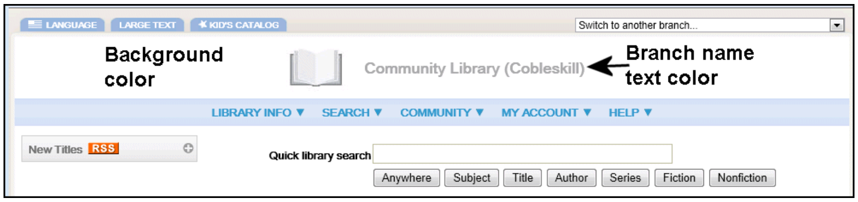
Navigation

These profiles in previous versions of Polaris have been moved to this dialog box:

- **Alternate logo (URL)** - Specifies the location of your custom banner logo, if any, for Polaris PowerPAC pages. If none is specified, the default banner logo is used.
- **Return link URL for header logo** (was **Navigation: Return link URL for header logo**) - Specifies the URL for the page that is displayed when the user clicks the header logo. If none is specified, the destination is the portal page if the organization uses this page, or the keyword search page if the portal page is not used.

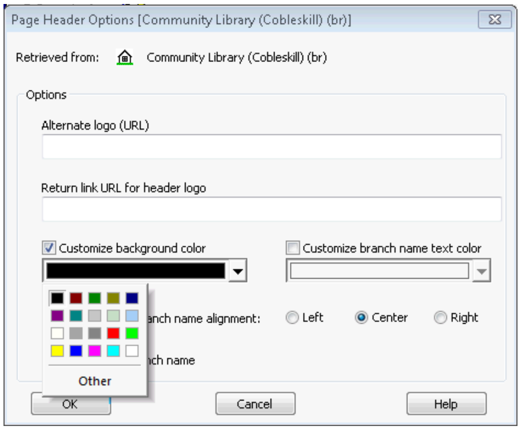
Colors

You can select the colors for the background and/or the branch name text.

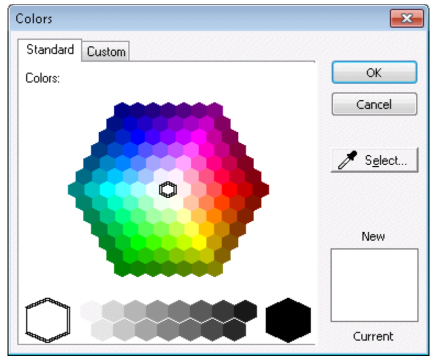


Select (check) **Customize background color**, **Customize branch name text color**, or both. Then select the drop-down arrow for the selected option to access the color picker.

Note:
You can suppress the branch name text from the header, which you may want to do if your logo image includes the organization name. See "Header Logo and Branch Name Alignment" below.

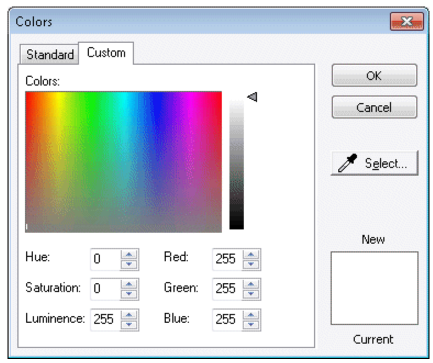


Click a color, or click **Other** to open the color tool.



To select a color on the Standard tab of the color tool, click **Select** and click the color or gray-scale value.

Or click the Custom tab to select a color from a continuous palette. Alternatively, you can type standard RGB values.



Click **OK** to close the color tool.

Header Logo and Branch Name Alignment

Select **Left**, **Center**, or **Right** to position the logo and branch name in the header. The default position is center.

If your logo image already includes your branch name, you can check **Exclude the branch name** to suppress the branch name text string from the header.

Note:
If you suppress the branch name at the system level, and all connection branches inherit the system setting, users cannot readily determine their connection branch after switching branches if the branch logo does not include the branch name. To avoid this problem, you can suppress the organization name for the system but allow the branch name to be displayed at the appropriate branches by setting the profile at the branch level.

Content Carousels on the PowerPAC Portal Page

A content carousel is a rotating graphical representation of a list of materials in the local library catalog. The PowerPAC user can click any title in the carousel to launch a search for the title in the library catalog.

You can set up content carousels of materials to display on the Polaris PowerPAC portal page. Each carousel can consist of a specified bibliographic record set created in the staff client, or titles from any of the following system-defined and automatic dashboards (web parts):

- Most Circulated Titles
- On-Order Items
- New Books
- New Large Print
- New Sound Recordings
- New Videos
- BookSense best-seller lists:
    - Children's Illustrated
    - Children's Interest
    - Hardcover Fiction
    - Hardcover Non-Fiction
    - Mass Market
    - Trade Paperback Fiction
    - Trade Paperback Non-Fiction

Note:
The content carousel is not intended to be an alternate display of the best-seller lists as they appear in the dashboard. It is an entry point into the library's collection, because it contains only materials known to be in the library's database.

Carousels based on record sets are populated when they are displayed. If a title is added to or deleted from a record set, the carousel is updated when the page cache is refreshed (for example, through IIS reset or auto-cycling), rather than every time the carousel appears. If the record set is deleted, the carousel is not created and does not appear on the page. Carousels based on automatic and system-defined dashboards are also refreshed to reflect new content whenever the cache is rebuilt in PowerPAC.

Note:
If a bibliographic record on a carousel is deleted or updated to not display in PAC, it will continue to display on the carousel until the cache is rebuilt. If the user selects that record before the cache is rebuilt, the search returns 0 results.

There is no limit to the number of content carousels that can appear on the portal page, but you may find that displaying too many content carousels will adversely affect response time.

Note:
For libraries that use Polaris Community Profiles, organization representatives can display content carousels on the organization's page in PAC search results by editing the organization record in Polaris PowerPAC. See "Editing Community Records in Polaris PowerPAC" on page 147. ContentXChange also offers the ability to place content carousels on the organization's own web site. See "ContentXChange" on page 154. These carousels can consist of title lists or searches saved in association with the organization representative's patron account.

Carousel Title Display

Content carousels display only titles for which there is a bibliographic record in the local database. The record must be set to display in PAC, and the record status must be final.

For each title, the carousel contains the cover image if any, and title and author tags and subfields specified in the Primary Display Title and Primary Display Author database tables.

When the PAC connection is to a branch, carousels based on new titles include only new titles for that branch. When the PAC connection is to the system, the carousel includes new titles for the whole system.

Sort Order and Entry Point

Portal page carousels based on ranked best seller lists are sorted in the ranked order provided by the best seller list supplier. All other portal page carousels are sorted in title order. The carousel "starts" at a random point in the list every time it appears, and the display is circular. That is, the user can scroll endlessly through the carousel. When the carousel reaches the end of the designated sort order (when the scrolling forward) or the beginning (when scrolling backward), the carousel continues at the beginning (or end) of the sorted list.

Maximum Entries

Content carousels display a maximum of 50 titles. If the list that generates the carousel contains more than 50 items, only the first 50 items in the sorted list appear in the carousel, using the sort order described above.

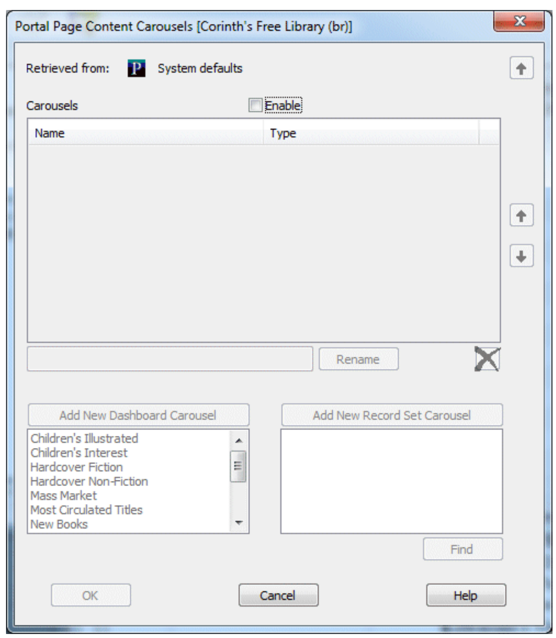
Content Carousels and Rotating Book Jackets

Like previous versions of Polaris, Polaris 4.1 offers a rotating, random book jacket image on the portal page. The user clicks the book jacket image and if the title is not in the library catalog, the user can request that the library purchase it. While it is possible to enable both rotating book jackets and content carousels on the portal page, the result may confuse the user since the features may appear somewhat similar but serve very different purposes. We recommend that you enable one or the other of these features, but not both. If you do enable both, the content carousel appears below the rotating book jacket image.

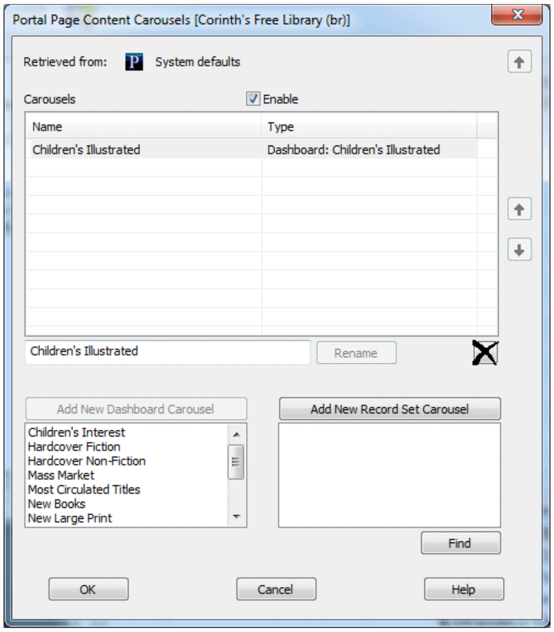
Setting Up Content Carousels for the Portal Page

First, for content carousels to include cover images, be sure enriched data options for cover images have been set in Polaris Administration (PAC profile **Enriched data**). Titles without cover images are displayed with format icons and bibliographic information (see "Carousel Title Display" on page 169).

Then use the new PowerPAC profile **Portal page content carousels** to set up the carousels. The profile is available at the system, library, and branch level. The settings of the PowerPAC connection organization determine the carousel display.

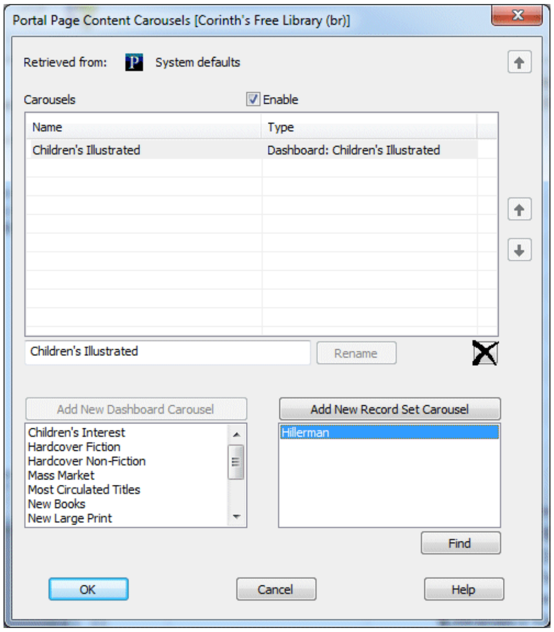


- **Enable carousels for the organization** - Select (check) **Enable**.
- **Add a dashboard carousel** - Select a dashboard (web part) from the dashboard list and click **Add New Dashboard Carousel**. The selected dashboard appears in the Carousels list in the upper part of the dialog box.

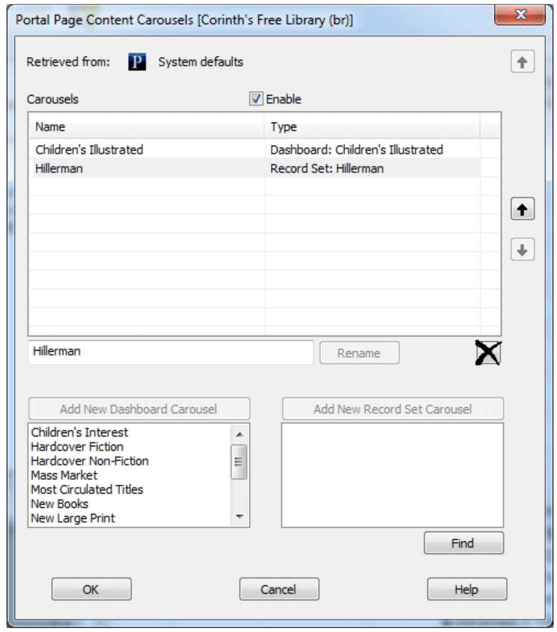


- **Add a record set** - Click **Find**. The Find Tool for bibliographic record sets opens. Search for the record set and select one or more record sets in the results lists. Right-click and choose **Select** from the context menu. The records set or sets you selected are displayed in the record set list.

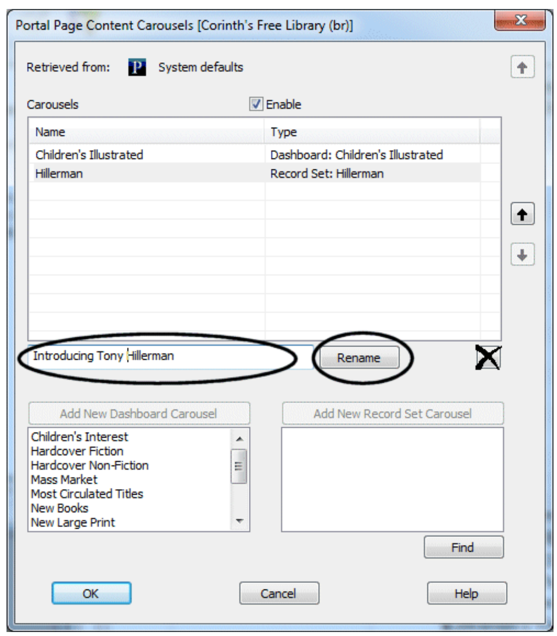
  Note:
  You can search for any bibliographic record set. Existing rules and permissions are in effect when searching for and selecting record sets. For example, you cannot find record sets owned by individuals other than yourself.



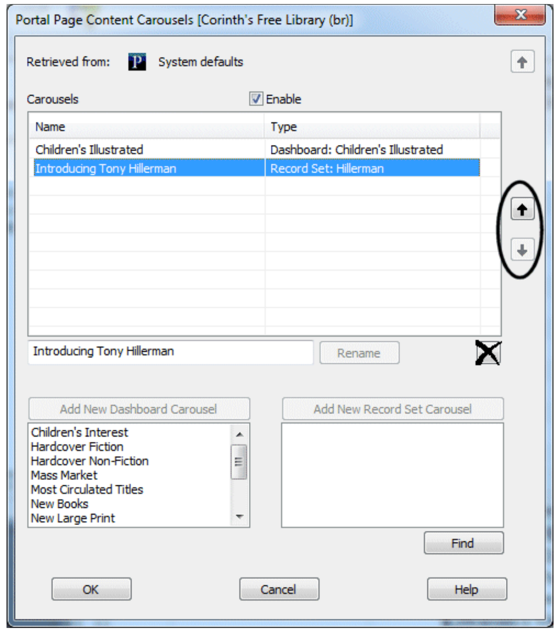
To create the carousel, select the record set in the list and click **Add New Record Set Carousel**. The selected record set appears in the Carousels list in the upper part of the dialog box.



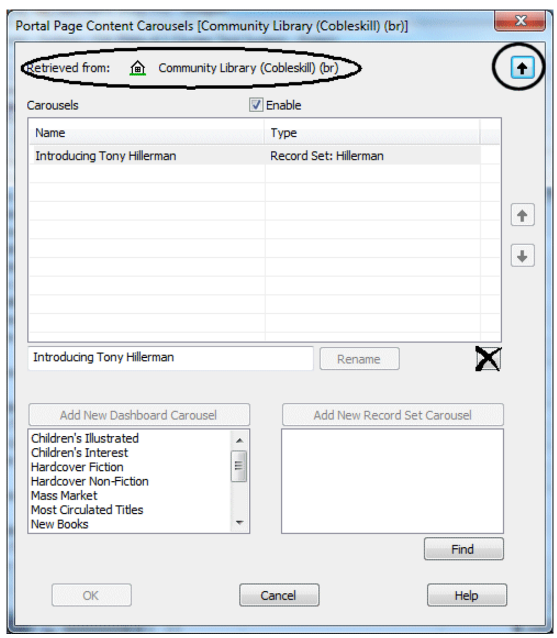
- **Rename a carousel** - By default, the carousel name is the name of the dashboard or record set. To assign a different PAC display name, select the carousel in the Carousels list. The name appears in the text box just below the list. Type the new name and click **Rename**.



- **Set the display order** - If you have set up multiple carousels, you can set their display order in PowerPAC. Select a carousel and click the up arrow to move it closer to the top of the list, or click the down arrow to move it closer to the bottom. The order of the list represents the display order in PAC.



- **Delete a carousel** - Select the carousel in the carousels list and click the delete icon .
- **Inherit settings from a parent organization** - The top of the dialog box indicates the organization where the current carousel options have been set. To inherit the settings of the parent organization, click the up arrow at the top of the dialog box.



Custom Content on Portal Page

As in previous versions of Polaris, you can display custom content on the portal page by specifying the URL for the content in the PowerPAC profile **Portal custom content**. In Polaris 4.1, you no longer have to reload Polaris PowerPAC to clear the cache whenever you change your custom content. The HTML is reloaded whenever the portal page is accessed and the content was cached more than five minutes previously. This improvement benefits those libraries who use the custom content feature to display temporary messages. You can also enable or disable the custom content by setting or clearing the profile without reloading Polaris PowerPAC.

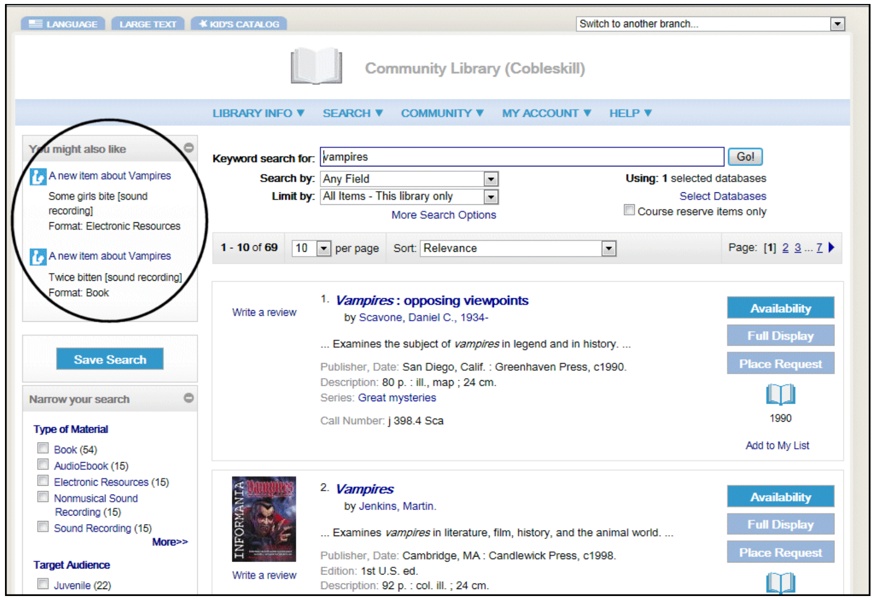
Feature It: Promotions in Polaris PowerPAC

Libraries can use Feature It to generate awareness of relevant resources that might otherwise go undiscovered in the public access catalog or in the community. With Feature It, you can promote library materials, Web resources, and/or community organizations and events in the context of specific search results, similar to "You might also like" features on many popular web sites.

Note:
Feature It and Community Profiles are available by separate licenses. For more information about Community Profiles, see "Community Profiles" on page 138.

Use the new Cataloging Promotions function in the staff client to select resources to feature, and to specify the conditions under which they will be featured. See "Promotion Records" on page 46.

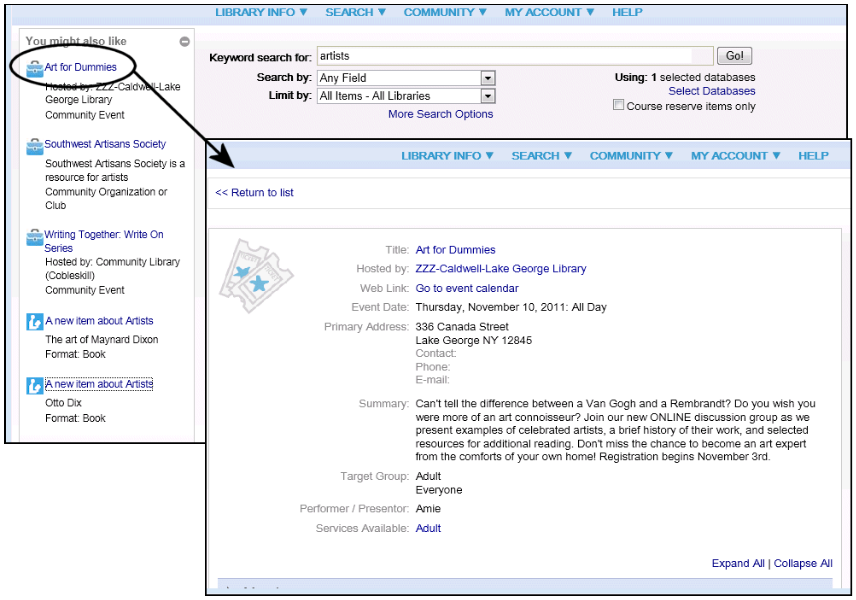
Once promotions are set up, when one or more of the PowerPAC user's search terms (16 words maximum) match the triggers and filters associated with one or more promotion records, promotion links are displayed in a position you specify on the PowerPAC search results screen. A maximum of 8 promotion links can be displayed. If more than 8 promotion links match the user's search terms, a relevancy ranking formula is applied to select those most relevant to the user's search terms. (Relevancy is based on the words entered as triggers in the promotion record, not on the metadata in the featured resource records.)



For bibliographic searches, promotions may be displayed for keyword, phrase, exact, advanced, and Boolean searches by one of the following access points (**Search by**): **Any field**, **Author**, **General notes**, **Publisher**, **Series**, **Subject**, **Title**. Promotions are not available for course reserve searches or browse searches. However, when the user selects a heading in a browse search headings list, promotions are displayed along with the titles associated with the heading. The selected heading is considered to be the user's search term when determining which promotions to display.

Promotions are also available for community keyword searches by one of the following access points: **Any Field**, **Organization Name**, **Event Name**, **Services available**, **Subject**, **Notes**. Promotions are not available for community browse searches, but when the user selects a heading in community browse results, promotions are displayed along with the records associated with the heading. As with bibliographic browse results, the selected heading is considered to be the user's search term when determining which promotions to display.

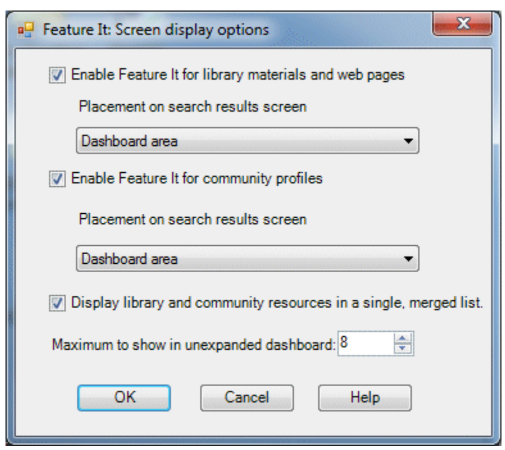
When the user clicks a promotion for a bibliographic record, a deep link URL to the catalog, or a community/event record, a search is launched for the appropriate bibliographic or community/event record, and the record is displayed in the PowerPAC results list. The illustration shows a community event record accessed from a promotion link. (In this example, the event record provides a link to register for the event. For more information about Community Profiles, see "Community Profiles" on page 138.)



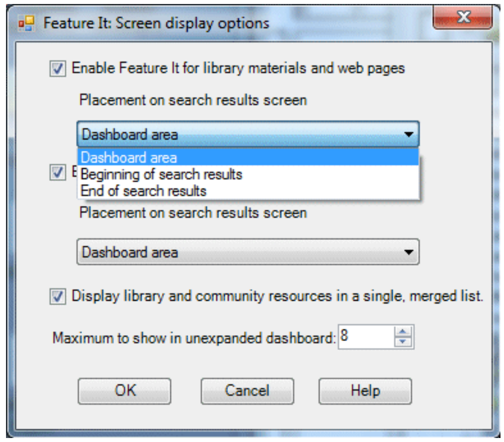
When the user clicks a promotion link that is a URL for an external resource, a new browser window opens.

Setting Up the PAC Display

Use the new PowerPAC profile **Feature It: Screen display options** to enable Feature It and specify the position of Feature It promotions in the PowerPAC search results display. The profile is available at the system, library, and branch levels; the settings of the PAC connection organization determine the display.



You can enable Feature It for library materials and web resources, community profile and event information (if licensed), or both, setting a separate display placement for each. Placement options include the dashboard area, at the beginning of search results, or at the end of search results. When you enable Feature It for library materials and web pages, promotion links for library materials and featured URLs are displayed when the user searches for either bibliographic records or community information. Similarly, when you enable Feature It for community resources, promotion links for these resources are displayed when the user searches for either bibliographic records or community information.



If you want to display library materials and community profile information in one list, you must enable both options, choose the same display position for both, and select (check) **Display library and community resources in a single merged list**. In the PAC display, the library icon indicates bibliographic materials. The briefcase icon indicates community information.

