What's New in Polaris® 5.0

This document summarizes what's new and different in Polaris 5.0 build 180.

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Sources for development   Polaris development reflects customers' enhancement requests from the following sources:

- Polaris Users Group (PUG) votes
- Tracker tickets
- Workflow analysis
- 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 services.

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Contents

New & Modified Polaris Administration/System Settings

The following table lists the new and modified parameters, profiles, permissions, and tables in Polaris Administration. It also lists the licenses that are available for new features and the new SQL jobs.

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Administration/System	Purpose	Default	Level	More Info
Acquisitions Parameters				
Automatically close purchase orders	Automatically closes purchase order by running the Close Purchase Orders SQL job.	No	System, Library, Branch	See "Automatically Close Purchase Orders" on page 5.
Cataloging Profiles				
Bibliographic records: Automatic Display in PAC processing	Prevents titles from displaying in the PAC if the linked items cannot be circulated. It an also be set to ensure that the titles do display if any linked items can be circulated. The SQL job updates the bibliographic records according to the settings in the profile.	No check boxes selected	System	See "Automatic Display in PAC Processing for Bibs" on page 7.
Cataloging Permissions				
Carousel toolkit: Access (A carousel toolkit license is also required.)	Allows users to access the Carousel toolkit from the Utilities menu	Granted to Admin group by default	System task control	See "Carousel Toolkit" on page 11.
Patron Services Parameters				
Floating options	A new Floating Options dialog box now includes the existing option to limit by material type with the new options to limit by collection and optionally apply load balancing.	N/A	At System level, all options can be set. At Library and Branch level, only the Collection or Title/ Material Type option can be set.	See "Floating Collection Limits & Load Balancing" on page 23.

| Administration/System	Purpose	Default	Level	More Info
Associated patron options (Modified the existing parameter.)	The Associated patron options parameter now includes the option (check box) to designate the patron to pick up held items for other patrons with whom the patron is associated.	Unchecked	System, Library, Branch	See "Associated Patrons (Family) Holds Pickup" on page 19.
Renewal: Auto-renew	Enables or disables the auto-renew process.	No - Not enabled		See "Auto-Renew" on page 38. When the parameter is set to Yes, automatic renewals are completed as part of the Notices Processing SQL job.
Lost item transition	Updates the circulation status of Lost items to Missing or Withdrawn, based on a specified time period.	Do not change status	System, Library, Branch	See "Lost/Missing/Withdrawn Automatic Process" on page 16.
Missing item transition	Updates the circulation status of Missing items to Withdrawn, based on a specified time period.	No selection	System, Library, Branch	See "Lost/Missing/Withdrawn Automatic Process" on page 16.
Circulation Permissions				
Special item check-in: Access	Users with this permission can access the Special Item Check-In dialog box.	Granted to Admin group by default	Branch	See "Missing Part Check-In" on page 28.
Special item check-in: Select missing	Users with this permission (and permission to access the dialog box) can select the Missing part: block & notify option.	Granted to Admin group by default	Branch	See "Missing Part Check-In" on page 28.
Special item check-in: Select unavailable	Users with this permission (and permission to access the dialog box) can select the Mark item Unavailable option.	Granted to Admin group by default	Branch	See "Missing Part Check-In" on page 28.
PAC Profiles				
Suppress item display (modified existing PAC profile)	The Suppress Item Display dialog box now includes the **Claim Missing Parts** circulation status so that libraries can prevent items with missing parts from displaying in the PAC.	Not suppressed	System, Library, Branch	See "Missing Part Check-In" on page 28.

Administration/System	Purpose	Default	Level	More Info
Patron access options (modified existing PAC profile)	The Patron Access Options dialog box now contains options for libraries to allow patrons to choose which e-mail reminder notices they want to receive.			See "Auto-Renew" on page 38.
Self-Check Unit Parameters				
Check-out: Item Options	Select the circulation statuses that will not patron check-outs from the self-check units.		Branch (self-check unit workstation)	See "Check Outs via SIP for Specific Item Circulation Statuses " on page 36.
Notification Parameters				
Notification options (modified existing parameter)	The Reminder tab includes a **Missing part notice** selection and the **Almost overdue** label was changed to **Almost overdue/Auto-renew**.			See "Auto-Renew" on page 38.
Server Parameters				
Renamed the server parameter **URL of the ContentXChange root** to **URL of the ContentXChange Carousel Toolkit root**.				See "Carousel Toolkit" on page 11.
Policy Tables				
Floating Collection Limits	When Collection is selected as the Limit by option for floating collections, the Floating Collection Limits sets the maximum number of items allowed to float into specific collections at the receiving branch.			See "Floating Collection Limits & Load Balancing" on page 23.
Fee Descriptions (modified table)	A new Missing Parts system-defined reason was added to the table.			See "Missing Part Check-In" on page 28.
Database Tables				
Circulation Statuses (modified table)	The new Claim Missing Parts status was added to the table.			See "Missing Part Check-In" on page 28.
Administration Permissions				
Modify Floating Collection Limits Table: Allow	Users with this permission (and other required permissions for modifying Administration tables) can modify the Floating Collection Limits table.			See "Floating Collection Limits & Load Balancing" on page 23.

Administration/System	Purpose	Default	Level	More Info
SQL Jobs				
Close purchase orders	Automatically closes purchase orders	Enabled, but the **Automatically close purchase orders** parameter must be set to **Yes** to run the job.		See "Automatically Close Purchase Orders" on page 5. If the parameter is set to **Yes**, the job runs on a default schedule of 6:59 a.m. each morning and closes the eligible purchase orders.
Lost, Missing, Withdrawn	Identifies the items that meet the criteria set in the patron services parameters, Lost item transition and Missing item transition, and updates the items. Lost items transition to either Missing or Withdrawn and Missing items transition to Withdrawn.	If either (or both) item transition parameters have been enabled, the job updates the item records according to the settings in the parameter.		See "Lost/Missing/ Withdrawn Automatic Process" on page 16.
Notices Processing (modified existing job)	The Notices processing job automatically renews eligible items for which the item's assigned branch has the *Renewal: Auto-renew* parameter is set to *Yes*.			See "Auto-Renew" on page 38.
CJ Chained Jobs Launcher: • CJ PAC Availability • CJ Automatic Display in PAC processing • CJ Keyword Processing • CJ DBCC Nightly	Purpose: Run a series of overnight jobs consecutively. This will eliminate the need to guess when a safe time to schedule the job to run would be. Step1: Runs CJ PAC Availability job Step2: Runs CJ Automatic display in PAC processing job Step3: Runs CJ Keyword Processing job Step4: Runs CJ DBCC Nightly			See "Overnight Processing Jobs" on page 10. The job occupies the same window that Keyword Processing used to occupy. The individual jobs and their schedules that run within this new job have been disabled. They are still available to be run individually on demand, but they will no longer run independently.
Licensed Features				
Carousel Toolkit				See "Carousel Toolkit" on page 11.

Automatically Close Purchase Orders

Polaris 5.0.31

A new **Close Purchase Orders** SQL job will close purchase orders automatically if the new Polaris Administration Acquisitions parameter, **Automatically close purchase orders**, is set to **Yes**. This parameter is available at the System, Library, and Branch organization levels, and it is set to **No** by default.
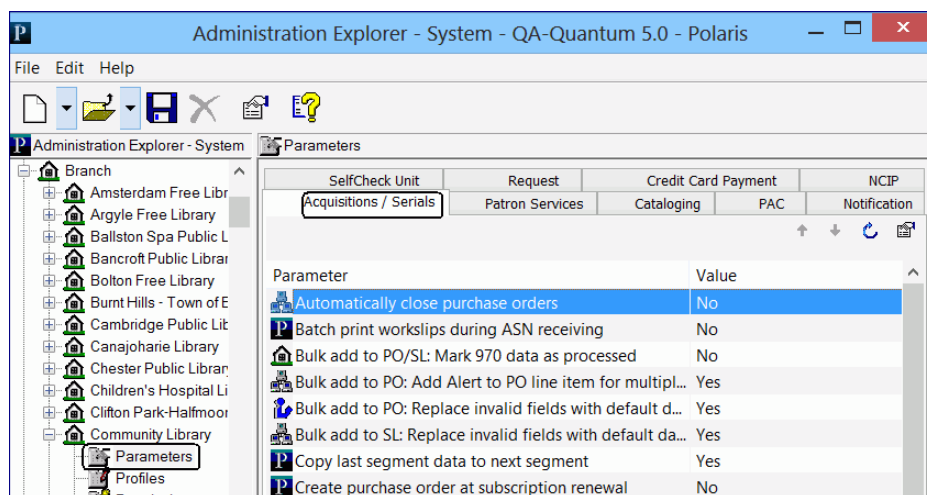
When the job runs, purchase orders are closed if: the **Automatically close purchase orders** parameter is set to **Yes** for the purchase order's **Ordered at** organization; the purchase order has a type of Firm, Gift or Donation; all line items have a status of Received, Cancelled or Partly Received; and all segments have a status of Cancelled or Received.

> **Note:**
> The Close Purchase Orders job does not affect standing order or subscription purchase orders or purchase order lines that have a status of On Order, Backordered, Exceptional Condition, Never Published, Out of Print, Return Requested, Returned, Pending Claim or Claimed.

Users can continue to manually close purchase orders when the lines are received but not yet paid (still encumbered). When a user manually closes a line item, a message informs the user that one or more lines have been received, but not yet paid and provides the option for the user to select **Yes** to continue to close the purchase order or **No** to cancel the closure. With the SQL job, any eligible purchase order will be closed automatically.

Enable the Close Purchase Order job

To enable the job that automatically closes purchase orders:

1. Select **Administration, Explorer,** and select the system, library, or branch organization for which you want to enable the Close Purchase Orders job.

2. Select **Parameters**, and select the Acquisitions/Serials tab.

3. Double-click the **Automatically close purchase orders** parameter, and select **Yes**.
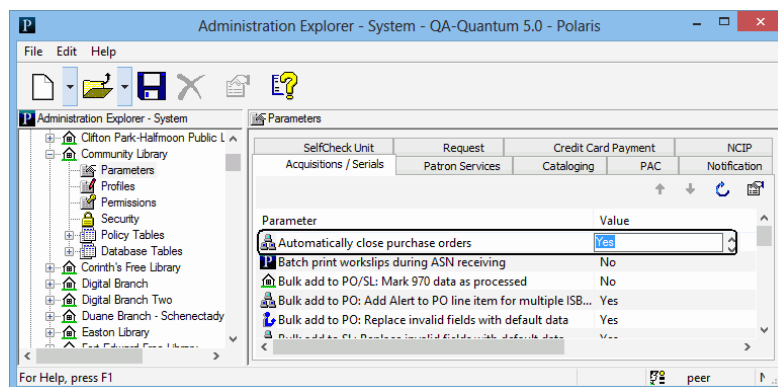
4. Select **File, Save** to save the parameter setting.

