What's New in Polaris 5.0 SP2 and Leap 1.0 SP2

innovative

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Contents

New and Modified Polaris Administration Settings

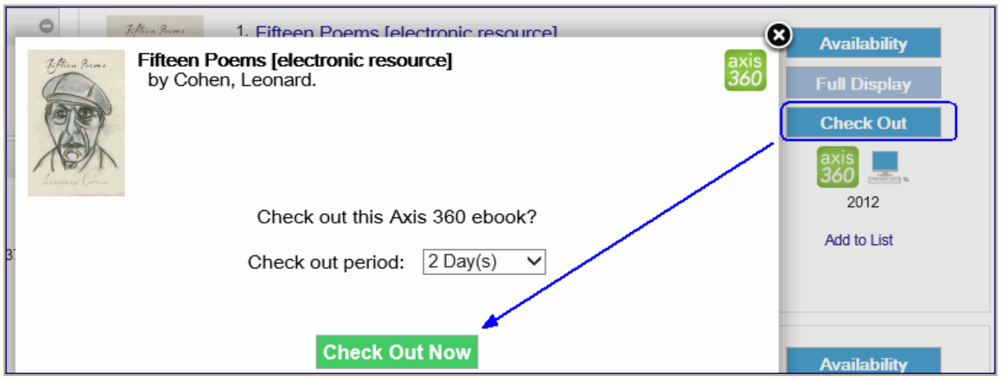
The following table lists the new and modified parameters, profiles, and permissions in Polaris Administration.

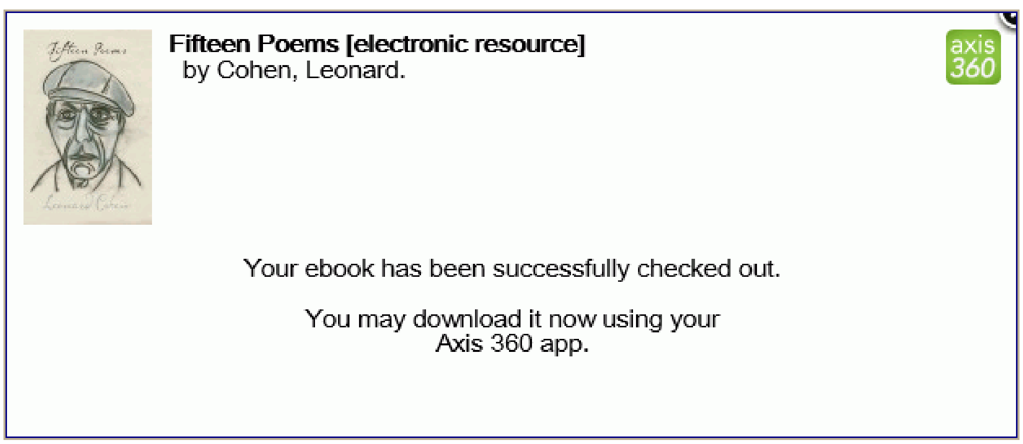
Location / Name	Purpose	Default	Level	More Info
Modified Credit Card Payment Parameter				
Online payments Configure: Setup	Added EnvisionWare configuration options to the Properties dialog box.	None	System, Library, Branch	See: "EnvisionWare ECommerce Integration - Polaris and ExpressCheck" on page 23.
Modified Patron Services Parameter				
Check-out: Receipt Options	Added option: **Prompt for eReceipt configuration in Leap**	Not selected	System, Library, Branch	See: "Option to Configure eReceipts at Checkout" on page 53.
New Circulation Permissions				
Bill a charge manually	Staff members with this Patron Status permission, in addition to the existing Patron Status Access and Modify permissions, can manually add charges to a patron's billing notice.	Not granted	Branch, Staff Member, Workstation	See: "Manually Bill Patrons for Charges " on page 14.
New PowerPAC Profile				
OverDrive download: Enable on in-house workstations	When this profile is set to **No**, patrons cannot download or access OverDrive eContent from library workstations designated as "in-house."	No	System, Library, and Branch	See: "Check Out and Download OverDrive Integrated EContent from the PAC" on page 5.

Axis 360 API Changes

Axis 360 has developed a single app for listening to audio-ebooks and reading ebooks, which eliminates the need for a Blio User ID, Acoustik User ID, or Adobe ID. This improved ease of use for the patron required modifications to the Axis 360 APIs, and in response to those changes, PowerPAC and Mobile PAC were modified so that users no longer need to select the eContent format when checking out Axis 360 integrated eContent titles.

When checking out Axis 360 integrated eContent titles from PowerPAC, the user selects the **Check Out** button. A dialog box opens, and the user selects the **Check Out Now** button. There is no need to select a format.





When checking out Axis 30 integrated eContent from Mobile PAC, the user selects the title in the Mobile PAC search results and selects **Check Out** on the Title page to go to the Check Out page.

On the Check Out page, the user selects the **Check Out** button.

A confirmation message informs the user that the eContent has been checked out and is ready to download.

Improved Processing for Integrated eContent

This release includes changes to import and synching processes to improve efficiency and accuracy for integrated eContent. The reorganized import processing steps improve efficiency, and a new overnight process provides more accurate title and availability information.

The new overnight process, PolAPIConsumerServiceOvernightProc.exe, checks for new titles (OverDrive only) and changes in item availability, such as added copies (OverDrive and Axis 360). It runs in addition to the existing PolAPIConsumerService.exe, which synchronizes patron circulation activity. For Axis 360 integrated eContent, processing is the same as before, but it runs in the new service.

For OverDrive, the PolAPIConsumerServiceOvernightProc.exe runs in either full synch or delta modes, based on a new appSettings.key named LastProcessTime. The first time the process runs after the service has been started, the LastProcess time is set to nothing by default, and a full synch occurs. New titles are brought in and availability is sychronized for all OverDrive eContent titles owned by the library.

After the initial run, the LastProcessTime is determined by the previous successful run, and a delta synch occurs. During a delta synch, only titles that are new or have availability changes since the LastProcessTime are synchronized.

The service should be stopped, restarted, and run in full synch mode when:

- A vendor account is enabled
- It is necessary to bring in the full set of OverDrive titles again (occasionally necessary because of changes to import settings and related processing).

If it is necessary to stop and restart the service, but a full synch is not desirable for some reason, you can force a delta synch by entering a valid datetime string into the LastProcessTime appSettings.key.

Check Out and Download OverDrive Integrated EContent from the PAC

Patrons who are logged into their accounts in PowerPAC or Mobile PAC can now check out OverDrive integrated eContent titles, and access the file from the final checkout acknowledgment or from their patron accounts. If the title is available in a single format, the PAC user selects the single format shown. If the title is available in multiple formats, the user selects the **Get Title** button, and a drop-down menu displays the available formats.

The patron experience may vary according to the device used to access the eContent; the operating system and the apps installed; and the browser settings. To access the eContent, the patron may need to allow one-time pop-ups or turn off the pop-up blocker on some devices, such as on the iPad.

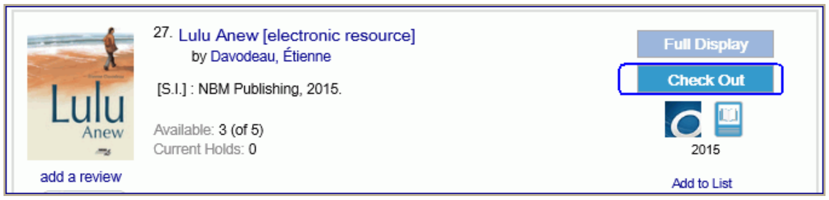
The following variables are outside of the control of the Polaris software:

- DRM-protected Adobe PDF, EPUB files (.acsm files), and Open EPUB files (.epub-files) may open in the OverDrive reading application, Adobe Digital Editions, or another reading application.
- OverDrive Read, OverDrive Listen, MediaDo, and streaming video titles open and play in a new browser tab or a new browser window.
- Kindle titles open in a new browser tab or window with an Amazon login page. The title is sent to the user's Kindle account; the Kindle app does not open automatically.
- Nook titles are sent to the user's Nook account; the Nook app does not open automatically. Depending on the user's device and the Barnes & Noble account, a new browser tab or window may open with a Barnes & Noble login page.
- Windows phone users may experience unsatisfactory results, and may prefer to switch to the OverDrive app to download their titles.

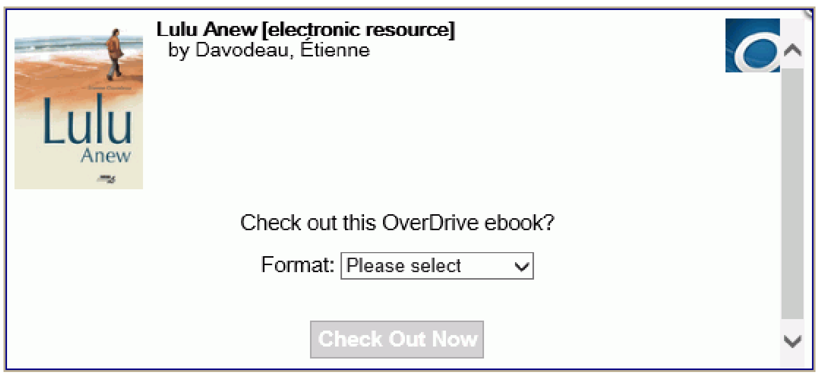
Check Out and Download OverDrive EContent from Polaris PowerPAC

A patron who is logged into PowerPAC can check out and immediately download or access OverDrive integrated eContent without going to the OverDrive app.

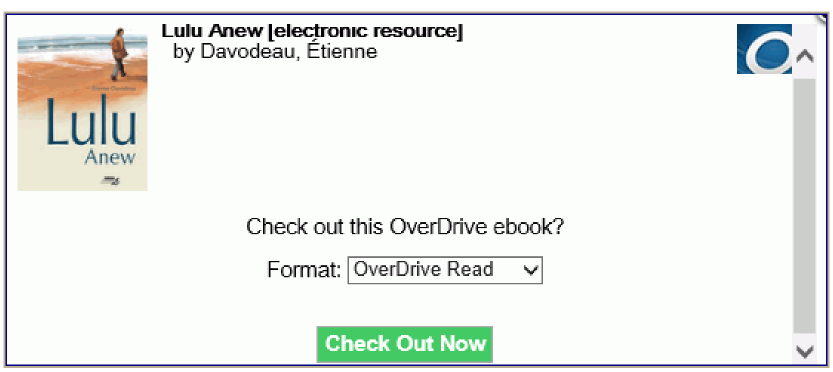
The patron selects the **Check Out** button from the title list.



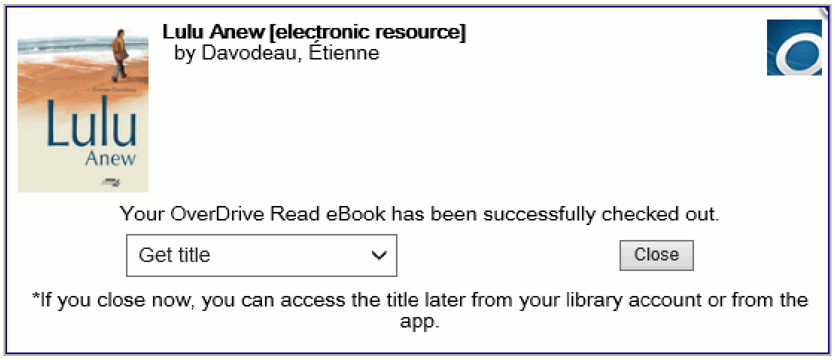
Another light box prompts the patron to select the format for the eContent check out.



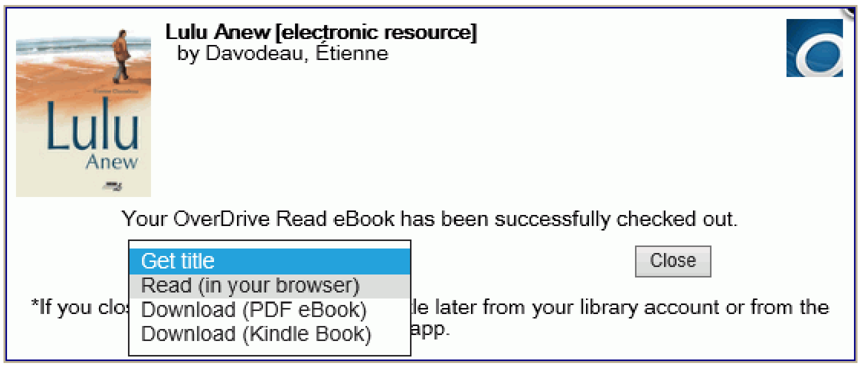
The patron selects the format in the **Format** drop-down list box, and the **Check Out Now** button is activated.



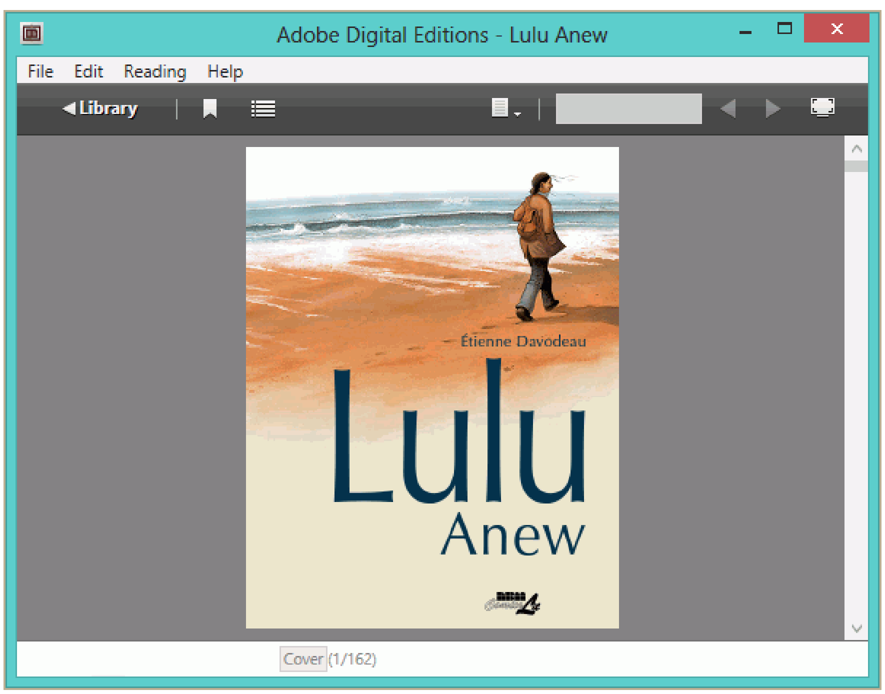
Another light box confirms that the eContent was checked out.



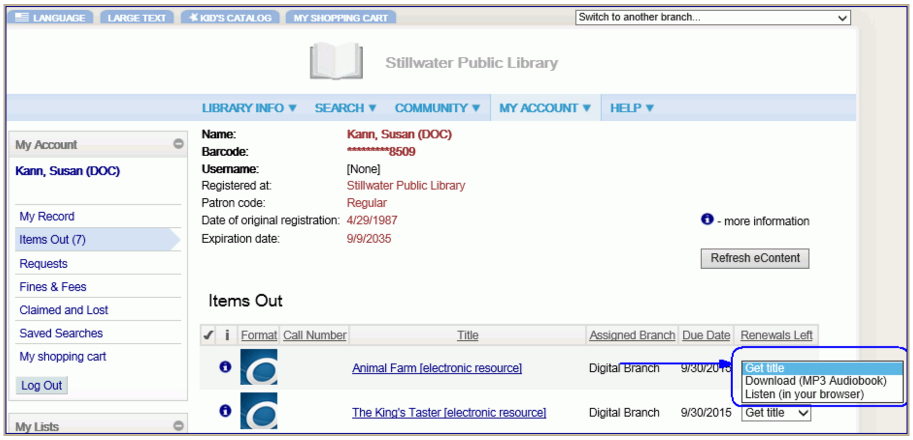
The patron selects an option in the **Get title** drop-down list box.



The eContent is downloaded in the format the patron selected without the patron having to go to the OverDrive app.



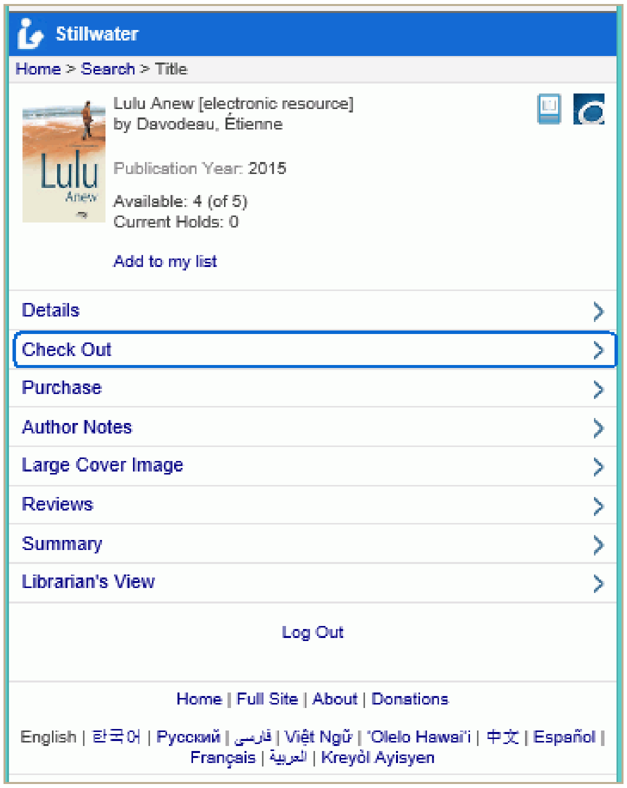
Or, the patron can select **Close** to close the light box and download or access the eContent from the Items Out list or from the OverDrive app.