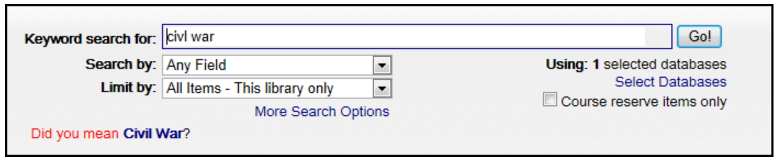
If you have selected **Dashboard area** as the placement for an enabled Feature It option, set the maximum number of promotion links to show in an unexpanded dashboard list. The maximum (and default) value is 8 promotion links. Since this list can occupy considerable dashboard space at the top of the dashboard, forcing the user to scroll to see search filters and related searches, you can set the value to a lower number. In this case, the dashboard list displays a **more** link when appropriate. The user can click **more** to expand the list (up to 8 links) and **less** to collapse it. If you set this value to 0, the list is completely collapsed and the user must click a plus sign to expand it.

For library (bibliographic) material, the promotion list header is **You might also like these library materials and web pages**. For community information, the list header is **You might also like these community resources**. For a merged list, the header is **You might also like**. You can edit the headers in Polaris Language Editor (WebAdmin). The language string IDs are:

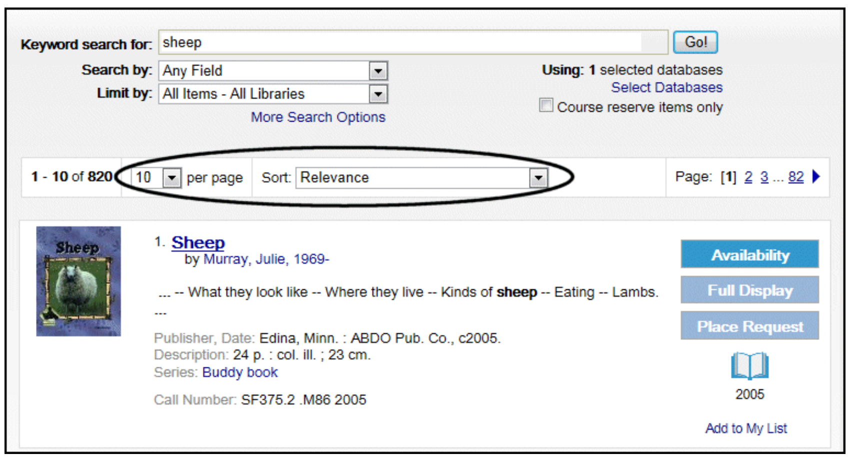
- **Bibliographic materials** - PACML_PACFEATURE_DASHHEAD
- **Community information** - PACML_CIPACFEATURE_DASHHEAD
- **Merged list** - PACML_FEATURE_DASHHEAD

Search Interface

The **Limit by** and **Using** lists, and the **Select Databases**, **More Options**, and **Did You Mean** links have been rearranged on the search interface. The illustration shows the Keyword search form.

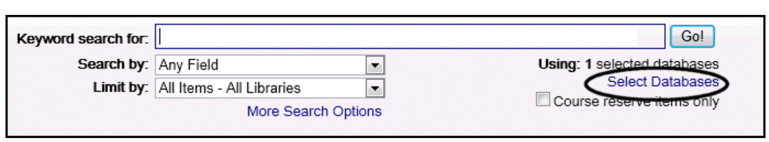


The settings for sorting options and the number of results to display per page have been moved from the search interface to the top and bottom navigation bars of the search results list. (Settings in the existing PAC profile **Search settings defaults** still control the default sort order when the search is launched.) The sorting option is retained if another search is performed from the search results page.

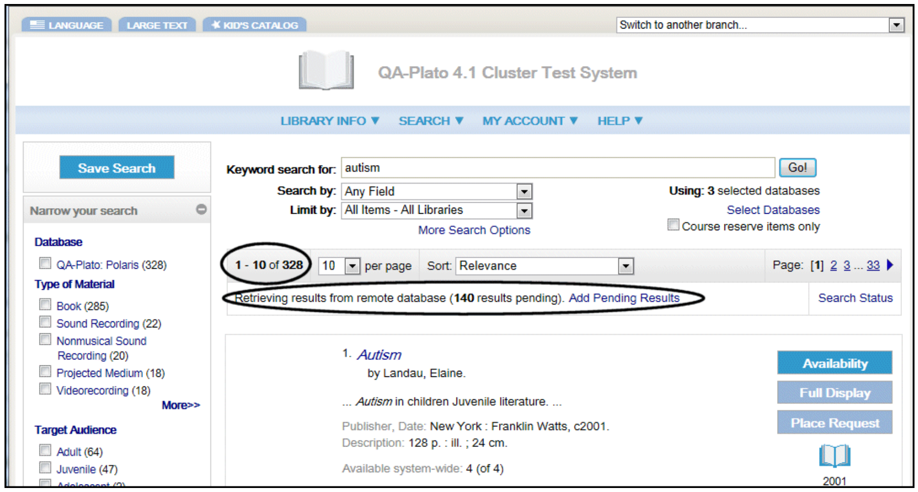


Merged Results

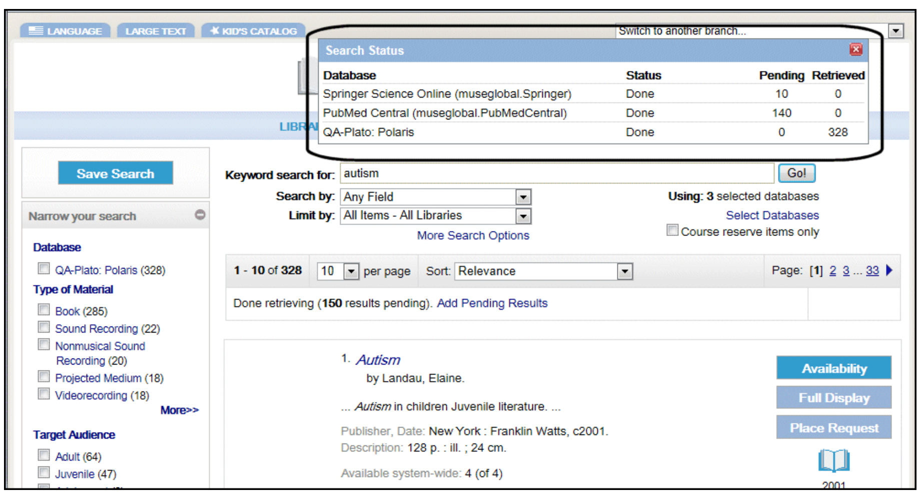
When users search both remote databases and the local catalog, the results are now displayed in a merged list. To select remote databases for searching, the user clicks the **Select Databases** link, as in previous versions of Polaris.



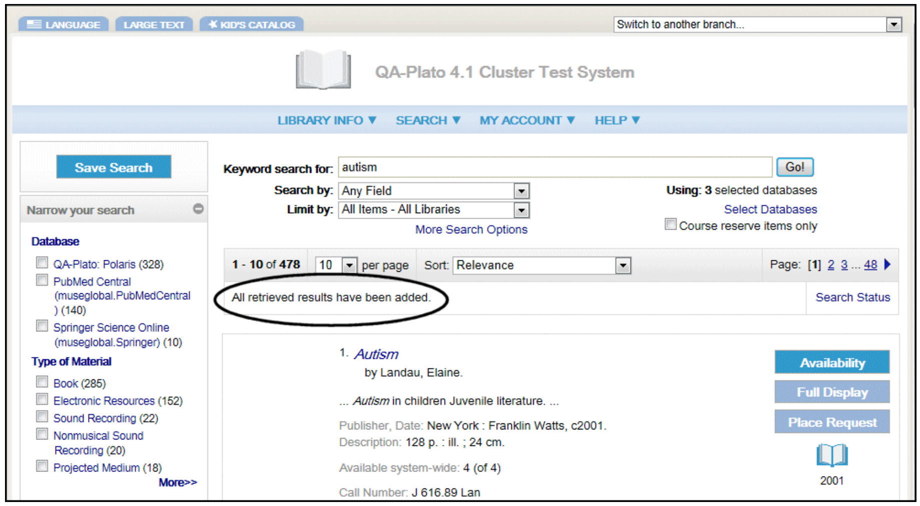
After selecting databases and entering the search term as usual, the user clicks **Go**. The search results list first displays results from the local catalog, if selected, and the user has the option of clicking **Add Pending Results** to add more results to the list. The number displayed at the top of the list changes as the results are added.



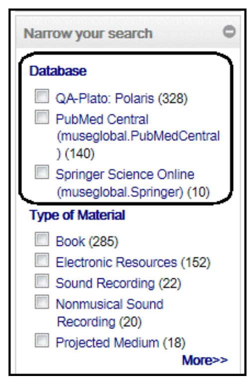
As results are being added from the selected databases, the user can click **Search Status** to see the progress. A status window displays the total results for each database, the database status, the results pending, and the results retrieved.



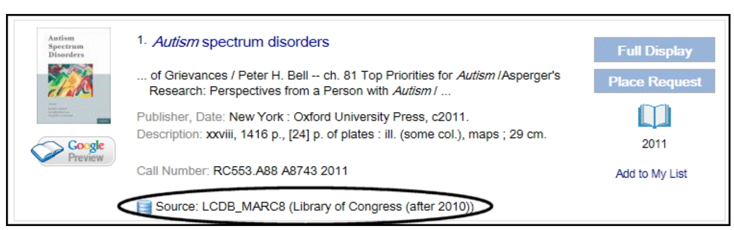
When all the pending records have been retrieved, the search bar indicates that all retrieved results have been added.



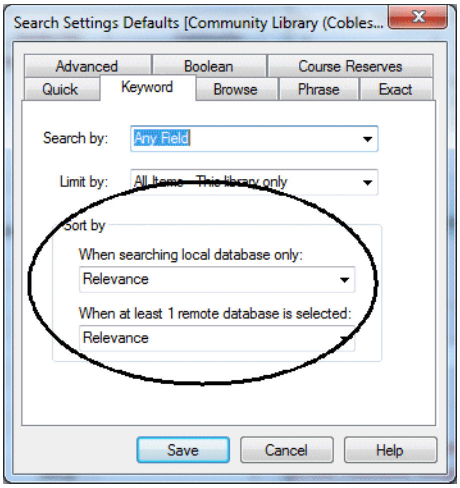
Users can filter the search results list by database. The **Narrow your search** dashboard displays the **Database** facets at the top of the list by default. For more information about setting up facets, see "Faceted Results" on page 181.



In the merged result set, the brief information for the title displays a database icon and the source database for titles found in remote databases.



As part of this development, you can set separate default sort orders for searches done in the local database only and for those where at least one remote database has been selected. "Most popular" and call number sort options are not available for searches where a remote database has been selected. Use the PAC profile **Search settings defaults** to set new sort defaults for keyword, phrase, exact, advanced, and Boolean searches. The illustration shows the keyword tabbed page.



Faceted Results

Record counts are now included for each facet offered on the **Narrow your search** dashboard element. The counts are recomputed by the existing Keyword Processing SQL job, which runs nightly by default.

In addition, these new facets are now available for bibliographic record searches:

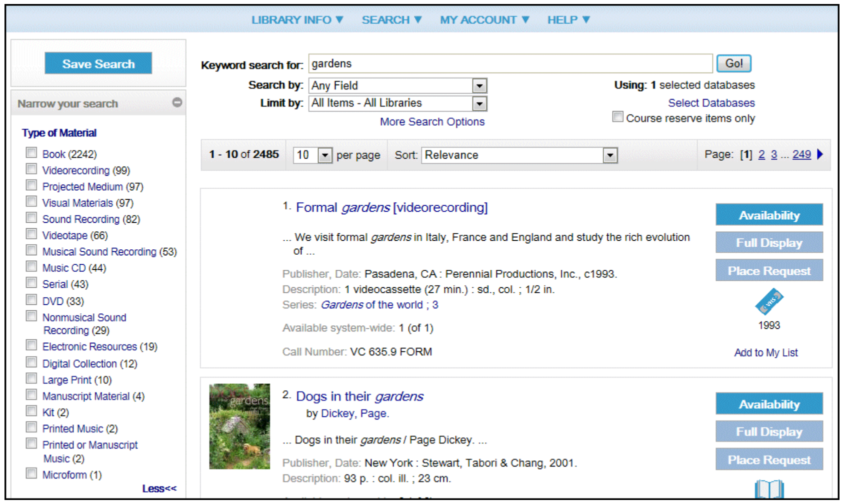
- Assigned branch of linked items
- Literary form
- Record Owner
- Database

Use the existing profile **Dashboards: Narrow your search & related searches** to set whether these facets are displayed, their position, their default state (expanded or collapsed), and their labels.

Narrow Your Search Selections Display

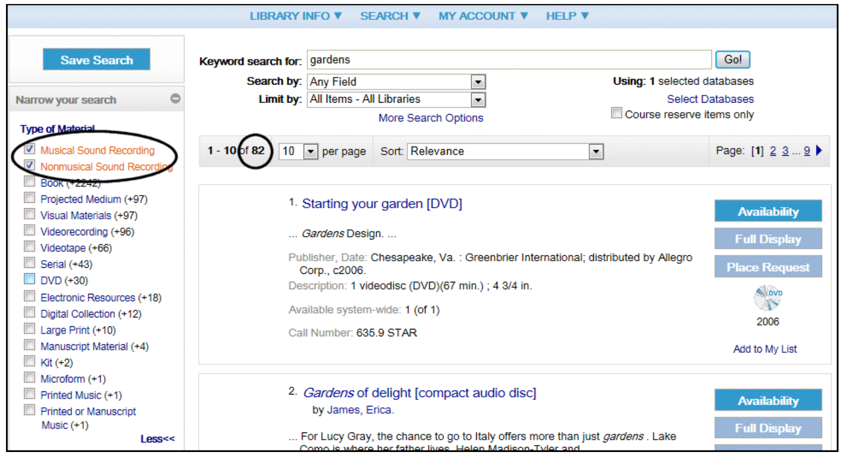
The **Narrow your search** dashboard now offers two types of facets for filtering a set of search results.

Facets marked with check boxes represent "or" filters for the results set. The illustration shows **Type of Material** checkbox facets for a set of search results.



When you select a facet, it is placed at the top of the list and the results set is filtered accordingly.

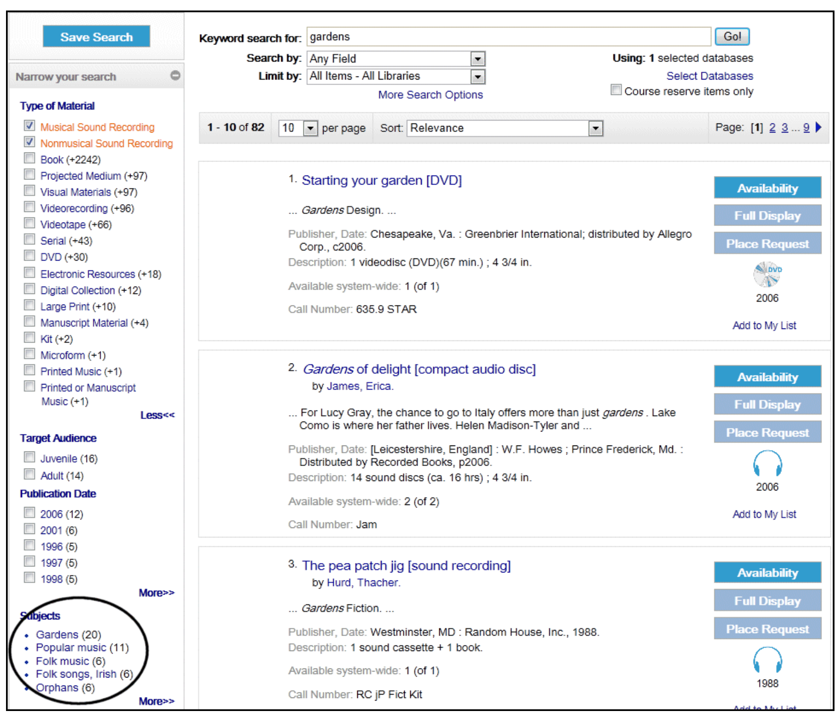
If you select another facet from within the same group, it is also added to the top of the list for that facet type. The filtered results set grows to include results that match the first selected facet *or* the second selected facet.



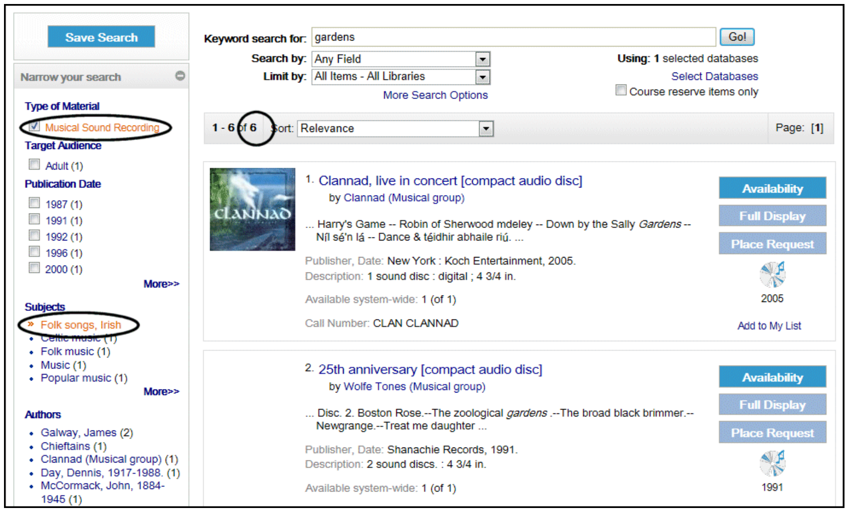
When you select facets from different check box groups, the filtered results set is restricted to results that match the selected facet in one group *and* the selected facet in the other group.

Note:
Check box facets are not necessarily mutually exclusive. For Type of Material, each title is included in the count for all facets that apply to it. For example, a large print book appears in the counts for both the **Book** and **Large Print** facets. As another example, **Musical sound recording** is a subset of **Sound recording**. If you select the **Musical sound recording** facet, the count for **Sound recording** may go down.

Facets marked with bullets represent "and" filters for the results set. The illustration shows **Subject** bullet facets for the same set of search results.



When you select a bullet facet, it is also placed at the top of its list. The filtered results set is now restricted to results that match any already selected facet *and* the selected bullet facet.



Summary View

The user can hover the cursor over a book jacket image in the brief search results to display summary information. You can determine the information displayed in this view with the PowerPAC profile **Title display: Configure** (see "Configuring the PAC Title Display" on page 185). If you enable Bookmarking and Sharing (AddThis™), the Share links also appear in this view.

Configuring the PAC Title Display

In Polaris 4.1, you can select which bibliographic data elements appear in the initial search results list, on the summary view for a title, and in the full display; set the display order of the data elements; specify a custom label for each data element; and create translated versions of the data labels for languages you have licensed. You can copy all these settings from any organization to any other organization. It is also possible to show multiple instances of a single tag in the brief display: for example, multiple 856$u fields. You can specify different elements for monographs and serials.

In addition, your display is no longer restricted to Polaris-defined elements. You can specify any additional data elements you need (custom entities), selecting the tags, indicator values, and subfields to include in each custom entity. Polaris 4.1 provides complete flexibility in selecting, editing, and displaying information for initial (brief) search results, summary information, and the full display for bibliographic or community information search results.

All the system-defined bibliographic data elements that were available in earlier releases of Polaris are available in Polaris 4.1. Polaris 4.1 also provides the *additional* elements for bibliographic title displays shown in the table below.

Note:
A separate set of data elements is available for community information results displays. For details, see "Configuring the PAC Community Results Display" in the *Polaris Community Profiles Guide* or the equivalent topic in staff client online Help.

Tag	*IND1*	*IND2*	*Subfields*	*Default Label*
086 Government Documents Classification Number	all values	n/a	a	Gov Doc Number
504 Bibliography	n/a	n/a	a	Bibliography
506 Restrictions on Access	all values	n/a	abcdefu	Restrictions on Access
508 Creation/ Production Credits	n/a	n/a	a	Credits
511 Participant or Performer	all values	n/a	a	Participants and Performers
520 Summary, Etc. (does not replace the existing entity containing all indicator values and only the $a subfield)	blank, 8	n/a	abcu	Summary
	0	n/a	abcu	Subject
	1	n/a	abcu	Review
	2	n/a	abcu	Scope and Content
	3	n/a	abcu	Abstract
	4	n/a	abcu	Content Advice

Tag	*IND1*	*IND2*	*Subfields*	*Default Label*
521 Target Audience (does not replace the existing entity containing all indicator values)	blank, 8	n/a	ab	Audience
	0	n/a	ab	Reading Grade Level
	1	n/a	ab	Interest Age Level
	2	n/a	ab	Interest Grade Level
	3	n/a	ab	Special Audience Characteristics
	4	n/a	ab	Motivation/Interest Level
526 Study Program Information Note	all values	n/a	abcdiz	Reading Program
538 System Requirements	n/a	n/a	aiu	System Details
540 Terms Governing Use and Reproduction	n/a	n/a	abcdu	Terms Governing Use and Reproduction
546 Language	n/a	n/a	ab	Language
586 Awards	all values	n/a	a	Awards

In Polaris Administration, separate profiles are available for Polaris PowerPAC bibliographic search results, Mobile PAC bibliographic search results, and (for libraries that use Polaris Community Profiles) community information search results in both applications.

Note:
Search results in Polaris PowerPAC Children's Edition are not currently configurable by this method.

Permissions

As part of this development, the following System Administration permissions have been added:

- **Modify bibliographic record title displays: Allow** - Controls access to the following profiles:
  - PowerPAC profile **Title Display: Configure**
  - Mobile PAC profile **Title Display: Configure**

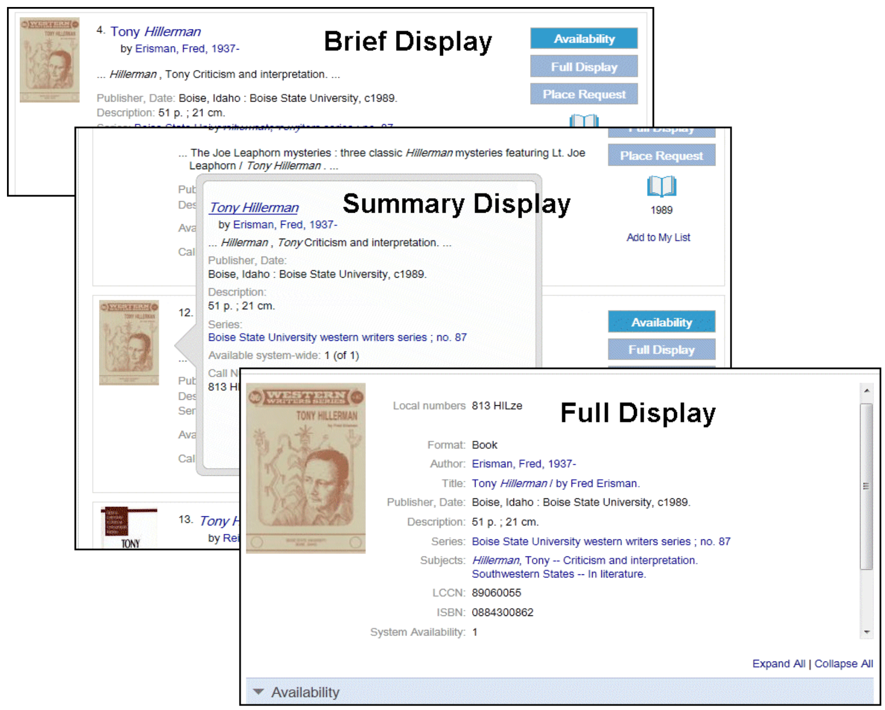
  Note:
  The System Administration permissions **Modify PAC brief title display** and **Modify PAC full title display** have been removed from Polaris 4.1. At upgrade, resources that had these permissions are granted the new **Modify bibliographic record title displays** permission by default.

- **Modify community record title displays: Allow** - Controls access to the following profiles:
  - Community profile **Community Information Display (PowerPAC): Configure**
  - Community profile **Community Information Display (Mobile PAC): Configure**

- **Modify and create display entities: Allow** - Controls access to the Entities Definition dialog box, where you can edit existing display elements (entities) or define newly-created ones. See “Editing Entities” on page 197 and “Defining New Entities” on page 198.

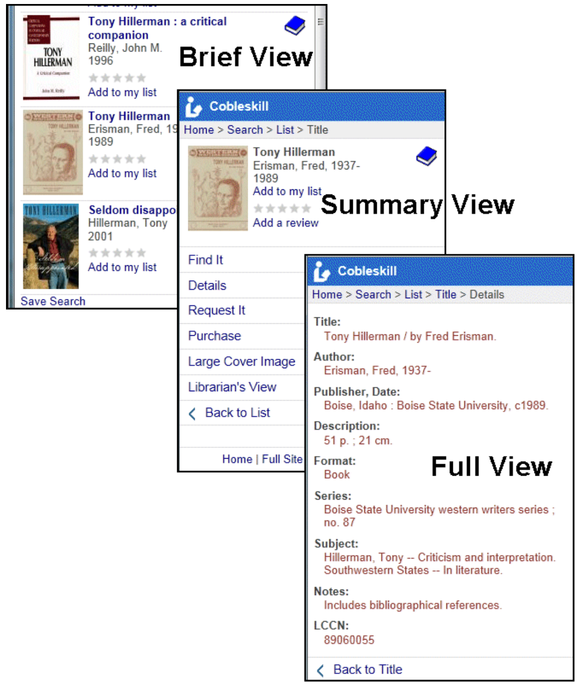
PowerPAC Profile - Title Display: Configure

You can configure bibliographic information for the brief, full, and summary displays in PowerPAC. The brief display is the information shown in initial search results. The summary information is displayed when the user hovers the cursor over a cover image. The full display appears on the product page, when the user clicks **Full Display** or the title itself.