Close Purchase Orders Job

If the **Automatically close purchase orders** parameter is set to **Yes** for the organization, the **Close Purchase Orders** SQL job runs on a default schedule of 6:59 a.m. each morning and closes the eligible purchase orders.

Transactions and Transaction Subtypes

A new **Purchase order closed** transaction was added to the database. This will include transactions where a purchase order is closed manually as well as by the new job. The following information is recorded and available in the transaction database for a **Purchase order closed** transaction:

- Supplier ID of the closed PO (SUPPLIER_ID)
- Purchase Order number (without suffix) (PO_NUMBER)
- Order type (ORDER_TYPE)
- Payment method (PAYMENT_METHOD)
- Purchase Order ID that was deleted (PURCHASE_ORDER_ID)
- Purchase order's Ordered At Org (Branch)
- User ID for the user who closed the purchase order or **PolarisExec** if the purchase order was closed automatically

Automatic Display in PAC Processing for Bibs

Polaris 5.0.47

Your library can now use a new Cataloging profile in Polaris Administration to specify criteria by which an automatic processing job will suppress or display titles in the PAC (PowerPAC and Mobile PAC). This new profile, **Bibliographic records: Automatic Display in PAC**, controls the new **CJ Automatic display in PAC processing** job, which sets the **Display in PAC** check box in bibliographic records to unchecked or checked. With this automatic processing enabled, staff members no longer need to manually check or un-check the **Display in PAC** box on the Bibliographic Record workform or bulk-change records to change the check box setting.

The new CJ Automatic Display in PAC processing job is now part of a series of jobs launched by the CJ Chained Job Launcher. See "Overnight Processing Jobs" on page 10.

Once the profile is set, the job updates bibliographic records to turn off (uncheck) or turn on (check) the **Display in PAC** setting with the exception of the following types of bibliographic records, which are excluded from automatic Display in PAC processing:

- bib records with resource entities for integrated eContent vendors (regardless of whether the vendor account is active or not)
- bib records with linked serial holdings records
- bib records that are constituent records in a bound-with group

In addition, the state of linked item records is considered only for item records with a status of final; provisional or deleted items are never considered during automatic Display-in-PAC processing.

If a bibliographic record meets the criteria for an automatic change to the Display in PAC setting, manual changes to this setting are overwritten by the overnight job, provided the underlying conditions do not change. For example, if a bibliographic record meets the criteria to have the Display in PAC setting turned off because all final items are set to not display in PAC, but a staff member manually checks the **Display in PAC** check box, the automatic process will clear the check box so that the title does not display in the PAC.

Set up automatic Display in PAC processing for bibliographic records

To set up automatic Display in PAC processing:

1. In the Administration Explorer tree view, expand the **System** folder.

2. Select **Profiles** and select the **Cataloging** tab.

   The cataloging profiles appear.
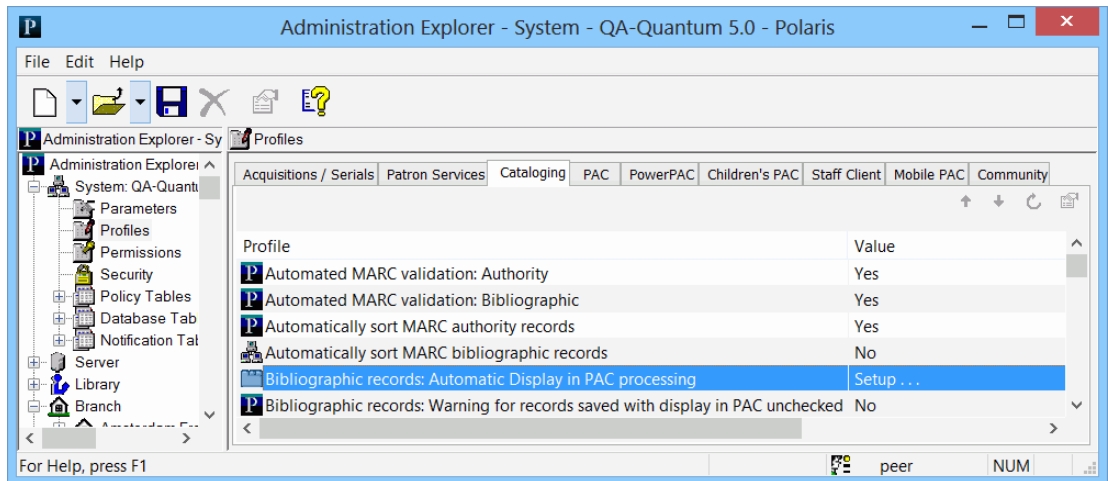
3. Double-click the **Bibliographic records: Automatic Display in PAC** processing profile.

   The profile dialog box opens. By default, no check boxes are selected.
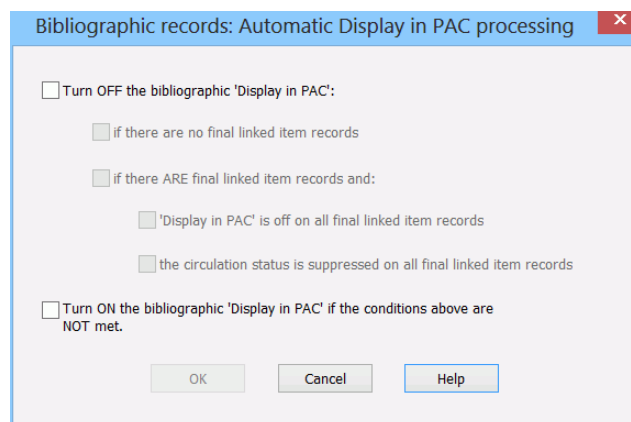
4. To suppress the display of bibliographic records based on the state of their linked item records, select the **Turn OFF the bibliographic 'Display in PAC' check box** and select from the following options:

    -   **if there are no final linked item records** - When this option is selected, the job looks for bibliographic records that have the **Display in PAC** box checked but have no linked item records with a status of **Final**. If it finds such bibliographic records, it clears (un-checks) the **Display in PAC** check box, and those titles will not display in the PAC.

    -   **if there ARE final linked item records and:**

        Display in PAC is off on all final linked item records - When this option is selected, the job looks for bibliographic records that have the **Display in PAC** box checked but all the final linked item records have the **Display in PAC** box unchecked. If it finds such bibliographic records, it clears (un-checks) the **Display in PAC** check box in the bibliographic records, and those titles will not display in the PAC.

        the circulation status is suppressed on all final linked item records - When this option is selected, the job looks for bibliographic records that have the **Display in PAC** box checked but all final linked item records have circulation statuses that prevent the items from displaying in PAC. If it finds such bibliographic records, it clears (un-checks) the **Display in PAC** check box in the bibliographic records, and those titles will not display in the PAC.

        > **Note:**
        > This option uses the **Suppress item display** PAC profile table for the item's assigned branch

5. To ensure that bibliographic records display in the PAC if the linked item records are in a state where they can be circulated, select **Turn ON the bibliographic 'Display in PAC' if the conditions above are NOT met.** When this option is selected, the job looks for any bibliographic records that do not already have the **Display in PAC** box checked, and whose linked items do not collectively meet the criteria selected under the **Turn OFF Display in PAC** setting. If it finds such bibliographic records, it checks the **Display in PAC** check box, and those titles will display in the PAC.

    > **Note:**
    > If your library has non-integrated eContent titles that you want to display in PAC even though they do not have linked item records, do not select the following options: **Turn OFF the bibliographic 'Display in PAC'** and **if there are no final linked item records.**

Tip:
To identify bibliographic records that were modified by the job, you can search for bibliographic records that were modified during the overnight window when the job ran.

When a bibliographic record is updated by the **Automatic display in PAC processing** job, the transaction is logged and the modifier and date last modified fields reflect these changes.

Overnight Processing Jobs

Polaris 5.0.47

A new CJ Chained Job Launcher job now runs a series of overnight jobs consecutively. The jobs in this series are prefaced with CJ (Chained Jobs), and they are run in the following order:

1. CJ PAC Availability
2. CJ Automatic Display in PAC Processing
3. CJ Keyword Processing
4. CJ DBCC Nightly

The CJ Chained Job Launcher job occupies the same window that the Keyword Processing job used to occupy. The individual jobs and their schedules that run within this new job have been disabled. They are still available to be run individually on demand.

Carousel Toolkit

Polaris 5.0.58

With the Carousel Toolkit, libraries can copy a code "snippet" for a content carousel from the Polaris ILS and paste the code into an external web site to display the content carousel. When users visit the web site and click the content carousel, the search results page displays in PowerPAC (via a deep link). Each branch can have a content carousel that points to its own PAC configuration.

The Carousel Toolkit provides the code for content carousels from a bibliographic record set or from one of the following system-supplied automatic web parts (dashboard elements):

- Book Sense best seller lists
- New Books
- New Large Print
- New Sound Recordings
- New Videos
- Most Circulated Titles
- On Order Titles

The Carousel Toolkit is a licensed feature. It is licensed at the system level; branches that do not want to use the feature can manage access to the feature through permissions.