Check Out and Download OverDrive EContent from Polaris Mobile PAC

A patron who is logged into Mobile PAC can check out and immediately download or access OverDrive integrated eContent without going to the OverDrive app.

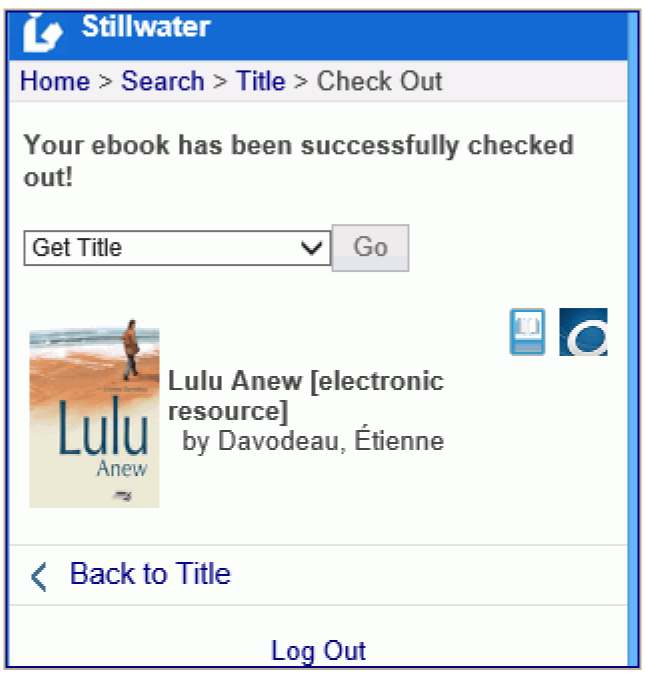
The patron selects **Check Out** from the title display in Mobile PAC.



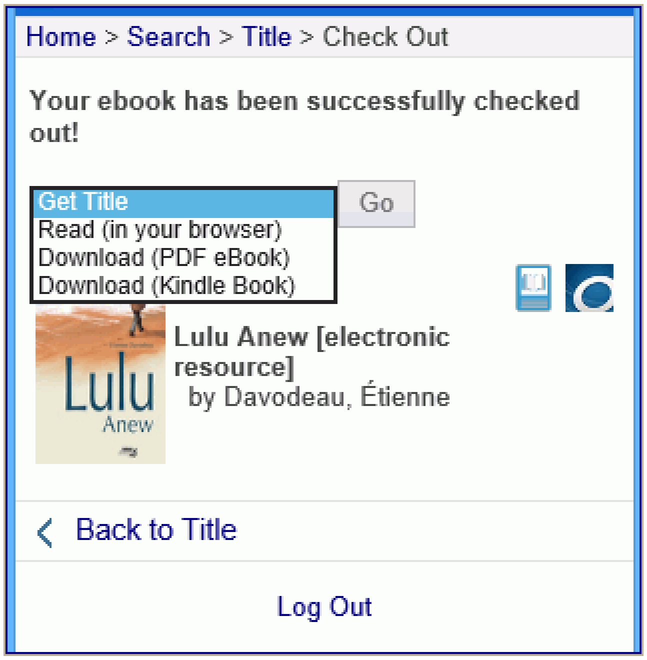
The Check Out view opens.

The patron selects the format in the **Format** drop-down list box and selects the **Check Out** button.

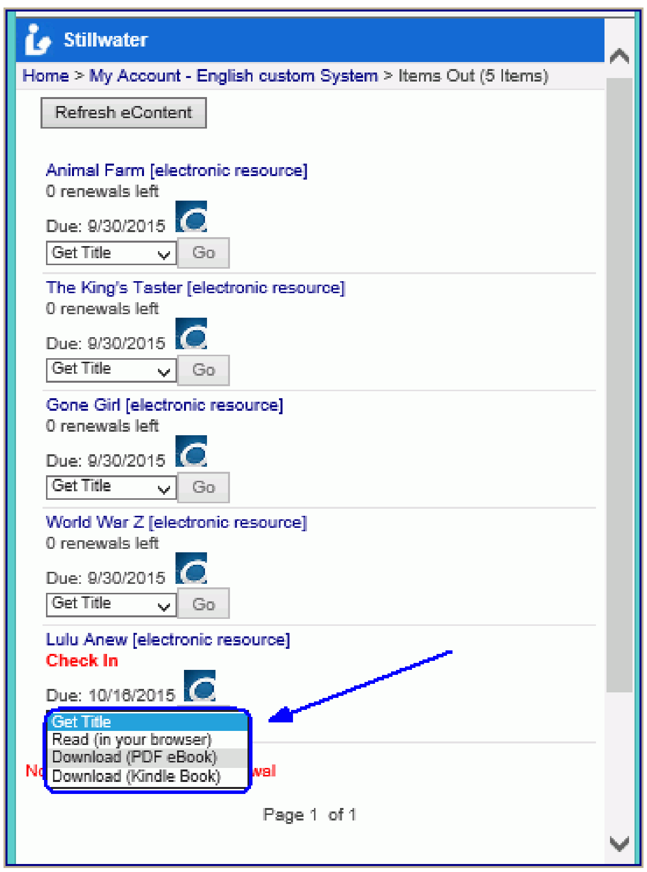
A message confirms that the check-out occurred, and the **Get Title** drop-down list contains the download formats for the eContent.



The patron selects the format for download in the **Get Title** drop-down list box. The OverDrive eContent is downloaded in the format the patron selected without the patron having to go to the OverDrive app.



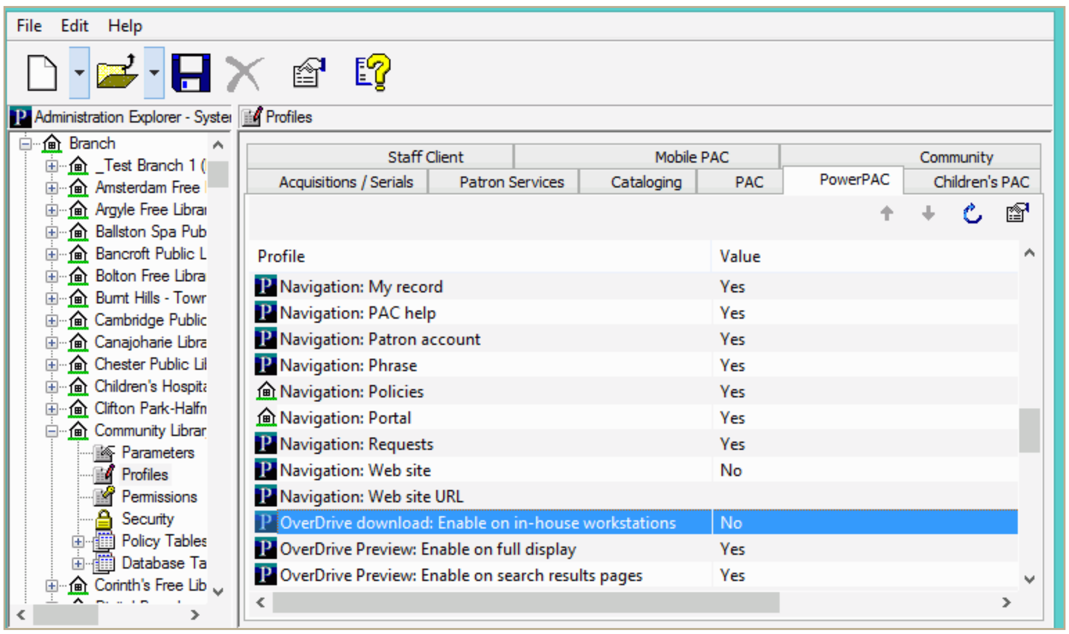
Or, the patron can navigate away from the page without getting the title, and then download or access the eContent later from the Items Out list or from the OverDrive app.



The patron selects an option in the **Get title** list, and the eContent is downloaded to the patron's phone or device.

Option to prevent downloads of OverDrive eContent on library workstations

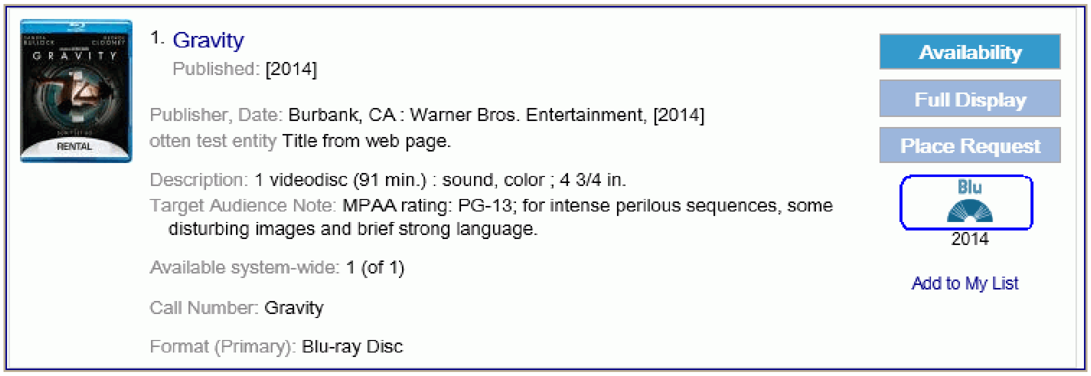
Your library can prevent patrons from downloading OverDrive eContent titles to library workstations or opening checked-out eContent in the browser on a library workstation by setting the new PowerPAC profile **OverDrive download: Enable on in-house workstations** to **No**. This profile is available at the System, Library, and Branch levels in Polaris Administration, and the default setting is **No**. If the profile is set to **No**, patrons will not be able to download or open checked-out OverDrive eContent on workstations specified as In-house (using the In-House Access Definitions table for the PAC connection library).



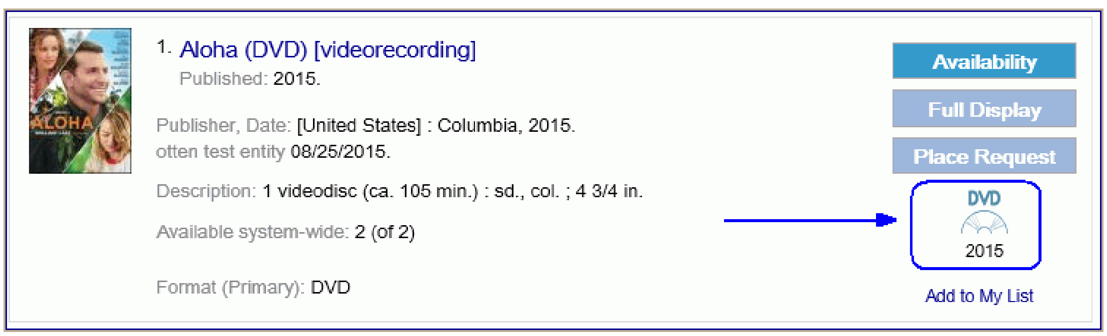
New TOM Icons for Blu-ray and DVD

To ensure that patrons and staff members can more readily distinguish between video formats for DVD and Blu-ray discs, the icon colors were changed. The Type of Material (TOM) icon for Blu-ray is now blue with **Blu** as the text above the image, and the TOM icon for DVD is a light silver-gray with **DVD** as the text above the image.

Example of a Blu-ray title displayed in PowerPAC:



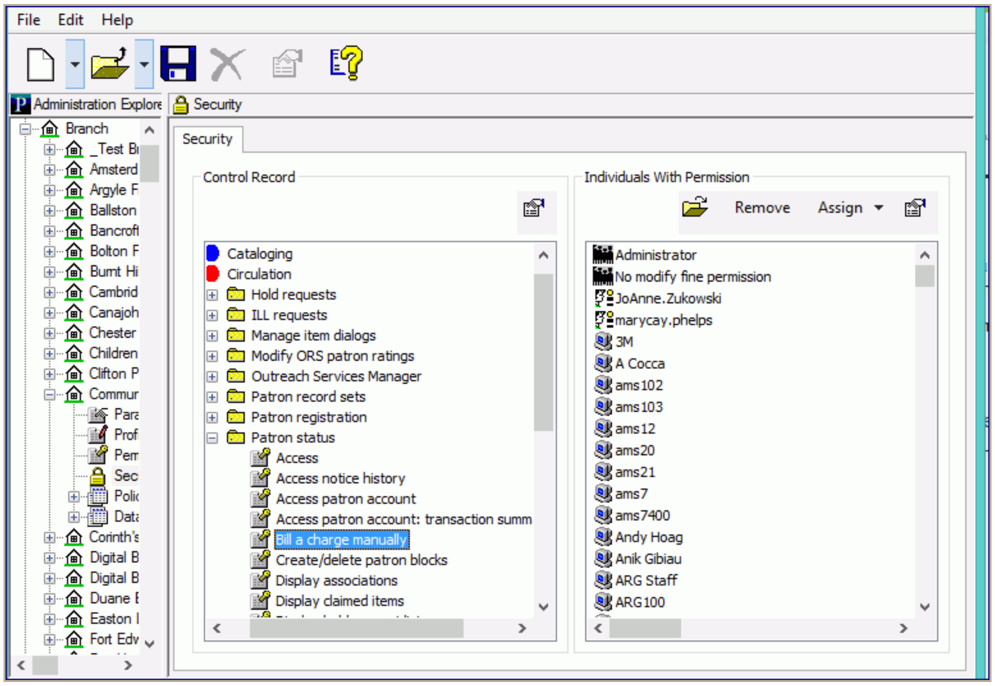
Example of a DVD title displayed in PowerPAC:



Manually Bill Patrons for Charges

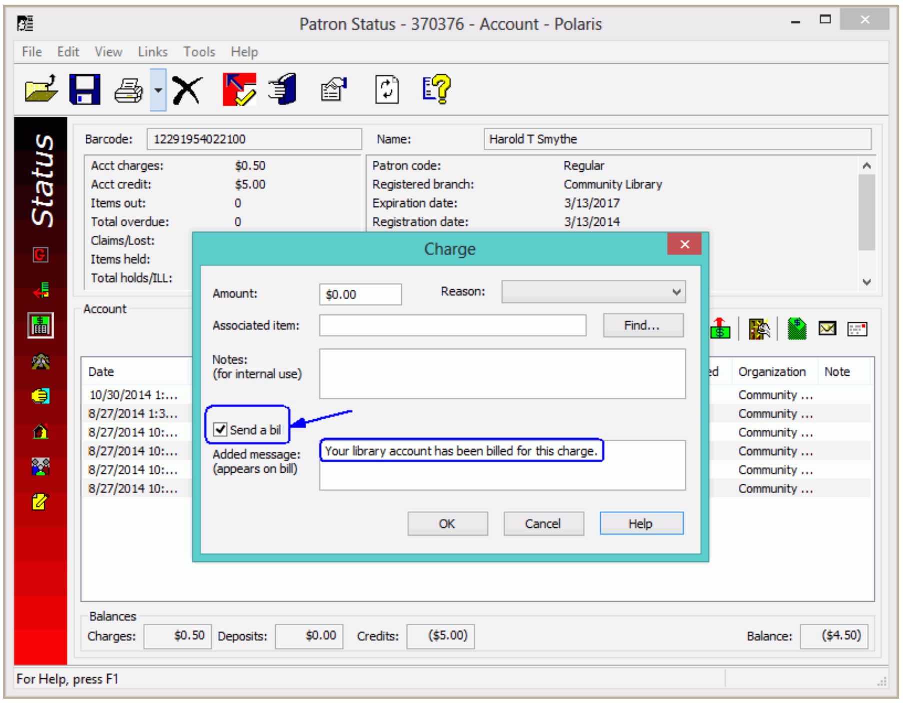
You can now manually bill patrons for charges related to lost items, missing parts, or other fees. When you add a new charge or select an existing unbilled charge and select the **Send a bill** option, the charge appears in a new section on the patron's billing notice. Charges previously billed to the patron cannot be manually charged.

To bill a charge manually, a staff member requires the new Circulation, Patron Status permission **Bill a charge manually** (available at the Branch level), in addition to the existing permissions, **Access patron account** and **Modify patron account**.

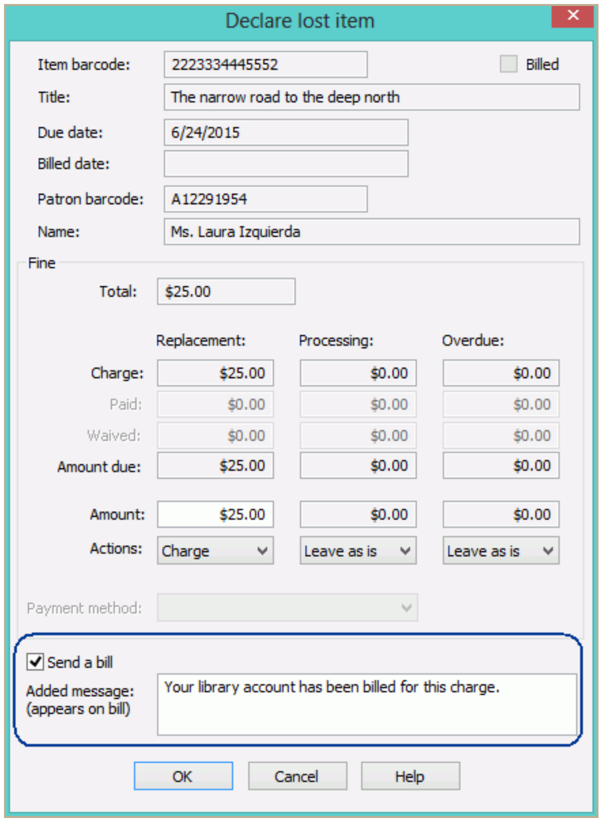


If you have the required permissions, you can add a charge to a patron's account and select **Send a bill** on the Charge dialog box. When the **Send a bill** check box is selected, the dialog box expands displaying the default Added message: **Your library has been billed for this charge**. This default message can be edited in WebAdmin. See "WebAdmin Strings for Manually-Billed Charges" on page 18.