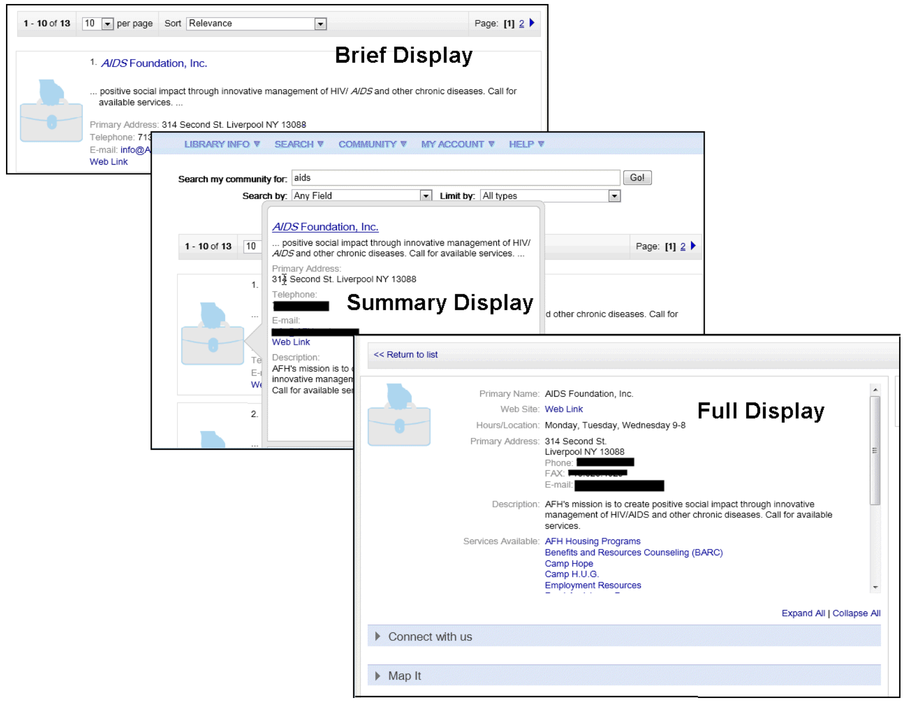
Mobile PAC Profile - Title Display: Configure

Use this profile to configure bibliographic information for the brief, full, and summary displays in Mobile PAC. The brief display is the information shown in initial search results. The summary information is displayed on the Mobile PAC product page for title. The full display appears when the user clicks **Details** on the product page.



Community Profiles for Search Results

Two Community profiles, **Community Information Display (Mobile PAC): Configure**; **Community Information Display (PowerPAC): Configure** control the community information displayed for community search results in the respective applications. The brief display is the information shown in the initial search results. The user hovers the cursor over the logo image to see the summary display, or clicks the name to see the full display for the entry. The examples are taken from Polaris PowerPAC community search results.

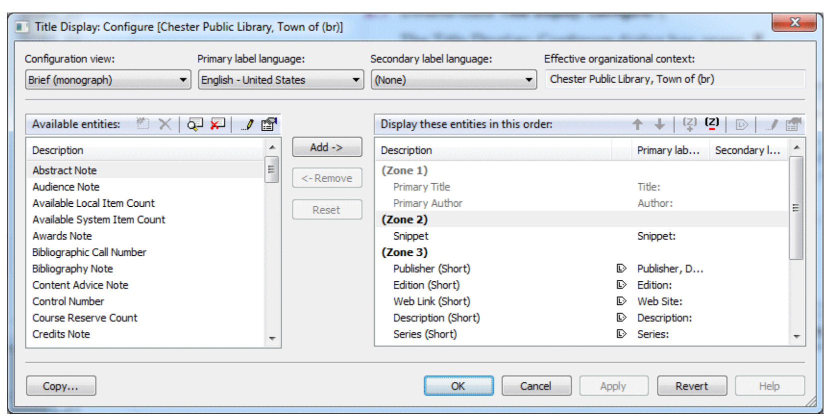


Selecting Entities to Display and Editing Labels

The specific procedures in this summary document apply to the Polaris PowerPAC profile, but the configuration workflow is similar for each application.

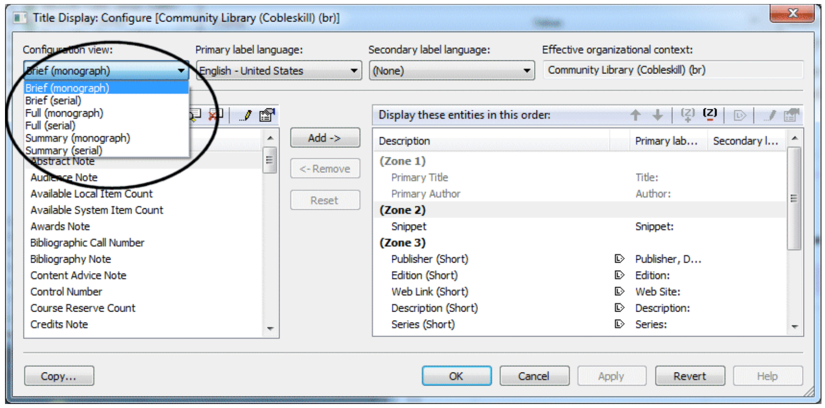
1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PowerPAC** tab in the details view.
2. Double-click **Title Display: Configure**.

   The Title Display: Configure dialog box opens.



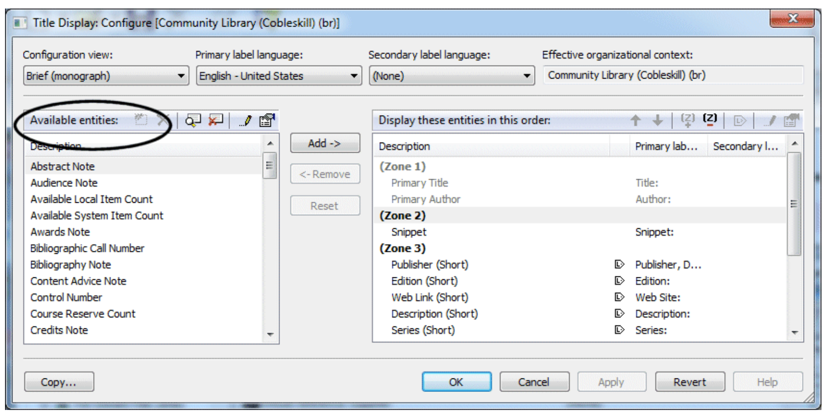
3. Select the view you want to configure from the **Configuration view** menu.

Note that you can configure separate displays for monographs and serials. The system uses your serials configurations for bibliographic records where LDR/07 = b or i or s.

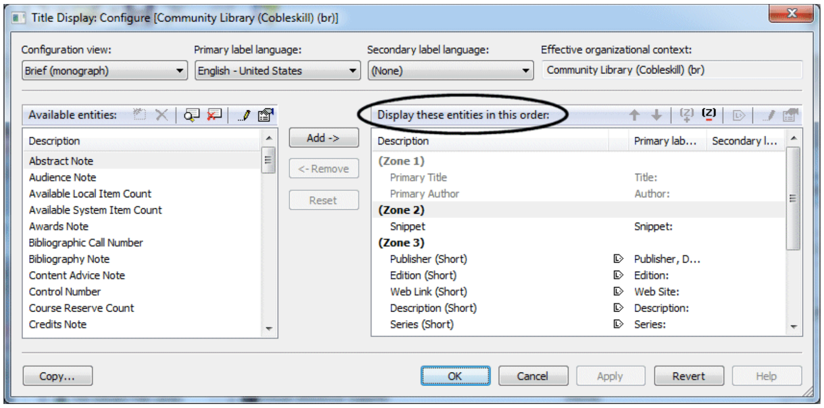


The **Available entities** list on the left side of the dialog box displays the data elements (entities) that can be added to a view.

> **Note:**
> The **Available entities** list may include both system-supplied and custom entities. Custom entities are defined at the system level only. See "Defining New Entities" on page 198.



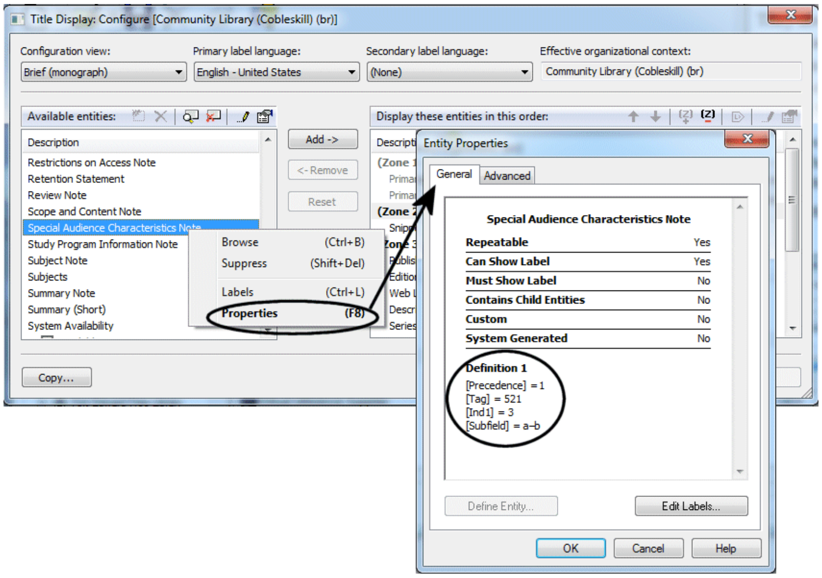
The **Display these entities** list on the right side of the dialog box lists those elements that are currently selected for the configuration view.



"Short" entries correspond to the data elements (tags and subfields) that were available for the brief display in previous versions of Polaris. They are not repeatable for a single view. "Long" entries correspond to the data elements that were available for the full display in previous versions of Polaris. They are repeatable within a single view. You can double-click the edge of a column header to expand the column and display the full text if necessary.

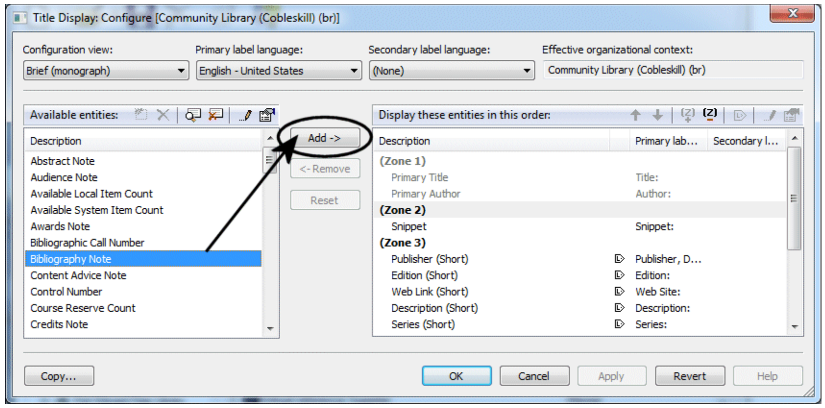
4. To see what tags, indicators and subfields are included in an entity, hover the cursor over the entity for a quick view, or right-click and select **Properties** from the context menu.

   The Entity Properties dialog box opens.

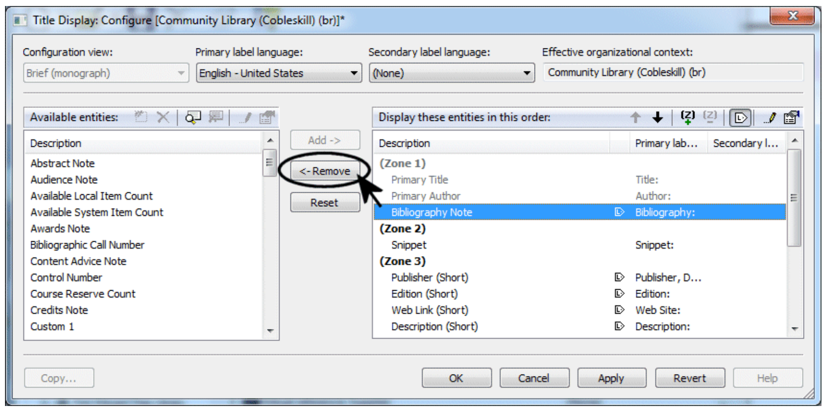


5. To add an entity to the view, click the entity in the **Available entities** list and then click **Add**.

   The entity is added to the **Display these entities** list.

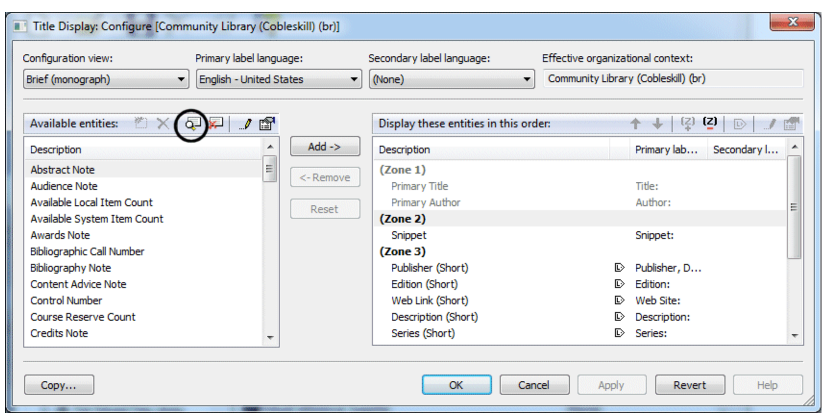


6. To remove an entity from the view, click the entity in the **Display these entities** list and then click **Remove**.

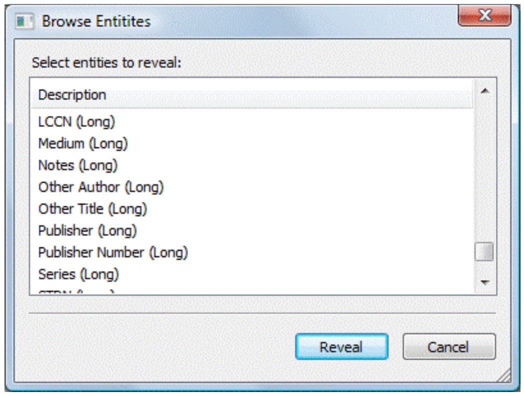


7. If the **Available Entities** or **Display these entities** list does not include the data element you want to display, follow these steps:

a) Click the Browse icon  at the top of the **Available entities** list.



The Browse Entities dialog box opens.



b) In the Browse Entities dialog box, select the element you want to add to the **Available entities** list.

You can hover the cursor over an entity to see its properties.

c) Click **Reveal**.

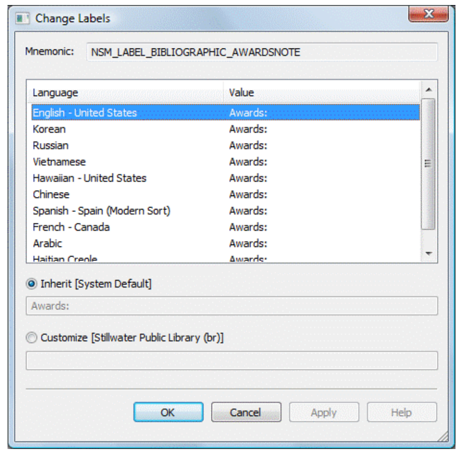
The element now appears in the **Available entities** list and can be selected for display.

> **Note:**
> You can shorten the **Available entries** list to reduce scrolling. Select the entity that you want to remove, right-click and select **Suppress** from the context menu, or click the Suppress icon  at the top of the **Available entities** list. To add an entry back to the list, repeat steps a-c.

8. To edit the default English label for an entity, and to enter or change the labels for other languages, follow these steps:

   a) Right-click the entity in the **Available entities** or the **Display these entities** list, and select **Labels** from the context menu, select **Edit Labels** from the Entity Properties dialog box, or click the Change Labels icon at the top of the **Available entities** or **Display these entities** list.

   The Change Labels dialog opens for the entity you selected.



Note:
You can also edit the labels using Polaris Language Editor (WebAdmin). The **Mnemonic** field at the top of the Change Labels dialog box displays the language string ID for the entity’s label. In Polaris Language Editor, select the **ERMSPortal** “product” to edit entity labels. For more information about using Polaris Language Editor, see the *Polaris Language Editor (WebAdmin) Guide* or online Help for Polaris Language Editor.

   b) On the Change Labels dialog box, click the language you want to edit.

   c) To customize the label, click the **Customize** option and then enter your text.

Note:
To enter diacritics or non-Latin characters, press and hold **ALT** while typing the code on the numeric keypad.

- To permanently save your changes and keep the dialog box open, click **Apply**.
- To permanently save your changes and close the dialog box, click **OK**.
- To remove any changes that have not been applied and close the dialog box, click **Cancel**.

Arranging Selected Entities for Display

The data elements that have been selected for display in the current configuration view can be organized into logical visual "zones" by inserting zone separators (white space).

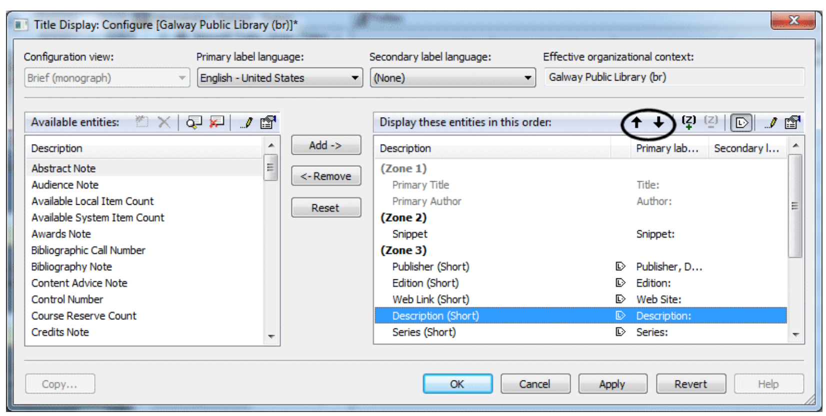
1. To insert a zone separator:

   a) In the **Display these entities** list, select the entity that should appear just below the new zone separator.

   b) Right-click and select **Create Zone** from the context menu, or click the Create Zone icon at the top of the **Display these entities** list.

2. To remove an existing zone separator, select it, right- click and select **Drop Zone** from the context menu, or click the Drop Zone icon .

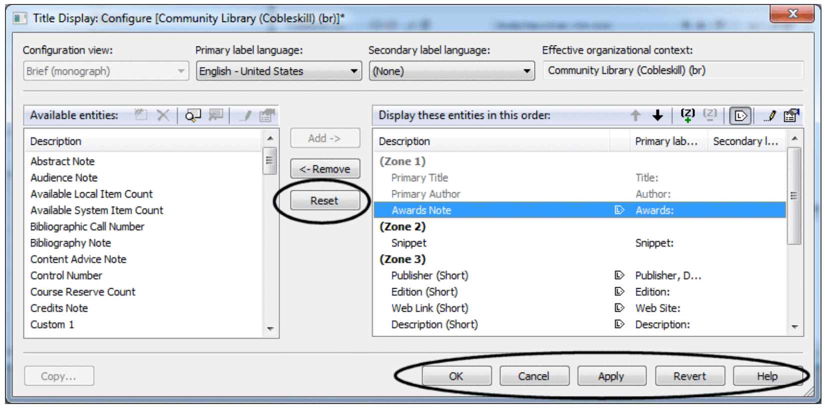
3. To change the order in which the entities and zone separators are displayed, select the entity or zone separator and click the up or down arrow buttons at the top of the **Display these entities** list.



4. To suppress the entity label (but not the entity itself) from the display, select the entity in the **Display these entities** list, right-click, and select **Show/Hide Label** from the context menu.

   In the **Display these entities** list, the label icon indicates that the label is currently set to be shown.

Saving or Cancelling Your Work



- To permanently save changes and keep the Title Display Configure dialog box open, click **Apply**.
- To permanently save changes and close the Title Display Configure dialog box, click **OK**.
- To remove any changes that have not been applied and close the Title Display Configure dialog box, click **Cancel**.
- To remove any changes that have not been applied and keep the Title Display Configure dialog box open, click **Reset**.

Important:
After saving your changes, use Polaris Language Editor (WebAdmin) to reload PowerPAC or Mobile PAC. Users may also need to clear their browser caches.

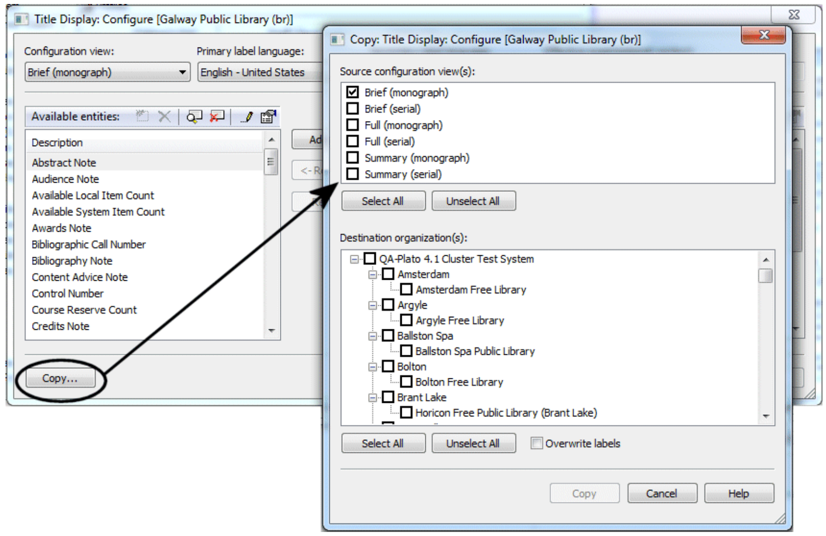
Sharing Configurations

- **Inherit a configuration from the parent organization** - Click **Revert** on the Title Display Configure dialog box. Only the currently-selected configuration view is inherited. If you make changes after clicking **Revert**, you will no longer inherit settings from the higher organization.

  Important:
  When you click **Revert**, all branch level configuration settings are lost. The action cannot be undone.

- **Copy a configuration to another organization** - Click **Apply** to save your changes, and then click **Copy** to display the Copy dialog box. Select the configuration views you want to copy and the organizations that should receive the configurations, and then click **Copy**.

  Important:
  The copy action takes place immediately. The action cannot be undone.



Editing Entities

You can edit many existing entities. However, the following system-defined entities *cannot* be edited:

- Bibliographic entities:
  - Bibliographic call number
  - Primary title
  - Primary author
  - Snippet
  - System Availability (Available System Item Count and Total System Item Count)
  - Holdings Statement
  - Available Local item Count
  - Available System Item Count
  - Control Number
  - Course Reserve Count
  - Fiction
  - Hold Request Count
  - Holdings Note
  - Local Availability (Available Local Item Count and Total Local Item Count)
  - OCLC Control Number
  - Publication year
  - Retention Statement
  - Total Local Item Count
  - Total System Item Count
  - Type of Material
- Community information entities:

- Primary Name (Short)
- Snippet
- Control Number
- Expiration Date
- Geographic Coordinates (sub-entities can be edited)
- Primary Address (Long) (sub-entities can be edited)
- Secondary Address (Long) (sub-entities can be edited)
- Type of Organization

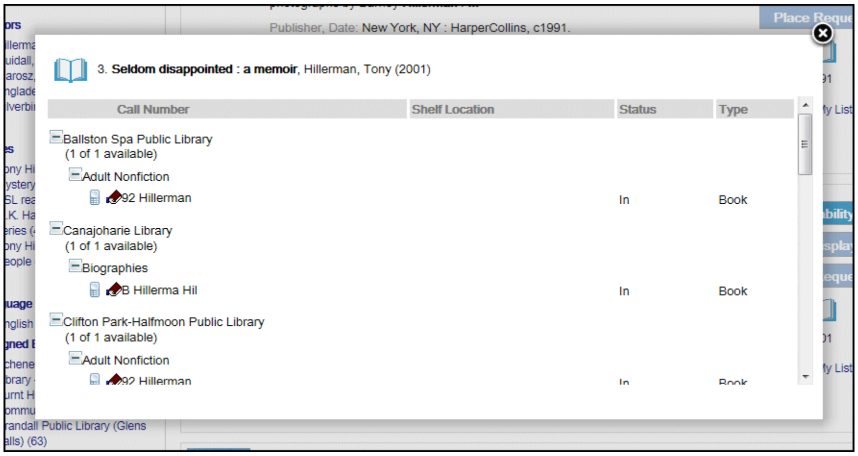
You can edit entities at the system level only. For detailed information and procedures, see "Configuring the PowerPAC Title Display" in the *Polaris Public Access Administration Guide*, "Configuring the PAC Community Results Display" in the *Polaris Community Profiles Guide*, or the equivalent topics in staff client online Help.

Defining New Entities

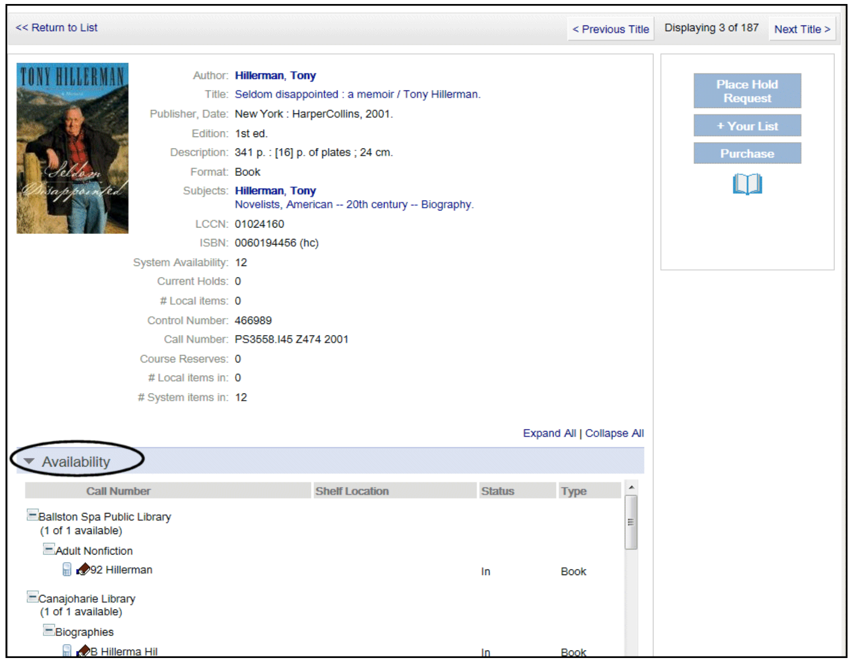
At the system level, you can define new entities for display in PAC bibliographic search results. (This feature is not available for community information search results). For detailed information and procedures, see "Configuring the PowerPAC Title Display" in the *Polaris Public Access Administration Guide*, or the equivalent topics in staff client online Help.