This development includes the following:

- New option on the **Utilities** menu - The **Utilities** menu includes a new **Carousel Toolkit** selection.
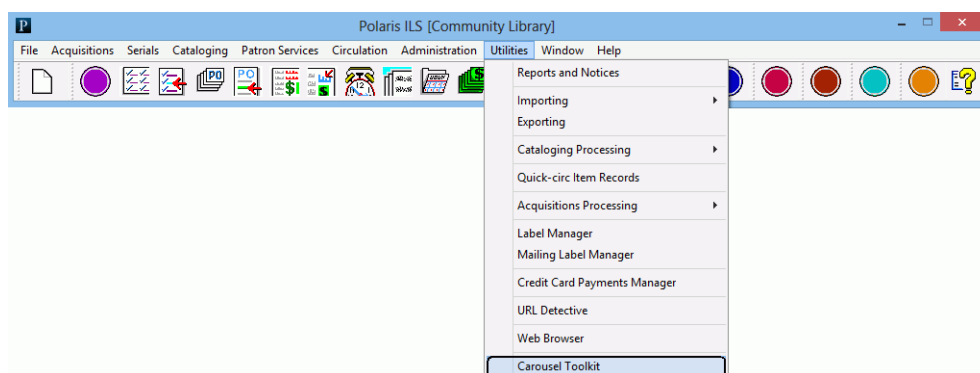
- New Cataloging permission - To use the Carousel Toolkit, staff members must be assigned the **Access Carousel Toolkit: Allow** permission.
- Renamed server parameter in Polaris Administration - **URL of the ContentXChange root** was changed to **URL of the ContentXChange/ Carousel Toolkit root**.
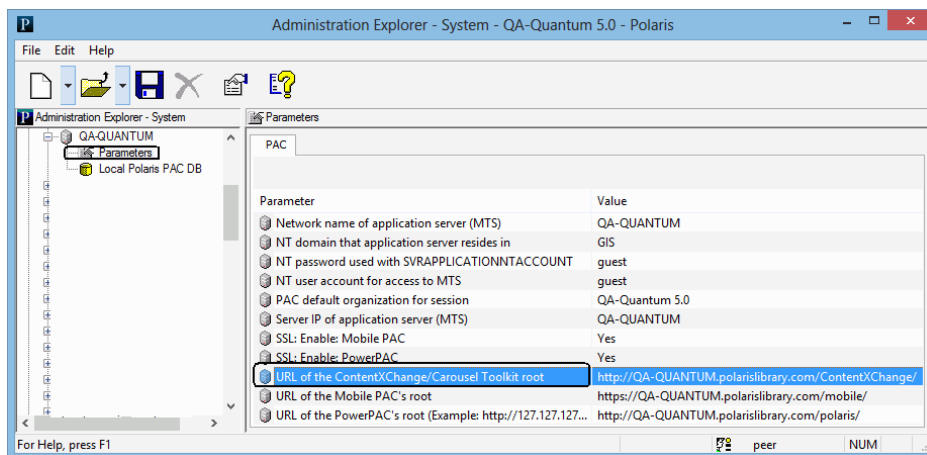
When carousel code snippets are pasted into external web sites, the content carousel is displayed on the web site. Users can click on a title in the carousel to go to the search results page at the branch (or system) connection specified in the Carousel Toolkit dialog box.

To display cover images in content carousels, enriched data must be set up in Polaris Administration. If cover images are not enabled in Administration, the carousels display the format icons and bibliographic information, but no cover images.

Generate and copy the code for a record set or dashboard element

The Carousel Toolkit license must be enabled, and the user must have the **Access Carousel Toolkit: Allow** permission.

To generate and copy the content carousel code for a record set or dashboard element.

1. Select **Utilities, Carousel Toolkit**.
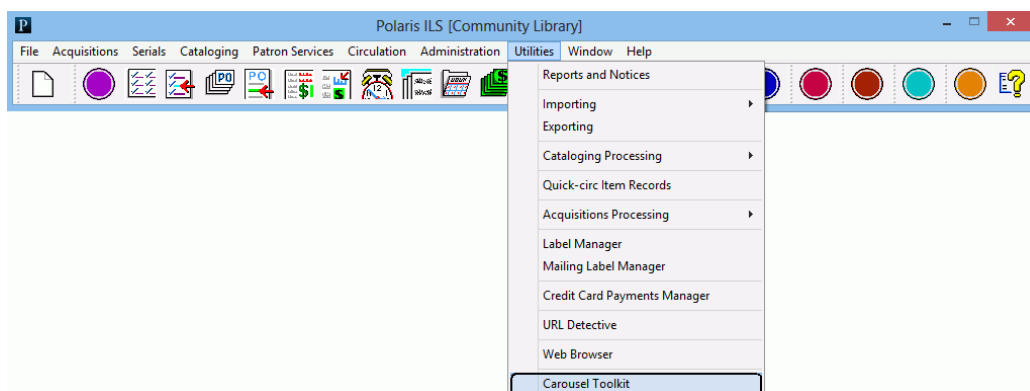
The Carousel Toolkit dialog box opens.
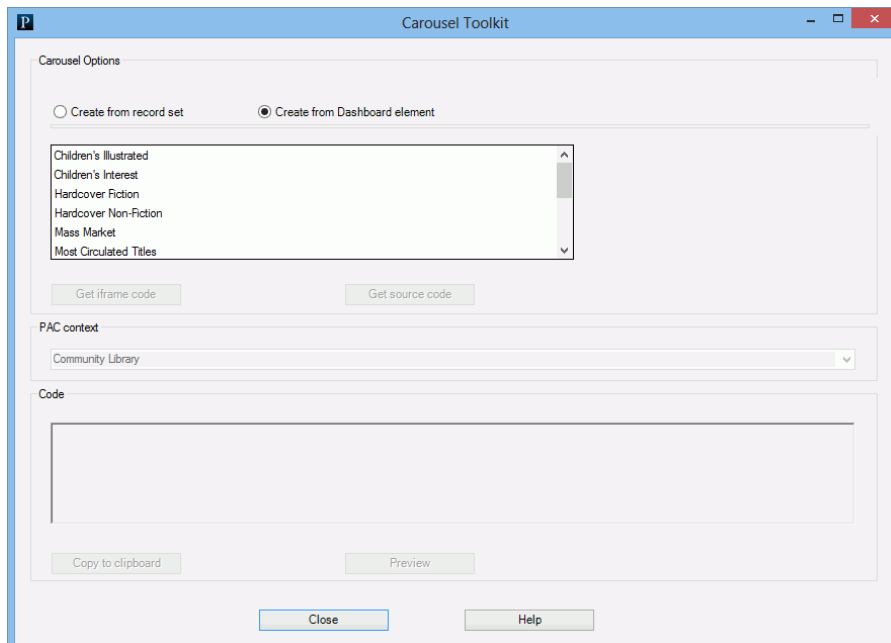
Tip:
If the record set is modified after it is selected in the carousel toolkit, it can still be selected for the carousel.

2. Select one of the following options to create the content carousel:

- **Create from record set** - Click **Find**. The Find Tool opens with bibliographic record set selected. Search for and select the record set.
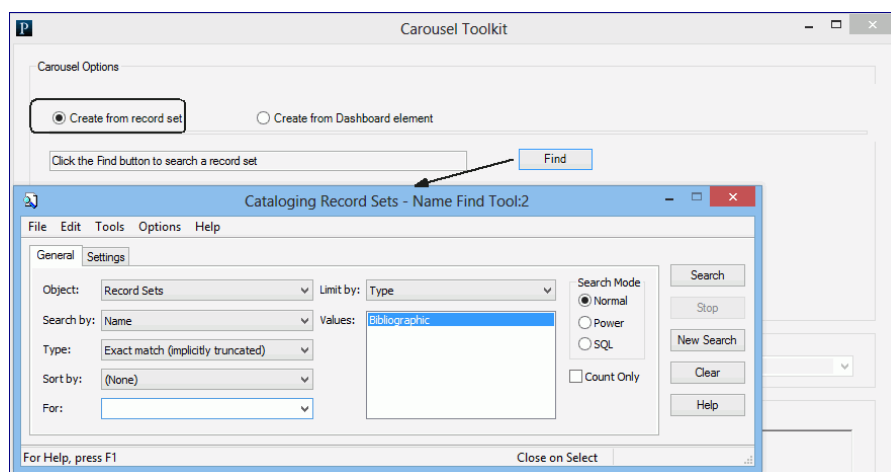
- **Create from Dashboard element** - Select a single dashboard element from the list.
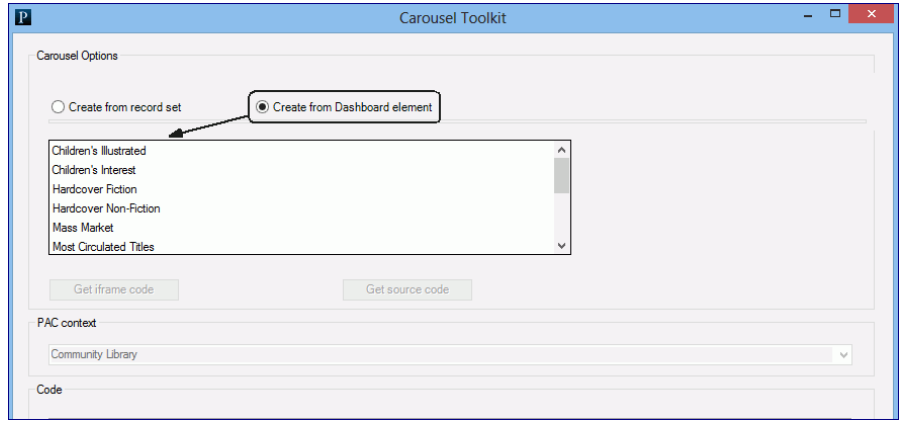
3. If you want to change the PAC connection branch where users will go when they click on a title in the carousel, select a different branch in the PAC context drop-down list.
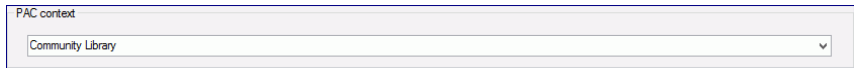
> **Note:**
> The **PAC context** box displays the branch for your user login, but you can select another branch or the system. The drop-down list contains the system PAC connection and all branches that are not suppressed in the system-level PAC profile setting **Suppress branches**.

4. After selecting the record set or dashboard element, select one of these options:

- **Get iframe code** – The iframe code is displayed in the **Code** box.
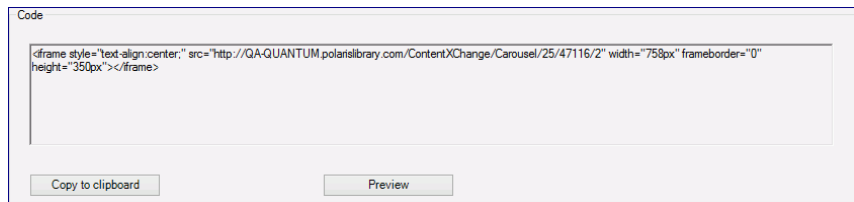
- **Get source code** – The source code is displayed in the **Code** box.
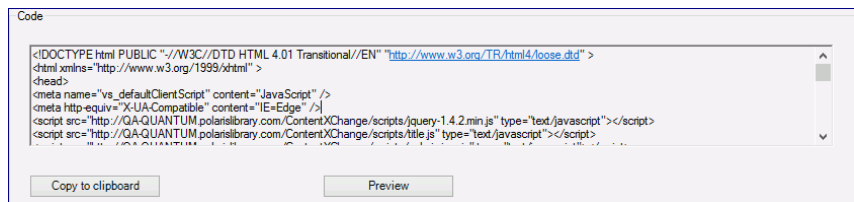
5. To see how the content carousel will look in the web page, click **Preview**. To see the preview, a browser must be installed and accessible on the workstation.