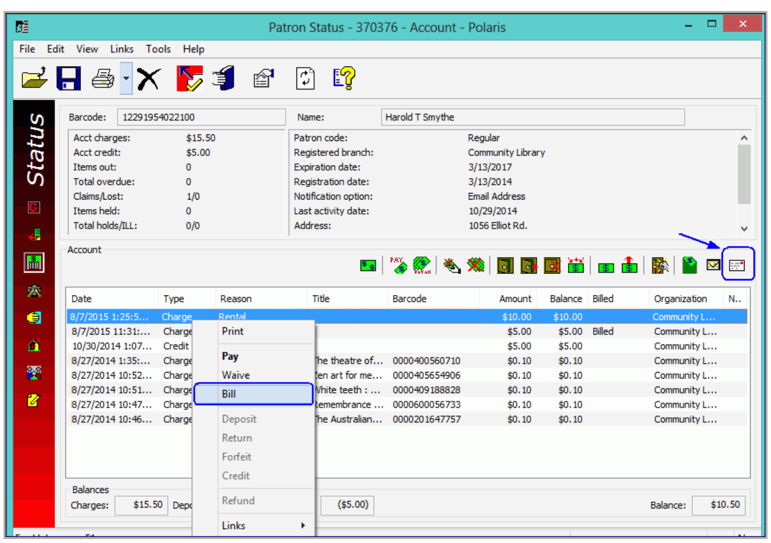
You can also edit the added message by typing a new message in the **Added message** box. If you add a note from the Special Item Check-in dialog box when checking in a Claim Missing Part item, the edited text appears instead of the default text.



When you declare an item lost from the Items Out or Claims view of the Patron Status workform, you can bill a charge manually from the Declare lost item dialog box if the charge has not already been billed.

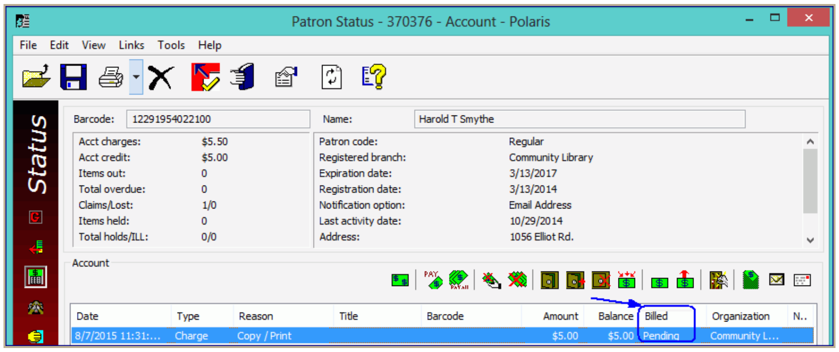


To bill an existing charge, select the charge on the Patron Status workform, Account view, and select the bill button, press **Alt+B**, or right-click and select **Bill**.



The Charge dialog box opens. When you are billing for an existing charge, you can edit only the **Added message** field; the other fields are read-only.

The Patron Status workform, Account view is updated with **Pending** in the Billed column.



Manually billed charges are also included in existing billing notices on all bill types (print, email, and text message) in a new section with a separate header. The billed charges are processed during overnight notices processing, and the notices are sent out according to the library's notification settings in Polaris Administration and the patron's preferences. If you export billing notices, manually-billed charges are in a separate export file.

When notice processing has run, the **Billed** column on the patron record is updated from Pending to Billed, and the notice history is updated showing the charge was billed. If the charge is associated with a title, the title and material type displays. If the charge is not associated with a title, the reason for the charge (postage, printing, etc.) is listed instead of the title and the material type is blank.

WebAdmin Strings for Manually-Billed Charges			
Usage	**Notice Types**	**Default String**	**Mneumonic**
Header for print notices	billing notice print full, half page, half page dot matrix, combined print full, combined half page, combined print Z fold	Miscellaneous Charges (Bill)	NT_MANBILL_ PRINT_HEADER
Text for print notices	billing notice print full, half page, half page dot matrix, combined print full, combined half page, combined print Z fold	Please pay the following miscellaneous charges on your library account. See the individual charges for details.	NT_MANBILL_ PRINT_BODY
Postcard text	postcard	[date notice printed]. Your library account was billed <$.$$> for <n> charges. Please call the library or check your account online. Example: 8/12/2015. Your library account was billed $12.00 for two charges. Please call the library or check your account online	NT_MANBILL_ POSTCARD
Header for email notices	email notices.	Uses the existing string for email notices which appears in the subject line of the email. Note: If your library has customized this string in WebAdmin, you may want to review it to ensure the text is general enough to cover overdue bills and manual bills for other charges.	NT_BILL_EM_ HEADER
Text for email notices	email notices	Uses the existing string for billed items.	NT_BILL_SMS_ TEXT
Added message	print, email, and text notices	Your library account has been billed for this charge. Note: If you added a note from the Special Item Check-In dialog box when checking in a Claim Missing Part item, that note appears instead of the default *text.2*	SCML_ MANUALBILL_ ADDEDMSG

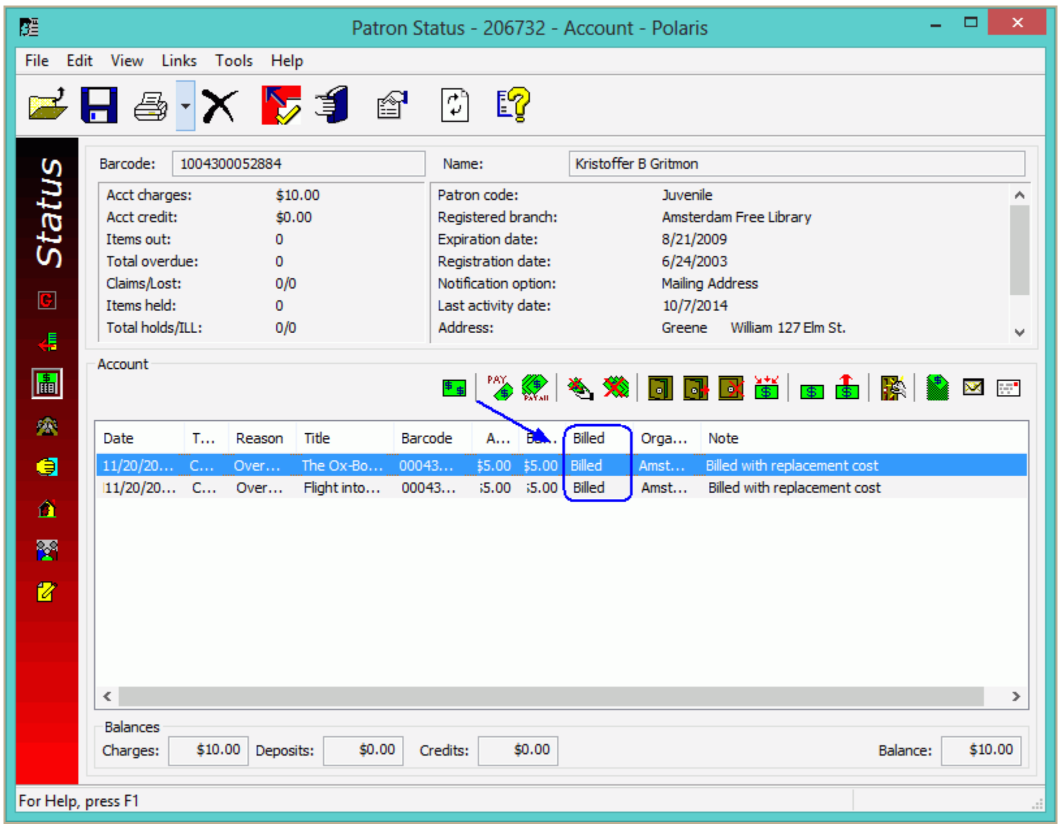
New Billed Column and Data in Patron Account

The Patron Status workform now includes a new **Billed** column that displays **Pending** if a bill has been initiated, and **Billed** when the bill is sent. Charges billed before the upgrade will display **Billed** in this column if the free text note starts with the term **Billed** and the charge has actually been billed by the system (TxnCode=1).

Notes supplied by the system (billed, billed with replacement cost, etc.) will continue to display in the **Notes** column to provide additional details about the charge. You can also enter notes when generating the charge.

See also: "Manually Bill Patrons for Charges " on page 14.

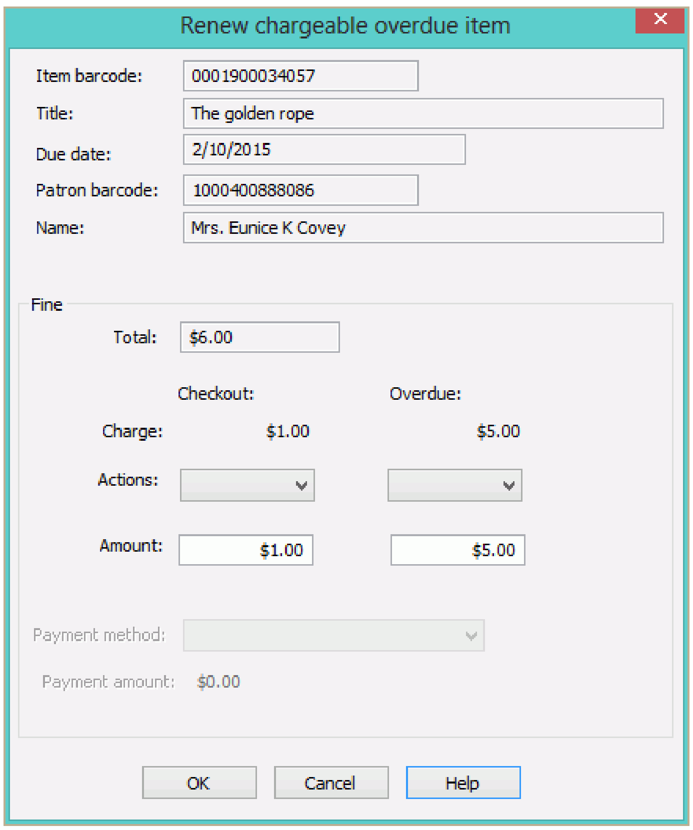
Note:
In the new **PatronAccounts.BillingStatusID** column, the value **0** is reserved for future use.



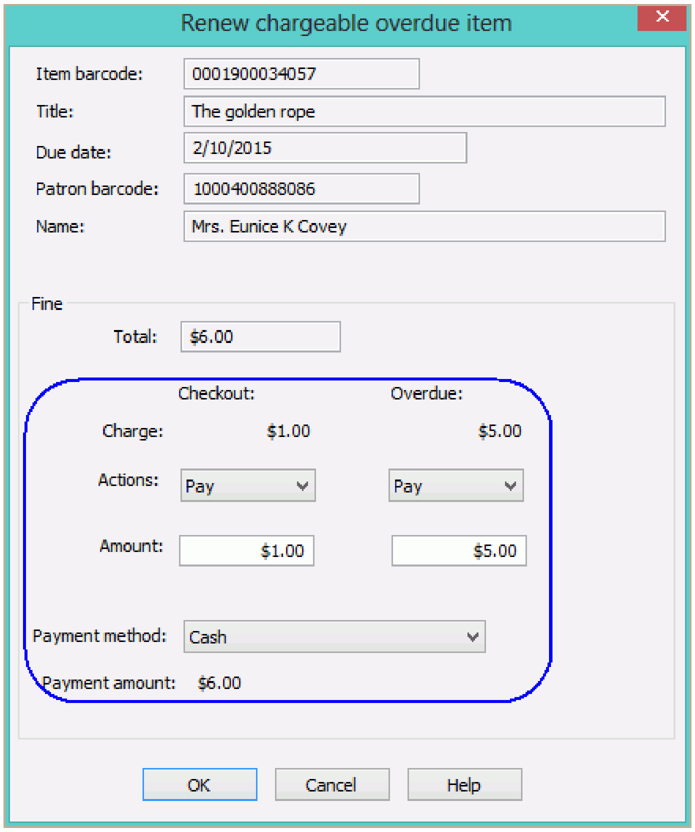
Combined Renewal and Overdue Charges

If your library has set the **Check Out: Charge Options** Patron Services parameter to charge for renewals and prompt the user regarding the charge, the renewal charge now appears on the same dialog box as the overdue charge when renewing overdue items. This development was implemented to prevent the situation where a patron decides to cancel a renewal after charges, payments, or waives have already been posted to the patron's account.

This newly combined **Renew chargeable overdue item** dialog box opens when you renew items (**Renew, Renew All**, or **Special Renew**) from the Patron Status workform, Items Out view and when you renew a single item from the **Check Out** workform. The updated user interface for the combined dialog box includes repositioned **Action** and **Amount** fields and a combined total amount for checkout charges and overdue fines.



You can select separate actions for the checkout and overdue charges, or you can select the same action for both. For example, you can select **Pay** for both the checkout and overdue amounts, and the payment amount is totaled at the bottom of the dialog box.


Renew chargeable overdue item
Item barcode: 0001900034057
Title: The golden rope
Due date: 2/10/2015
Patron barcode: 1000400888086
Name: Mrs. Eunice K Covey
Fine
Total: $6.00
Checkout:
Overdue:
Charge: $1.00 $5.00
Actions: Pay Pay
Amount: $1.00 $5.00
Payment method: Cash
Payment amount: $6.00
OK
Cancel
Help

New Circulation Status: eContent External Loan

(This circulation status is reserved for future eContent development.)

A new circulation status **eContent external loan** was added in anticipation of future enhanced support for interlibrary loan features offered by eContent vendors (for example, 3M Cloud Link or OverDrive Advantage).

Although you may see the new status in database tables and search drop-down lists, it is not actively used in 5.0SP2. In this release, no eContent item records are assigned the status by either the APIs or other processes.

We look forward to continuing this development in future Polaris releases.

EnvisionWare ECommerce Integration - Polaris and ExpressCheck

Your library can now use EnvisionWare to process credit card payments made from the Polaris staff client without using EnvisionWare's Staff Register point of sale (POS) software. In addition, EnvisionWare can be used as the credit card payments gateway for processing payments from Polaris ExpressCheck.

If the library has the required license, EnvisionWare can be selected as the payment gateway in Polaris Administration. When EnvisionWare is selected as the payment gateway, the following options are available:

- Enable credit card payments from the PAC (PowerPAC and Mobile PAC)
- Enable credit card payments from the staff client without using EnvisionWare's Staff Register software
- Enable credit card payments from the staff client using EnvisionWare's Staff Register software
- Enable credit card payments from ExpressCheck

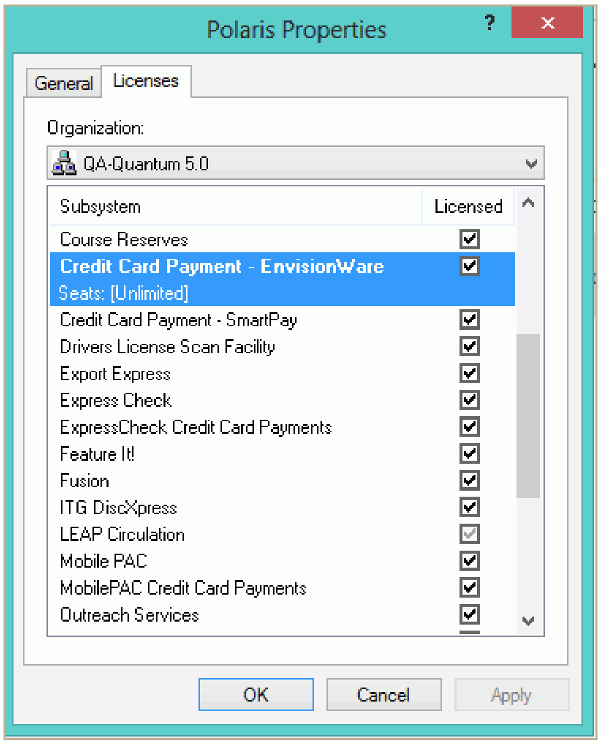
Note:
Partial payments can be accepted in the staff client, but not in ExpressCheck. Refunds for credit card payments cannot be processed through EnvisionWare.

See also:

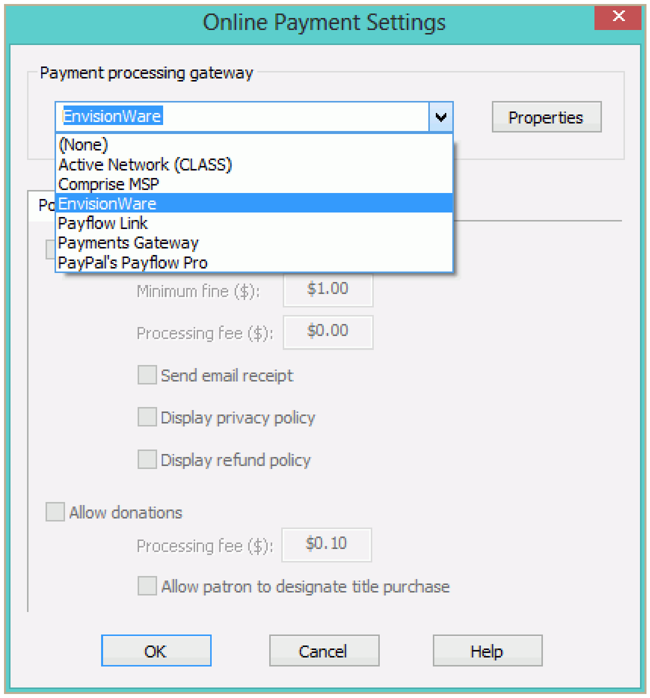
- "License for EnvisionWare eCommerce" on page 24.
- "Updates to EnvisionWare ECommerce Properties " on page 26.
- "Use EnvisionWare for credit card payments without Staff Register" on page 28.
- "Use EnvisionWare for credit card payments from Polaris ExpressCheck" on page 30.
- "View payments made through EnvisionWare in the Credit Card Payments Manager " on page 32.
- "EnvisionWare transactions in Fines and Fees - Credit Card Payments report" on page 33.