Availability Display

Users can now get detailed availability information for a title without viewing the full display. When you click **Availability** for a title in the search results list, availability information is displayed in a separate lightbox window. You can click **X** in the corner to close the window.

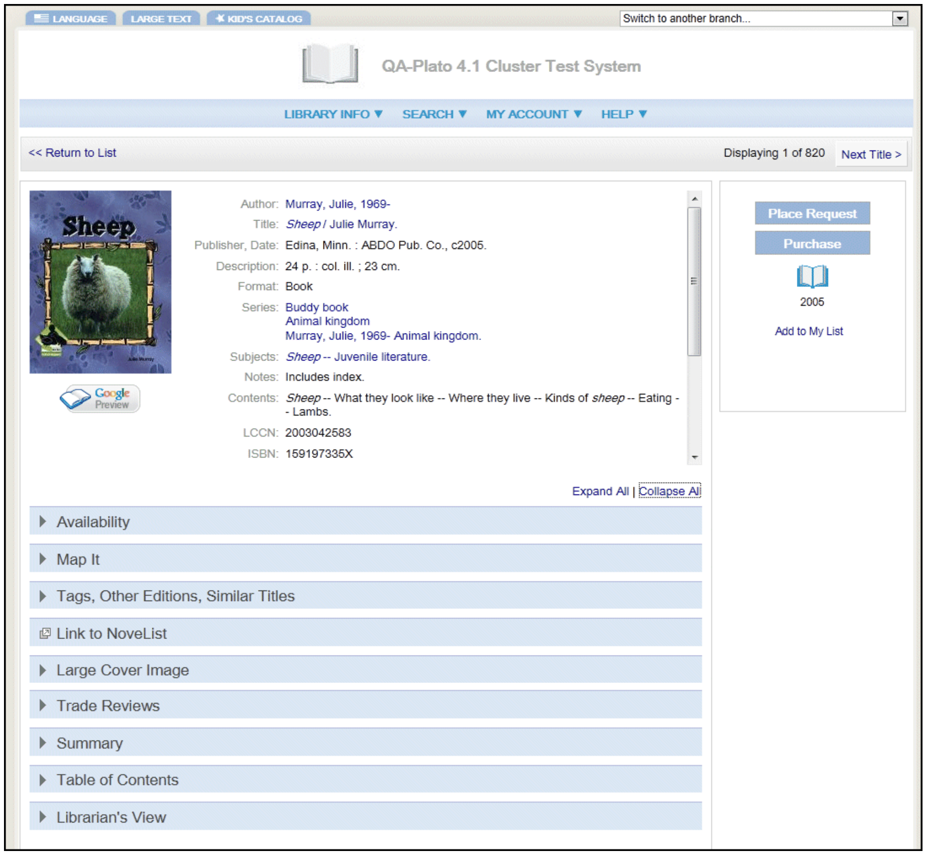


Availability information is also available as a "drawer" on the product page (full display) for a title. For more information about the product page, see below.



PowerPAC Product Page

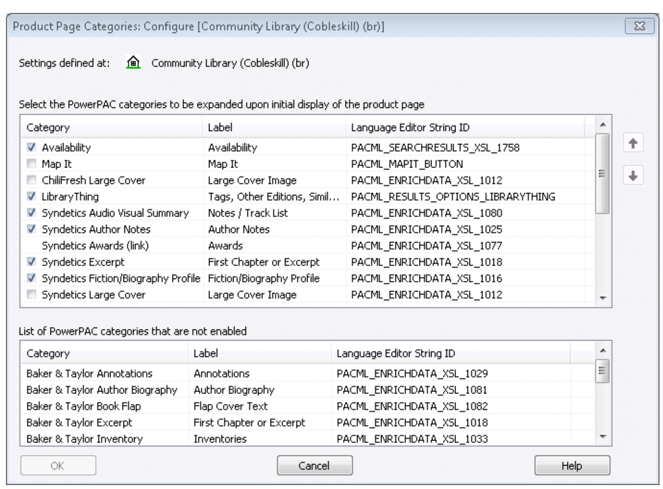
The PowerPAC product page is displayed when a user clicks a title, cover image, or **Full Display** for a title in the search results list. This page includes the bibliographic information set for the full display in the PAC profile **Title display: Configure**, as in previous versions of Polaris. Since this information may be extensive, this section of the page can be scrolled. Below the bibliographic information is a series of expandable category “drawers” for availability information, enriched content, and other features. External links to other resources are indicated by an icon . (These links open in a new browser window.) The user can click **Expand All** or **Collapse All** to control the display of the drawer contents, or expand and collapse individual drawers. The illustration shows an example with all drawers collapsed.



In Polaris Administration, you can set which drawers should be expanded by default when the page is opened, and determine the display order of the drawers on the page. Use the new PowerPAC profile **Product page categories: Configure**, available at the system, library, or branch level.

Note:

You need the new System Administration permission **Modify product page categories: Allow** to work with this profile. At upgrade, resources with the 4.0 **Modify PAC full title display permission** (removed in Polaris 4.1) are granted the new permission.



In the Product Page Categories: Configure dialog box, the top portion lists the categories (features) that have been enabled for the organization. To set a category to be expanded in the initial product page display, check the category. To change the display order, select the category and click the appropriate arrow at the side of the dialog box to move the category up or down in the display order.

The Product Page Categories: Configure dialog box lists the language string ID for each category for your use in Polaris Language Editor (WebAdmin), where you can search for and edit the drawer labels. For more information, see the *Polaris Language Editor (WebAdmin) Guide* or Language Editor online Help.

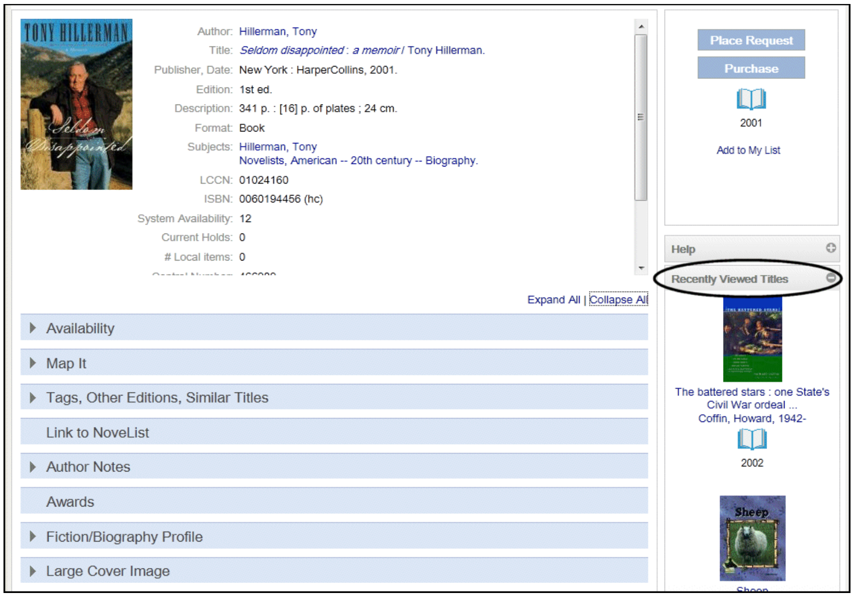
The bottom portion of the Product Page Categories: Configure dialog box lists the categories that are possible to display on the product page, but have not been enabled for the organization. For information about setting up features such as third-party enriched content, see the *Polaris Public Access Administration Guide* or staff client online Help.

Note:
You can also configure the product page for Mobile PAC, using a separate profile. See "Mobile PAC Product Page" on page 236.

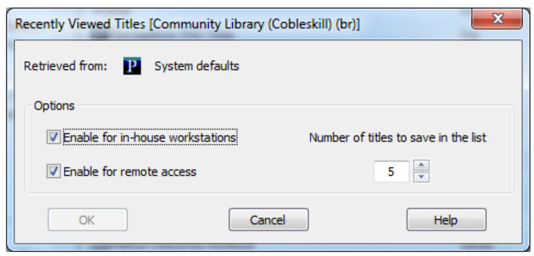
Recently Viewed Titles

A Recently Viewed Titles feature is now available for display in the PowerPAC dashboard on the product page for a title, and on any bibliographic record search and results page. When the user has viewed at least one product page for a title in the current session, the Recently Viewed Titles list displays the titles already viewed, including the cover image, title, author, format icon, and publication date. The user can click a title in the list to launch a search for the title.

The list is available as long as the current session is active, and is cleared when the browser is closed or the session times out. It is available regardless of whether the user has logged in. The user can disable the feature for the session by clicking **Turn off recently viewed titles**. This action clears the list; the user can start it again by clicking **Turn on recently viewed titles**.



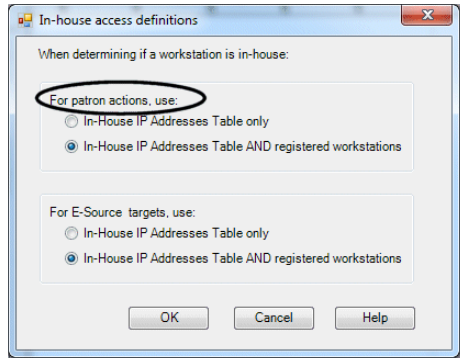
Use the PowerPAC profile **Recently viewed titles**, available at the system, library, or branch level, to set up the Recently Viewed Titles web part.



Set either or both location options:

- Check **Enable for in-house workstations** to make this feature available at workstations in the library. In-house workstations are defined by the settings in the organization's PowerPAC profile **In-house access definitions**. If you have privacy concerns regarding in-house PAC workstations, leave this option unchecked.

Note:
As part of this development, the label in the In-House Access Definitions dialog box **For patron inactivity timeout, use:** has been changed to **For patron actions, use:** to reflect its use for the Recently Viewed Titles feature as well as the inactivity timeout.

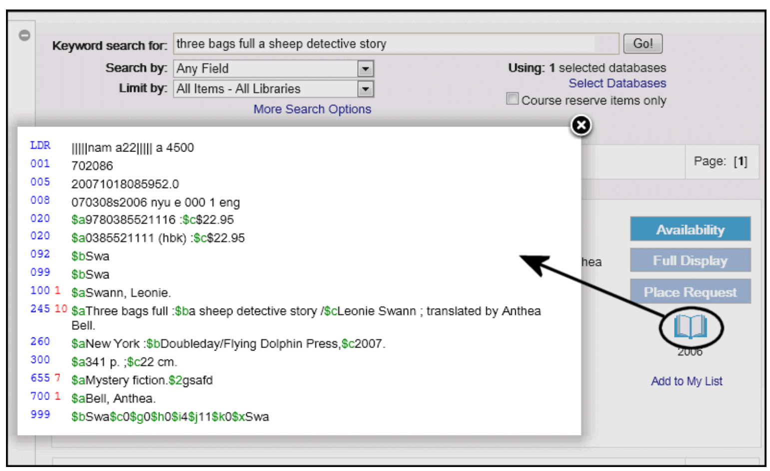


- Check **Enable for remote access** to make this feature available to users outside the library.

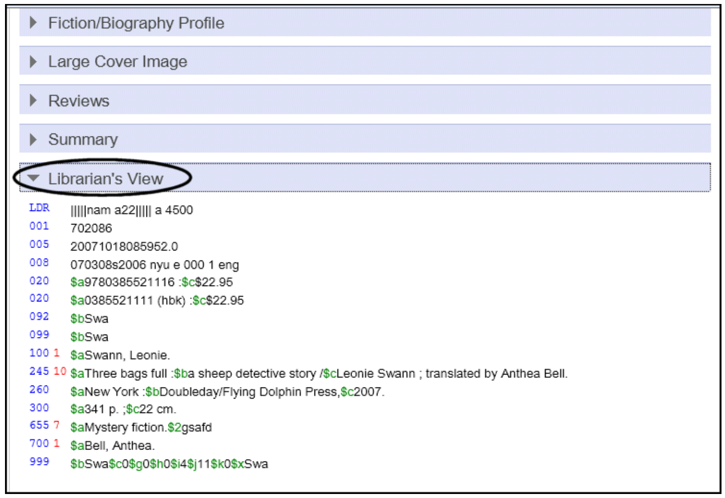
You can also set the maximum number of titles that should appear in the Recently Viewed Titles list. The maximum is 99; the default value is 5.

Librarian's View (MARC View)

The Librarian's View (MARC view) is available by clicking the format icon for a title in PowerPAC search results. The view appears in a lightbox window so the user does not lose the search results context.



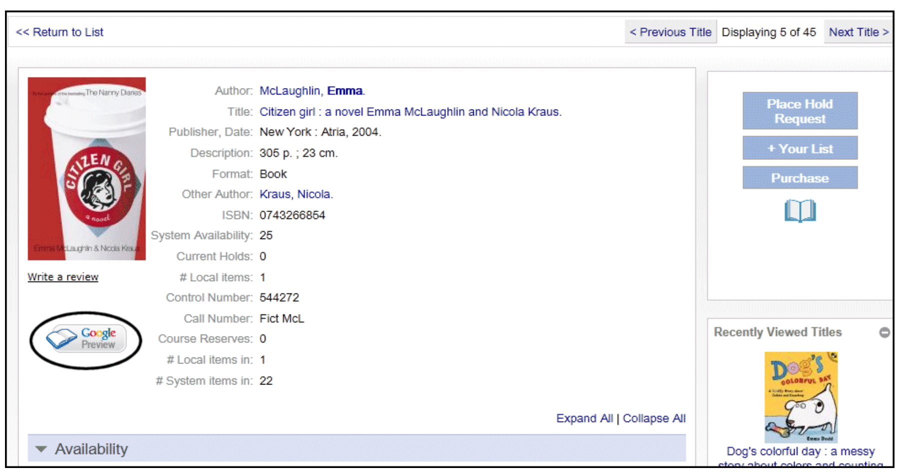
The Librarian's View is also available as an option on the product page for a title. You can set the display position for the option using the new PowerPAC profile **Product page categories: Configure** (see "PowerPAC Product Page" on page 199).



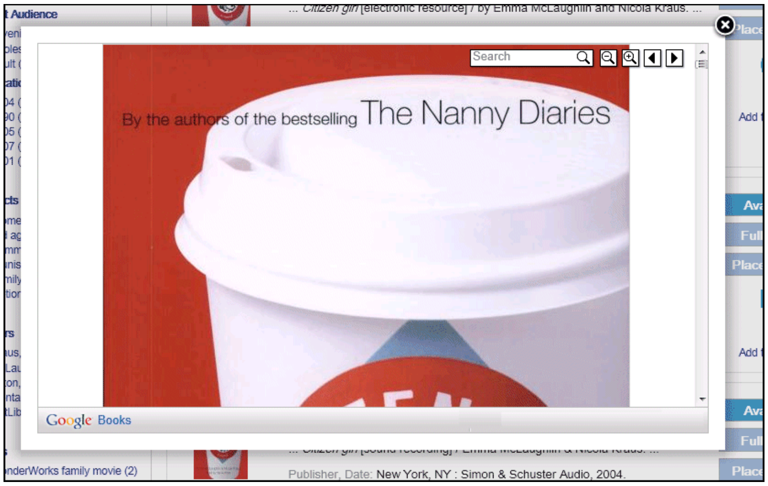
To enable the Librarian's View, use the existing PowerPAC profile **Librarian's (MARC) view: Enable**.

Google Preview

Google Preview is a book viewer for any title that has a preview in Google Book Search. You can offer Google Preview for titles in the brief search results list, on the product page (full display) for a title, or in both locations. The illustration shows the Google Preview button on the title product page. The button is displayed only for titles that have Google previews.



When you click the Google Preview button, the preview is displayed in a "lightbox" window. Use the Preview controls to page through the preview.

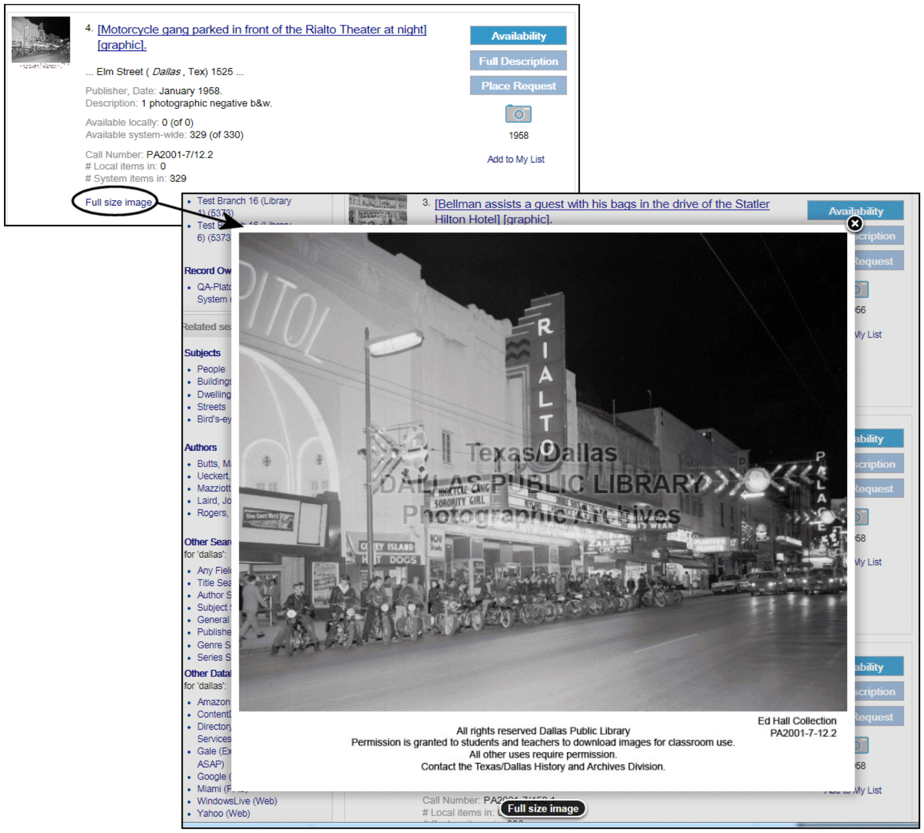


The PowerPAC profiles **Google Preview: Enable on search results pages** and **Google Preview: Enable on full display** control this feature. The profiles are available on the system, library, or branch level and are set to **Yes** by default.

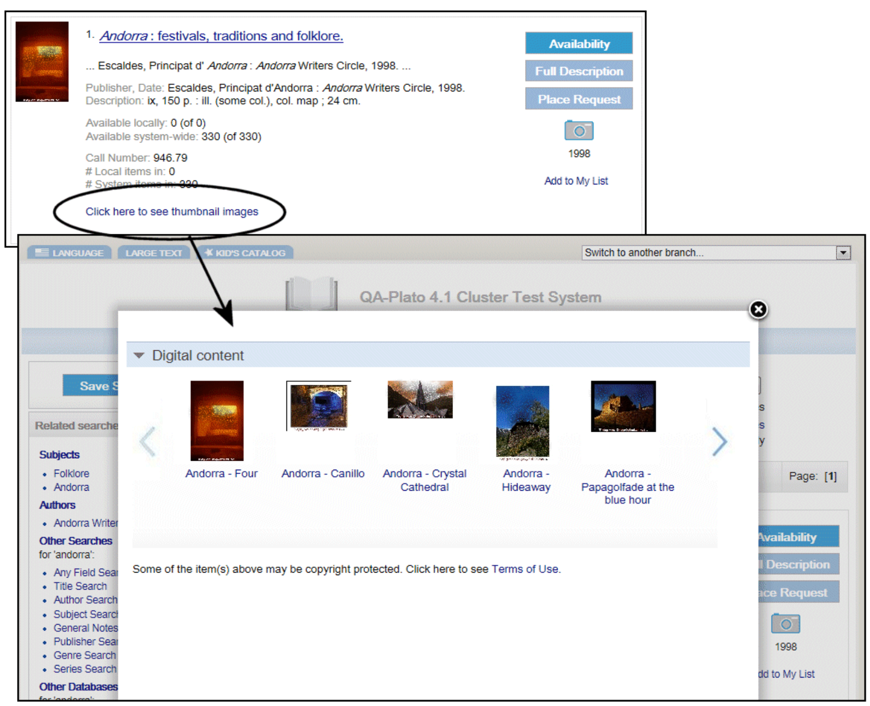
Important:
You do not need any kind of Google account ID to enable this feature, but Google’s terms of service document states that you cannot alter the Google Preview button image. For details, go to **http://code.google.com/apis/books**

Digital Content Display in PowerPAC Search Results

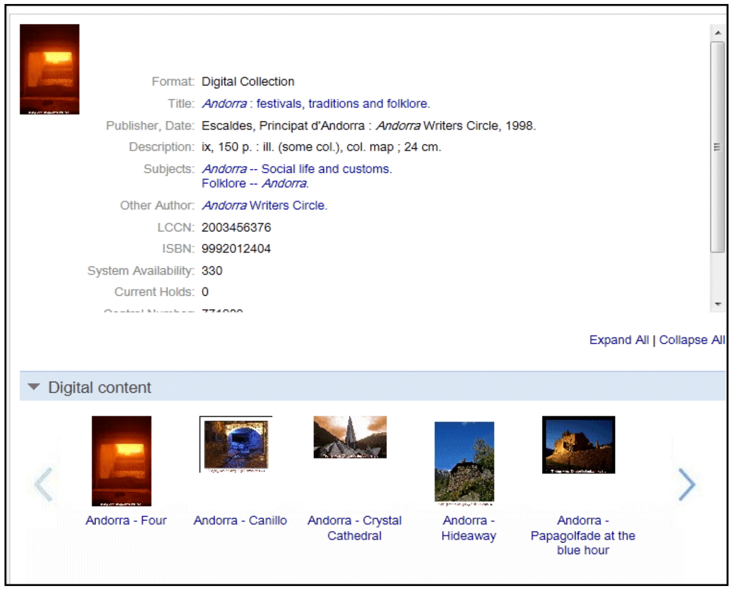
The display in PowerPAC brief search results for Polaris Fusion content has changed. If the record contains one image, the user can click **Full size image** to display the larger image in a lightbox display.



For records with multiple images, the link **Click here to see thumbnail images** opens a "sliding" set of thumbnail images in a lightbox display. The user can click any image to see the full-size equivalent.



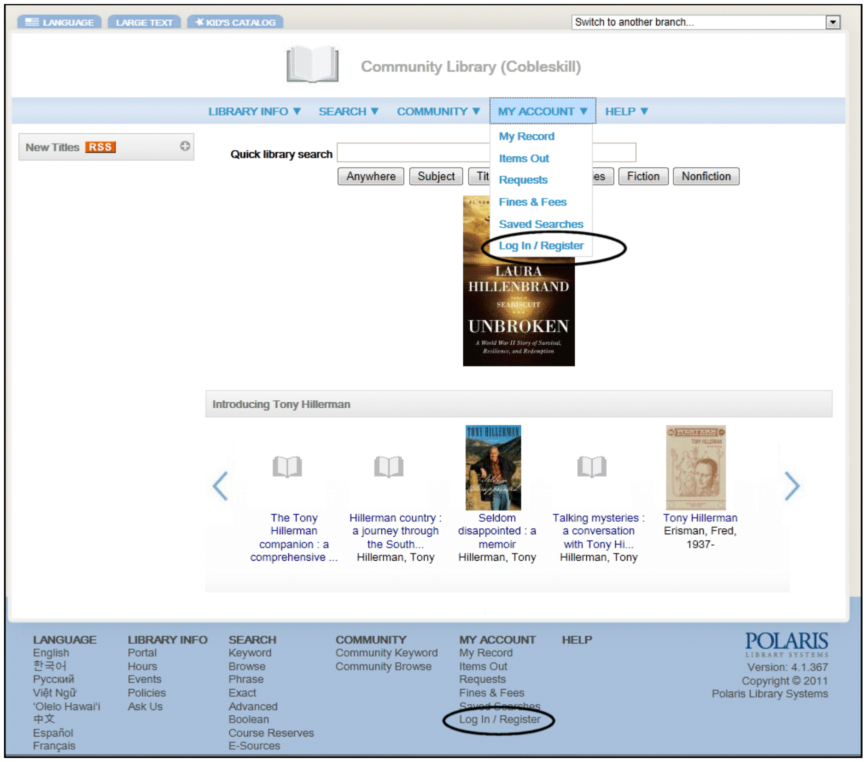
On the product page (see "PowerPAC Product Page" on page 199), a Digital Content drawer displays Fusion content.