6. When the source code or iframe code is displayed in the **Code** box, click **Copy to clipboard**.

7. Paste the code snippet into the code for a web page.

The content carousel is displayed in the web page.
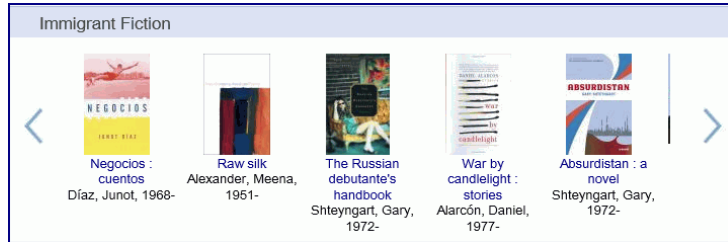
When a user selects a title in the content carousel, the title is displayed in the Polaris PowerPAC for the branch (or the system) selected in the **PAC context** box.
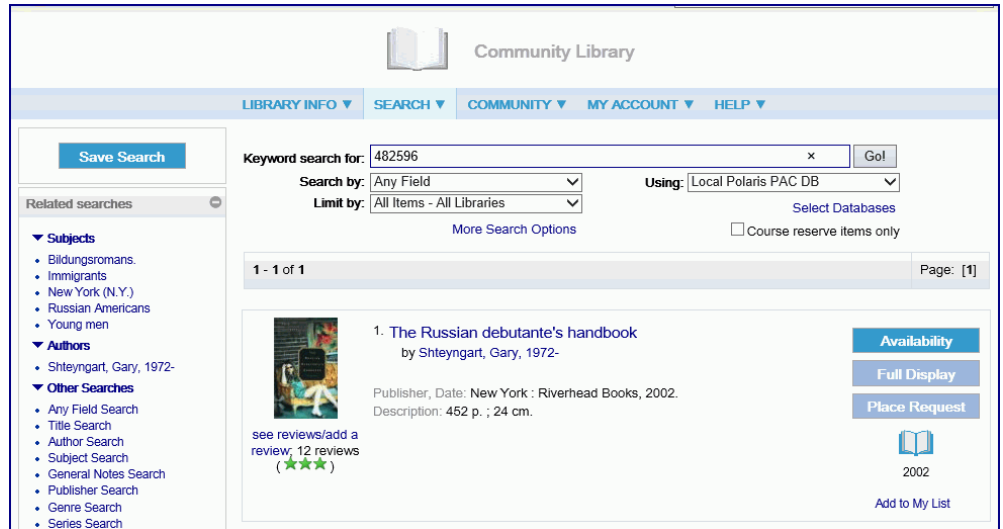
Lost/Missing/Withdrawn Automatic Process

Polaris 5.0.66

Libraries can now set patron services parameters to automatically update the circulation status of lost or missing items based on a specified period of time. These new patron services parameters are available at the System, Library, or Branch level in Polaris Administration. Item records are updated (or not) according to the settings for the item's assigned branch.

When the **Lost item transition** or **Missing item transition** processing has been enabled, the **Lost Missing Withdrawn Processing** SQL job identifies items that meet the criteria specified in the applicable parameter and updates the items as follows:

- Lost items transition to either Missing or Withdrawn
- Missing items transition to Withdrawn

> **Note:**
> The first time the job runs, processing may take some time because all the item records that have retained a Lost status for longer than specified in the **Lost item transition** parameter, and all the items that have retained a Missing status for longer than specified in the **Missing item transition** parameter are included in the processing. When determining if a particular item should be updated automatically, the day on which the job is run is not included.
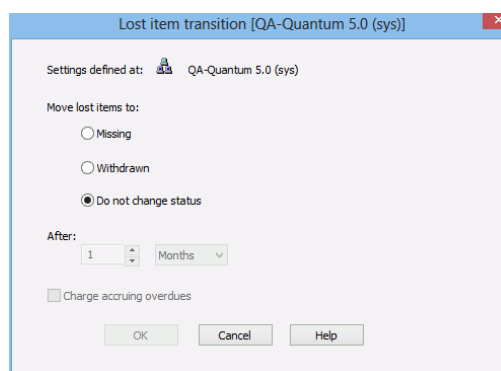
Set up lost item transition to missing or withdrawn

Note:
Libraries in a consortium will need to consider whether to implement the automatic transition of Lost items because the items will be assigned the new status without regard to Lost item recovery settings for the Governing library.

To enable lost item transition processing:

1. Select **Administration, Explorer**, and select **System, Library or Branch**.

2. Select **Parameters**, and select the **Patron Services** tab.

3. Select **Lost item transition** in the list of parameters.

4. The Lost item transition dialog box opens. The **Do not change status** option is selected by default.

5. Select **Missing** or **Withdrawn**.

6. Specify the time period after which **Lost** items will be updated to either **Missing** or **Withdrawn** by selecting a number and **Months** or **Years**.

    Recommendation:
    The transition period set by the Assigned Branch should be longer than any of the lost-and-paid recovery periods set within the library system. This reduces the likelihood of an item being recovered after it has received a Withdrawn status.

7. If you want to charge accruing overdues to the patron's account, select **Charge accruing overdues**.

8. Select **OK**.

Lost item transition processing

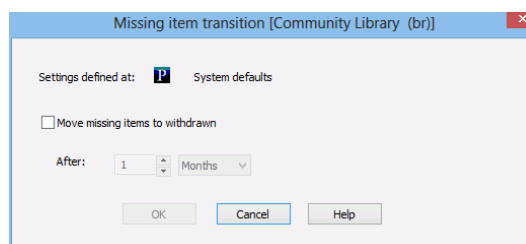When an item transitions from Lost, the following updates are made to the item record:

*   The circulation status changes from Lost to Missing or Withdrawn.
*   The status reflects the date and time of the change.
*   The item is removed from the Patron Status workform, Claims view.

- If the item is lost and not paid, the charge remains on the patron's account.
- If the item is lost and paid, no lost-item-recovery options, such as crediting the patron's account, are applied.
- If Charge accruing overdues is selected, the charges are added to the patron account.
- The item record history displays: Circulation status modified via Lost Item Transition processing Automatic status change.

Set up missing item transition to withdrawn

To enable missing item transition processing:

1. Select **Administration, Explorer**, and select **System, Library or Branch**.

2. Select **Parameters**, and select the **Patron Services** tab.

3. Select **Missing item transition** in the list of parameters.

4. The Missing item transition dialog box opens.

5. Select **Move missing items to withdrawn**.

6. Specify the time period after which **Missing** items will be updated to **Withdrawn** by selecting a number and **Months** or **Years**.

7. Select **OK**.

Missing item transition processing

When an item transitions from Missing to Withdrawn, the following updates are made to the item record:

- The circulation status changes from Missing or Withdrawn.
- The status reflects the date and time of the change.
- The item record history displays: Circulation status modified via Missing Item Transition processing Automatic status change.
- Other item data, including the last borrower, remain.

Associated Patrons (Family) Holds Pickup

Polaris 5.0.71

Libraries that use associated patron groups can now designate a member (or members) of the group who can pick up items held for other members of the group, and then check out these items using their own library cards. When the item is picked up and checked out by the designated member of the associated group, the hold is deleted from the account for the patron who placed the hold, and the holds list indicates the item was picked up by another member of the group.

A new check box, **Always check 'Allow me to pick up holds for these patrons' by default**, was added to the Associated Patron Options parameter in Polaris Administration so that the organization (system, library, or branch) can specify the default setting for associated patrons. Staff members with the appropriate set of permissions can modify an association to change the default setting.

A new Find Tool **Limit by** option, **Has patron associations**, is available when searching for patron records. Select **Yes** to find patron records with associations.
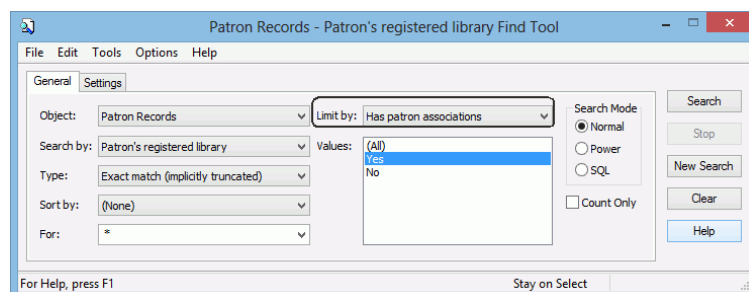
Specify the default for picking up held items for associated patrons

To specify your library organization's default setting for allowing patrons to pick up held items for their associated patrons:

1. Select **Administration, Explorer**, and select the system, library, or branch organization for which you want to specify the default setting.

2. Select **Parameters**, and select the Patron Services tab.

   The patron services parameters are listed in the details view.

3. Double-click the **Associated patron options** parameter to open the dialog box.
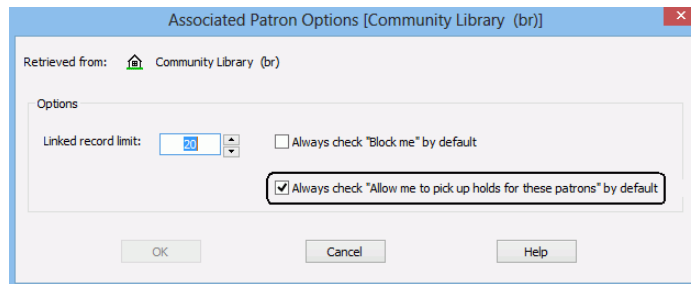
4. Select (or clear) the **Always check 'Allow me to pick up holds for these patrons' by default** check box.

If this box is checked, the **Allow me to pick up holds for these patrons** box is checked by default on the Add Associations and Edit Associations dialog boxes. Staff members with the appropriate permissions can change the setting when adding or editing a patron association.

You can add multiple patrons and apply the current setting to all the associated patrons. When you edit an association, the setting is applied to the associated patron displayed in the Edit Association dialog box.