License for EnvisionWare eCommerce

A license is now required for EnvisionWare eCommerce with Polaris. When a library has a license for EnvisionWare eCommerce integration with Polaris, the EnvisionWare license, Credit Card Payment EnvisionWare, is selected in the license list.



If your library has a license for EnvisionWare, you can select EnvisionWare from the list of eCommerce gateways in the Online Payment Settings dialog box in Polaris Administration.

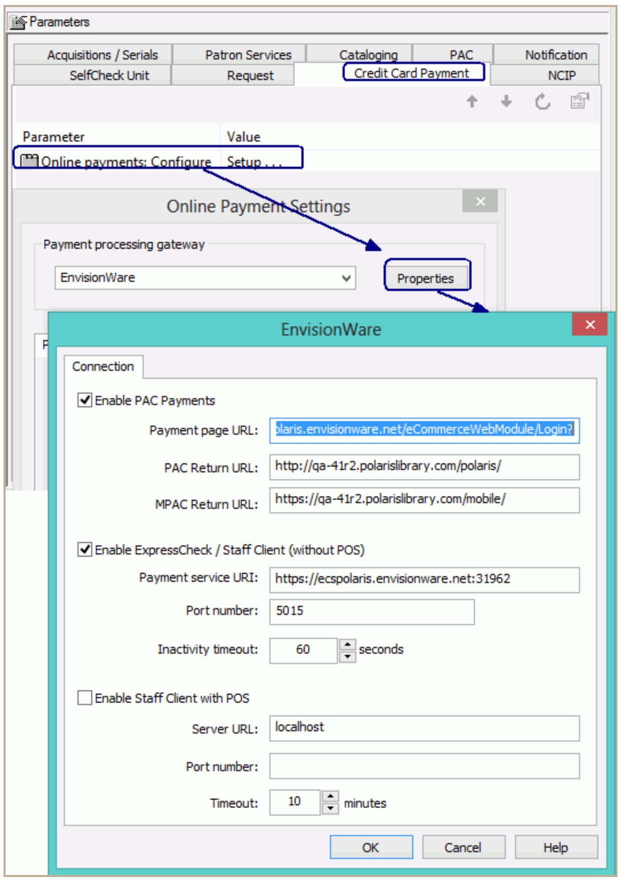


Note:
Upon upgrading to Polaris 5.0SP2, customers using EnvisionWare will require a license. Contact your Polaris support representative to obtain a license and enable the integration options your library uses.

Updates to EnvisionWare ECommerce Properties

The EnvisionWare properties dialog box now includes various Polaris and EnvisionWare integration options, and the library identification was removed from the properties. The EnvisionWare properties dialog box opens when you select **System Administration | Parameters | Credit Card Payment | Online payments: Configure | EnvisionWare | Properties.**

You can select the options at the System, Library, or Branch organization level.



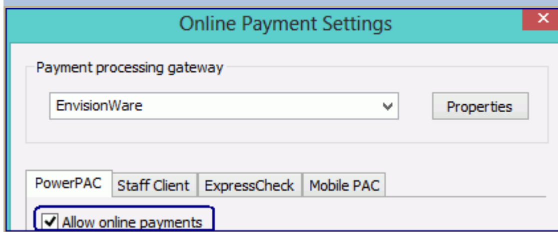
On the EnvisionWare properties view, you can select from the following options:

- **Enable PAC payments**
- **Enable ExpressCheck/Staff Client (without POS)**
- **Enable Staff Client with POS**

When the **Enable PAC payments** box is checked on the EnvisionWare properties dialog box for the library, patrons can make credit card payments from the PowerPAC or Mobile PAC.

Note:
For customers who already use EnvisionWare eCommerce, the following updates will be made upon upgrade to Polaris 5.0 SP2:

If **Allow online payments** is checked on the PowerPAC or Mobile PAC tab on the Online Payment Settings dialog box, the **Enable PAC Payments** check box is selected automatically on the EnvisionWare properties dialog box.



If your library has set up online payments in the staff client using EnvisionWare's Staff Register software, you will need to check the **Enable Staff Client with POS** check box .

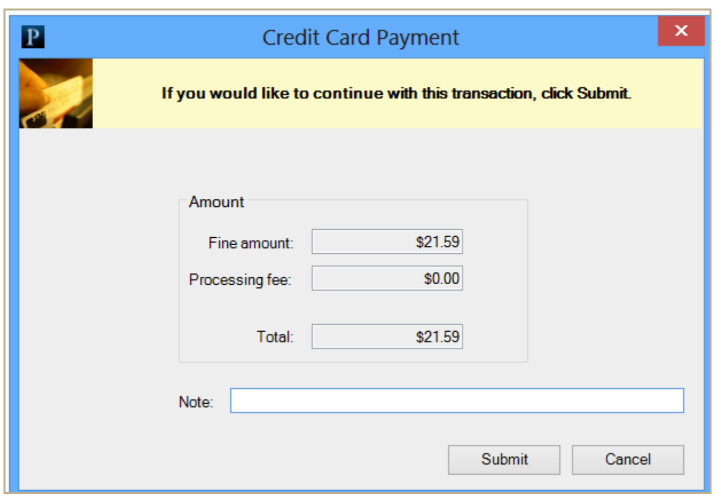
Use EnvisionWare for credit card payments without Staff Register

If your logon branch has selected EnvisionWare as the payment gateway in Polaris Administration, and **Enable ExpressCheck/Staff Client (without POS)** is selected on the EnvisionWare properties dialog box, staff members can make credit card payments for patrons from the Polaris staff client without using the EnvisionWare Staff Register software.

To make a credit card payment from the Polaris staff client without using EnvisionWare's Staff Register:

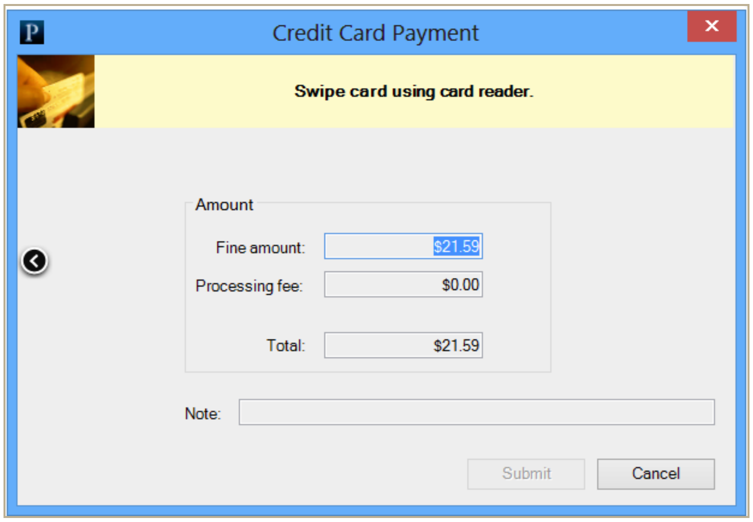
1. Initiate the credit card payment from one of the following areas in the Polaris staff client:
    - Patron Status workform, Account view- select **Pay**
    - Patron Status workform, Items Out view- select **Declare lost, Renew**
    - Patron Registration workform - select **Pay registration fee**
    - Item Record workform - select **Check In, Pay overdue fine**
    - Check-in workform - select **Resolve Billed or Lost Item**
    - Check-in workform - select **Pay overdue fines**
    - Check-out workform - select **Check out fee, renew**

    The Credit Card Payment dialog box opens.

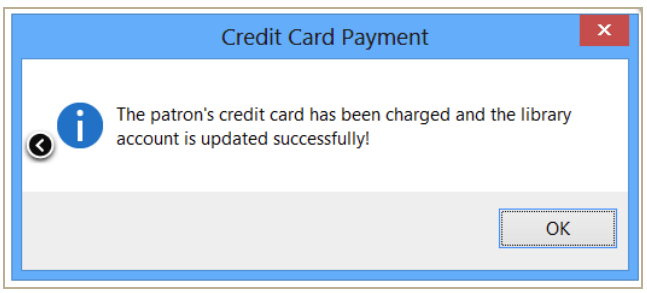
2. Select **Submit**.

    A message instructs you to swipe the credit card.



3. Slide the patron's credit card through the card reader, and select **Submit**.

   A message indicates that the patron's credit card has been charged, and the patron's library account is updated.



4. Click **OK** to close the message box.

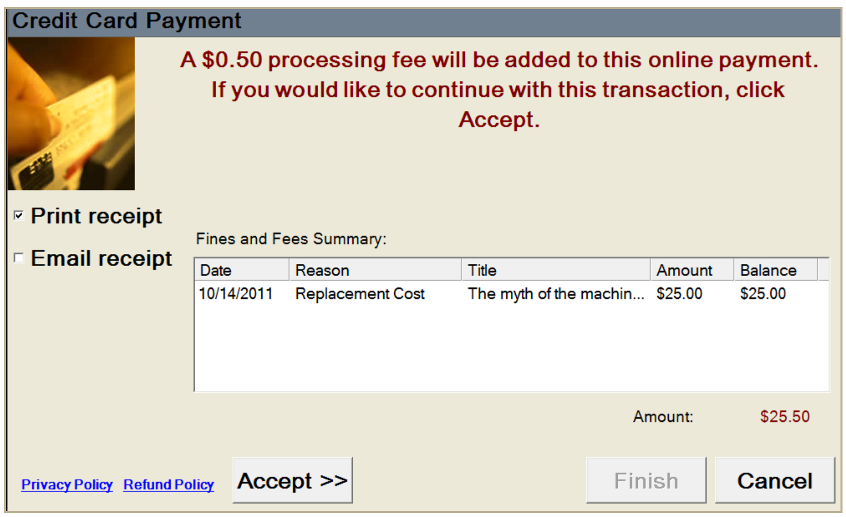
Use EnvisionWare for credit card payments from Polaris ExpressCheck

If your logon branch has selected EnvisionWare as the payment gateway in Polaris Administration, and **Enable ExpressCheck/Staff Client (without POS)** is selected on the EnvisionWare properties dialog box, patrons can make credit card payments from Polaris ExpressCheck units.

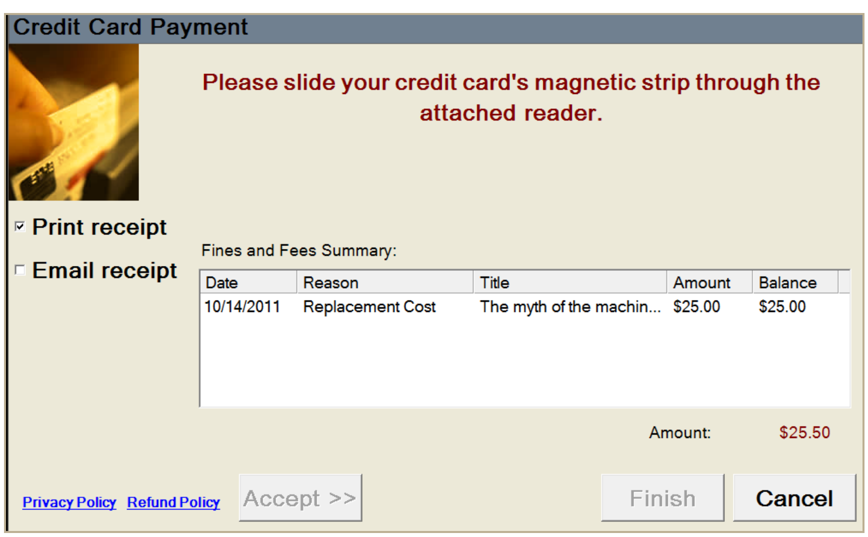
To make a credit card payment from Polaris ExpressCheck units:

1. Select **Pay** on the ExpressCheck Patron Account Fines and Fees view.

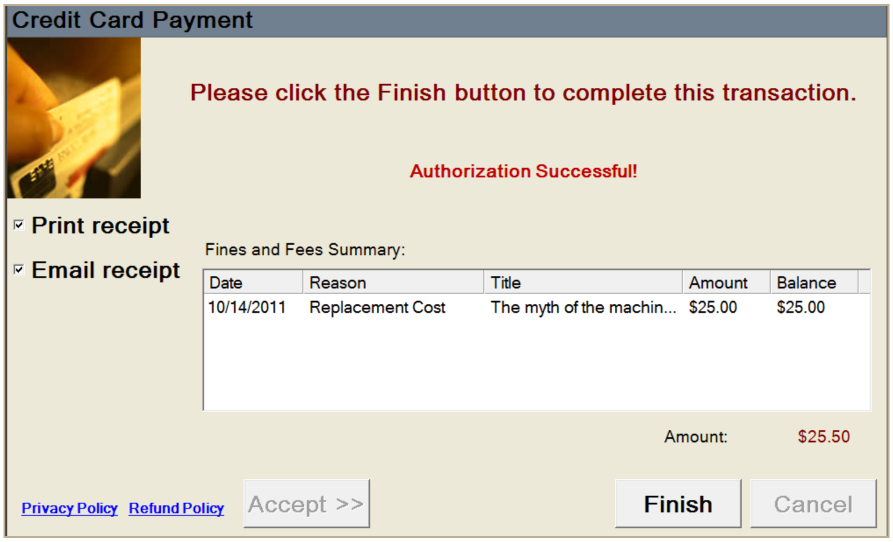
   The Credit Card Payment dialog box opens.



2. Select **Accept** to go to the next view.



3. Slide the credit card through the card reader.



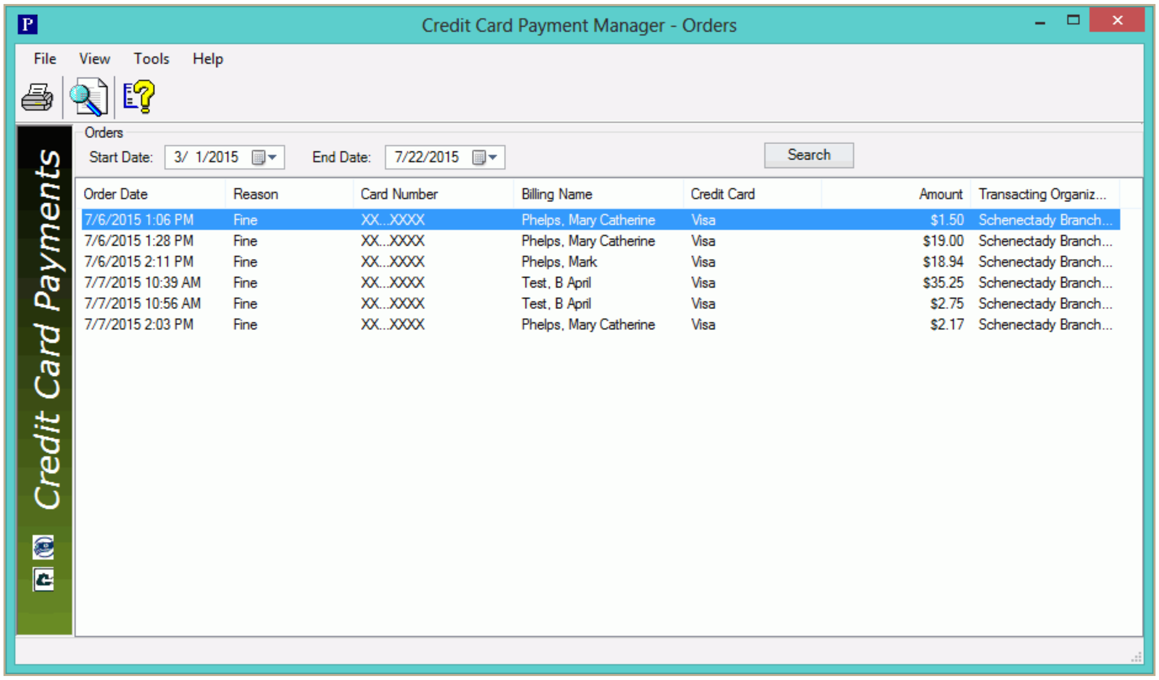
4. Select **Finish** to complete the payment.

   The patron account is updated with the payment transaction, and a receipt is printed or sent by email or text message.

Note:
If the payment cannot be completed, an error message appears indicating the reason the transaction could not be completed. Select **Cancel** and return to the Patron Account view.

View payments made through EnvisionWare in the Credit Card Payments Manager

If your library uses EnvisionWare to transact credit card payments without using the EnvisionWare Staff Register application, the transactions appear in the Credit Card Payments Manager. The Billing Name in the Credit Card Payments Manager is taken from the patron account associated with the charge, which may be different from the name on the credit card used for the payment. Since Polaris does not store any credit card information, the patron account information is retained to facilitate any future troubleshooting.



EnvisionWare transactions in Fines and Fees - Credit Card Payments report

When credit card payments are made using the EnvisionWare payment gateway, the transactions appear on the Fines and Fees - Credit Card Payments report.

EDI Implemented with Findaway World

Libraries can now send EDI orders to the materials vendor, Findaway World. When Findaway receives the electronic order, an acknowledgment file is placed in the library's directory on Findaway's site. The Polaris EDIAgent retrieves the acknowledgment file from Findaway's site and creates the purchase order acknowledgment (POA) report in Polaris. In addition, the EDIAgent retrieves the invoice file from Findaway and automatically generates an EDI invoice in Polaris. A library staff member can retrieve the invoice using the Polaris Find Tool. For more information on EDI ordering, see the Polaris staff client online Help. If your library is interested in sending EDI orders to Findaway World, contact your Polaris site manager.