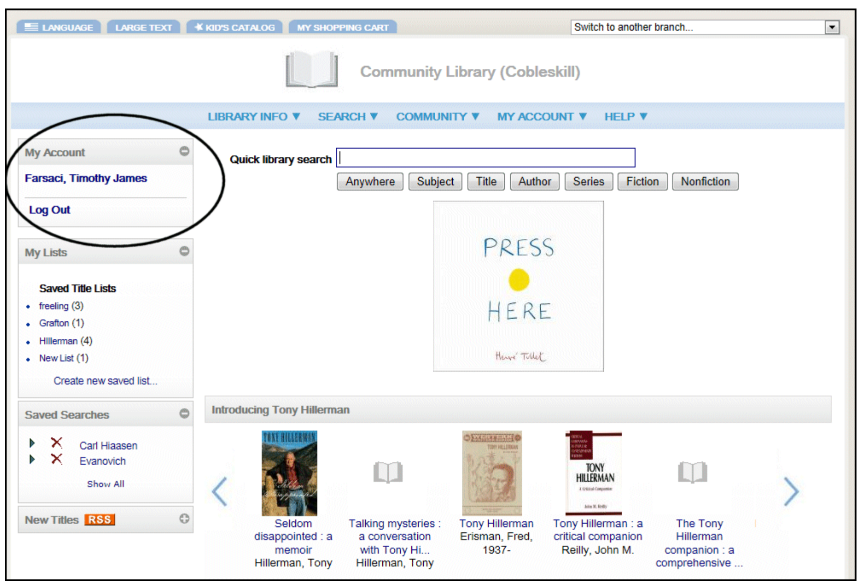
You can edit the drawer label with Polaris Language Editor (WebAdmin). Choose the PowerPAC "product." The string ID is **PACML_FUSIONCONTENT.**

Log In Links and Logged-In Patron Display

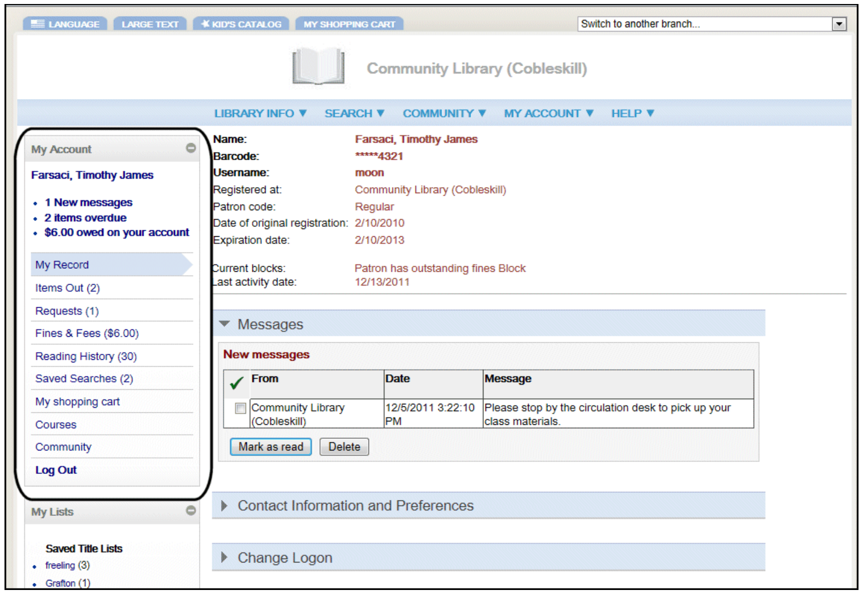
In Polaris PowerPAC 4.1, a patron can log in for the session by clicking **Log in/Register** on the **My Account** menu or in the site index at the bottom of the page.



When the patron has logged in, PowerPAC pages display the patron's name and the **Log Out** option in the dashboard.



The dashboard for My Account pages displays bold links for action items, such as overdue items and money owed; a summary of read and unread messages; and account page links (also accessible from the My Account menu).



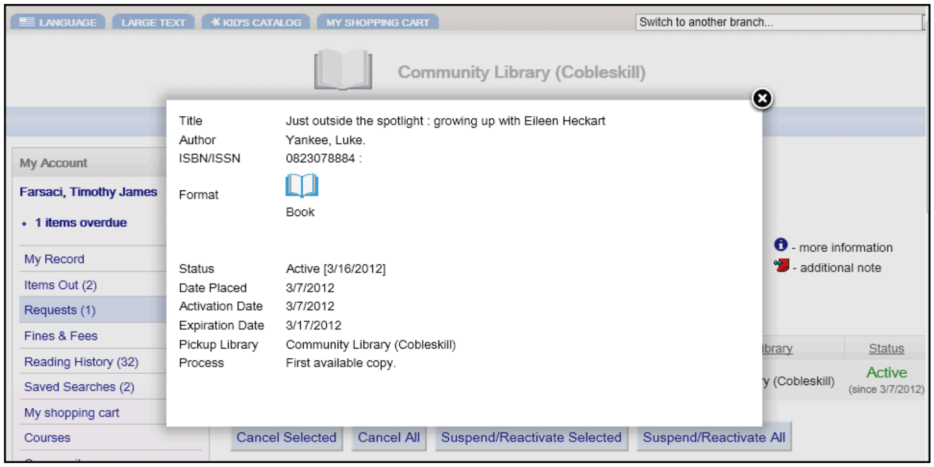
Logging in from any page except My Account pages returns the patron to the portal page, if the library uses it, or to the main search page. Logging in to a My Account page displays that page.

Patron Account Pages

The Items Out, Fines & Fees, Requests, and Reading History lists in the PowerPAC patron account are now displayed in pages of 100 items, with options to move to another page displayed at the top and bottom of the list. Users can click the column heads on most pages to sort the list. Clicking the header a second time reverses the sort order. (Exceptions: the column that displays the information icon is not sortable; columns on the Fines & Fees page are not sortable.)

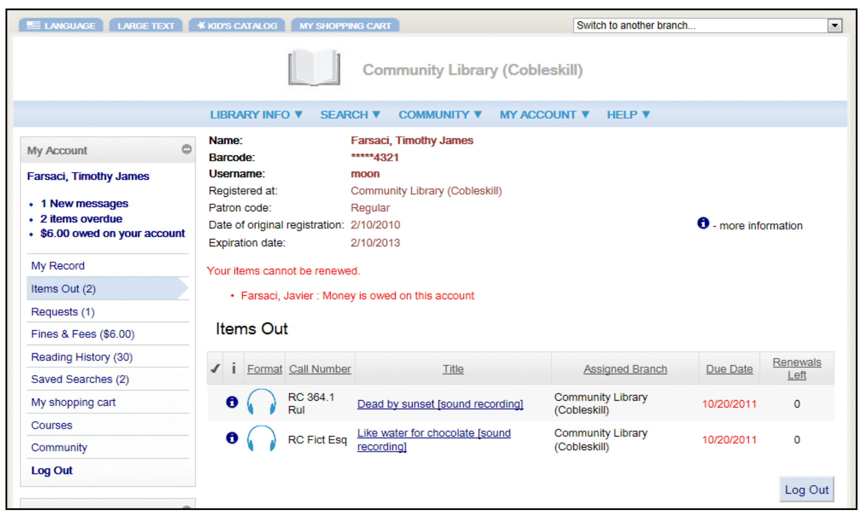
Options that take action on all entries, such as **Pay All** or **Renew All**, affect all items in the entire list, not just the items listed on the page. However, checking individual items is limited to the currently displayed page. If individual items are selected on one page and then another page is selected, a message warns that the current selections will be cleared. The user can choose to continue or stay on the current page. On the current page, selections are retained when the user clicks for an item or changes the sort order.

When the user clicks for an item, the detailed information is displayed in a lightbox. The illustration shows the detailed information for an item on the Requests page.



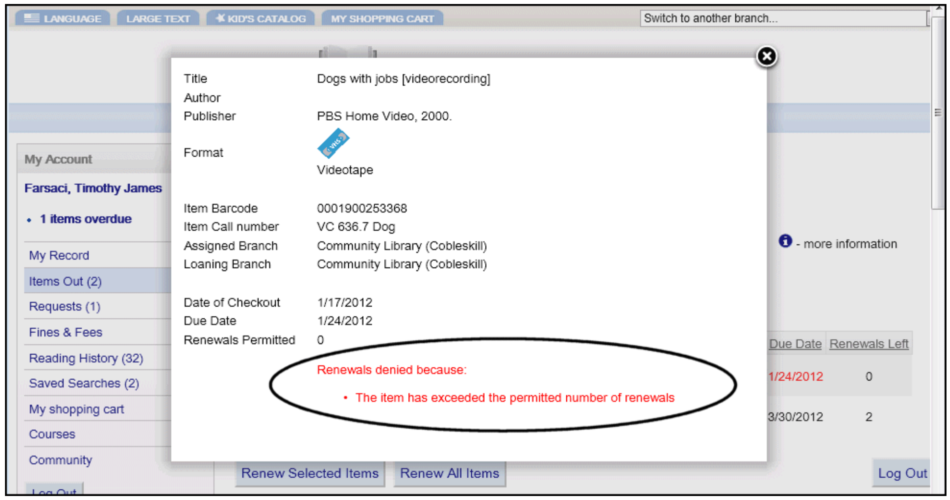
Renewals from the Items Out Page

If the patron is blocked from renewing items, no renewal options are displayed on the Items Out page. Also, no renewal options are displayed if no items can be renewed because they have reached their renewal limits or because they are eligible to fill Active or Pending hold requests.



If some but not all items can be renewed, renewal options are displayed. If the patron selects **Renew All**, the acknowledgement message lists the items that were renewed, and identifies the items that could not be renewed.

When the Renewals Left column indicates 0 for an item, the patron can click for the item to see why the item cannot be renewed.

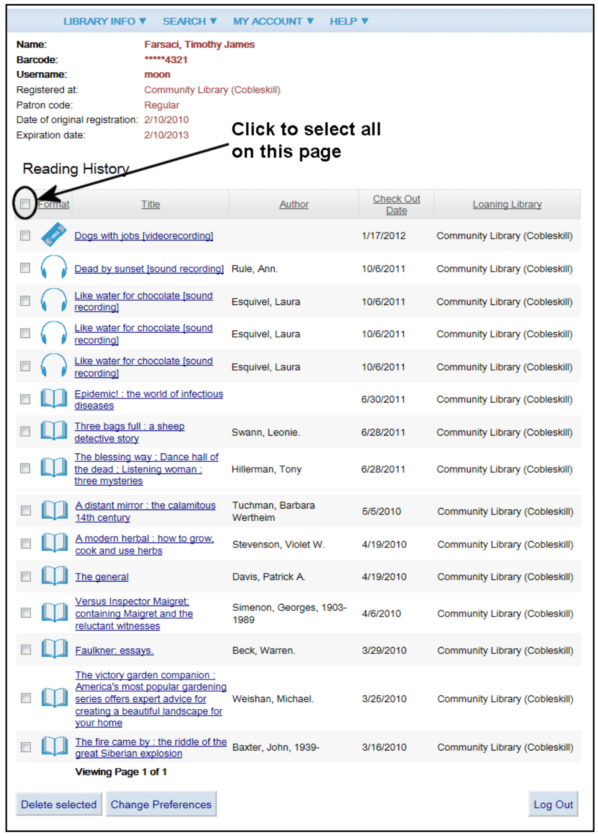


Deleting Items from PowerPAC Reading History

The reading history page in the PowerPAC patron account has changed to better accommodate deleting multiple items from the reading history. To allow patrons to remove individual items from the reading history, set the PAC profile **Patrons can remove reading history** to **Yes**. (This setting also applies to Polaris Mobile PAC.) The system uses the setting for the patron's registered branch.

> **Note:**
> The **Patrons can remove reading history** profile was a PowerPAC profile in previous versions of Polaris. It was moved to PAC profiles in Polaris 4.1 because it also affects Mobile PAC.

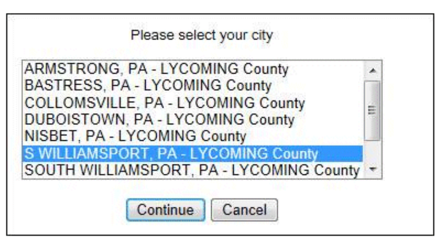
The patron can check individual items, or click a new "master" check box at the top of the reading history list to check all items on the page at once, then click **Delete Selected** below the list. A tooltip identifies the master check box when the user hovers the cursor over it.



When the patron checks items to delete and clicks **Delete Selected**, a confirmation message is displayed. As in previous versions of Polaris, when patron chooses to continue and removes an item from the reading history, the item is also removed from the reading history list in the staff client (Patron Status workform - Reader Services view).

County Selection for Self-Registration

During self-registration from PAC, when a Zip code applies to multiple cities in the database, the city selection menu now includes the county. This change accommodates situations where Zip codes cross city and county lines.



Blocked E-Sources No Longer Linked

If an e-source is blocked from access by both in-house and remote users, it is still listed in the PAC e-sources page but is no longer a link. Previously, a user had to click the link and log in before discovering that the e-source was disabled.

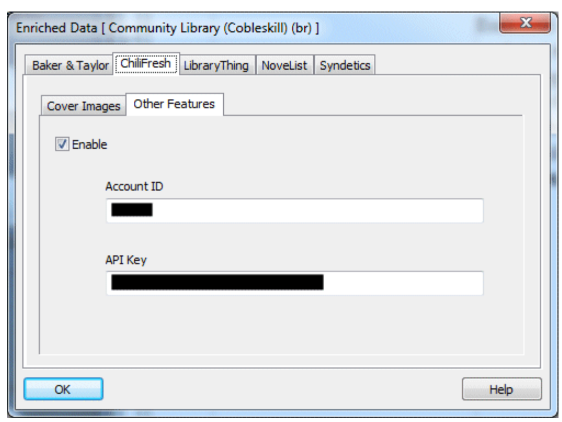
Link to Requests List from Failed Request Message

When a patron attempts to place a hold request from PAC but the request cannot be placed, the message now includes a button to access the patron’s current list of hold requests. This feature was previously available only when a request was successful.

ChiliFresh Reviews and Ratings Changes

Enriched content settings for ChiliFresh reviews and ratings have been updated to accommodate ChiliFresh’s new API. Polaris customers must now supply an API key value, different for each organization with a separate ChiliFresh account. (The API key is matched to the account ID.) Obtain the your API key from ChiliFresh, and use the PAC profile **Enriched data** (ChiliFresh tab - Other Features subtab) to enter the API key. The **Service URL** field has been removed, since it is no longer needed.

Important:
When you upgrade to Polaris 4.1, you must obtain the API key from ChiliFresh and enter it in the Enriched Data dialog box. Rating symbols will not appear in PowerPAC or Mobile PAC until the API key is entered.

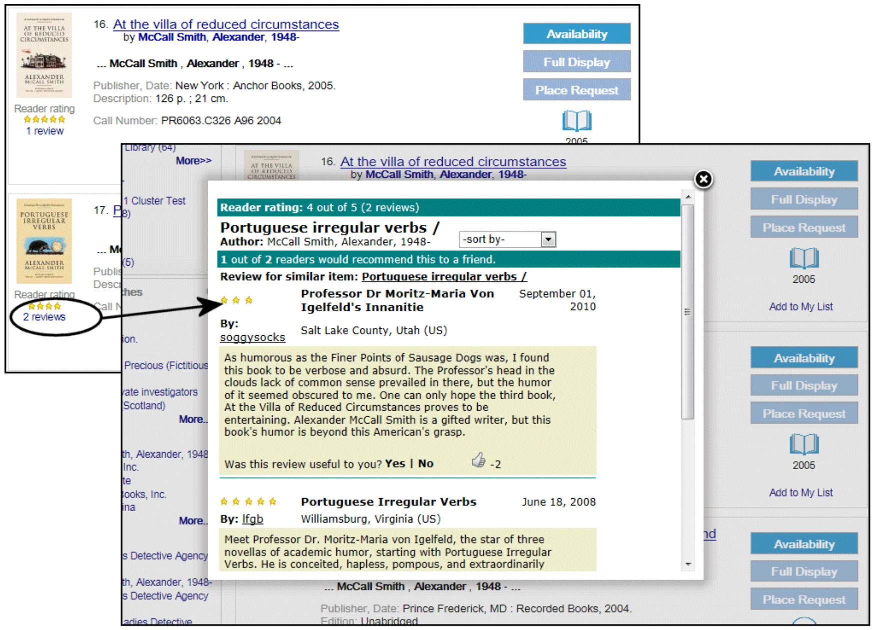


Your settings apply to both Polaris PowerPAC and Mobile PAC.

Note:
Enriched content support in Mobile PAC is new in Polaris 4.1. See “Enriched Content in Mobile PAC” on page 234.) For details about ChiliFresh support in Mobile PAC, see “ChiliFresh Ratings and Reviews in Mobile PAC” on page 234.

ChiliFresh Reviews Display in PowerPAC

ChiliFresh reviews are now displayed in a lightbox window, which opens when the user clicks the Reviews link for a title in the search results list or on the title’s product page.



JavaScript™ Message in Polaris PowerPAC

Polaris PowerPAC now displays a warning message at the top of the page when JavaScript is disabled in the user’s browser. The default message is **JavaScript has been disabled in your browser. Please enable JavaScript to enjoy all features of this site.**

You can customize the message in Polaris Language Editor (WebAdmin). The string ID is **PACML_JAVASCRIPT_DISABLED**. For more information about editing messages, see the *Polaris Language Editor (WebAdmin) Guide* or click **Help** in the Language Editor.

Note:
This feature was also added to Polaris 4.0, build 407 and later.

Patron Self-Registration: Additional Information Sent to Library

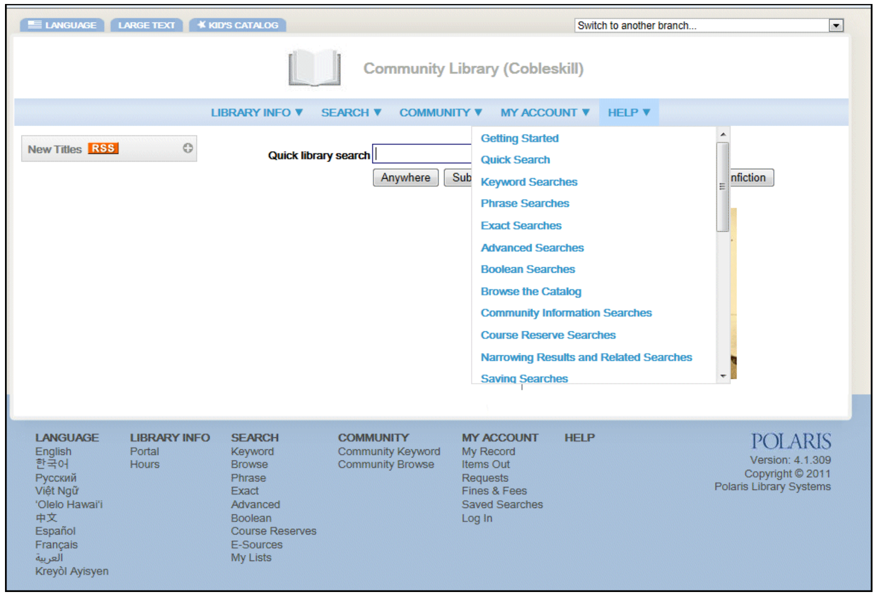
If a user includes an e-mail address and telephone number when registering for a patron account in PAC, this information is now included in the resulting e-mail message that is sent to the library.

Note:
This feature was also added to Polaris 4.0, build 419 and later.

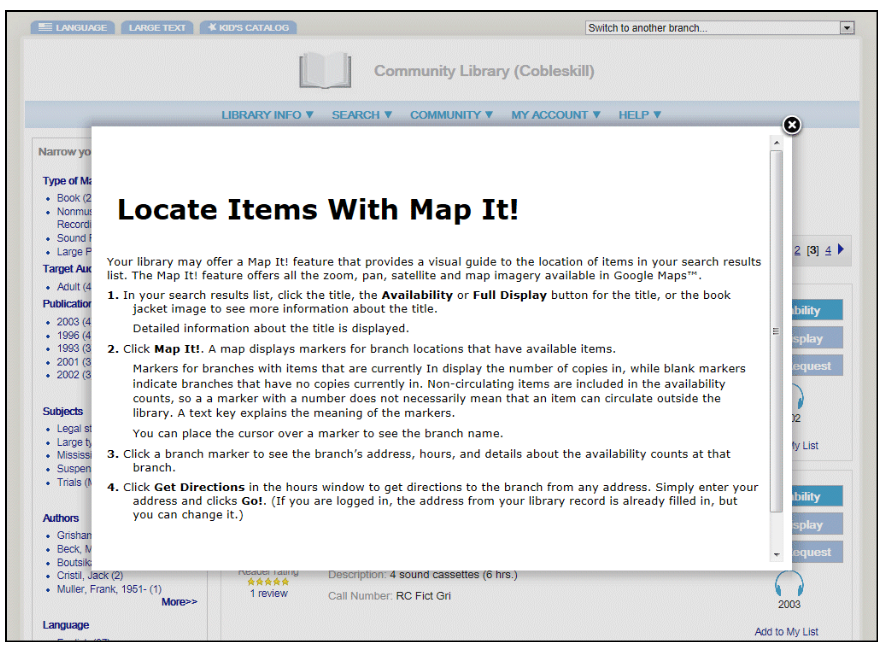
PowerPAC Help Pages

In Polaris 4.1, Polaris PowerPAC default Help files are provided as an extended set of HTML pages. Help topics are easier to access, sensitive to which features the library has enabled, and more readily customized.

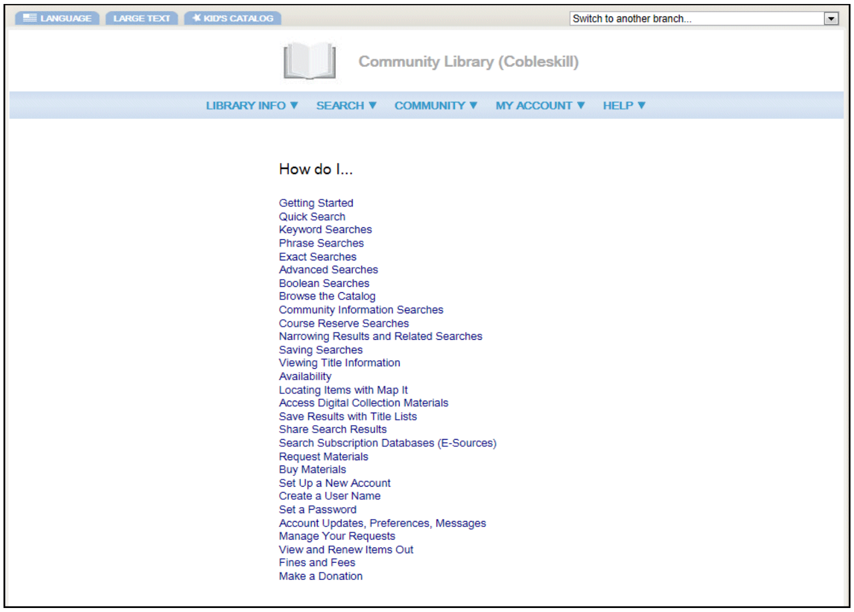
When the user clicks the **Help** option on the menu bar, a scrollable set of help topic links is displayed.



When the user clicks a topic link, the appropriate topic is displayed in a lightbox, without losing the current page context.



The user can click **All Topics** at the bottom of the scrollable list to display the complete set of help topic links. This page is also available by clicking the **Help** link in the site index list at the bottom of the page.

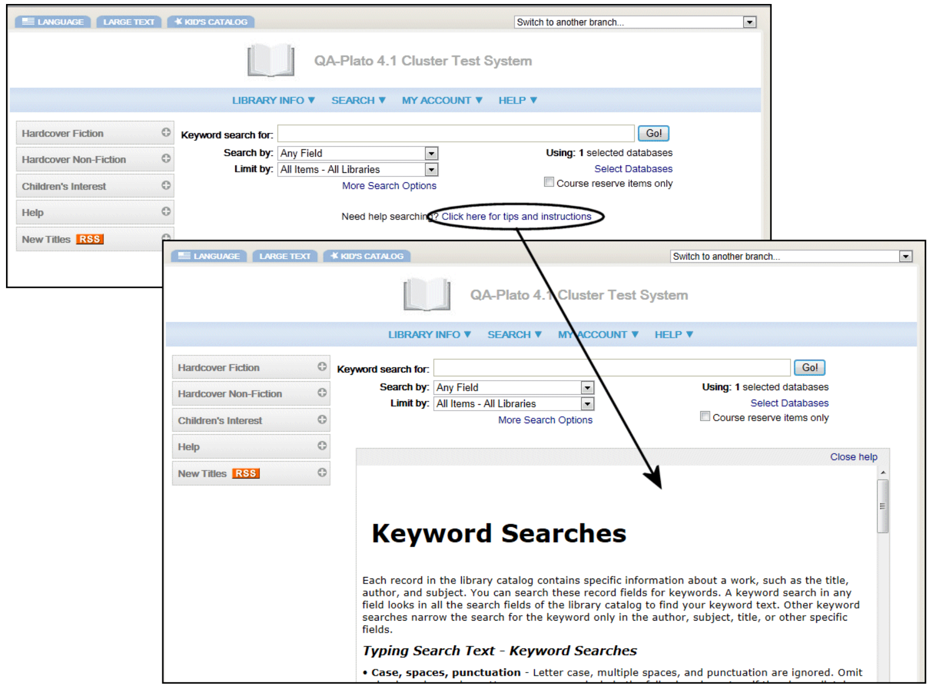


Certain links are always displayed because they are applicable to PowerPAC in general. **Availability** is an example of this type of topic link. Others are displayed only when the connection organization has enabled the corresponding feature in Polaris Administration. For example, if the organization has not enabled Google Maps, the topic link **Locate Items with Map It** is automatically suppressed.

The PowerPAC profile **Navigation: PAC help** controls whether the **Help** option appears on the menu bar, as in previous versions of Polaris. Customers who offer their own help materials from the dashboard, for example, can choose to suppress the **Help** option from the menu bar. Customization instructions are available for customers who want to display the **Help** menu option but who want to edit the HTML help files or add their own links to the Help page. See the *Polaris PAC Customization Guide*, available at **www.polaristown.com** and the Polaris Developer Network.

Help with Searching

Previous versions of Polaris PowerPAC displayed help text on the search page for each type of search except Advanced. In Polaris 4.1, the user can click a link to display the appropriate help information in the search page.



User Guide

The *Polaris PowerPAC User Guide* is available as an English-language .pdf file, delivered to customers as part of the Polaris documentation set. In Polaris 4.1, the *User Guide* covers the same content as the new default set of HTML pages. The *User Guide* is not exposed in the PAC interface unless the library chooses to make it available through a dashboard link or by some other mechanism.

PAC Customization Guide Available

The *Polaris PAC Customization Guide* offers instructions on how you can customize Polaris PowerPAC, Polaris PowerPAC Children’s Edition, and Mobile PAC at the program level, beyond the features offered through Polaris Administration; for example, by creating custom themes, layouts or entire pages. You need some knowledge of HTML for some techniques; others require more advanced programming skills. The guide is available at **www.polaristown.com** and on the Polaris Developer Network. A summary of changes, “PAC Customization - What’s New in Polaris 4.1,” is available at the same locations.