> **Note:**
>
> When you add associated patrons to a patron record and check the **Allow me to pick up holds for these patrons** check box, only the primary patron, whose record is displayed in the Patron Status workform, is permitted to pick up held items for the associated patrons. For example, the primary patron is the mother who has a son and daughter for whom she can pick up held items. The son and daughter cannot pick up held items for their mother or for each other.
>
> To set up associations where patrons can pick up held items for each other, do the following for each member of the group: open the Patron Status workform, add the other associated patrons, and check the **Allow me to pick up holds for these patrons**.
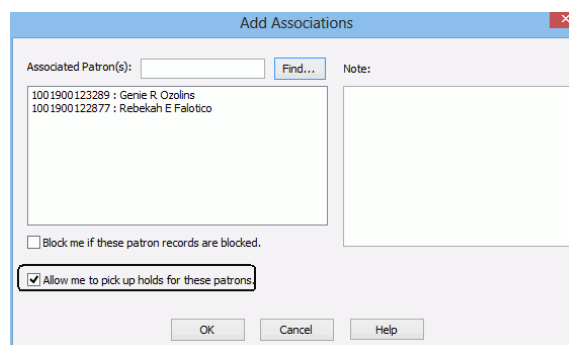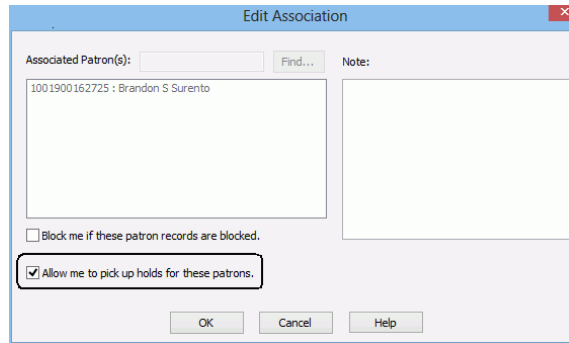
The Associations view of the Patron Status workform includes a new column that displays **Yes** if the patron is allowed to pick up and check out held items for associated patrons.
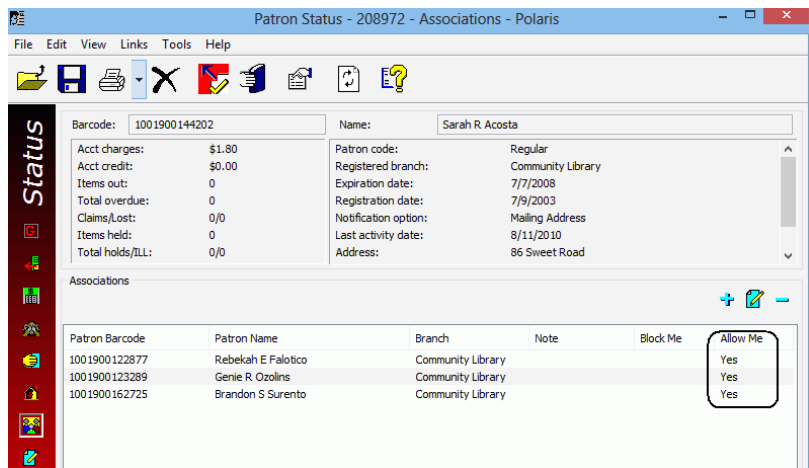
The Associated Patrons linked list box also includes a new column that displays **Yes** if the patron is allowed to pick up and check out held items for associated patrons.
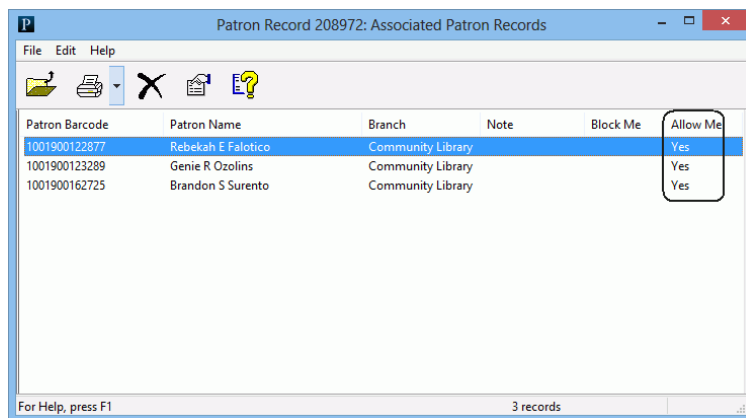
Check Outs for Associated Patrons

For primary patrons who are designated as allowed to pick up held items for other associated patrons, the following circulation processing occurs:

- The primary patron can use his or her own library card to check out the items held for other associated patrons.

- When the primary patron checks out an item for an associated patron, the item is checked out to the current (primary) patron, not the associated patron for whom the hold was placed.

- For offline check outs, when the primary patron checks out an item for an associated patron, the following message is included in the offline processing report: **This item satisfies a hold request for associated patron [**barcode, last name, first name, middle initial**].**

- When the primary patron checks out an item for an associated patron using Polaris Express Check (or a self-check unit that communicates via SIP or NCIP), the item is checked out to the primary patron without an additional message.

- The hold request is deleted from the associated patron's account (except in the case where the request status **Out to patron** is enabled in Polaris Administration).

- The item history shows that the item was checked out to the current patron who is authorized to pick up holds for the associated patron.

- The item is added to the primary patron's list of checked out items.
- All renewals, notices, overdues etc. are linked to the patron who checked out the item for the associated patron.

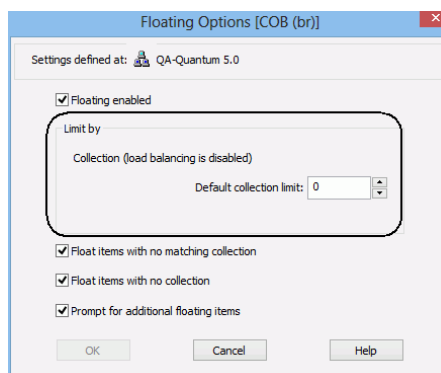# Floating Collection Limits & Load Balancing

Polaris 5.0.79

Branches that participate in floating collections can now set limits on the number of items allowed to float. When a user checks in an item that is eligible to float into a receiving branch's collection, the collection limit is checked. The item will be checked in if it does not exceed the limit on the number of **In** items (with a record status of **Final)** in that collection.

To apply floating limits by collection, open the new Patron Services **Floating options** parameter at the System level and select **Collection**. If **Collection** is selected, you can also select **Load balancing**. See "Collection Load Balancing" on page 24.
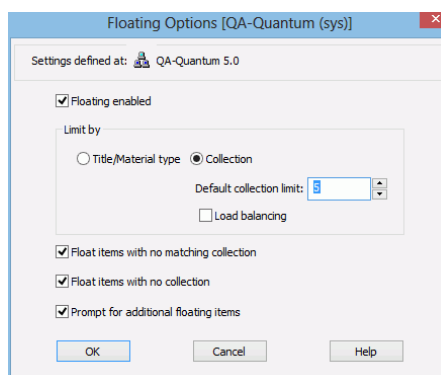
At the Branch level, the Floating Options dialog displays the **Limit by** option selected at the System level.

Example with load balancing disabled at the System level.

Example with load balancing enabled at the System level.
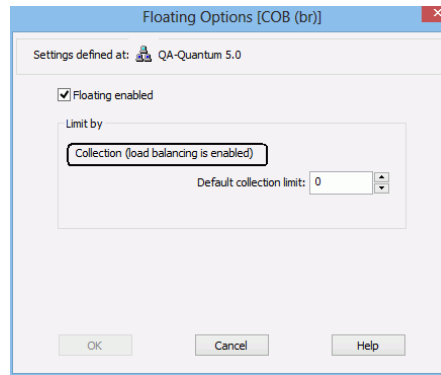
When **Collection** is selected as the **Limit by** option for floating collections, you can specify the limits for specific collections using the new **Floating: Collection Limits** policy table, which is available at the system, library, or branch level in Polaris Administration. The columns display the received branch (the check-in branch), the collection, and the maximum **In** item limit (number of final items with a circulation status of **In**) for that collection.
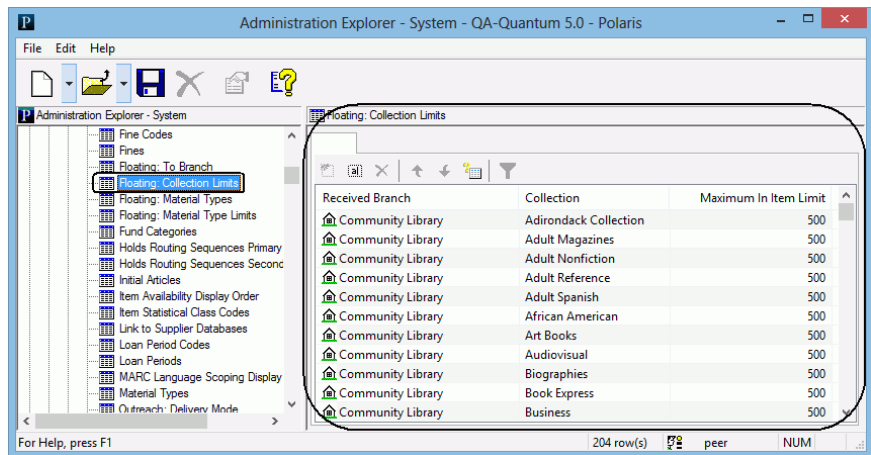
The new permission **Modify Floating Collection Limits Table: Allow** is required to modify this table.

Collection Load Balancing

If the **Limit by Collection** option is selected on the Floating Options dialog box, you can also select **Load balancing**. Load balancing is available at the system level only, so all branches that use floating collections must agree to either enable load balancing or not.

When load balancing is enabled, and an item cannot float into the receiving branch because it would exceed that branch's collection limit, the system checks all eligible receiving branches that participate in floating collections. The item will float to the branch that has the lowest ratio of the number of

items to the collection limit. If no eligible branches are found, or two or more branches' collections have the same ratio of the number of **In** items to the collection limit, the item is returned to its assigned branch.

The following options can be selected when either **Limit by** option is selected (**Title/Material type** or **Collection**), but they are not available if **Load balancing** is selected:

- **Float items with no matching collection**
- **Float items with no collection**
- **Prompt for additional floating items**

Set floating limits by collection

To set up floating limits by collection for the library system:

> **Note:**
> At the System level, your library can use the Floating Options parameter to define floating limits by the maximum number of **In** items attached to the same bibliographic record for each material type, or by the number of **In** items in a collection. If **Title/Material** type is selected, the limits are set for the receiving branches using the Floating: Material Type Limits policy table. If **Collection** is selected, the limits are set for the receiving branches using the Floating: Collection Limits policy table.