EDI Implemented with Library Services Centre

Libraries can now send EDI orders to the materials vendor, Library Services Centre. When Library Services Centre receives the electronic order, an acknowledgment file is placed in the library's directory on Library Services Centre's site. The Polaris EDIAgent retrieves the acknowledgment file from Library Services Centre's site and creates the purchase order acknowledgment (POA) report in Polaris. In addition, the EDIAgent retrieves the invoice file from Library Services Centre and automatically generates an EDI invoice in Polaris. A library staff member can retrieve the invoice using the Polaris Find Tool. For more information on EDI ordering, see the Polaris staff client online Help. If your library is interested in sending EDI orders to Library Services Centre, contact your Polaris site manager.

> **Note:**
> Library Services Centre limits EDI purchase order numbers to 12 characters. Polaris will block the release of EDI purchase orders to Library Services Centre if the number exceeds 12 characters.

EDI Implemented with Children's Plus

Libraries can now send EDI orders to the materials vendor, Children's Plus, Inc. When Children's Plus receives the electronic order, an acknowledgment file is placed in the library's directory on Children Plus's site. The Polaris EDIAgent retrieves the file from Children Plus's site and creates the purchase order acknowledgment (POA) report in Polaris. In addition, the EDIAgent retrieves the invoice file from Children's Plus and automatically generates an EDI invoice in Polaris. A library staff member can retrieve the invoice using the Polaris Find Tool. For more information on EDI ordering, see the Polaris staff client online Help. If your library is interested in sending EDI orders to Children's Plus, contact your Polaris site manager.

> **Note:**
> Children's Plus limits EDI purchase order numbers to 10 characters. Polaris will block the release of EDI purchase orders to Children's Plus if the purchase order number exceeds 10 characters.

Polaris Leap Development

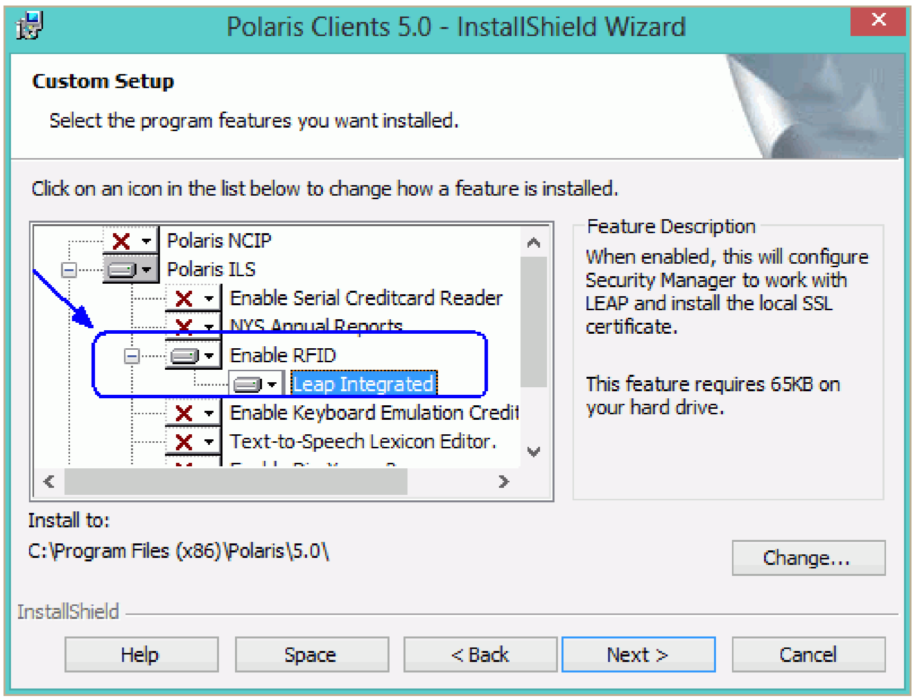
Leap development for 1.0 SP2 includes the following new and enhanced functions, navigation options, search capabilities, and other improvements:

- "Integrated RFID for Desktops Running Leap" on page 38.
- "Printing Leap Workforms " on page 43.
- "Bulk Check-In from Leap" on page 44.
- "Check in user defaults" on page 48.
- "Change Item Information or Barcode at Check-In" on page 49.
- "Option to Configure eReceipts at Checkout" on page 53.
- "Change Pickup for Shipped Holds and Rerouting Message for Held Items" on page 56.
- "Move Claimed Items to Lost" on page 59.
- "Secured Patron Records" on page 60.

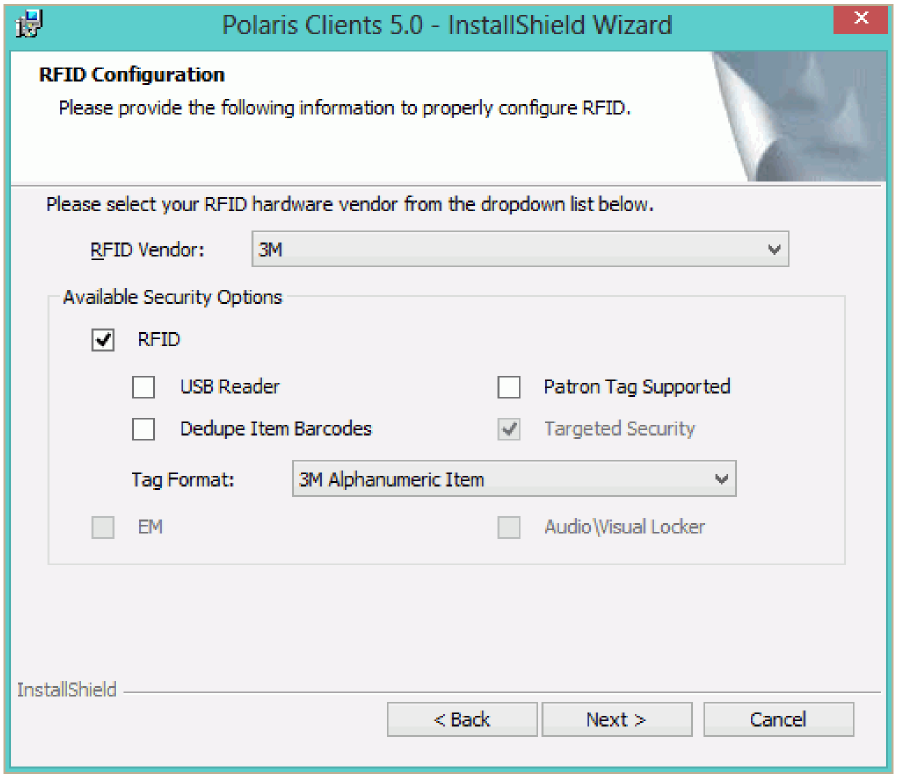
Integrated RFID for Desktops Running Leap

You can use RFID with Leap on a workstation where the Polaris staff client has been installed or on a workstation where Leap is running alone.

If you install the Polaris staff client on a workstation and select **Enable RFID**, you can select **Leap Integrated** on the InstallShield Wizard. The Polaris Security Manager is installed automatically with the Polaris staff client.



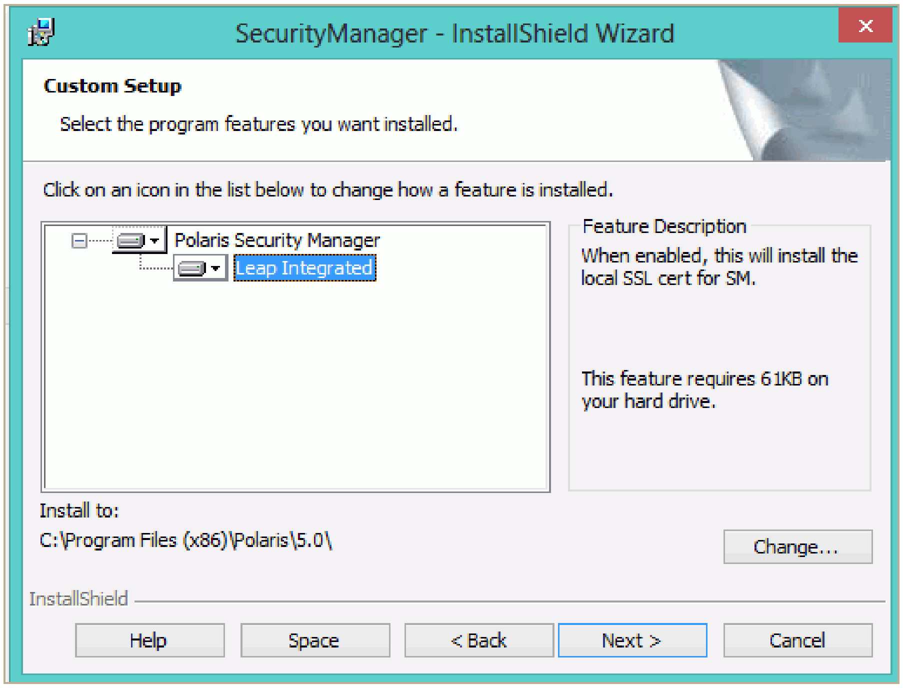
Click **Next** and select the RFID vendor and security options on the RFID Configuration window.



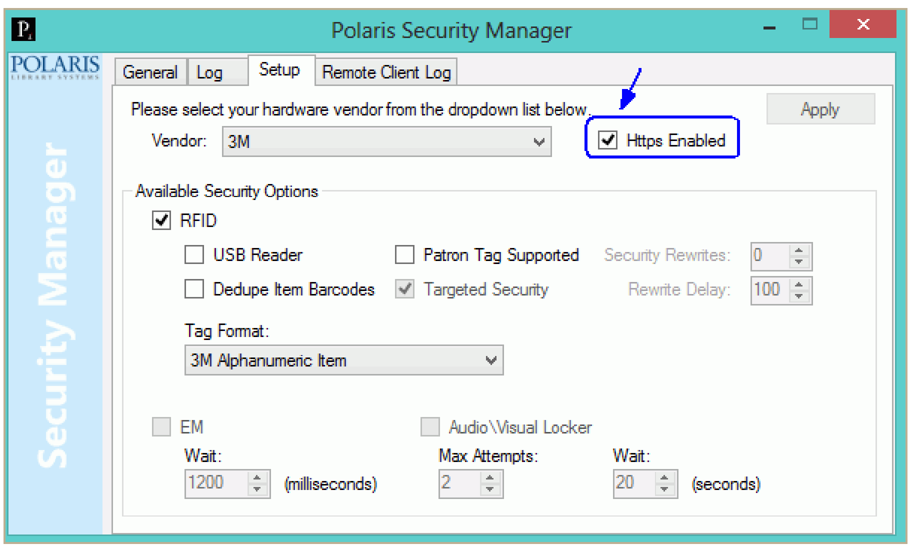
If the workstation will be running Leap without installing the Polaris ILS, you can enable RFID by installing the standalone Polaris Security Manager.

To install the standalone Security Manager, run **setup.exe** in the Security Manager folder.

In the SecurityManager - Install Shield Wizard dialog box, select **Leap Integrated**, and click **Next**.



Open the Polaris Security Manager, and select the Setup tab.



Select the RFID vendor in the **Vendor** drop-down list box.

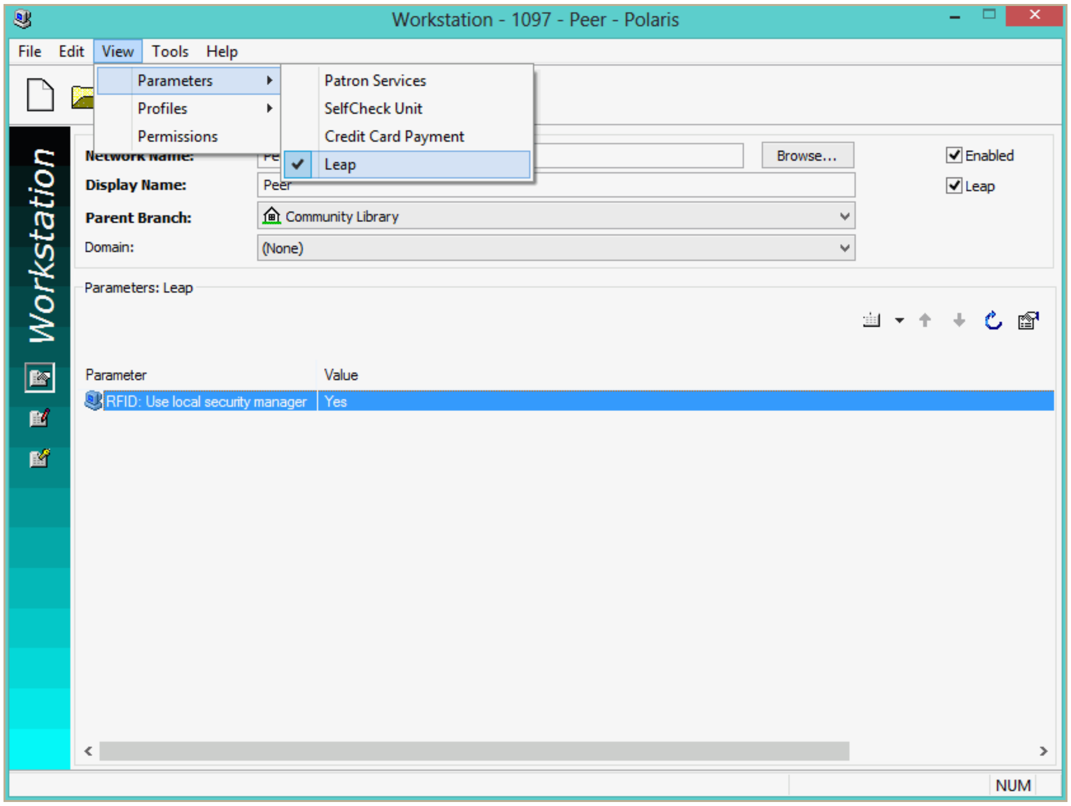
If it is not already checked, select the **Https Enabled** check box.

Select the RFID check box and set the security options.

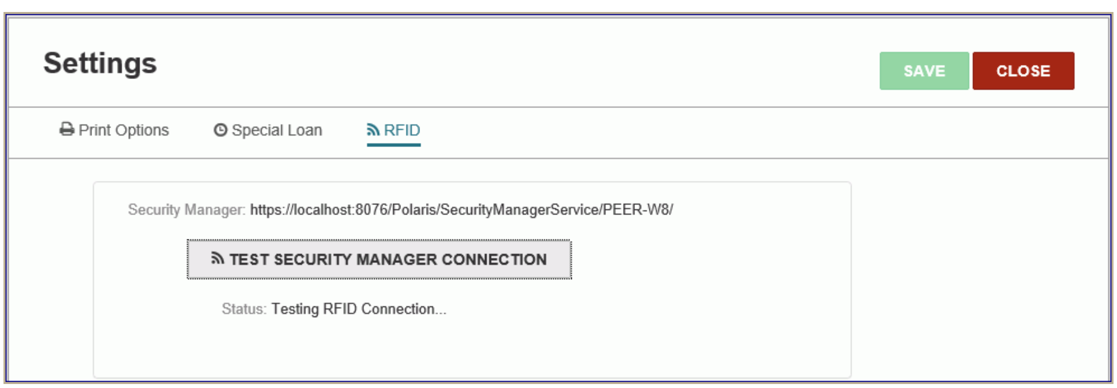
If the Leap application is running on a workstation where RFID has been enabled for Leap, you can use RFID to circulate items in normal and bulk mode. Place the tagged items on the reader or click the return icon next to the input box. If the tag cannot be read, the message

Tag not found. Please try again appears. If the item is on the RFID pad, the barcode is entered in the barcode input box in Leap, and the check-in is performed.

The Workstation workform in the Polaris staff client now includes a Leap category in the Parameters view and a new parameter **RFID: Use local security manager**. The default value is set to **No**. To use integrated RFID from Leap, set this value to **Yes**.

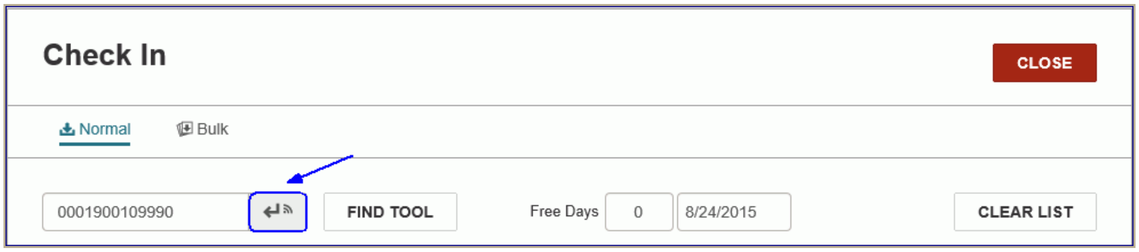


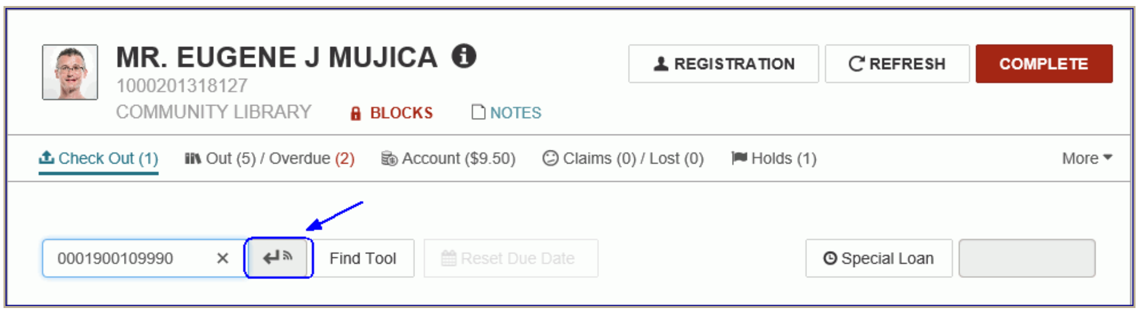
To ensure that Security Manager is installed and connecting correctly, you can test the connection in Leap. Go to the Settings page in Leap, select the new **RFID** tab, and select **TEST SECURITY MANAGER CONNECTION**.