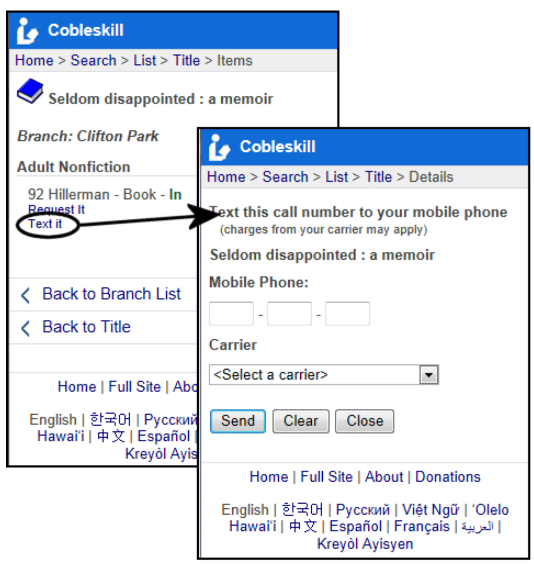
Polaris Mobile PAC

Polaris 4.1 includes the following improvements in Polaris Mobile PAC.

Note:
Mobile PAC setup information is now included in the *Polaris Public Access Administration Guide* and staff client online Help, and is no longer located in a separate document. See "Setting Up Mobile PAC" in the *Polaris Public Access Administration Guide*, or the equivalent topic in staff client online Help.

Text It Available in Mobile PAC

Mobile PAC 4.1 offers Text It, a feature introduced in Polaris PowerPAC 4.0. From the item availability display, a patron can send an e-mail text message containing the item call number to a mobile phone via the mobile phone carrier's SMTP e-mail service. If you enable this feature, a Text It link appears for each item in the item availability display for Mobile PAC search results. When the user clicks the Text It link, the Text It details form opens.



If the patron is logged in and the patron record includes a phone number with carrier, the **Mobile phone number** and **Carrier** fields are already filled in. 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 enters 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 specified mobile phone.

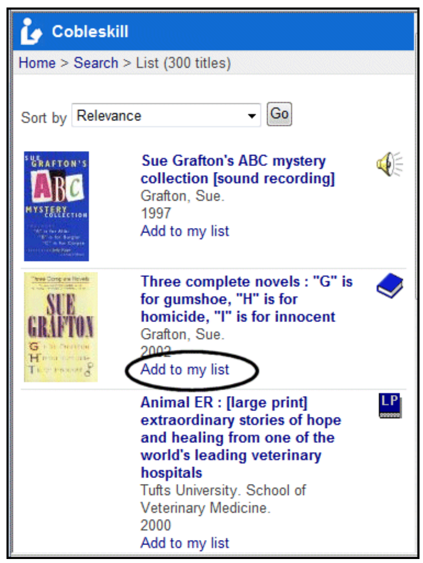
To display the Text It link in Mobile PAC, set the PowerPAC profile **Item availability: "Text it" feature enabled** to **Yes** (the default setting). This setting also controls the feature in Polaris PowerPAC. The profile is available at the system, library, and branch levels. For more information about Text It, see "Sending Call Numbers by Text Message" in the *Polaris Public Access Administration Guide* or the equivalent topic in staff client online help.

Title Lists Available in Mobile PAC

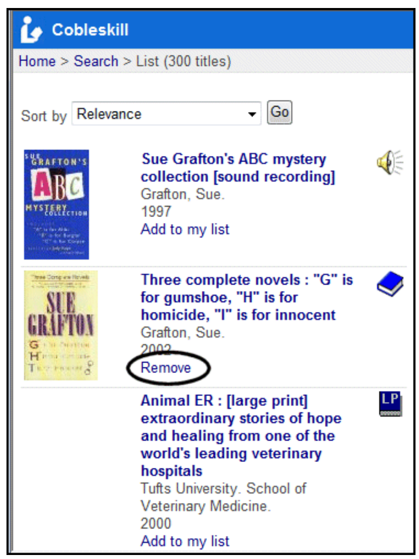
Patrons using Mobile PAC 4.1 can develop and save title lists from search results. Individual titles can be copied or moved among a patron's title lists, and patrons can place requests and view availability information and enriched content for titles in a title list, as well as send multiple titles or the entire list by e-mail.

Creating a Working List

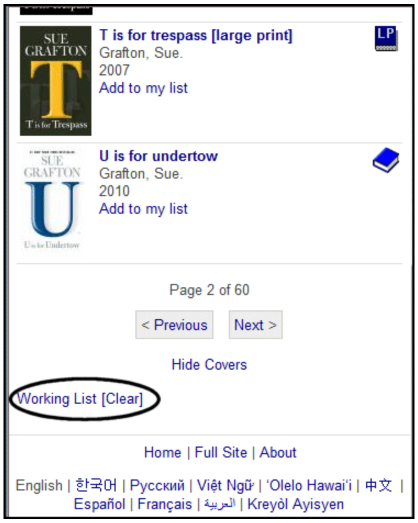
To create a working list, the user clicks the **Add to my list** link for a title returned in search results. The link is displayed in the initial results list and in the detailed view for a title.



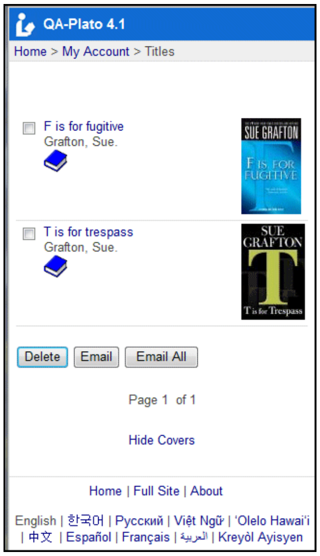
After the title has been added, the link changes to **Remove**, which the user can click to remove the title from the working list.



When at least one title has been added to the working list, the bottom of each search results page displays links to access the working list or to clear the list.

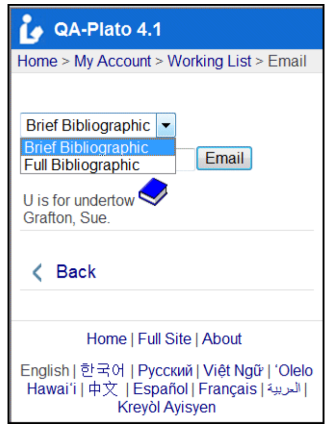


The user clicks **Working list** to display the working list.

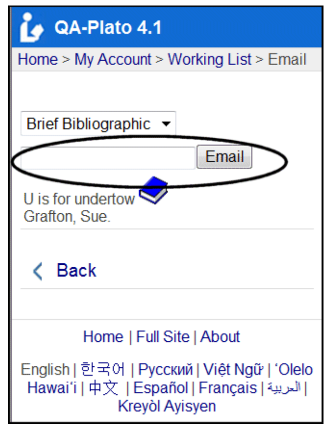


E-Mail Options

From this list page, the user can check and delete individual titles from the working list, check individual titles and click **EMail**, or click **Email All** to send the entire list. When the user clicks **Email** or **Email All**, the e-mail page is displayed. Format options include **Brief Bibliographic** and **Full Bibliographic**.

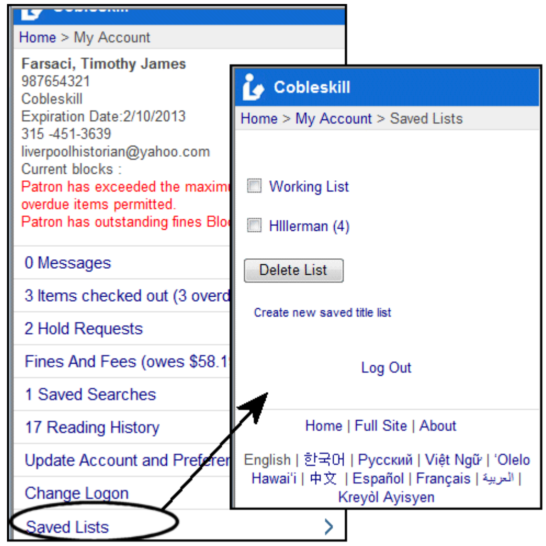


After selecting a format, the user types an e-mail address and clicks **Email**.

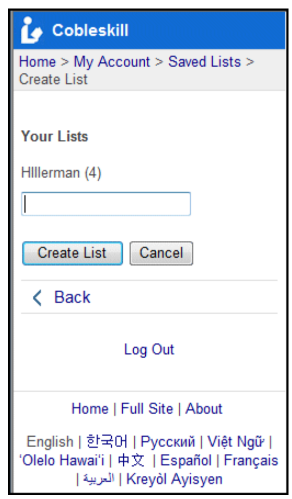


Saving Lists

Logged-in patrons can access the working list and any previously saved lists by clicking **My Lists** on the My Account page. The Saved Lists page is displayed.



The working list is available for the current session. To create a new saved list, the patron clicks **Create new saved title list**. The Create List page opens, where the patron can name and save the new list.



The new list is saved with no titles in it. Titles can be copied or moved from the working list or an existing saved list to the new list (or to any other saved list.)

Copying and Moving Titles Among Lists

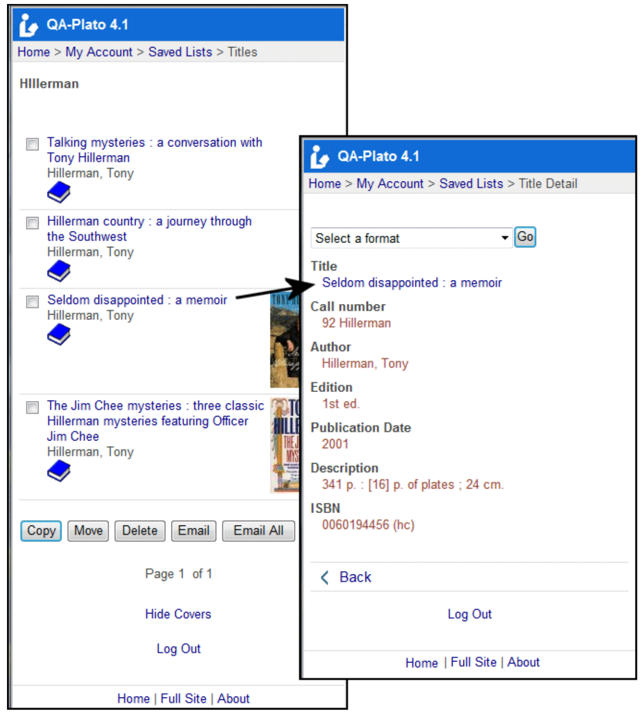
From the Saved Lists page, the patron opens the list with the title to be copied or moved.

From the list of titles, the patron checks the title or titles and clicks **Copy** or **Move**. The Copy or Move page opens.

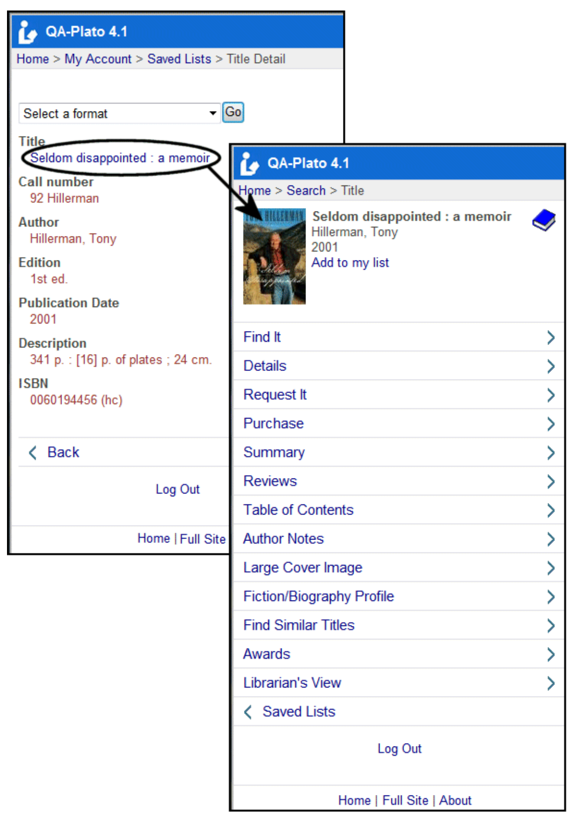
The patron chooses a destination list from the saved lists in the patron account, and clicks **Copy to** or **Move to**. The selected title is copied or moved to the destination list.

Title Details

When the patron clicks a title in the title list, the Title Detail page opens.



From the Title Detail page, the patron can select a display format or click the title link for further options. These include viewing availability information, viewing detailed bibliographic information, placing a hold request on the title, and viewing enriched data if available.



Setting Up Mobile PAC Title Lists

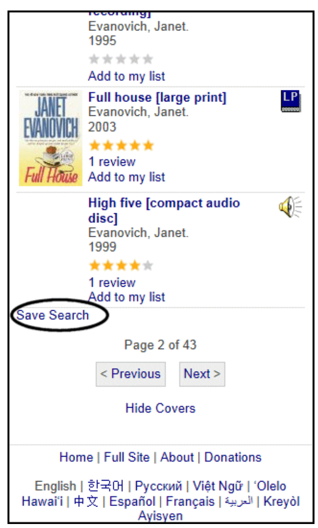
To provide the title list option in Mobile PAC, set the PowerPAC profile **Title list: Enable** to **Yes** in Polaris Administration. To allow patrons to e-mail selected titles or entire lists, set the PowerPAC profile **Title list: Email** to **Yes**. These settings also apply to Polaris PowerPAC.

You can edit text strings related to Mobile PAC title lists using Polaris Language Editor (WebAdmin). For more information about using the Language Editor, see the *Polaris Language Editor Guide* or Language Editor online Help.

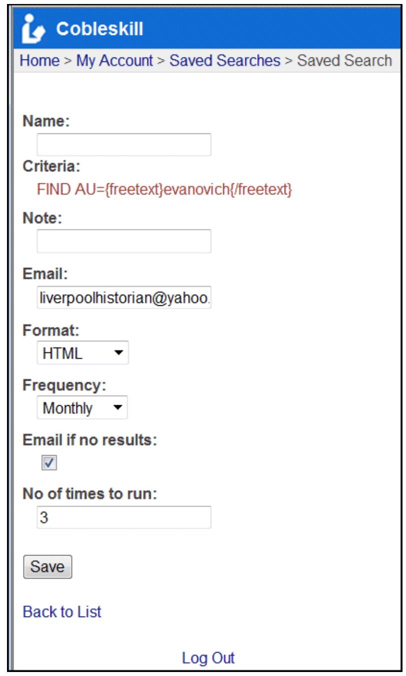
Saved Searches (Search Agent) Available in Mobile PAC

Registered patrons using Mobile PAC 4.1 can save searches, and have the saved searches run automatically either weekly or monthly. Each search run looks for results that are new since the last run. The results are automatically sent to an e-mail address the patron specifies. By accessing their patron accounts, patrons can view, edit, or delete saved searches, or run them manually. (These features are also available in Polaris PowerPAC 4.1 and previous versions).

To save a search, the patron first searches the catalog using the criteria he wants for the saved search, then clicks **Save Search** at the bottom of any page in the search results.

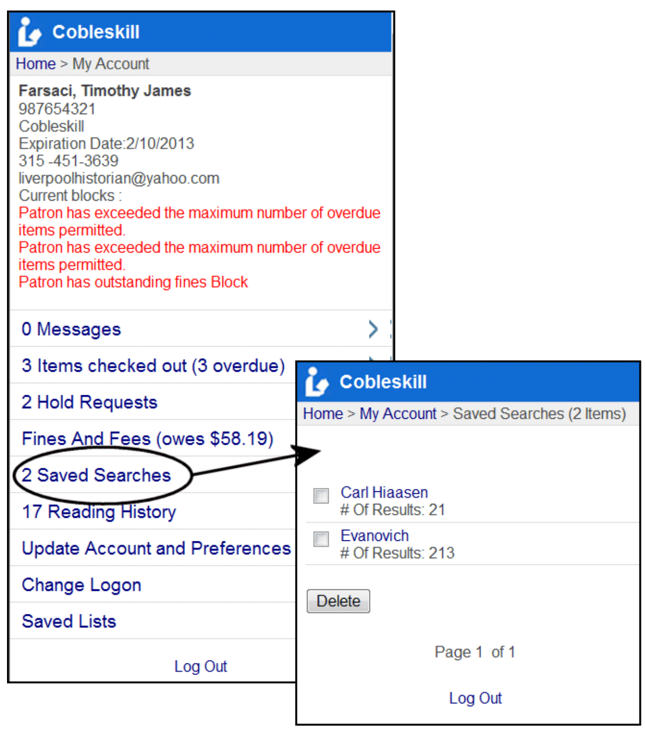


If the patron has not logged on, the Log On page opens. After the patron logs on, he names the search, adds an optional note, sets the notification criteria, and clicks **Save**.

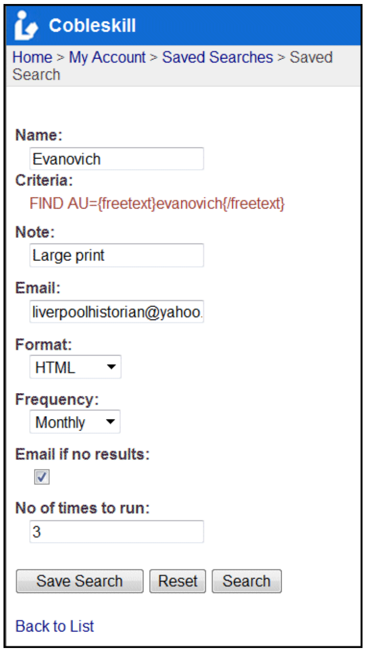


As in Polaris PowerPAC, all saved searches sent to the same patron e-mail address must be in the same e-mail format. If the patron specifies a format different from existing saved searches when saving a new search, a message provides the options to specify a different format for the new search or to change all the others.

Saved searches are available to delete, edit, or run manually from the patron account. The patron clicks **Saved Searches** to access the list.



On the Saved Searches page, the patron can check searches to delete, or select a search name to edit the settings or run the search manually.



Note:
As in Polaris PowerPAC, the patron cannot edit the search criteria. Instead, the patron sets up and saves a new search, and deletes the old one if necessary.

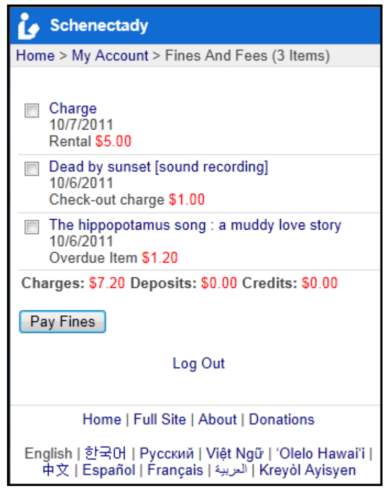
To provide the ability to save searches in Mobile PAC, set the PAC profile **Search agent: Enable** to **Yes**. Then set up the PAC parameter **Search agent parameters**. For each organization that makes the search agent available, you can specify how many searches a patron can have currently saved, the maximum number of titles that can be returned when a search is run, and the number of times a search can be run. You specify whether to offer weekly search runs, monthly search runs, or both, and designate a "from" address to appear in the e-mail that delivers the search results to the patron. For detailed information about search agent settings, see " Setting Up the Search Agent (Saved Searches)" in the *Polaris Public Administration Guide* or the equivalent topic in staff client online Help. Search agent settings also apply to Polaris PowerPAC.

You can edit text strings related to Mobile PAC save search functions using Polaris Language Editor (WebAdmin). For more information about using the Language Editor, see the *Polaris Language Editor Guide* or Language Editor online Help.

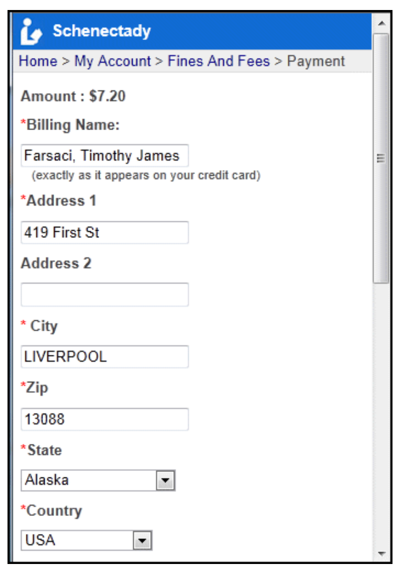
Credit Card Payments from Mobile PAC

Mobile PAC now supports credit card payments for patron account charges and donations, using the PayPal Payflow Pro gateway. Mobile PAC e-commerce is a separately licensed feature, but there is no additional cost for the license.

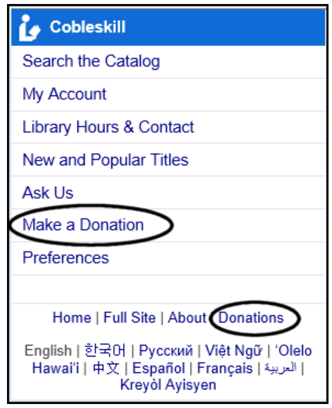
When credit card payments for fines and fees are enabled, patrons can select charges to pay and click **Pay Fines** on the Fines and Fees page of the patron account.



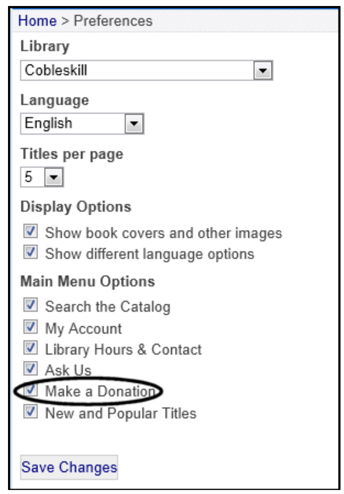
The scrollable Payment form opens, where the patron enters and submits billing and credit card information. The illustration shows the top part of the form.



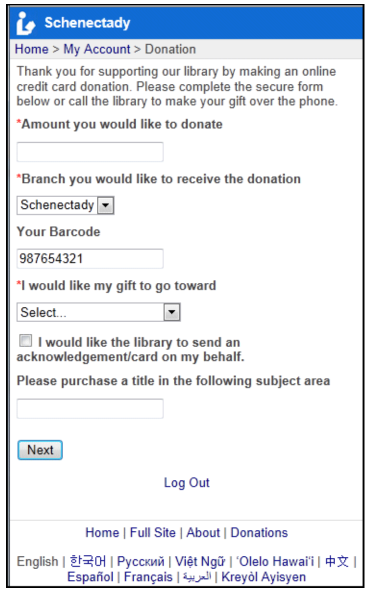
If donations are enabled, the link appears in the footer of Mobile PAC pages and as a **Make a Donation** link on the Home page.



The home page **Make a Donation** link can be displayed or suppressed from the User Preferences page.



When the user clicks the donation link, the donation form opens. As in Polaris PowerPAC, the user does not have to log in to make a donation.



The user completes the form and clicks **Next** to open the credit card Payment form, where the user supplies and submits billing and credit card information.

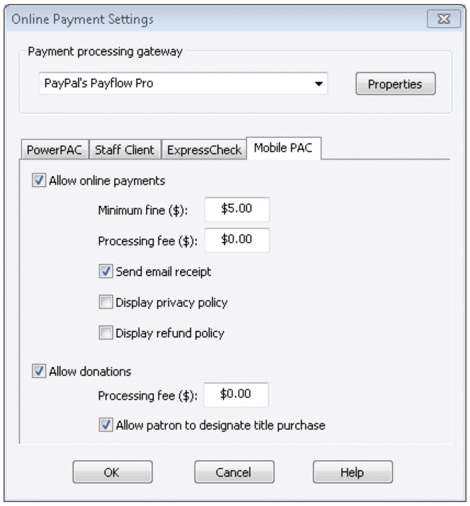
Setting Up Mobile PAC Credit Card Payments

For detailed information about setting up e-commerce in Polaris, see "Credit Card Processing with PayPal® Payflow Pro®" in the *Polaris Patron Services Administration Guide* or the equivalent topic in staff client online Help.

Important:
To accept Mobile PAC online payments, you must enable Secure Socket Layer (SSL) in Polaris Administration. Set the **SSL: Enable Mobile PAC** parameter for the Web server to **Yes**. See "Setting Web Server Parameters" in the *Polaris Administration Guide* or the equivalent topic in staff client online Help. Patrons must have SSL protocol enabled for their mobile device Web browser.

Once you have set up e-commerce, use the existing Credit Card Payment parameter **Online payments: Configure** to set up credit card payments from Mobile PAC:

1. Double-click **Online Payments: Configure**, and click the **Mobile PAC** tab on the Online Payments Settings dialog box.



2. Select (check) **Allow online payments**. The payment options become available.

   Credit card payments for fines and fees are allowed from Mobile PAC if both the patron's registered branch and the Mobile PAC connection organization allow credit card payments.

3. Set the minimum fine amount you want to accept by credit card payment.

   The default value is the lowest possible value, $0.01. If the amount the patron owes falls below your setting, the **Pay Fines** link is not displayed in Mobile PAC.

4. To charge a processing fee for fine payments, specify the amount in the **Processing fee** box for online payments. The maximum value is $20.00. A message informs the patron about the processing fee before the payment is submitted.

5. If you want patrons to receive an automatic payment receipt, select (check) **Send email receipt**.

   The e-mail receipt lists each fine covered by the transaction. The patron can specify an e-mail address on the payment form. The sender's address is that specified in the PAC profile **Email notification: Email address of sender**.

   Note:
   The link for paying fines is on the Fines and Fees page of the patron account. Be sure the Mobile PAC profile **Navigation: Fines & fees** is set to **Yes** for the organization. See "Patron Account (My Account) in Mobile PAC" in the *Polaris Public Access Administration Guide* or the equivalent topic in staff client online Help..