1. In the Administration Explorer, select **System**, **Parameters**, and select the **Patron Services** tab.

2. Double-click **Floating options**.
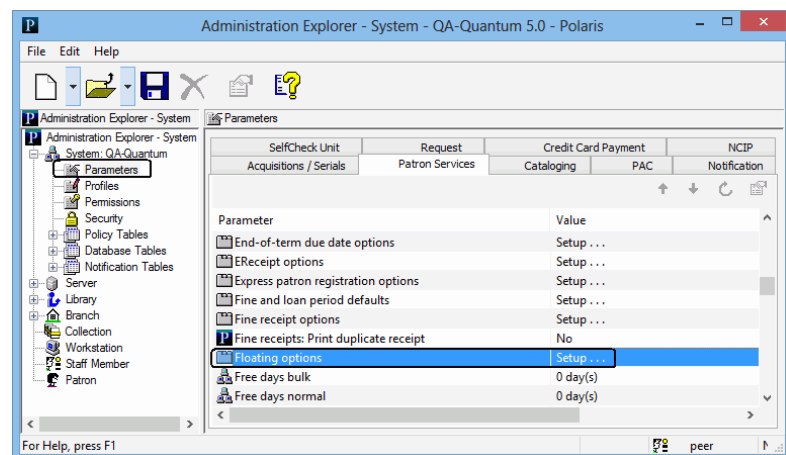
The Floating Options dialog box opens.
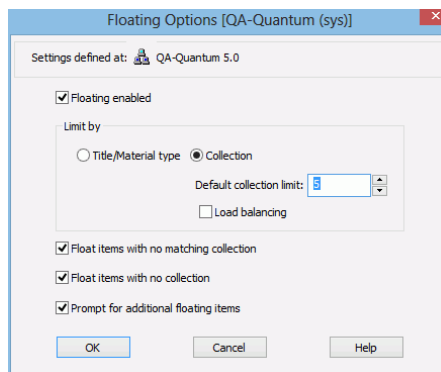
3. Select **Floating enabled** if it is not already selected.

4. Select **Collection** under **Limit by**.

5. Select a number to define the default limit for the number of **In** items that the collections can have in the **Default collection limit** box.

> **Note:**
> A value of **0** means no items can float into the collection.

6. To apply load balancing, select the **Load balancing** check box.

When **Load balancing** is selected, the additional check box options are not displayed.
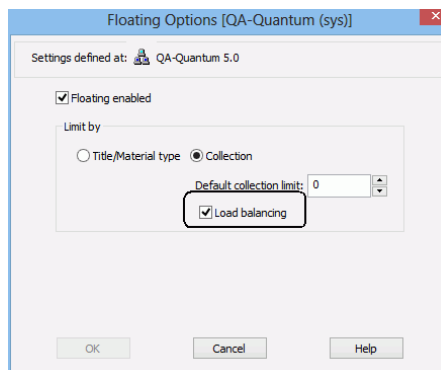
7. Select **OK** to save the settings and close the dialog box.

Limit the number of floating items a branch can receive for a collection

To set limits on the number of items that can be checked in for a floating collection:

1. In the Administration Explorer, select the System, Library or Branch.

2. Open the **Policy Tables** folder, and select **Floating: Collection Limits**.

   The Floating: Collection Limits table is displayed in the details view.
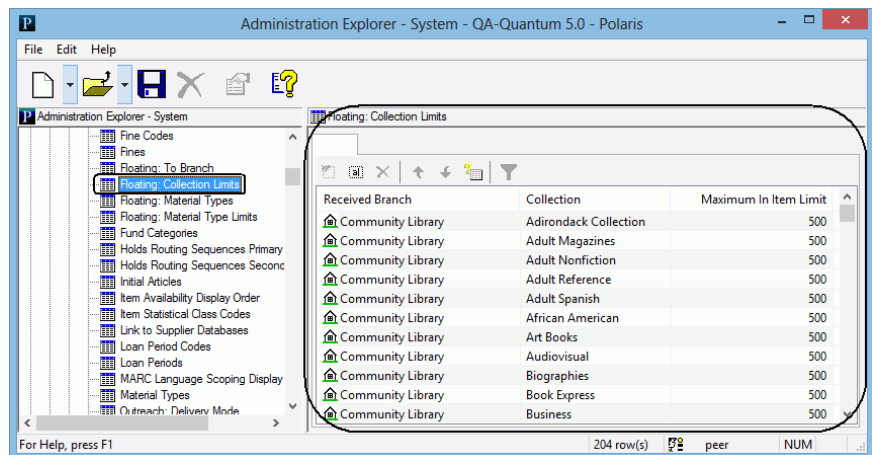
3. Select the collection for which you want to change the receiving branch's limits.

4. Click ▣ .

   The Modify box opens.

5. Change the collection limit as appropriate, and click **OK**.

   The Modify box closes.

6. Select **File, Save** to save the policy table.

Missing Part Check-In

Polaris 5.0.145

Polaris now includes new options for items, such as DVD or CD sets, that are returned with missing parts. With this development, staff members can manage these items whether the missing parts are discovered before or after the item is checked in. A staff member checking in multi-part items is likely to discover the missing parts while the item still has a status of **Out**. But, if the library uses automated materials handling (AMH) units, a staff member may discover that parts are missing after the item has been checked in by the AMH and has a status of **In**.

This development includes the following:

- The Special Item Check-In dialog box, which opens when an authorized staff member selects Special Item Check-in from the Tools menu on the Check-In workform.
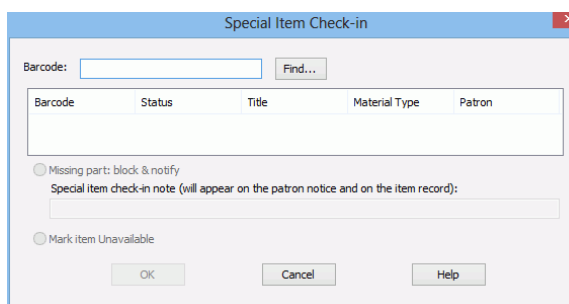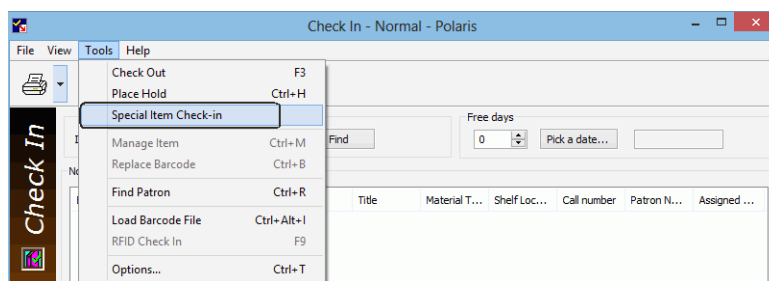
Authorized staff members can use this dialog box to scan the item's barcode or search for the item with the missing part, and then update the item record's status by selecting one of the following options:

- **Missing part: block & notify** - Selecting this option updates the item's status to **Claim Missing Parts**; blocks the item from being circulated; moves the item to the Patron Status workform, Claims view; generates a notice to the patron; and includes the special item check-in note (if entered) on the patron notice and the Item Record workform. If the item's status is still **Out**, the notice is sent to the current borrower. If the item's status is **In**, the notice is sent to the last borrower. (If the last borrower is not available for an In item, a message appears and the item is not added to the dialog box.)

- **Mark item Unavailable** - Selecting this option updates the item to **Unavailable,** which prevents the item from being circulated.

- New Circulation permissions:
  - **Special item check-in: Access** - Users with this permission can access the Special Item Check-In dialog box.
  - **Special item check-in: Select missing** - Users with this permission can select the **Missing part: block & notify** option on the Special Check-In dialog box.
  - **Special item check-in: Select unavailable** - Users with this permission can select the **Mark item Unavailable** option on the Special Check-In dialog box.
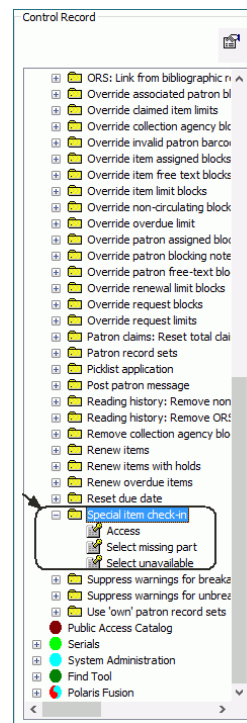
- A new **Claim Missing Parts** status was added to the Circulation Statuses database table in Polaris Administration. The status description can be modified.
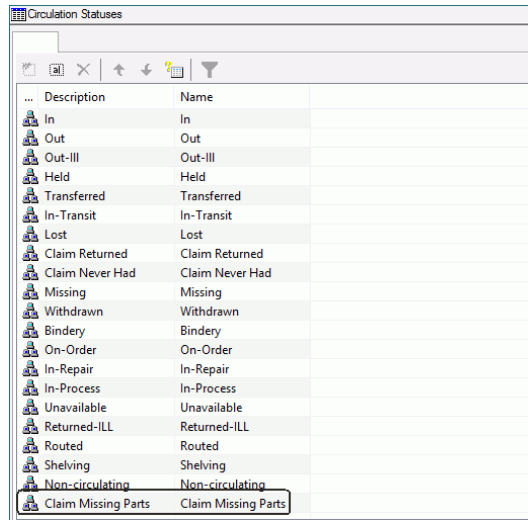
- The **Claim Missing Parts** status displays in the Item Record workform for items with missing parts.
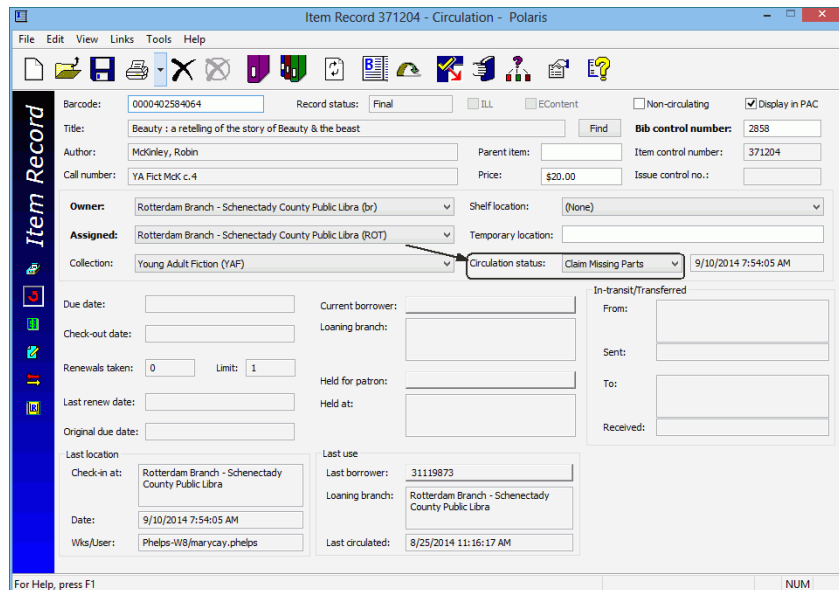
- The **Claim missing parts status** can be used to find item records when searching by Circulation status.
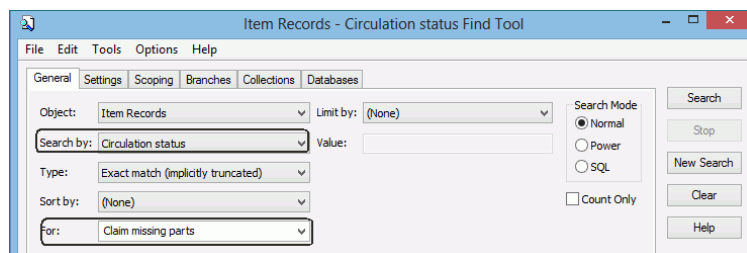
- Missing parts will appear on the Claims view of the Patron Status workform. Staff can select the item with the claim type **Claim Missing Parts** and charge the patron for the missing parts if the item is salvageable, or declare the item lost if the missing part cannot be recovered and the entire set must be removed from circulation (un-salvageable):