Using RFID in Leap

Once Leap RFID has been enabled on a workstation, you can place RFID-tagged items on the reader to check the items in (normal or bulk mode) and check the items out. The RFID icon on the return button indicates that RFID is enabled for the workstation. This icon acts as an on-screen shortcut equivalent to the F9 shortcut key combination in the Polaris staff client.





If the RFID tag cannot be read, the following message is displayed: **Tag not found, please try again.**

If the item is successfully checked out, a single attempt is made to disable security on the tag. If this attempt fails, the following message is displayed: Unable to turn off security for item *barcode*.

In addition, RFID scans can be used in quick search. If the quick search input box is empty and an RFID-tagged item is on the pad, selecting the RFID-enabled quick search button will automatically execute the search if a match is found.

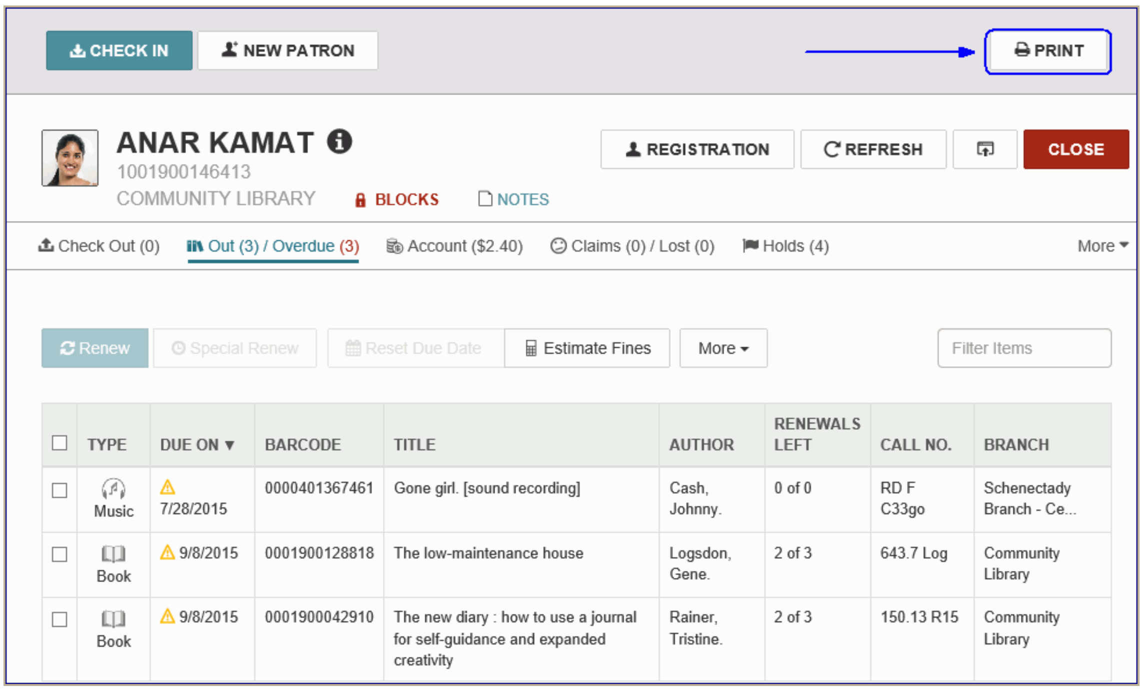
Printing Leap Workforms

The new Print function works in the following browsers:

- Windows IE 11
- Windows Chrome 45
- OS X Chrome

However, the **PRINT** button does not appear if you are using Leap on an iPad due to iOS limitations.

When you select the new **PRINT** button, the entire view is printed including all entries in a list view.



Bulk Check-In from Leap

You can now use Leap to quickly check in multiple items in bulk. With bulk check-in, most blocks and dialog boxes do not appear. Users who have selected the bulk view as the default check-in view in Leap or in the Polaris staff client will automatically go to the bulk view when checking in items using Leap.

The default view for the Leap Check In workform can be set in Leap using a new tab in the Settings page. See "Check in user defaults" on page 48. In the Polaris staff client, the default view is set using the **View** menu on the Check In workform.

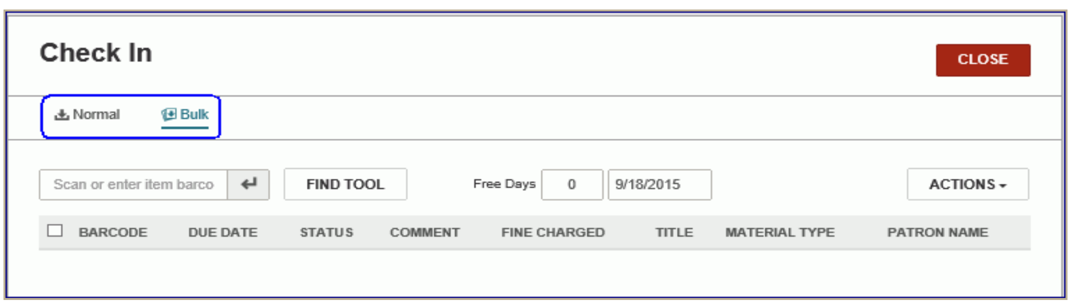
If the user's default is set to **In House** or **Inventory** mode in the staff client or in Leap, the Leap Check In workform opens in the Normal view.

The Leap Bulk Check In view uses the same display settings as the Bulk Check In mode in the Polaris staff client. The displayed columns are determined by the settings in the **Check in list view options** parameter in Polaris Administration. For more information on bulk check in, see the Polaris staff client online Help.

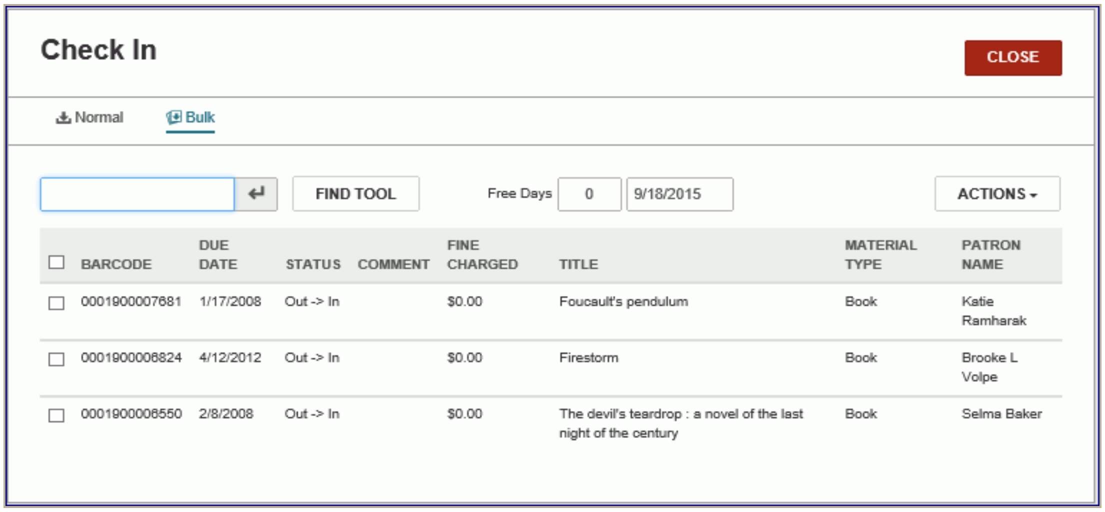
To check in items in bulk using Leap:

1. Select **CHECK IN**.

   The Check In page opens in Normal or Bulk mode depending on your default check-in mode setting.



2. If the **Normal** check-in mode is displayed, select **Bulk** to change to the Bulk check-in mode.
3. If you want to change the free days, enter the number of days in the **Free Days** box or select a date from the calendar. Free days are set according to the **Free days (bulk)** Patron Services parameter in Polaris Administration.
4. Scan the item barcodes to check the items in.



As items are checked in, they display at the top of the list, the status in the Status column indicates the status change: from > to. For example: **Out > In**.

The item barcode, due date, status, comments, and fine charged to the borrowing patron, if applicable, appear in columns in the list of items checked in. Your library may also choose to display the item's title, material type, and/or the borrower's name. The Comment column displays conditions such as **Quick circ item** for a Quick Circ item or **To *Branch name*** for an item that is in-transit.

5. Continue to scan item barcodes until you have checked in all the items.

   When an item is checked in, a transaction is logged with the type: Checkin Leap Bulk.

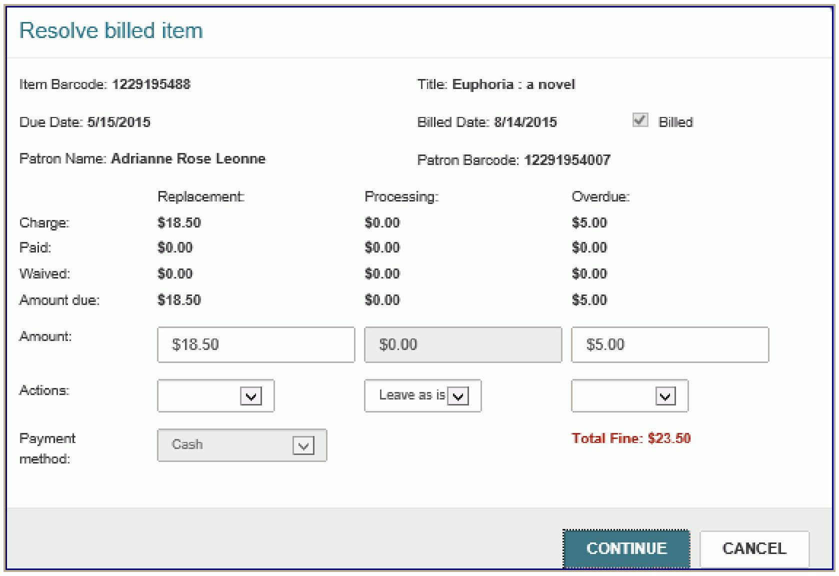
When you check in items using bulk check in, you may encounter messages, dialog boxes, or prompts for the following types of items:

- **Items belonging to other branches**

  If you scan an item that does not belong to your branch, a prompt displays if the **Patron Services parameter Check-in: Prompt for in-transit in bulk mode** is set to **Yes**. If the parameter is set to **No**, items that belong to other branches are set to In-transit without a prompt. When the item is checked in, the Status column displays I**n-Transit** and the Comment column displays **To *Branch name***. If you set Polaris for in-transit slip printing at the Check In workform, an in-transit slip is printed.

- **Items that have been billed**

  If the patron has been billed for an item, the Resolve billed item dialog box appears. Select an action for each billed amount and select **CONTINUE.**



- **Items with blocks**

  If an item has a free-text or manually-assigned block, a dialog box displays the text and offers the option to check in or cancel.

- **Items that satisfy hold requests**

  When you scan an item that will fill a hold request where the pickup branch is also the check-in branch, the item is trapped for the request, and the status becomes Held. The Comment field displays “For [patron name]”. If the pickup branch is a different branch, the item status becomes Transferred to pickup branch, and the Comment field displays “To [branch]”

  If the item is already held, the item status changes to In, In-transit, or Held for the next patron. The Comment field displays the action taken.

- **Items from other library systems (ILL items)**

  If you check in an ILL item from another library system, a message indicates the item is an ILL and prompts you to continue or stop the check in. If you continue with the check in, the ILL item will be processed in the same way as in the Polaris staff client.

- **Quick Circ items**

  If you check in a quick circ item in bulk mode, the Comment column displays **Quick-circ item**.

- **Claimed items**

  If you check in an item with a Claimed status, the status column displays Claim Returned, Claim Never Had, or Claim Missing Part.

- **Items in floating collections**

When you check in items in the bulk view, items float (or not) according to the library's policy. If the option "Prompt for additional floating items" is set to yes for the check-in branch, the prompt displays. The floating limits set in Polaris administration are respected.

- **Items with fines**

  If items that you are checking in have fines, they are charged to the patrons' accounts automatically as the items are checked in and no messaging displays. The amount is displayed in the Fine Charged column.

Check in user defaults

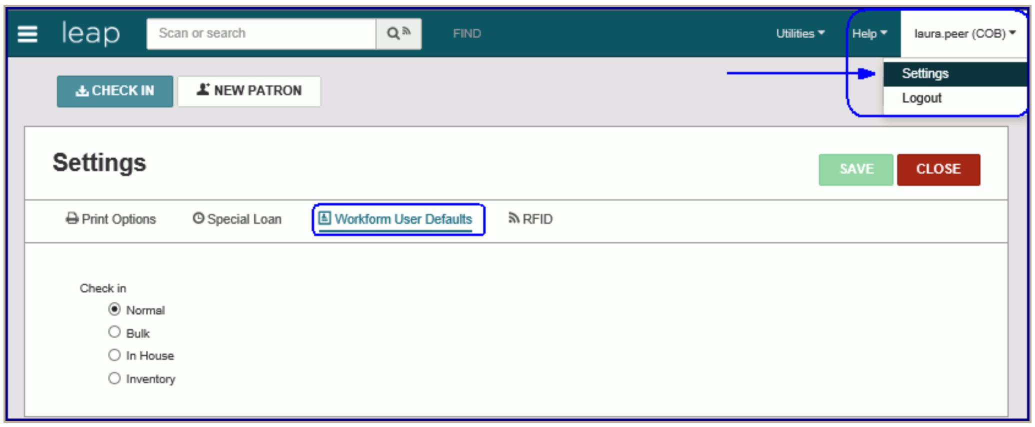
The Settings page has a new **Workform User Defaults** tab where the user can select the preferred view for the Check In workform.

To specify the preferred view for the Check In workform:

1. Select your username, and select **Settings**.

   The Settings page opens.

2. Select the **Workform User Defaults** tab.



3. Select the default view for the Check In workform. **Normal** is the setting selected by default, but you can set it to **Bulk**.

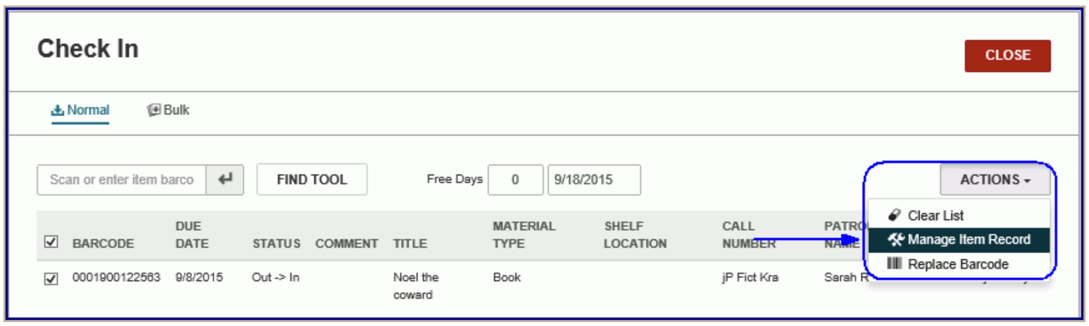
Note:
The **Inventory** and **In House** options are not available in this version of Leap.

Change Item Information or Barcode at Check-In

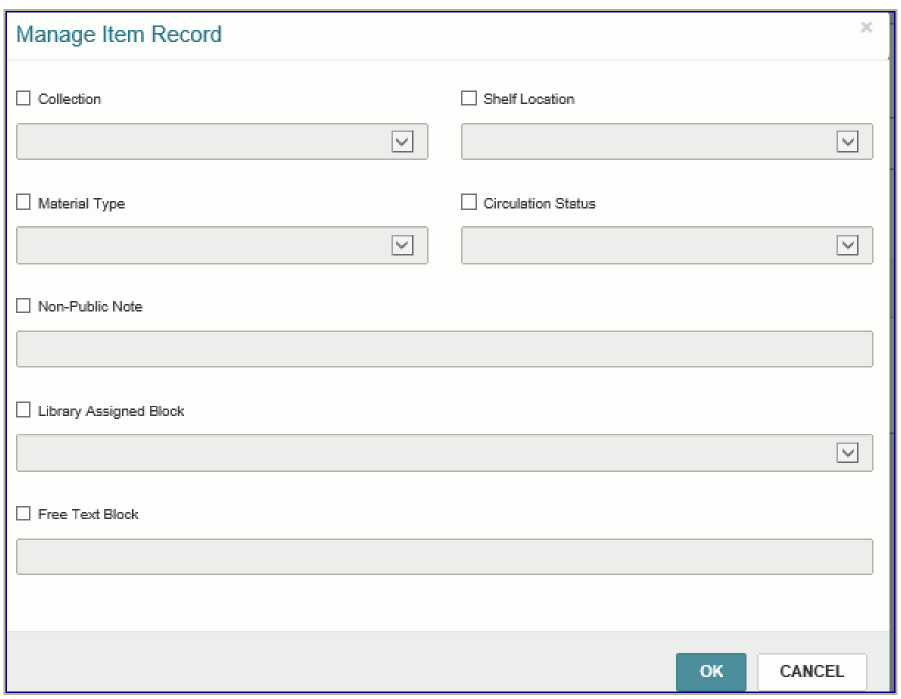
When checking in items in Leap, staff members who have the appropriate **Manage item dialogs** permissions can edit specific fields and replace the item barcode. These **Circulation | Manage item dialogs** permissions allow staff members who may not have full **Cataloging | Item records** permissions to modify certain fields at check in. For more information on these Circulation permissions, see Polaris online Help.