6. To display a privacy policy link on the processing fee, payment, and payment verification pages in Mobile PAC, select (check) **Display privacy policy**.

   When this option is checked, your privacy policy message is displayed when the patron clicks the privacy policy link. You specify your privacy policy text using the Polaris Language Editor (WebAdmin). The message ID is **MP_CRUMBS_FINESANDFEES_PRIVACY**. The system uses the text specified for the patron's registered branch. For information about editing PAC language strings, see the *Polaris Language Editor Guide* or Language Editor online Help.

7. To display a refund policy link on the processing fee, payment, and payment verification pages in Polaris Mobile PAC, select (check) **Display refund policy**.

   When this option is checked, your refund policy message is displayed when the patron clicks the refund policy link. You specify your refund policy text using the Polaris Language Editor (WebAdmin). The message ID is **MP_CRUMBS_FINESANDFEES_REFUND_POLICY**. The system uses the text specified for the patron's registered branch.

8. To accept credit card payments for donations, select (check) **Allow donations.**

   > **Important:**
   > To display the donation link in Mobile PAC, set the Mobile PAC profile **Navigation: Donations** to **Yes**.

9. To charge a processing fee for donations, specify the amount in the **Processing fee** box for donation payments. The maximum value is $20.00. A message informs the user about the processing fee before the payment is submitted.

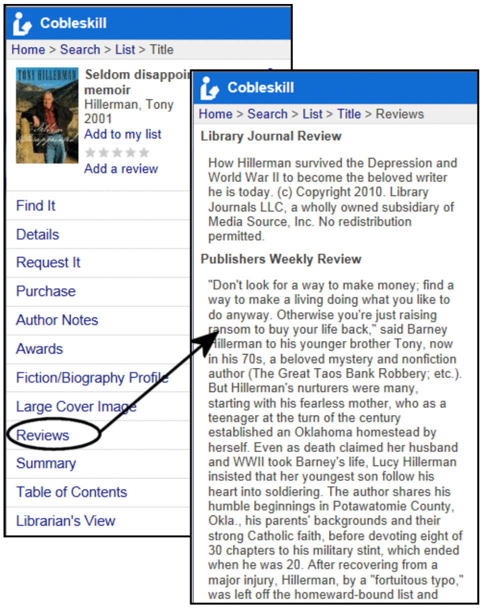
10. To allow donors to direct a donation toward a title purchase in a specific subject area, select (check) **Allow patron to designate title purchase**.

    This option places an appropriate control on the donations page, where the donor can specify a title purchase.

11. Click **OK** to save your settings.

Enriched Content in Mobile PAC

Enriched content from third-party sources is now available in Mobile PAC search results, from links in the Title (product) page. The example shows Syndetics™ reviews.



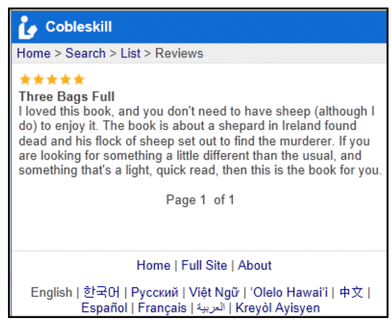
Mobile PAC shares enriched content settings with Polaris PowerPAC. For more information about setting up enriched data for PAC use, see "Enabling Enriched Data" in the *Polaris Public Access Administration Guide* or the equivalent topic in staff client online Help.

Note:
If you run Mobile PAC in SSL mode, the URL prefix for NoveList must begin with **https://**. For NoveList Select, the Service URL must begin with **https://**

ChiliFresh Ratings and Reviews in Mobile PAC

Mobile PAC now supports ChiliFresh ratings and reviews. If a title has been rated, the ratings symbols appear in the search results list.

The user clicks the **review** link to see reviews that other readers have submitted.



From the title product page, a user can also click **Add a review** to write a review.

Mobile PAC shares ChiliFresh enriched content settings with Polaris PowerPAC. These have changed in Polaris 4.1. See "ChiliFresh Reviews and Ratings Changes" on page 213.

Configuring the Mobile PAC Title Display

Using the Mobile PAC profile **Title Display: Configure**, you can select the bibliographic data elements that appear in the brief, summary, and full displays for both monographic and serial titles in Mobile PAC search results. Like Polaris PowerPAC, you can select which bibliographic data elements appear in the initial search results list, on the summary view for a title, and in the full display; set the display order of the data elements; specify a custom label for each data element; and create translated versions of the data labels for languages you have licensed. You can copy all these settings from any organization to any other organization. You can specify any additional data elements you need (custom entities), selecting the tags, indicator values, and subfields to include in each custom entity. You can also edit existing data elements.

The system uses the connection organization’s settings for the Mobile PAC profile **Title Display: Configure**, but the setup workflow is the same as that for PowerPAC. For detailed procedures, see “Configuring the PAC Title Display” on page 185.

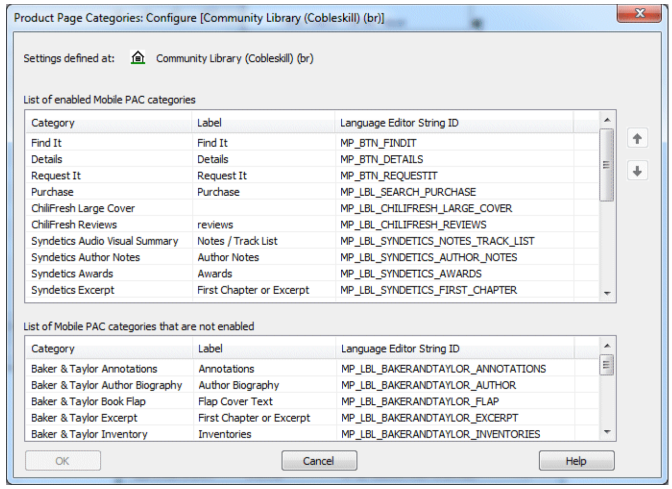
For libraries that use Polaris Community Profiles, a separate profile controls the Mobile PAC display of community informations results, and a separate set of data elements is available for your community information displays. For details, see “Configuring the PAC Community Results Display” in the *Polaris Community Profiles Guide 4.1* or the equivalent topic in staff client online Help.

Mobile PAC Product Page

The Mobile PAC product page is displayed when a user clicks a title or cover image in the search results list. This page offers links to availability information, full bibliographic information, and other features such as enriched content. The illustration shows an example.

In Polaris Administration, you can set the display order of the links on the page. Use the new Mobile PAC profile **Product page categories: Configure**, available at the system, library, or branch level.

Note:
You need the new System Administration permission **Modify product page categories: Allow** to work with this profile. At upgrade, resources with the 4.0 **Modify PAC full title display permission** (removed in Polaris 4.1) are granted the new permission.



In the Product Page Categories: Configure dialog box, the top portion lists the categories (features) that have been enabled for the organization. To change the display order, select the category and click the appropriate arrow at the side of the dialog box to move the category up or down in the display order.

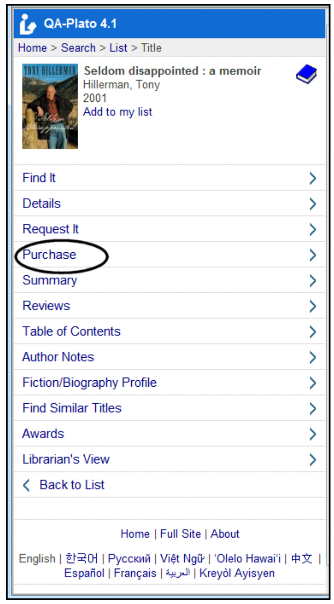
The Product Page Categories: Configure dialog box lists the language string ID for each link for use in Polaris Language Editor (WebAdmin), where you can search for and edit the link labels. For more information, see the *Polaris Language Editor (WebAdmin) Guide* or Language Editor online Help.

The bottom portion of the Product Page Categories: Configure dialog box lists the categories that are possible to display on the product page, but have not been enabled for the organization. For information about setting up features such has enriched content, see the *Polaris Public Access Administration Guide* or staff client online Help.

Note:
A separate profile controls the PowerPAC product page. See "PowerPAC Product Page" on page 199.

Purchase and Buy It Now Links in Mobile PAC

A **Purchase** link is now available in the Title page for a title in Mobile PAC search results. When the user clicks the link, a search is launched for the title in a specified vendor's web site. As in Polaris PowerPAC, the purchase transaction takes place on the vendor's site.



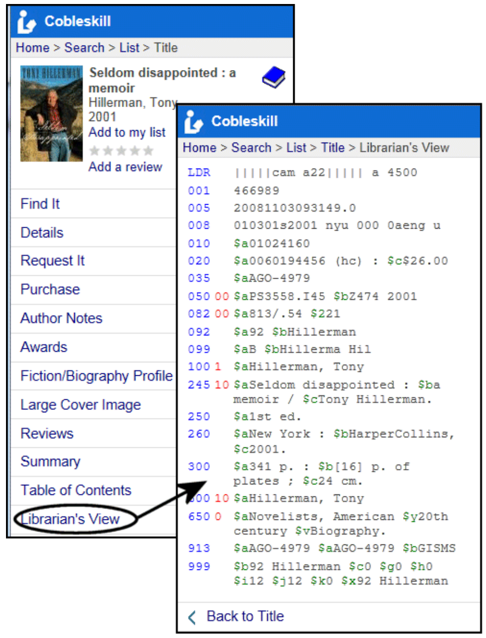
In addition, Mobile PAC now supports Polaris Bookstore, available by separate contract. Through Polaris Bookstore and Baker & Taylor Inc., your library can establish an online bookstore where patrons can purchase materials at a discount comparable to other major online retailers, and your library receives a portion of the sales as a donation. As in previous versions of Polaris PowerPAC, if you enable both links, the **Buy It Now** link is displayed when the title is available at the Bookstore. The **Purchase** link is displayed when the title is unavailable at the Bookstore and the title has an ISBN. For more information about Polaris Bookstore, see "Setting Up Polaris Bookstore" in the *Polaris Public Access Administration Guide* or the equivalent topic in staff client online Help.

To enable the **Purchase** link, **Buy It Now** link (if you have a contract), or both, use the PAC profile **Purchase options**. Your settings also apply to Polaris PowerPAC.

You can edit the **Purchase** and **Buy It Now** link labels using Polaris Language Editor (WebAdmin). The strings IDs are **MP_LBL_SEARCH_PURCHASE** and **MP_LBL_SEARCH_BUY_IT_NOW**.

Librarian’s (MARC) View in Mobile PAC

You can now provide a **Librarian’s View** link in the product (Title) page for a title in Mobile PAC search results. When the user clicks the link, the MARC record view is displayed.



Use the PowerPAC profile **Librarian’s (MARC) View: Enable**, available at the system, library, or branch level, to display or suppress the **Librarian’s View** link in both Mobile PAC and Polaris PowerPAC (see “Librarian’s View (MARC View)”.

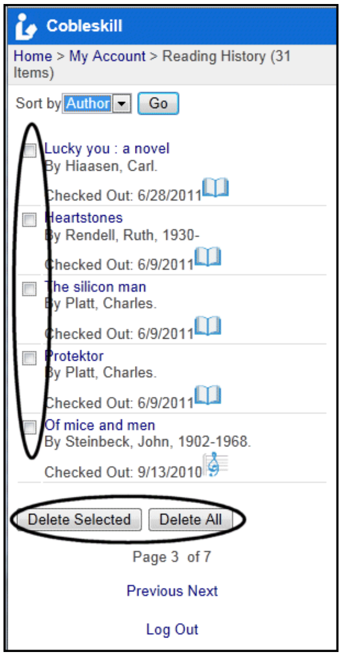
You can edit the **Librarian’s View** link label using Polaris Language Editor (WebAdmin). The string ID is **MP_LBL_MARCVIEW_LIBRARIAN_VIEW.**

Deleting Items from Mobile PAC Reading History

Patrons can now delete individual items from their reading histories on the Mobile PAC reading history pages for the patron account. To allow patrons to remove individual items from the reading history, set the PAC profile **Patrons can remove reading history** to **Yes**. (This setting also applies to Polaris PowerPAC.) The system uses the setting for the patron’s registered branch.

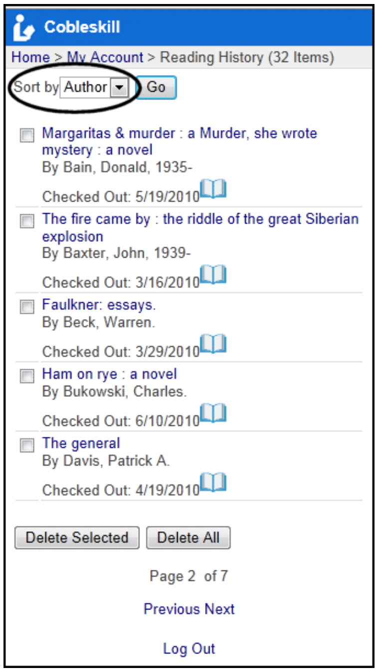
Note:
The **Patrons can remove reading history** profile was a PowerPAC profile in previous versions of Polaris. It was moved to PAC profiles as part of this development.

The patron can check individual items and click **Delete Selected**, or click **Delete All**. When a patron removes an item from the reading history, the item is also removed from the reading history list in the staff client (Patron Status workform - Reader Services view)



Mobile PAC Reading History Includes Author

The Mobile PAC reading history now includes the author, where available. When the list is sorted by author, the sort order is now readily apparent.



Phone Number Validation from Mobile PAC

When a patron registers for a new account or updates an existing account from Mobile PAC, the system now performs a validation check on the phone number:

- The phone number may have either 7 digits or 10 digits.
- The digits can be separated with periods, hyphens, or spaces, or may exist without separation.
- Valid patterns are ### #### or ### ### ####
- The first three digits of a 10-digit number may be surrounded by parentheses.

The validation takes place in any of the three phone number fields.

Community Keyword Searching in Mobile PAC

If your library enables Community Profiles, keyword searching for community information is now available in Mobile PAC. For more information, see "Community Profiles" on page 138.

Mobile PAC Deep Links

Record set ID (brs) and record set name (brsn) are now valid access points for deep linking in Mobile PAC. In addition, the Mobile PAC deep link structure has been formalized and updated.

All URLs should be prefixed with your site-specific mobile base URL (example: **mylibrary.com/mobile/**). The URL is necessary for each link parameter:
{Base Mobile PAC URL}/view.aspx?{TYPE}={TERM}

Because Mobile PAC does not currently support Boolean searching, only single terms are allowed.

The following access points {TYPE} are available:

- **ISBN**
- **LCCN**
- **CN** - Control number
- **ISSN**
- **Title**
- **Author**
- **Subject**
- **Series**
- **Keyword**
- **brs** - Record set ID
- **brsn** - Record set name

In general, if a mobile device goes to a PowerPAC deep link and Mobile PAC supports the search criteria specified in the URL, the mobile device user is automatically directed to the Mobile PAC search results page. If Mobile PAC does not support the search criteria, the mobile device user is directed to the PowerPAC search results page.

However, if **type=phrase** is part of the PowerPAC deep link, the user is directed to the Mobile PAC search results page. Also, the user is directed to the Mobile PAC search results page when there are multiple terms for author, title, or subject in the PowerPAC deep link.

Examples:

http://mylibrary.com/polaris/view.aspx?title=time+to+kill&type=phrase

http://mylibrary.com/polaris/view.aspx?title=time+to+kill&author=grisham+john

Note:
Although the user is directed to the Mobile PAC search results page in these cases, if the user then clicks the **Search** bread crumb in the Mobile PAC page header, the search form does not support the deep link search terms due to their complexity.

For more information and examples of deep link searches, see “Deep Links to PAC” in the *Polaris Public Access Administration Guide* or the equivalent topic in staff client online Help.

SIP Self-Check

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

Patron Loan and Request Limits Table Used

SIP circulation now uses the settings in the Patron/Material Type Loan Limit Blocks policy table to determine check-out blocks. The material type group limits, new in Polaris 4.1, also apply to SIP circulation (see "Check-Out Limits for Material Type Groups" on page 91). As part of this development, the SelfCheck Unit parameters **Maximum items out**, **Maximum items overdue**, **Maximum fines**, and **Maximum items on hold** have been removed from Polaris Administration.

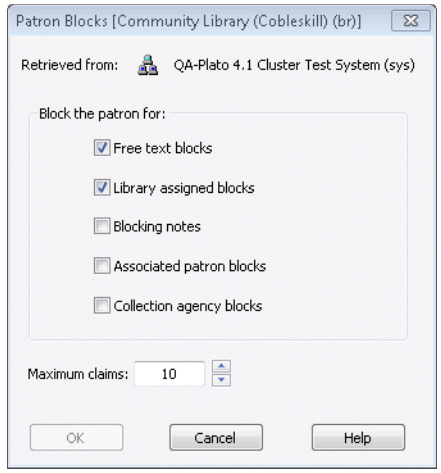
Note:
The **Maximum items on hold** parameter applied only to items with a status of Held. The Patron Loan and Request Limits table settings apply to Active, Inactive, and Pending requests, and optionally to Held/Shipped requests.

Charge for Checkout

SIP circulation supports charging for checkout and/or renewal. Use the new SelfCheck Unit parameter **Check-out: Charge options** to set these options. For details, see "Charge for Checkout" on page 82.

SIP Self-Check: Ignore Patron Library-Assigned Blocks

Using a new SelfCheck Unit parameter, you can now set SIP self-check units to respect or ignore library-assigned blocks on a patron record. The parameter **Block patron for library-assigned blocks** is located on the new **Patron blocks** parameter dialog box, available at the system, library, or branch level. By default the option is checked (patron will be blocked).



As part of this development, the following additional SelfCheck Unit parameters , formerly available as separate items on the SelfCheck Unit parameters list, have been grouped on the new dialog box for set-up convenience:

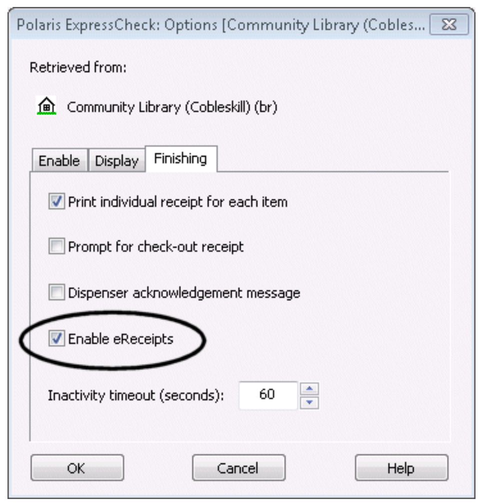
- **Block the patron for free text blocks** (formerly **Allow authentication of patrons with free text blocks**) - Checked by default (patron will be blocked)
- **Block the patron for blocking notes** - Checked by default (patron will be blocked)
- **Block the patron for associated patron blocks** - Unchecked by default (patron will not be blocked if associated patrons are blocked). This is a new feature in Polaris 4.1. For details, see “Associated Patron Blocking” on page 76.
- **Block the patron for collection agency blocks** - Checked by default (patron will be blocked)
- **Maximum number of claims** - Default value is 10; valid range is 0-9999.

Polaris® ExpressCheck™

The following changes have been made to Polaris ExpressCheck.

EReceipts Available for ExpressCheck Transactions

Patrons can receive e-mail and/or text message receipts instead of printed receipts for check-out and renewal transactions at Polaris ExpressCheck workstations. To enable eReceipts for Polaris ExpressCheck check out and renewal, use the SelfCheck Unit parameter **Polaris ExpressCheck: Options - Finishing** tabbed page. Select (check) the **Enable eReceipts** option.



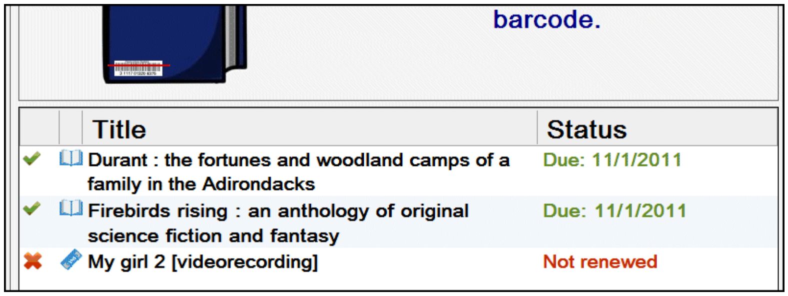
The patron will receive eReceipts if both the patron's branch and the ExpressCheck workstation's branch have enabled eReceipts in the Patron Services parameter **EReceipt options** parameter, and an eReceipt option is set in the patron's record. The eReceipt is sent when the patron selects **Exit** in Polaris ExpressCheck. For more information about eReceipts, see "E-Mail and Text Message Receipts (eReceipts)" on page 96.

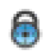
Note:
In Polaris 4.1, the SelfCheck Unit parameter **Polaris ExpressCheck: Enable** has been renamed **Polaris ExpressCheck: Options**. The options are reorganized on tabbed pages.

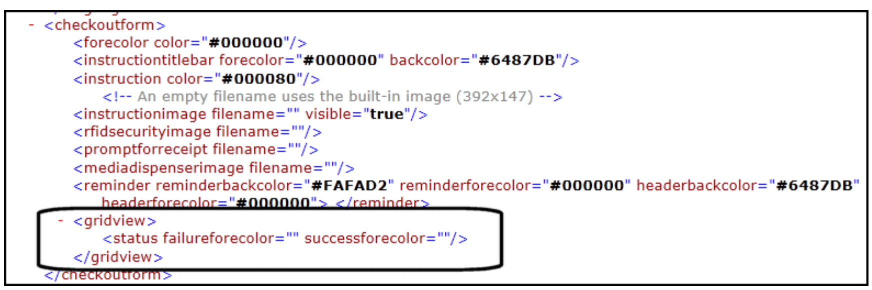
ExpressCheck Display Improvements

The item display on the check-out screen has been improved in the following ways:

- You can optionally display a format (type of material, or TOM) icon for each item. Polaris ExpressCheck uses the familiar PAC format icons. See "Enabling New Display Features" on page 247.
- You can opt to display long titles on multiple lines instead of truncating them in the display. A scroll bar appears in the right column if the list of items fills the screen. See "Enabling New Display Features" on page 247.

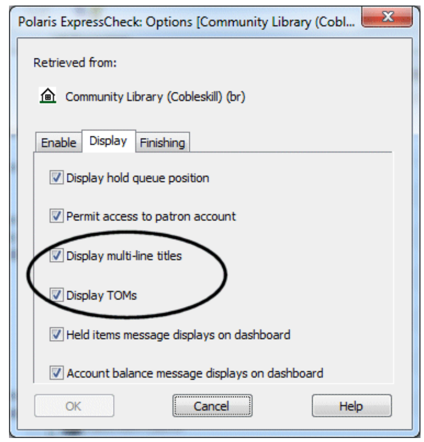


- Certain icons, such as the green check mark and red x to denote successful and unsuccessful checkout, have been improved.
- At RFID workstations, locked  and unlocked  icons indicate whether security has been turned off.
- You can specify display colors for successful checkouts and unsuccessful checkouts in **EC_Interface.xml**, the file used for ExpressCheck interface customizations. For details, see the *Polaris ExpressCheck Administration Guide*. The options **successforecolor** and **failureforecolor** are located under the **checkoutform/gridview** node.



Enabling New Display Features

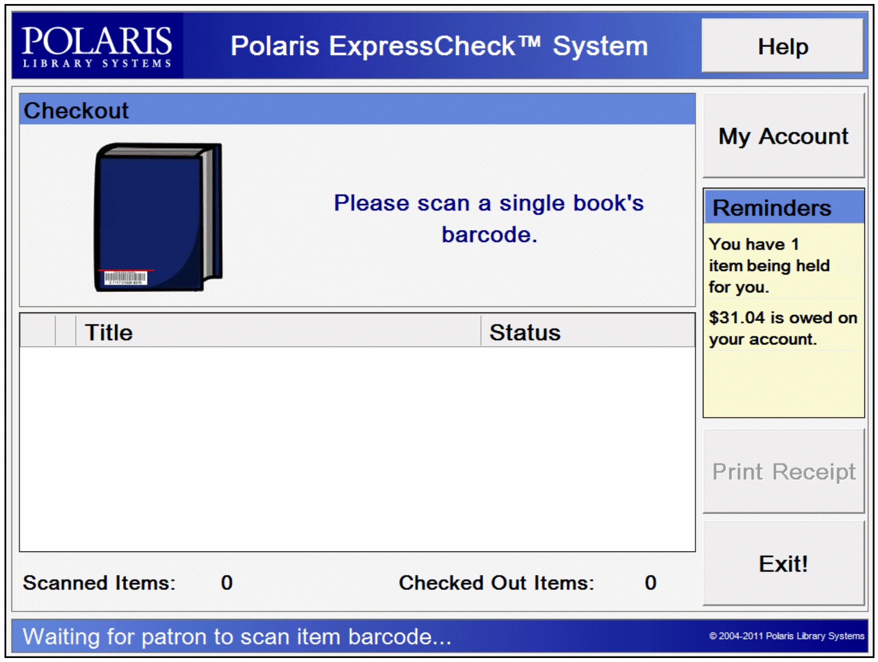
As part of this development, the SelfCheck Unit parameter **Polaris ExpressCheck: Enable** has been renamed **Polaris ExpressCheck: Options**. The options are reorganized on tabbed pages. The new display options are available on the Display tabbed page.



The options are available at the system, library, branch, and workstation level. Both are set to display (checked) by default.

Hold and Fine Message Options in Polaris ExpressCheck

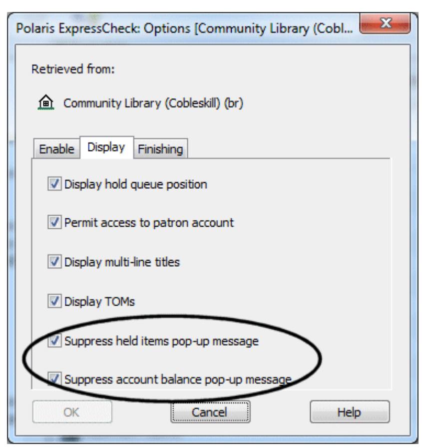
In previous versions of Polaris, patrons checking out at the Polaris ExpressCheck station received a message at the beginning of the transaction if they had held items. Similarly, patrons who owed money were prompted to view their accounts at the beginning of the transaction. You can now choose to display either or both of these messages as reminders in the check-out screen dashboard.