  - To charge the patron for the missing part, select the Check In/ Charge button ![icon] to open the Charge for missing parts dialog box. Enter the amount of the charge, select the reason, and enter any applicable notes.

Tip:
When the item is updated using the Special Item Check-In dialog box, the item does not go in transit, no floating processing occurs, and the assigned branch does not change.
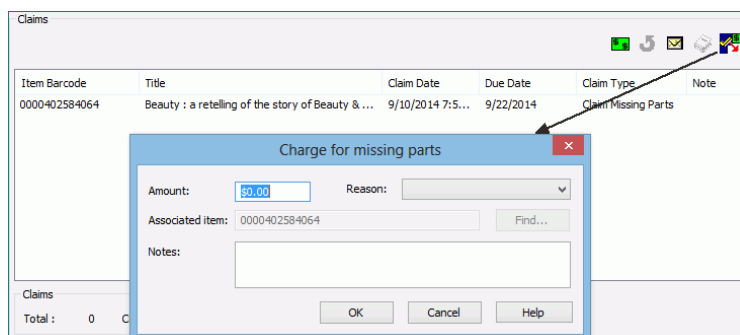
  - To declare the item lost, select the Declare Lost button ![icon] to open the Declare lost item dialog box. Enter information for the un-salvageable item.

Tip:
You can select an item with any claim type and select ![icon] to declare the item lost from the Claims view.
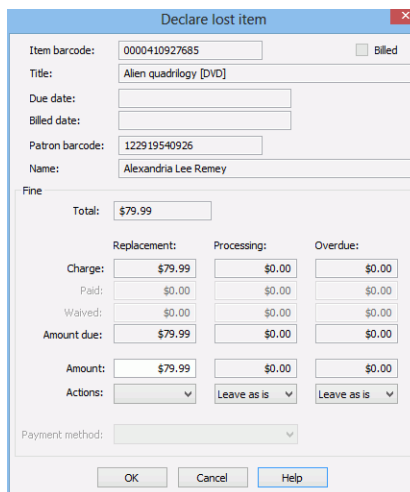
- A new **Missing Parts** system-defined reason was added to the **Fee Descriptions** policy table in Polaris Administration.

- **Claim Missing Parts** was added to the **Holds options** dialog box on the **Requests** tab to prevent holds on items with missing parts.

- A system block is placed on the item record if it has a **Claim Missing Part** status. This message appears when a user tries to circulate an item with a missing part.

- The Suppress Item Display dialog box (**profiles, PAC, Suppress item display**) includes the **Claim Missing Parts** circulation status that libraries can select to prevent items with missing parts from displaying in the Polaris PowerPAC or Mobile PAC.
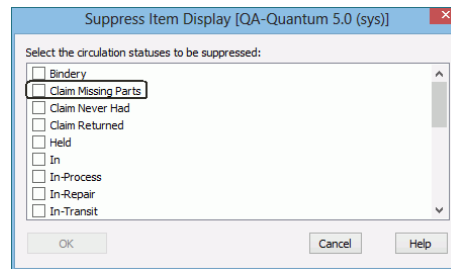
- The existing **Notification options** parameter in Polaris Administration was modified as follows:
  - The **Reminder** tab includes a selection for **Missing part notice**. This option is un-selected by default. When **Missing part notice** is selected, the default Notification method is **Patron preference**, but the library can change this setting.
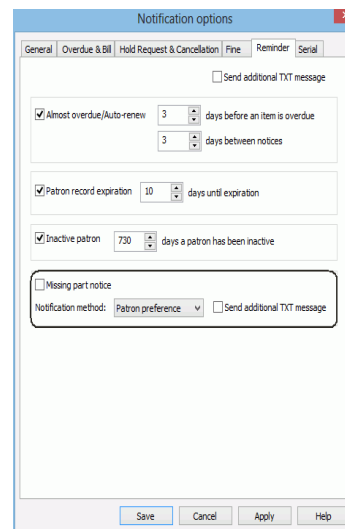
  - On the **Overdue & Bill** tab, if the existing options **Include claimed items** and **Combined patron notices** are selected, the Missing Parts notice is included in the combined notice.

- The Missing Part notice is sent according to the settings in the **Notification options** parameter for the check-in branch.

  > **Note:**
  > The text and the subject of each notice can be edited in Web Admin.

  - E-mail - The Subject is **Missing library item**, and the default header text is: **An item was returned to the [*check-in library name*] missing a part(s). Please return the part(s) to the library within 48 hours to avoid fines.** If a note was entered in the Special Item Check-In dialog box, an additional **Missing:** field displays the note. The item details are listed: title, author, call number, barcode, format, due date, check out date, check out from. If the item has a status of **In**, the check-in date is displayed. If the item has a status of **Out**, the check-in date is blank.

  - TXT - The Subject is **Missing library item**, and the default text is: **[*Item Title*] was returned to the library with parts missing. Please return the part(s) to the library within 48 hours to avoid fines.** The note from the Special Item Check-In dialog box does not display in the text message. If there are missing claim part items in a single reporting period, a separate text message is sent for each.

  - Phone - The default message is: **An item was returned to the [*check-in library name*] missing a part(s). Please return the part(s) to the library within 48 hours to avoid fines.** The message does not include text from the Special Item Check-In dialog box.

  - Print - The default header text for the printed notice is: **An item was returned to the [*check-in library name*] missing a part(s). Please return the part(s) to the library within 48 hours to avoid fines.** If a note was entered in the Special Item Check-In dialog box, an additional **Missing:** field displays the note. The item details are listed: title, author, call number, barcode, format, due date, check out date, check out from. If the item has a status of **In**, the check-in date is displayed. If the item has a status of **Out**, the check-in date is blank.

If an item is in a **Claim Missing Part** status, and the missing part is recovered, you can check the item in normally if you do not want to charge the patron.

Or, if you want to charge the patron, select to check the item in and generate the charge.

Check Outs via SIP for Specific Item Circulation Statuses

Polaris 5.0.145

Library organizations can now select the following circulation statuses that will not block patrons from checking out items using an organization's self-check unit:

- **Bindery**
- **Claim Never Had**
- **Claim Returned**
- **In-Repair**
- **In-Transit**
- **Missing**
- **Unavailable**
- **Withdrawn**

The following circulation statuses cannot be selected, and items continue to be blocked from check outs: **Transferred, Lost, Returned-ILL, On-order, On-the-Fly, In-Process**, or **Routed**. This development does not affect NCIP or check-in functions.

In Polaris Administration, a new Self-Check parameter **Check-out: Item options** was added where the library can specify the check out options for their SIP self-checkout stations. The workstation branch of the SIP self-check machine determines the circulation statuses that will or will not block check-outs, not the item's owning or assigned branch.

Double-click the parameter to open the Check-Out: Item Options dialog box. The following existing parameters were added as check box options to the new dialog:

Tip:

These check boxes are unchecked by default unless the library has selected them prior to the upgrade. If your library has selected any of these check boxes, they are selected in the new dialog box.

- **Allow checkout of items with free text blocks.**
- **Allow checkout of items with library-assigned blocks.**
- **Deny checkout if item is from another branch.**
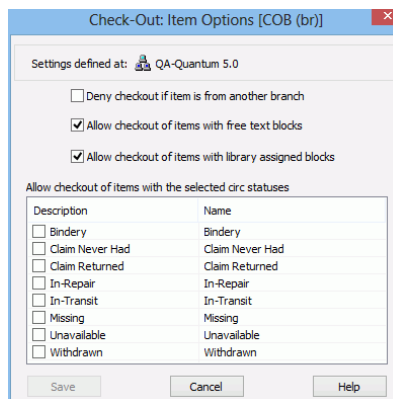
To specify the circulation statuses for which you want to allow SIP check outs, select the statuses from the list.

Note:

The statuses are from the Circulation Statuses database table.

If these statuses are selected as eligible for check out from a self-check station via SIP, the items are processed as follows:

- **Bindery, In-Repair, Missing, Unavailable, Withdrawn -** Check-in is bypassed, and the item is checked out.
- **Claim Never Had, Claim Returned -** The item is checked in first, and the claim is resolved, but any outstanding bills remain for the patron who made the claim.
- **In-Transit -** Check-in is bypassed, holds are ignored, and the In-transit to fields are cleared during check-out.

Auto-Renew

Polaris 5.0.146

Items are eligible for automatic renewal, via the Notices Processing SQL job, when the item's assigned branch has set the new **Renewal: Auto-renew** patron services parameter to **Yes**. When the Notices Processing job runs, it checks the settings in the **Notification options** parameter for the patron's registered branch. If the patron has items out that are eligible for auto-renewal, the items are renewed based on the number of days selected in the **Almost overdue/Auto renew __ days before an item is overdue** field on the Reminders tab of the Notification options dialog box. The new due date for an automatically renewed item is calculated by taking the current due date and adding the full loan period.