To change item information:

1. Check In an item.
2. Select the checked-in item in the list.
3. Select **ACTIONS** and select **Manage Item Record** in the drop-down list box.

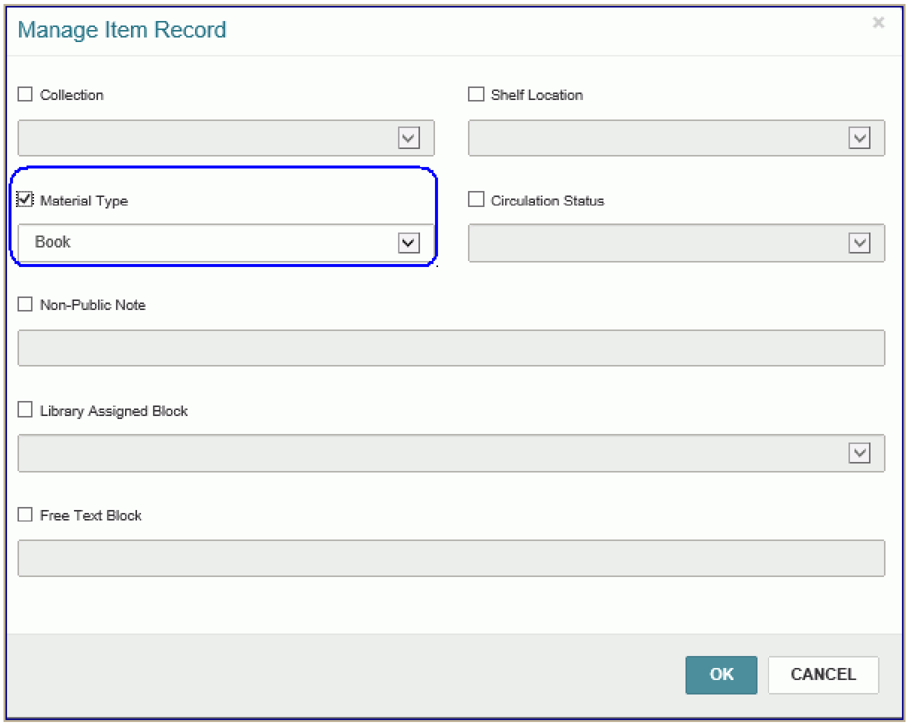


The Manage Item Record dialog box opens.



4. Select the check box for the item record field to modify.

   The current value appears in the box.



5. Select the new value in the drop-down list box.
6. Select **OK**.

   The item record field or fields are changed.

To change the item barcode:

1. Check In an item.
2. Select the checked-in item in the list.
3. Select **ACTIONS** and select **Replace Barcode** in the drop-down list box.

The Replace barcode dialog box opens.

4. Type the new barcode in the box, and select OK.

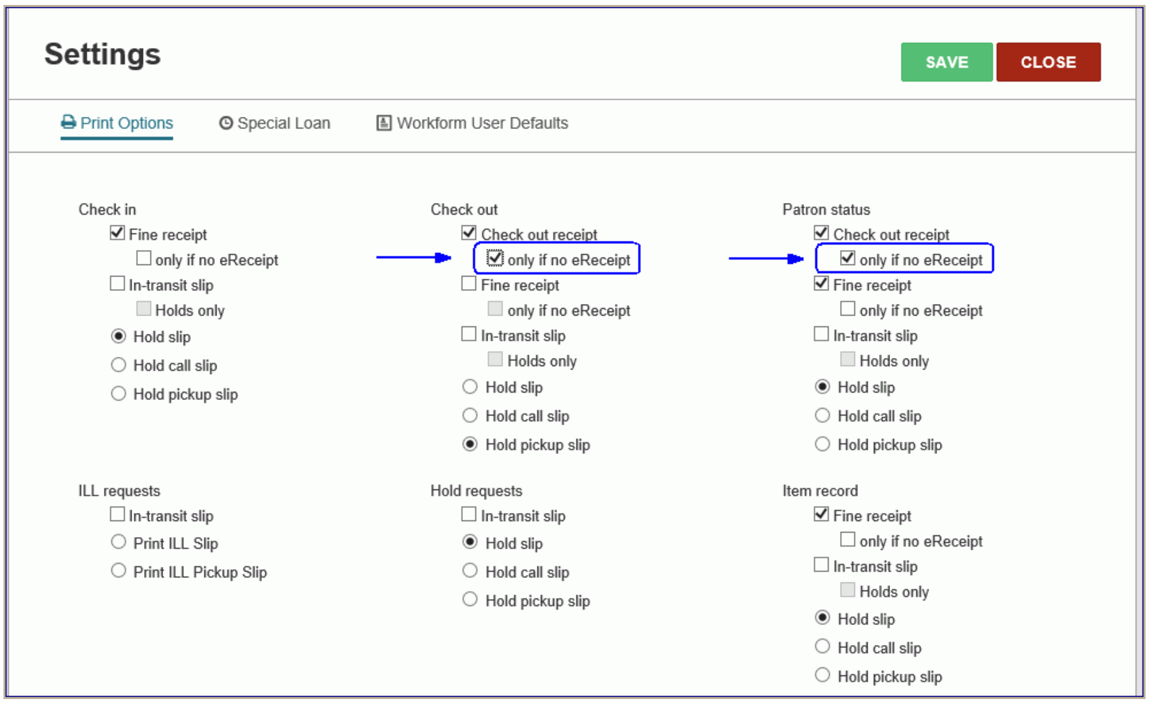
   The item's barcode is changed.

Option to Not Print Check Out Receipts for Patrons Using eReceipts

You can now set an option to prevent receipts from being printed at check out if the patron has selected eReceipts.

To prevent check out receipts from being printed for patrons who have chosen eReceipts:

1. Go to the **Settings** page and select the **Print Options** view, if it is not already displayed.
2. Under **Check out**, select the **only if no eReceipt** check box.
3. Under **Patron status**, select the **only if no eReceipt** check box. This option controls the check out receipt when renewing from the patron status.

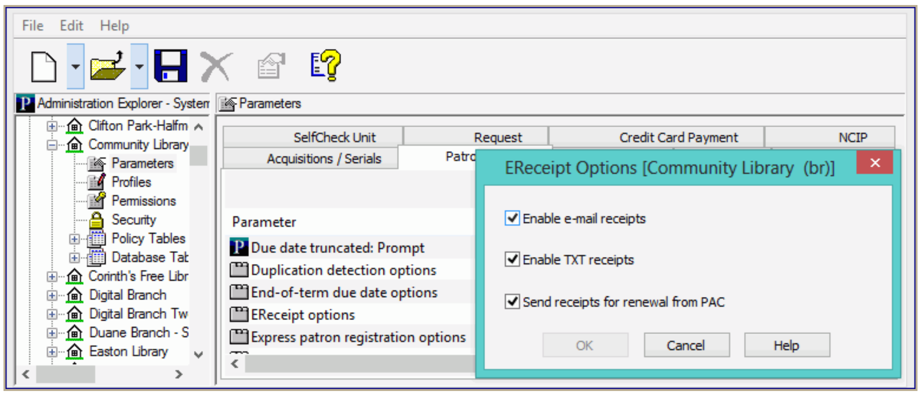


Option to Configure eReceipts at Checkout

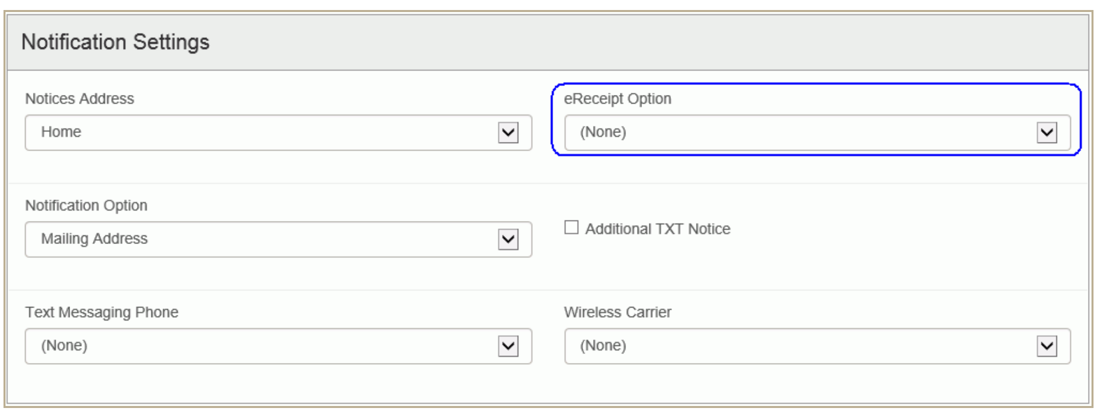
You can now set an eReceipt prompt that will appear when checking out items to patrons whose eReceipt option is set to **None**. When the prompt appears, you can use a new dialog box to update the eReceipt options in the patron's record.

The eReceipt prompt appears in Leap when all the following conditions are met:

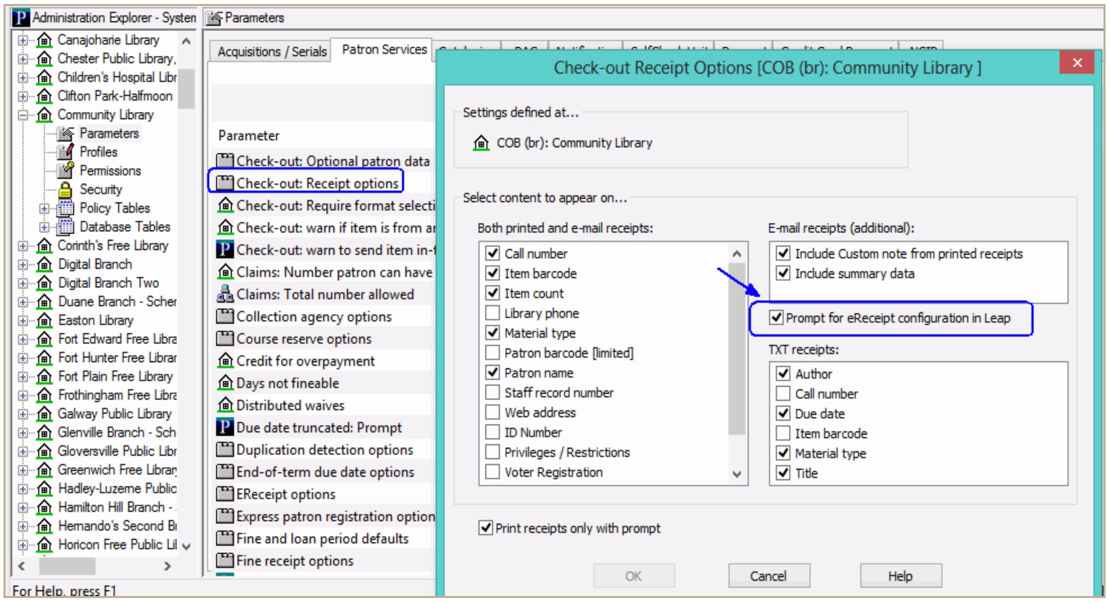
- The patron's registered branch and the Leap login (checkout) branch have enabled at least one eReceipt option using the existing patron services parameter **EReceipt options**; the **Enable e-mail receipts** and/or **Enable TXT receipts** check boxes are selected on the EReceipt Options dialog box.



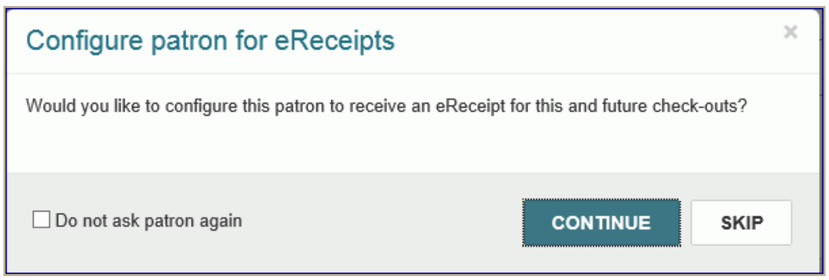
- The patron's **eReceipt Option** is set to **None**.



- The Leap login branch has selected the new option to prompt for eReceipts in Leap; the **Prompt for eReceipt configuration in Leap** check box is selected on the Check-out Receipt Options dialog box.

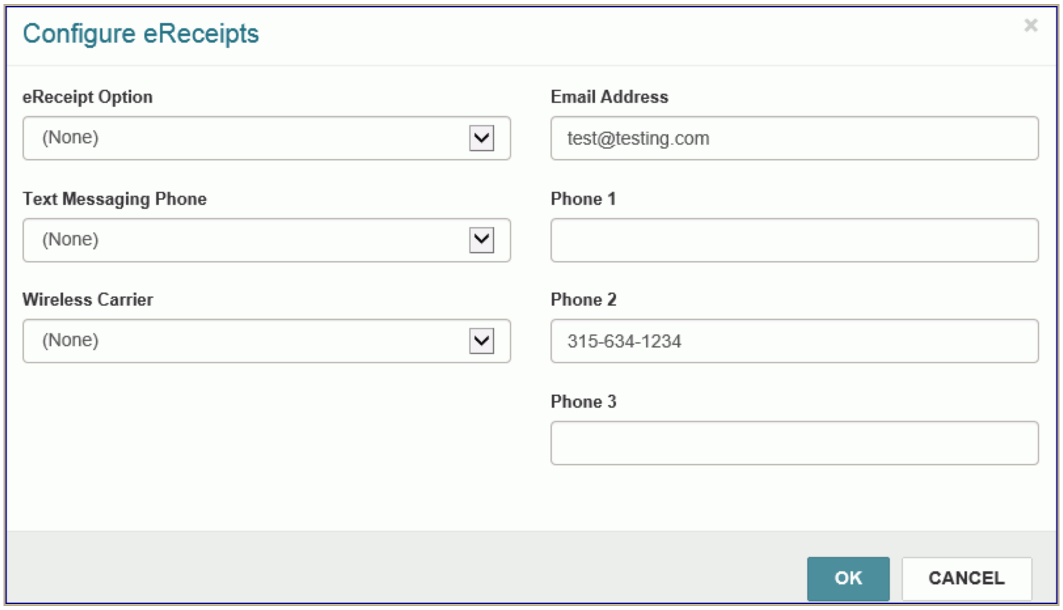


If the conditions for the prompt are met, a message asks **Would you like to configure this patron to receive an eReceipt for this and future check-outs?** when you complete a checkout.



If the patron does not want to change the receipt options, select **Do not ask patron again** and **SKIP**. The eReceipts prompt will not appear for subsequent check outs for that patron.

If the patron agrees to receive eReceipts, select **CONTINUE**.The Configure e-Receipts dialog box opens.



To update the patron's eReceipts options, select the eReceipt option and enter the appropriate information for that type of eReceipt. For example, if you select TXT messaging, select the text messaging phone and the wireless carrier.

Select **OK** to close the dialog box and update the patron's record. Once the patron's record is updated with the eReceipt option, the prompt will not appear for subsequent checkouts.

Change Pickup for Shipped Holds and Rerouting Message for Held Items

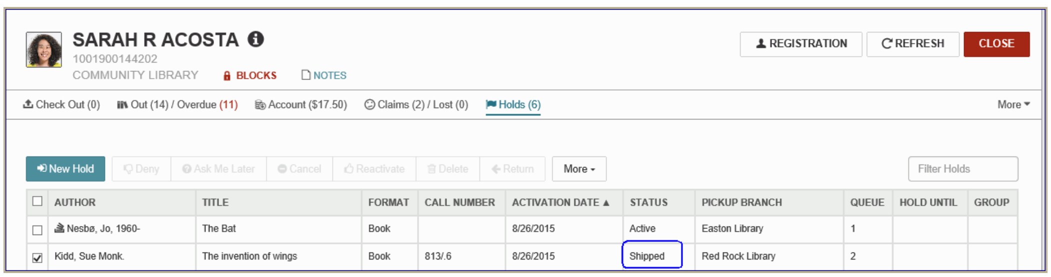
You can now change the hold request pickup location (branch) for hold requests with a status of **Shipped**. In addition, when a request has a status of **Held** and the item is held at a branch other than your logged-in branch, a message now alerts staff members if the pickup branch is changed, so that the item can be shipped to the new pickup branch. Leap also indicates if the pickup location for a held or shipped item was changed in PowerPAC, Mobile PAC, Leap, or the Polaris staff client.

> **Note**:
> The pickup branch list in Leap excludes branches (if any) selected in the Request parameter: **Hold options | Pickup | Exclude selected branches in staff client**.