The messages are displayed by default. To suppress either or both reminders from the dashboard display, use the SelfCheck Unit parameter **Polaris ExpressCheck: Options**. On the Display tabbed page, select (check) **Suppress held items pop-up message** and/or **Suppress account balance pop-up message**. Selecting an option suppresses that pop-up message when the patron logs on. The options are available at the system, library, or branch.

Note:

In Polaris 4.1, the SelfCheck Unit parameter **Polaris ExpressCheck: Enable** has been renamed **Polaris ExpressCheck: Options**. The options are reorganized on tabbed pages.



Notes:

If the patron owes an amount that would block checkout, a message stopping the transaction will display at the beginning, as in previous versions of Polaris.

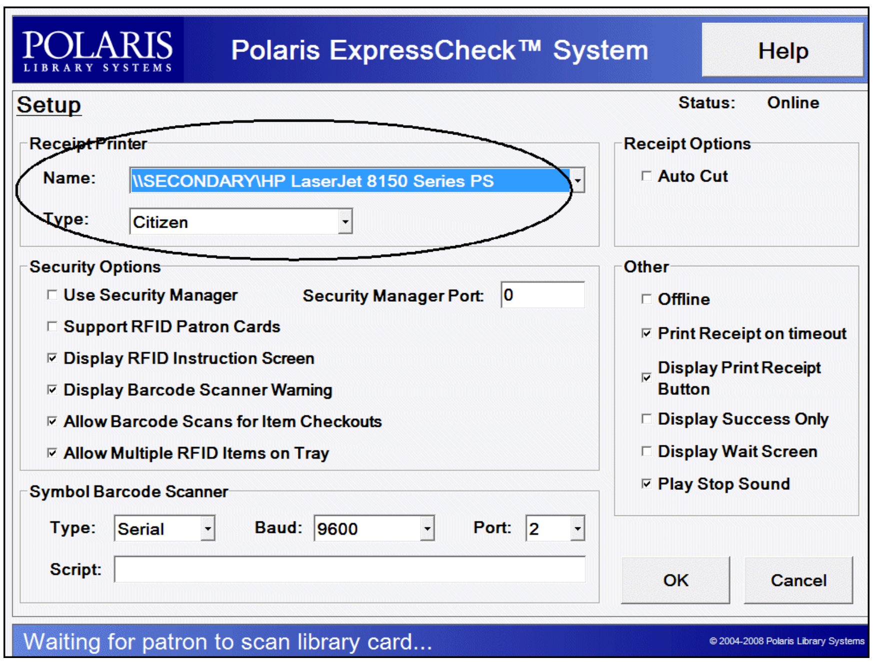
If the library has implemented a charge for checkout, the "money owed" dashboard message will increment as chargeable items are checked out and the amount may go over the patron fine limit. However, the accrued amount is not checked against the limit as items are checked out, only at the beginning of the checkout.

You can edit the dashboard **Reminder(s)** header and messages using Polaris Language Editor (WebAdmin). The language string IDs are:

- **EC_TEXT_REMINDER_TITLE**
- **EC_TEXT_COURTESY_MONEYOWED**
- **EC_TEXT_REMINDER_HELDITEMS** [for multiple items]
- **EC_TEXT_REMINDER_HELDITEMS** [for one item]

Star TSP143 Printer for Polaris ExpressCheck

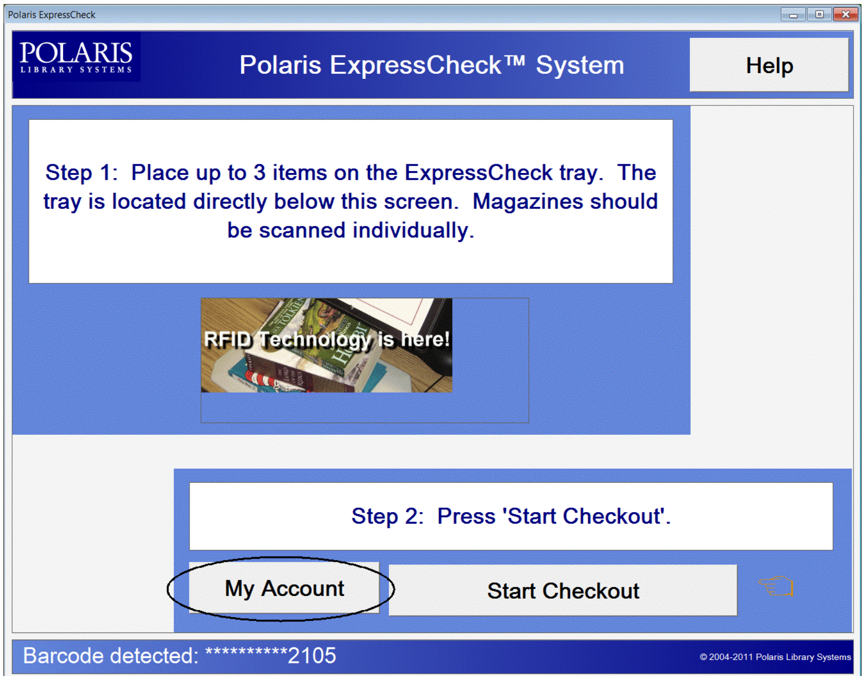
The Star model TSP143 receipt printer is now available for selection in the Polaris ExpressCheck setup screen. Select the network name of the printer in the **Name** box, and select the Star printer in the **Type** list.



For more information about setting up Polaris ExpressCheck, see the *Polaris ExpressCheck Administration Guide*.

Patron Account Access from Opening Screen (RFID)

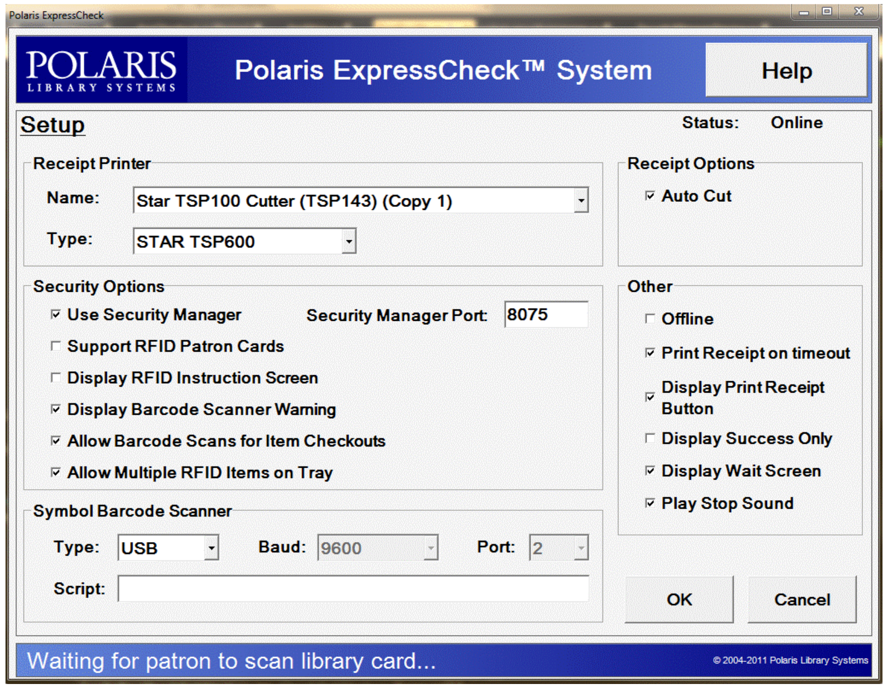
After a patron scans the account barcode, the opening screen for RFID workstations now offers an option to directly access the patron account, without proceeding to checkout.



Be sure **Enable on-screen keypad** is set for these workstations, since a password is required to access the account. In Polaris Administration, the on-screen keypad option is available in SelfCheck Unit parameters, **Polaris ExpressCheck: Options**, Enable tabbed page. Be sure the option is set for the workstation.

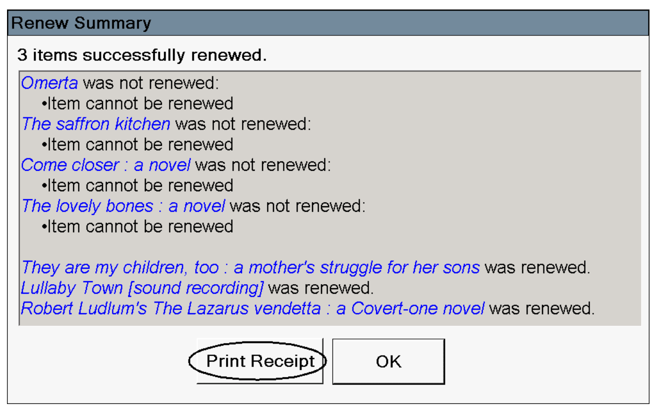
ExpressCheck Uses Administration Check-Out Receipt Settings

The specific information included on the check-out receipt is determined by the branch's Polaris Administration settings for check-out receipts. You set these fields with the Patron Services parameter **Check-out: Receipt options**. As part of this development, the **Bold** and **Color** options are removed from the ExpressCheck Setup dialog box since they are not supported.



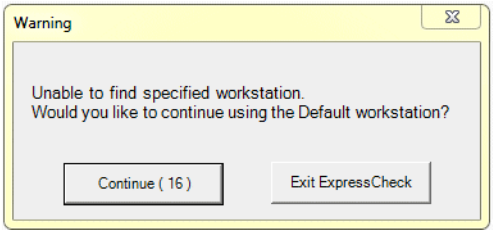
Printing Receipts from the Items Out View

Patrons can now choose to print a check-out receipt when they renew items from the Patron Account - Items Out view in Polaris ExpressCheck. If no items were renewed, the **Print Receipt** button is not displayed.



Default Workstation Message

When the ExpressCheck workstation is online and a staff member logs in to start the application, a message now appears if the workstation cannot be identified in Polaris.



The staff member can choose to continue and use the default workstation ID (1), or exit ExpressCheck. Note that using the default workstation ID may affect settings such as loan periods, since they may differ for the two workstations.

Polaris ExpressCheck Offline Transaction Files

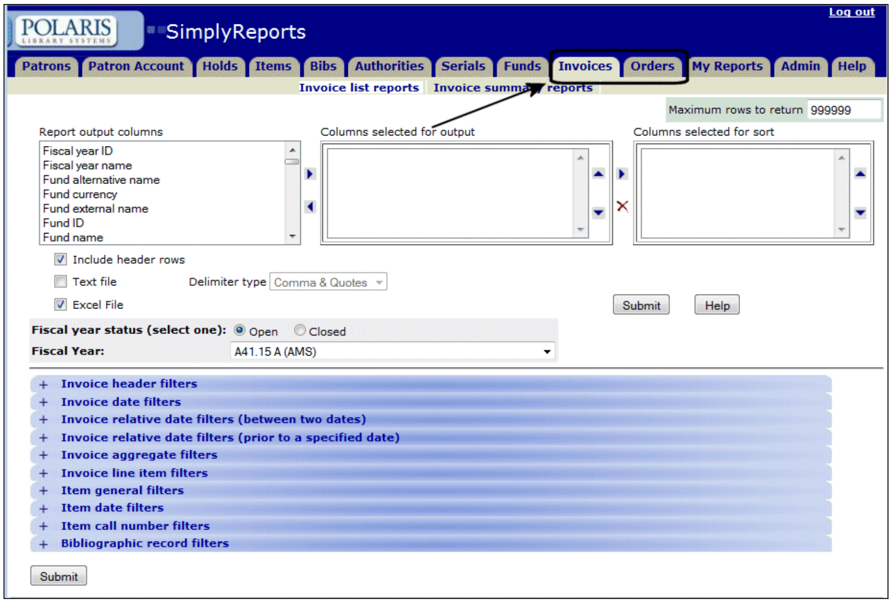
Polaris ExpressCheck offline transaction files are now stored in the folder **C:\ProgramData\Polaris\[version]\OfflineTransaction** on the ExpressCheck workstation, consistent with offline transaction files for staff client workstations.

SimplyReports

The following enhancements were made for SimplyReports version 4.1.

Acquisitions Reports Added

SimplyReports now has two new tabs, **Orders** and **Invoices**, for reporting on Acquisitions data. Order and invoice reports can be run according to a single fiscal year.



Invoice and Order Report Columns

To create an order or invoice report, first select a fiscal year. No reports will cross fiscal years.

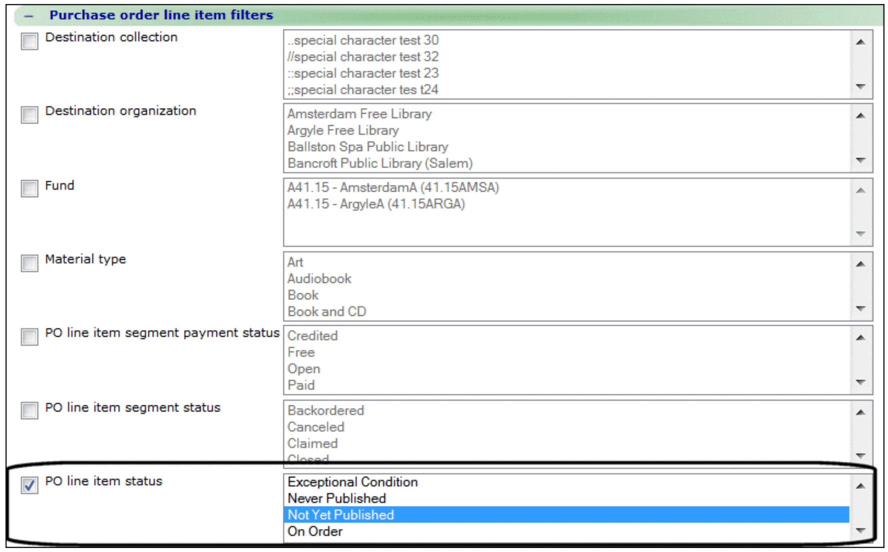
- Columns that refer to MARC data are reporting on the purchase order or invoice line item data.
- Columns that refer to item data are reporting on the purchase order or invoice line item segment data.

Invoice and Order Report Filters

The invoice and purchase order data can be filtered by information and dates in invoice and purchase order records, and by characteristics of linked records, such as suppliers, items, funds and bibliographic records.

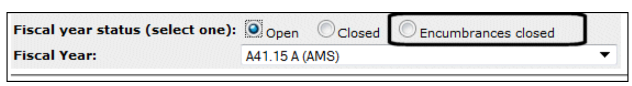
Not Yet Published Status Available for Order Reports

The Purchase order line item status filter in Order List and Summary reports includes the new purchase order line item status, **Not yet published**.



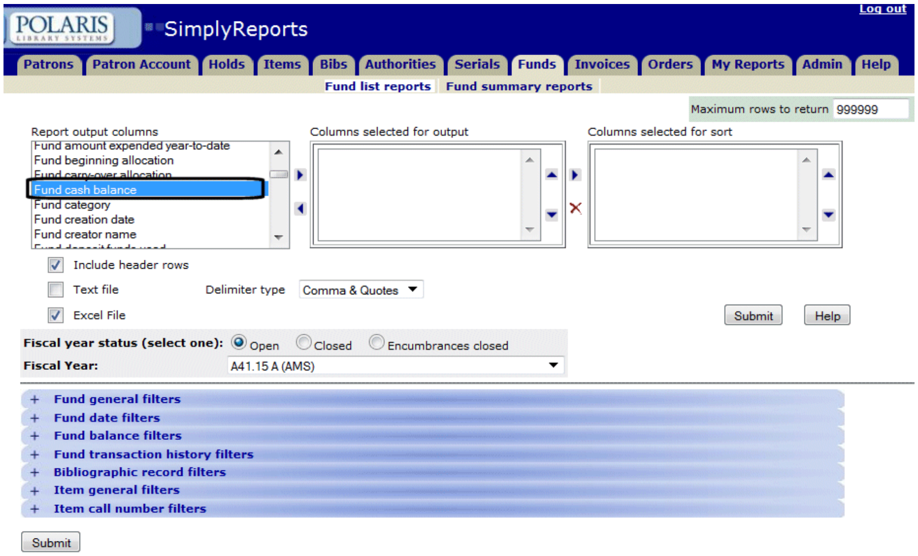
Encumbrances Closed Status Added for Fiscal Year Filter

The Fiscal year filter that is available on the Fund, Invoice and Orders tabs has the status selection of **Encumbrances closed**. When you select a status, the fiscal year records available in the drop-down list have the selected status.



Cash Balance Added to Fund List and Summary Reports

Cash balance database column was added to SimplyReports for both Fund list and Fund summary reports. The Cash Balance is equal to the sum of the free balance and the total encumbered.



Filter Labels Updated

The labels for SimplyReports filters are now consistent among the different report tabs. For example, all item filters are labeled the same way no matter where they appear in the application.

Database Column and Filter Lists Consolidated in Help

Previously, the database columns and filters were listed as they appeared on each SimplyReports report-creation tab. Now, the available database columns and filters are listed once.

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.

Charging for Phone Renewals

Inbound telephony supports charging for renewals on certain items. See "Charge for Checkout" on page 82.

eReceipts for Phone Renewals

Inbound telephony supports e-mail and text message receipts when items are renewed. See "E-Mail and Text Message Receipts (eReceipts)" on page 96.

Alpha-Numeric Passwords for Inbound Telephony

You can now set inbound telephony (Polaris Phone Attendant) to accept alpha-numeric passwords when a patron logs in by telephone to access account information and renew items. After the patron has entered the account barcode, the system transforms the password from the patron record into a number string and then matches the string to the patron's password input. If the patron presses 2, for example, the system accepts the keypress as representing 2, a, b, or c. Any special characters in the password, including # or *, are mapped to 0, so the patron must press 0 for these characters.

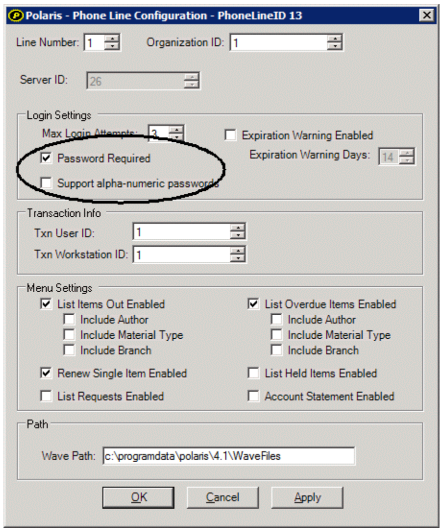
Note:
Setting inbound telephony to recognize alpha-numeric passwords weakens password strength, because several letters or characters can map to the same number.

When this option is set, the Phone Attendant plays a prompt after the patron enters the barcode. The default message is **Please enter your password using the number key appropriate to the letter. Press 0 for all special characters**. You can edit the message in Polaris Language Editor (WebAdmin). The Inbound Telephony string ID is **PA_MENU_LOGIN_ALPHA_NUMERIC_PASSWORD**.

To set the alpha-numeric password option:

1. Open **PhoneAttendantConfig.exe** (in **C:\Programs\Polaris\[version]\Bin**) on the telephony server.
2. On the Phone Lines tabbed page, select the phone line you want to configure and click **View**.

   The Phone Lines Configuration dialog box opens.
3. Select (check) **Password required** and **Support alpha-numeric passwords**.



4. Click **Apply**.

For more information about setting up inbound telephony, see "Configuring the Phone Attendant" in the *Polaris Telephony Guide*, or the equivalent topic in staff client online Help.

Polaris Language Editor (WebAdmin)

Polaris Language Editor includes new language strings for many of the developments noted in other sections of this document. In addition, the following specific changes have been made to Polaris Language Editor (WebAdmin).

EReceipt Content in Polaris Language Editor (WebAdmin)

Polaris Language Editor includes a new "product," **Receipts**. Select this product to edit the content of e-mail and text message receipts. For more information about eReceipts, see "E-Mail and Text Message Receipts (eReceipts)" on page 96.

Title Display Labels in Polaris Language Editor (WebAdmin)

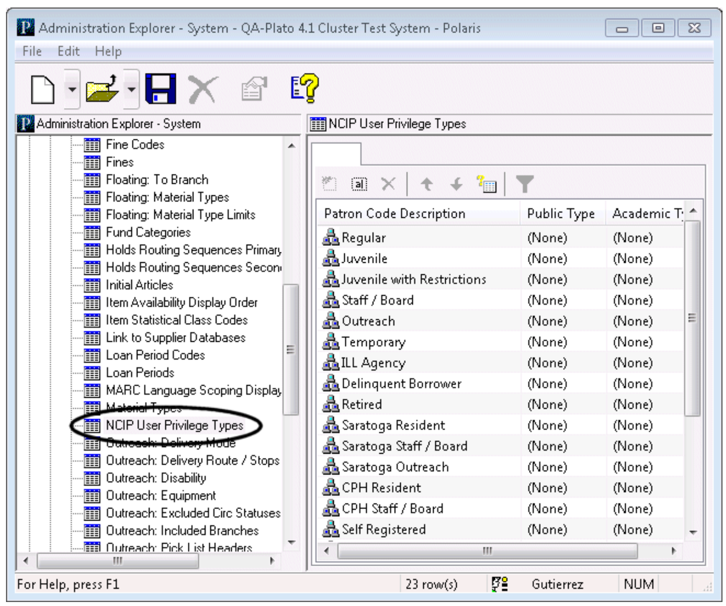
Select the new product **ERMSPortal** to edit the labels for elements displayed in PowerPAC, Mobile PAC, and Community Information search results. For more information, see "Summary View" on page 184.

Polaris NCIP Service

The following changes were made to support NCIP processing.

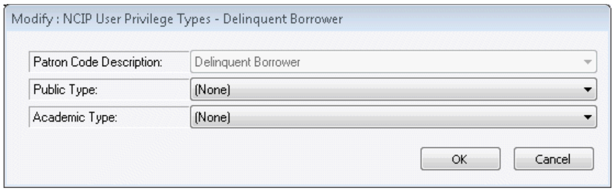
NCIP User Privilege Types Mapping

The NCIP standard allows disparate library automation systems to communicate, supporting resource sharing and other patron activities. A Polaris database table maps Polaris patron codes to NCIP user privilege types. In Polaris 4.1, this table is available for modification in Polaris Administration as the system-level policy table **NCIP User Privilege Types.**



Using the new table, you can map Polaris patron codes to the public use privilege types and/or academic user privilege types defined by the NCIP standard. Available public user types include **Adult**, **Child**, **Senior**, **Staff**, and **Young Adult**. Available academic user types include **Faculty**, **Graduate**, **Postdoctoral**, **Staff**, and **Undergraduate**. **None** is also a valid value, so it is permissible that some Polaris patron codes are not mapped to any NCIP user privilege type.

You need the new System Administration permission **Modify NCIP User Privilege Types table: Allow** to modify this table. Select the Polaris patron code to map and click the Modify icon above the table to open the Modify dialog box. You can select a public user privilege, an academic user privilege, both, or **None** (no mapping).

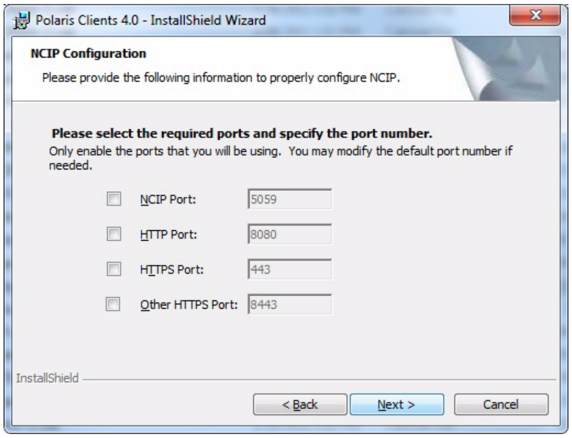


If a new Polaris patron code is added to your system, it is automatically listed in the NCIP User Privilege Types table with a default value of **None** (no mapping) for both public and academic user privileges.

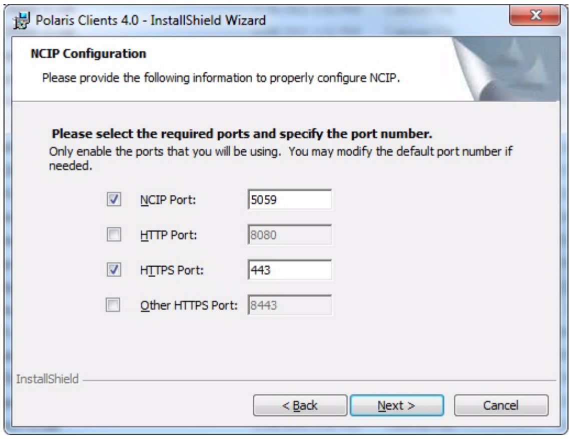
Note:
Contact your Polaris Site Manager for advice on completing this table.

Installation

The Polaris client installation for NCIP service has changed. You now specify the required ports during installation.



When you select the appropriate ports, you can change the port number.



This change allows more than one NCIP Service to be installed on one server or in a hosted environment.

For more information about Polaris staff client installation, see the *Polaris 4.1 Installation Guide*.

Note:
This feature was also added to Polaris 4.0, build 441 and later.

NCIP ILL Transactions Added

NCIP processing may create ILL bibliographic and item records. These transactions are now logged as **3016 ILL bibliographic record created** and **3020 ILL item record created**, subtype 286 (created through NCIP).

To be sure that the transactions will be recorded, open the system-level database table Transaction Logging in Polaris Administration, and confirm that **ILL bibliographic record created** and **ILL item record created** are set to be logged. These settings make the transaction data available for reports. For more information about logging transactions, see the *Polaris Administration Guide* or staff client online Help.

Note:
This feature was also added to Polaris 4.0, build 482 and later.

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