Automatically renewed items are included in the *Almost overdue* reminder notice. An e-mail will notify the patron that the item was renewed automatically, unless the patron has opted out of receiving this type of reminder notice. The library can set patron access options for the PAC that allow patrons to opt out of receiving reminder notices.

The conditions, such as patron blocks, that prevent manual renewals also prevent automatic renewals. In addition, automatic renewals are prevented for: hourly loans; course reserve items; e-Content; ephemeral items; items with an assigned branch that charges patrons for checkouts and renewals, or for renewals only; overdue items; or items with loan periods less than the number of days before an item is overdue.

To set up auto-renew, you use new and existing settings in Polaris Administration. The item's assigned branch determines if the item is eligible for auto-renewal, and the patron's registered branch determines when the renewal is done and whether a reminder notice (with an optional text message) is sent to the patron.

This development includes the following:

- A new **Renewal: Auto-renew** patron services parameter in Polaris Administration that enables or disables the auto-renew process.

- Automatic renewals are completed as part of the existing Notices Processing SQL job.

- The **Almost overdue** label on the **Reminder** tab of the existing Notification options dialog box was renamed **Almost overdue/Auto-renew** because auto-renewed items will be added to the almost overdue reminder notice. If the patron has items out that are eligible for automatic renewal, they will be renewed based on the number of days selected in the **Almost overdue/ Auto renew _____ days before an item is overdue** field.
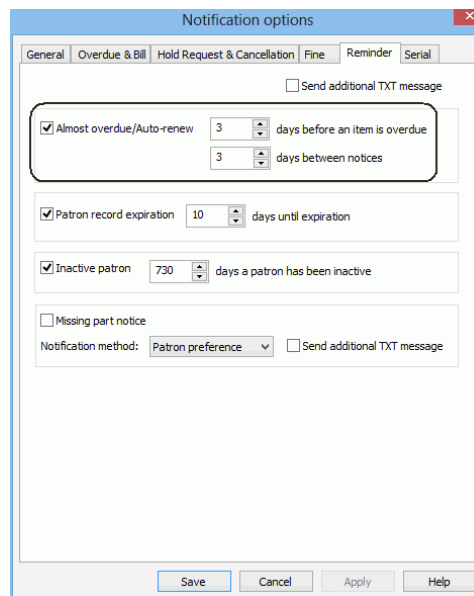
- The existing **Patron Access Options** PAC profile contains new options for libraries to allow patrons to choose which e-mail reminder notices they will receive: **Almost overdue/Auto-renew reminder notice; Patron record expiration reminder notice;** and **Inactive patron reminder notice**.
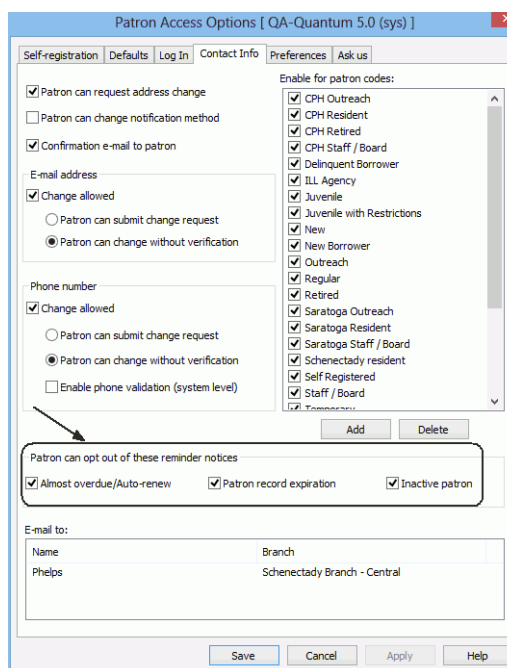
- New fields were added to the Patron Registration workform for library staff to indicate if a patron wants to opt out of receiving reminder notices. Changes to the patron's information in the staff client is reflected in the patron's PAC account.
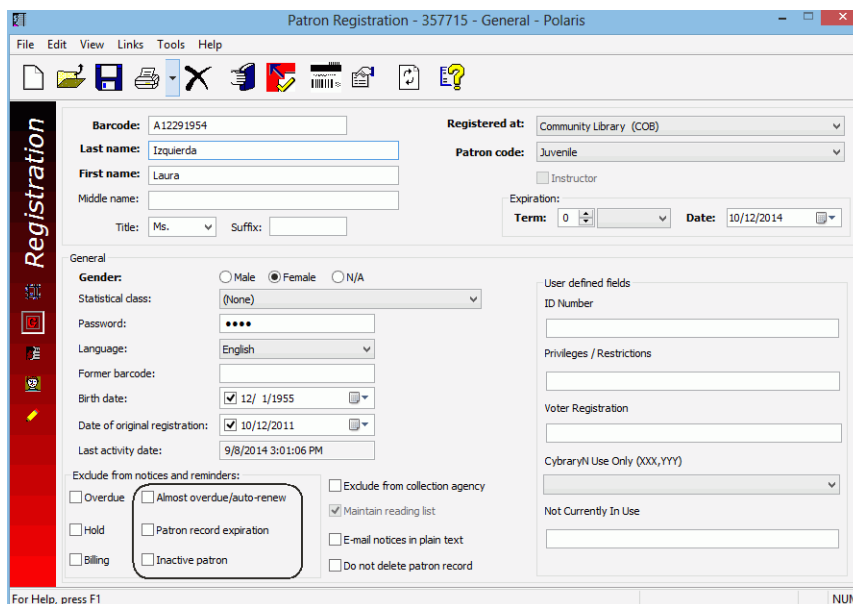
Note:

When a patron's registered branch sends reminder notices, and the patron has not opted out of the type of reminders the branch sends out, a message is displayed if a user saves the record without a primary email address.
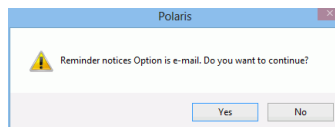
- The Patron Bulk Change dialog box includes options to change the **Exclude from notices and reminders** settings for multiple patrons.
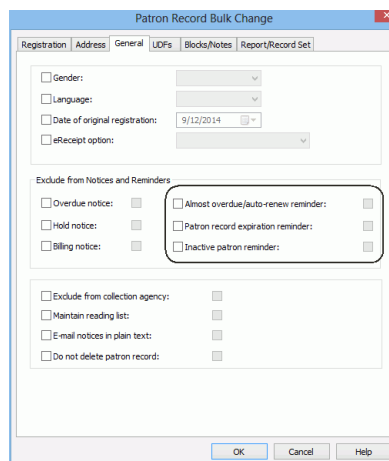
- E-receipts will not be sent to patrons when items are renewed automatically, whether e-receipts are enabled or not in Polaris Administration.

- Automatic renewals will appear in the Item Record workform, History view.

- New fields were added to the Patron account in the PowerPAC and Mobile PAC for patrons to choose which reminder notices they will receive. (Opt-out options selected in the Patron Access Options profile for the branch apply to patrons who are registered at that branch.) Changes made in the PowerPAC or Mobile PAC are reflected in the patron's record in the staff client.

PowerPAC e-mail reminder notice options

Mobile PAC e-mail reminder notice options

- If a patron's reminder notice settings are changed in offline mode, the changes are retained when the patron record is uploaded to Polaris.

- Almost Overdue Reminder/Auto-Renew Notice example:

  Note:
  The notice strings can be customized in WebAdmin.

- Existing Polaris standard reports that contain renewal counts will include automatic renewals along with manual renewals. However, since auto-renewals use a different check-out transaction subtype, libraries can create custom reports to differentiate between manual and automatic renewals.

In SimplyReports, patron list reports now include the following output columns for reporting on patrons who have opted out of receiving e-mail reminder notices: **Patron exclude from almost overdue; Patron exclude from patron expiration; Patron exclude from inactive patrons**. In addition, the **History action** item record filter has a new **Renewal (auto-renew)** selection to limit the report output to items that have been renewed automatically.

Reminder Notice Opt Out

Library staff can now specify which e-mail reminders patrons do not want to receive. In addition, you can allow patrons to select these opt-out options themselves.

> **Note:**
> If a patron's reminder notice settings are changed in offline mode, the changes are retained when the patron record is uploaded to Polaris.

The Patron Registration workform contains the following **Exclude from notices and reminders** check boxes:

- **Almost overdue/auto-renew**
- **Patron record expiration**
- **Inactive patron**

> **Note:**
> When a patron's registered branch sends reminder notices, and the patron has not opted out of the type of reminders the branch sends out, a message is displayed if a user saves the record without a primary email address.
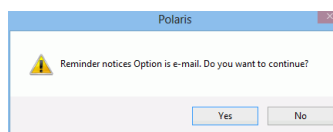
The Patron Bulk Change dialog box includes options to change the **Exclude from notices and reminders** settings for multiple patrons.

The existing **Patron Access Options** PAC profile contains new options for libraries to allow patrons to choose which e-mail reminder notices they will receive: **Almost overdue/Auto-renew reminder notice; Patron record expiration reminder notice;** and **Inactive patron reminder notice**.
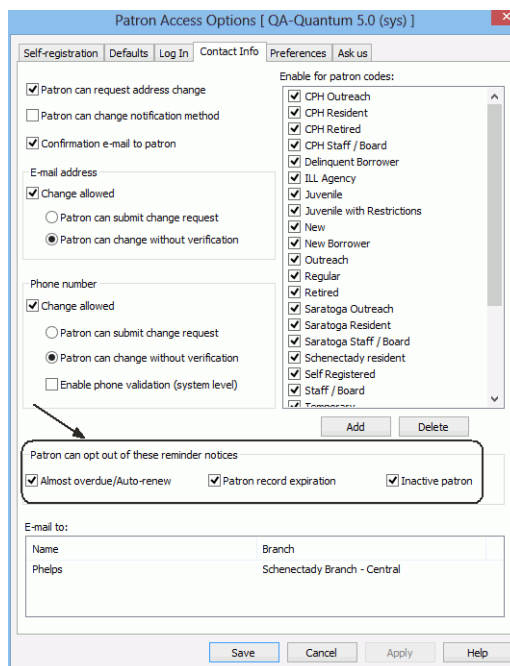
New fields were added to the Patron account in PowerPAC and Mobile PAC for patrons to choose which reminder notices they will receive. (Opt-out options selected in the Patron Access Options profile for the branch apply to patrons who are registered at that branch.) Changes made in the PowerPAC or Mobile PAC are reflected in the patron's record in the staff client.

PowerPAC e-mail reminder notice options

Mobile PAC e-mail reminder notice options