Change the pickup branch for a Shipped hold

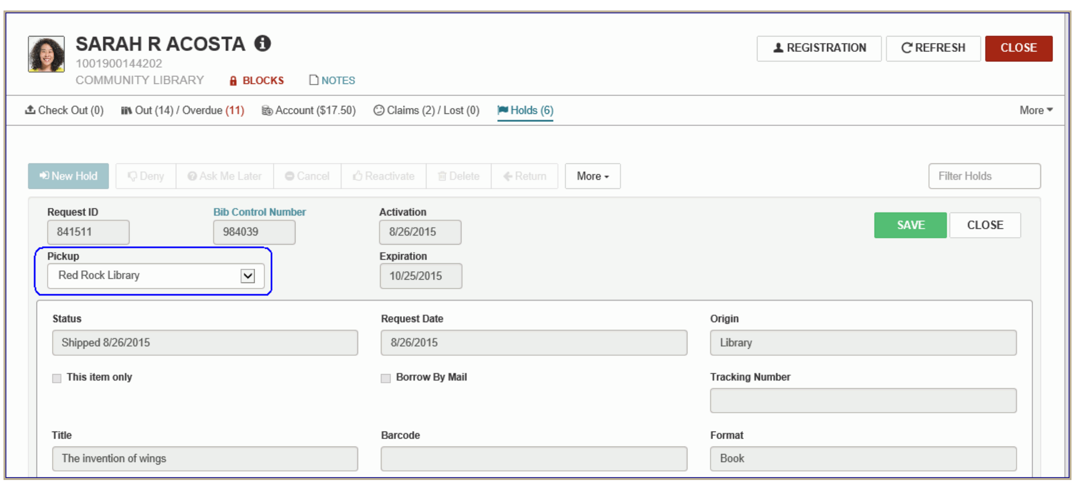
To change the pickup location for a hold request with a status of **Shipped**:

1. Go to the **Holds** view of the patron record, and select a hold with a status of **Shipped**.



   The Hold Request page opens.

2. Select a different pickup branch in the **Pickup** drop-down list box.

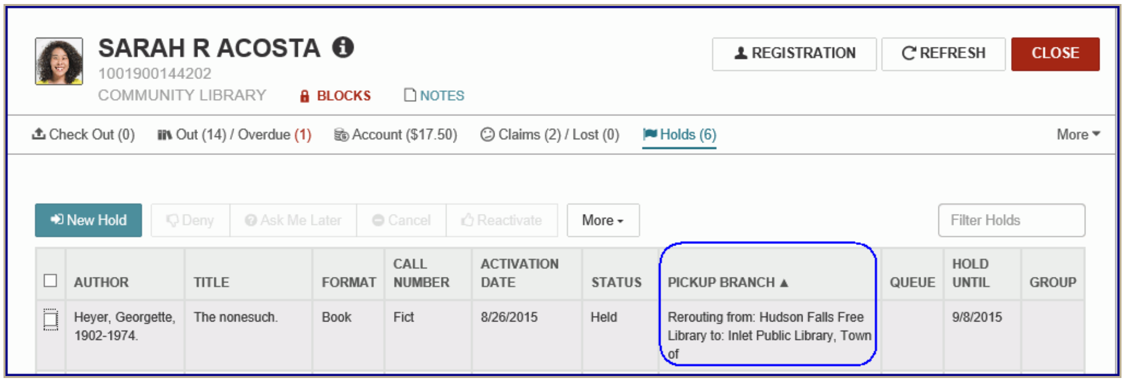


3. Select **SAVE**.

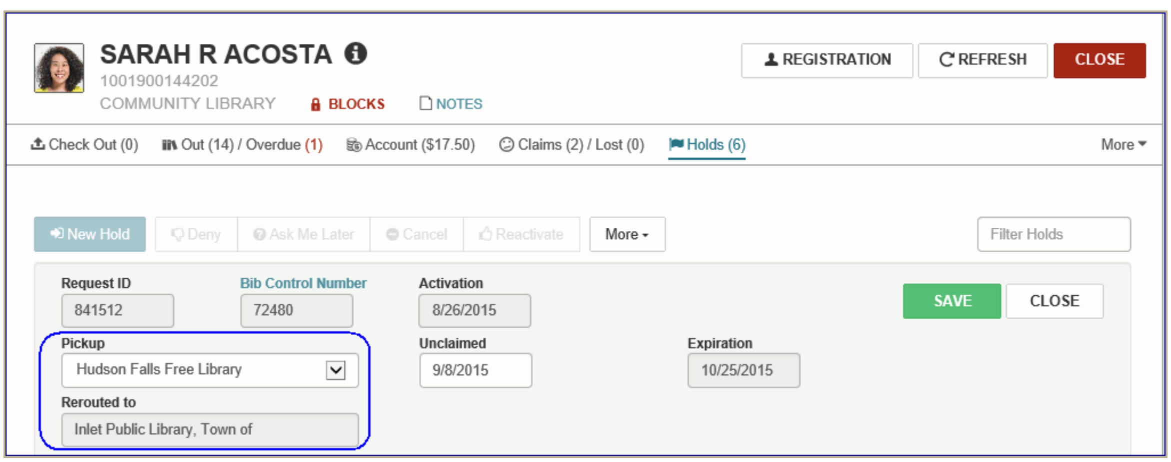
   A message informs you that the hold was modified, and the pickup branch is changed in the holds list.

Change pickup location for an item held at another branch

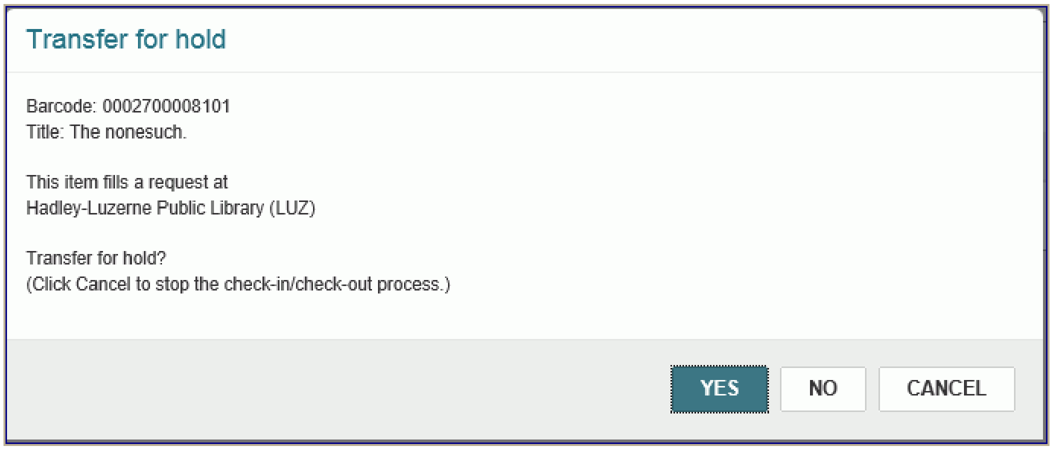
If the pickup branch is changed (from PowerPAC, Mobile PAC, the Polaris staff client, or Leap) for a request with a status of **Held**,and that item is being held at a branch other than your logged-in branch, the following message displays in the **PICKUP BRANCH** column of the Holds view: **Rerouting from: *original pickup branch* to: *new pickup branch***.



When you open the hold request, the original pickup branch is selected in the **Pickup** drop-down list box, and the new pickup branch is selected in the **Rerouted to** drop-down list box.

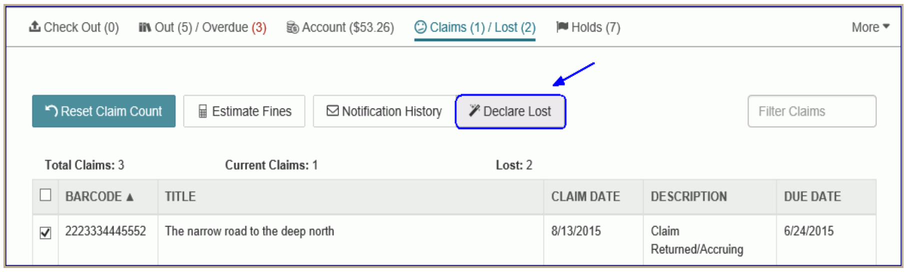


When you check in an item that can fill a hold request for which the pickup location has been changed, the Transfer for hold message box displays the new pickup branch. You can select **YES** to transfer the checked-in item to the new pickup location, **NO** to check the item in but cancel the hold, or **CANCEL** to cancel the check in.

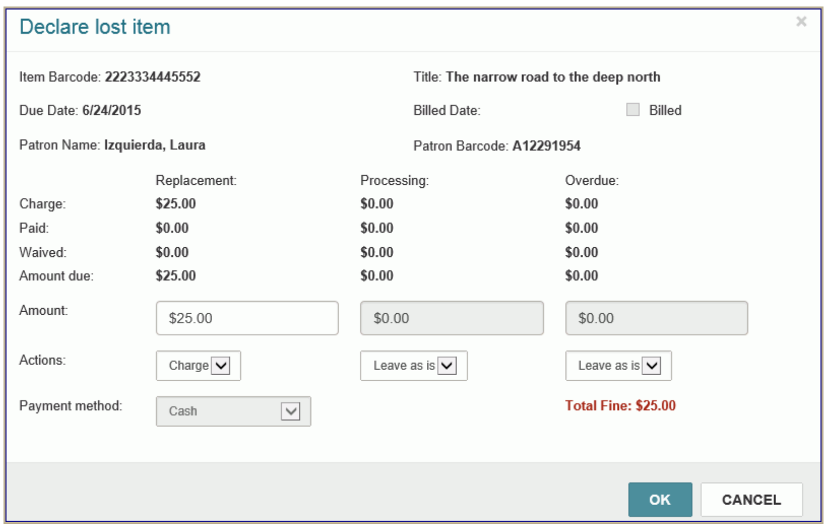

Transfer for hold
Barcode: 0002700008101
Title: The nonesuch.
This item fills a request at
Hadley-Luzerne Public Library (LUZ)
Transfer for hold?
(Click Cancel to stop the check-in/check-out process.)
YES
NO
CANCEL

Move Claimed Items to Lost

You can now change a claimed item to a status of Lost from the Claimed/Lost view of the patron's record. Select a singled claimed item (Claim Never Had, Claim Returned/Accruing, Claim Missing Part), and select the new **Declare Lost** button.



The Declare Lost dialog box opens where you specify the action to take for each charge and select **OK**.

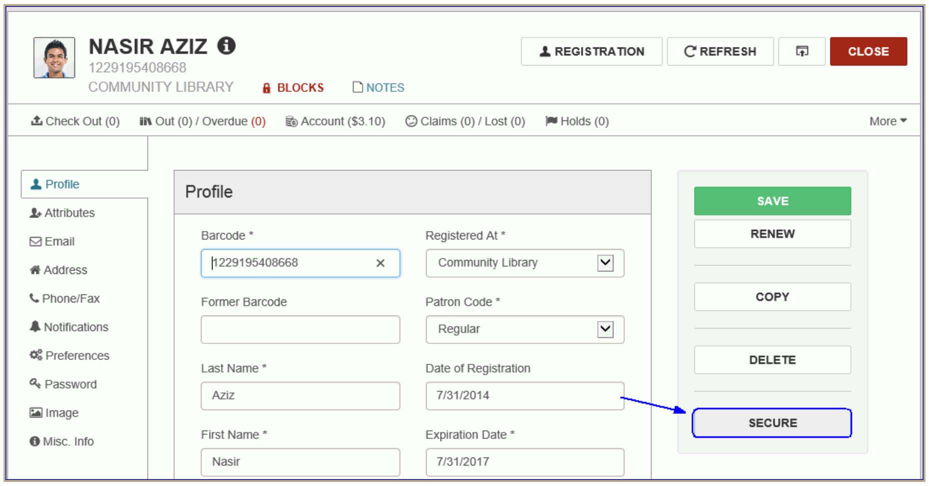


Depending on your selections in the dialog box, the Claims/Lost view displays the description **Lost/Unpaid** or **Lost/Accruing**.

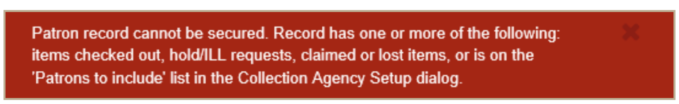
Secured Patron Records

If you have the required Polaris permission, **Patron record: Secure**, you can now set a patron record to a "secured" status in Leap so that the patron is restricted from most library activity. In addition, secured patron records cannot be deleted. To allow a secured patron to resume library activities, you must have the permission, **Patron record: Release**.

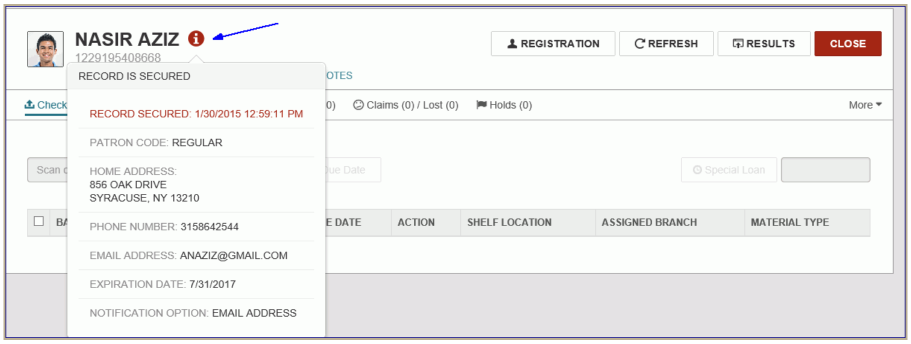
To set a patron's record to a secured status, open a patron record, and select **SECURE**.



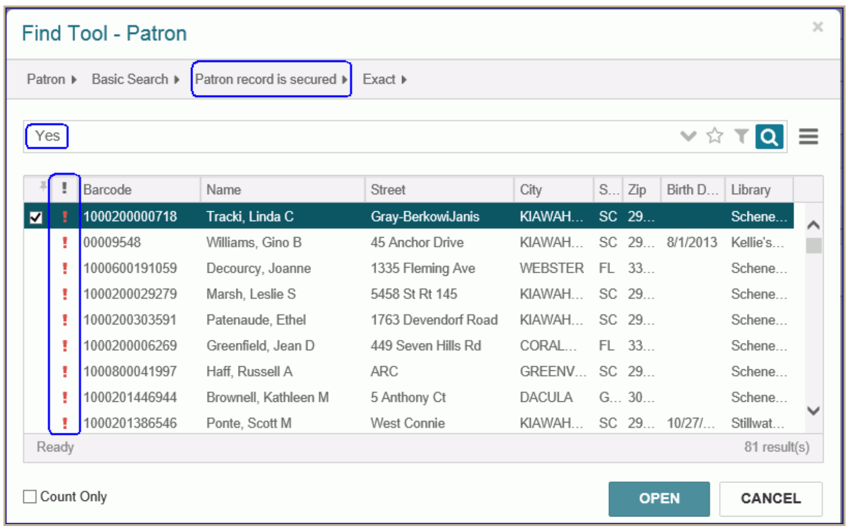
If the patron's record cannot be secured, a message appears.



If a patron record has been secured to prevent library activity, the information icon displays in red . When you select the icon, the information box displays **Record secured: mm/dd/yyy hh.mm.ss am/pm**. You can move among the different views of a secured patron record, but no actions can be taken except copying the patron record. Items can be checked in for secured patrons, but no other circulation activity is possible.



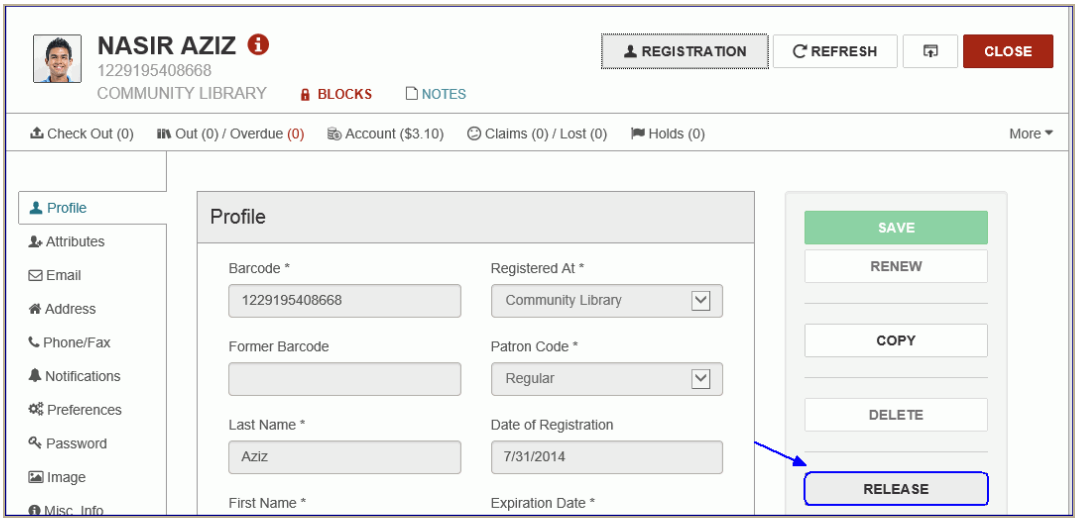
You can search for secured patrons in the Leap Find Tool with a new limiter **Patron record is secured**, values **Yes** or **No**. In the patron Find Tool results list, a red exclamation point next to the patron's barcode indicates the patron record is secured.



If a staff member scans a barcode for a secured patron record or selects a secured patron from the Find Tool results list, a message displays: *This record is secured; no changes can be made.*

To release a secured patron record so that library activity can resume, go to the Registration view of a secured patron record, and select **RELEASE**.

Note:
The **RELEASE** button displays only if the patron record is secured and you have the permission to release secured patron records.


NASIR AZIZ
1229195408668
COMMUNITY LIBRARY
BLOCKS
NOTES
REGISTRATION
REFRESH
CLOSE
Check Out (0)
Out (0) / Overdue (0)
Account ($3.10)
Claims (0) / Lost (0)
Holds (0)
More
Profile
Attributes
Email
Address
Phone/Fax
Notifications
Preferences
Password
Image
Misc. Info
Profile
Barcode *
1229195408668
Registered At *
Community Library
Former Barcode
Patron Code *
Regular
Last Name *
Aziz
Date of Registration
7/31/2014
First Name *
Expiration Date *
SAVE
RENEW
COPY
DELETE
RELEASE

Pickup Branch Column Added to the Picklist

The Picklist page now includes a new **PICKUP BRANCH** column so that staff members can identify items that need to be routed to other locations for pickup.