What's New in Polaris and Leap 6.0

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Polaris Installation Notes

File Path

When the new Polaris release is installed on a workstation, the file path changes from 5.6 to 6.0.

Examples:
c:\ProgramData\Polaris\6.0
c:\Program Files\Polaris\6.0
c:\Program Files (x86)\Polaris\6.0

Polaris Inventory Manager

You can now use the Polaris Client Installer wizard to install Polaris Inventory Manager (PIM).

Polaris SIP

If your SIP self-check vendors can support UTF-8, you can now select this option under Polaris SIP. See "SIP with UTF-8 Added to Installer" on page 35.

New and Modified Polaris Administration Settings

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

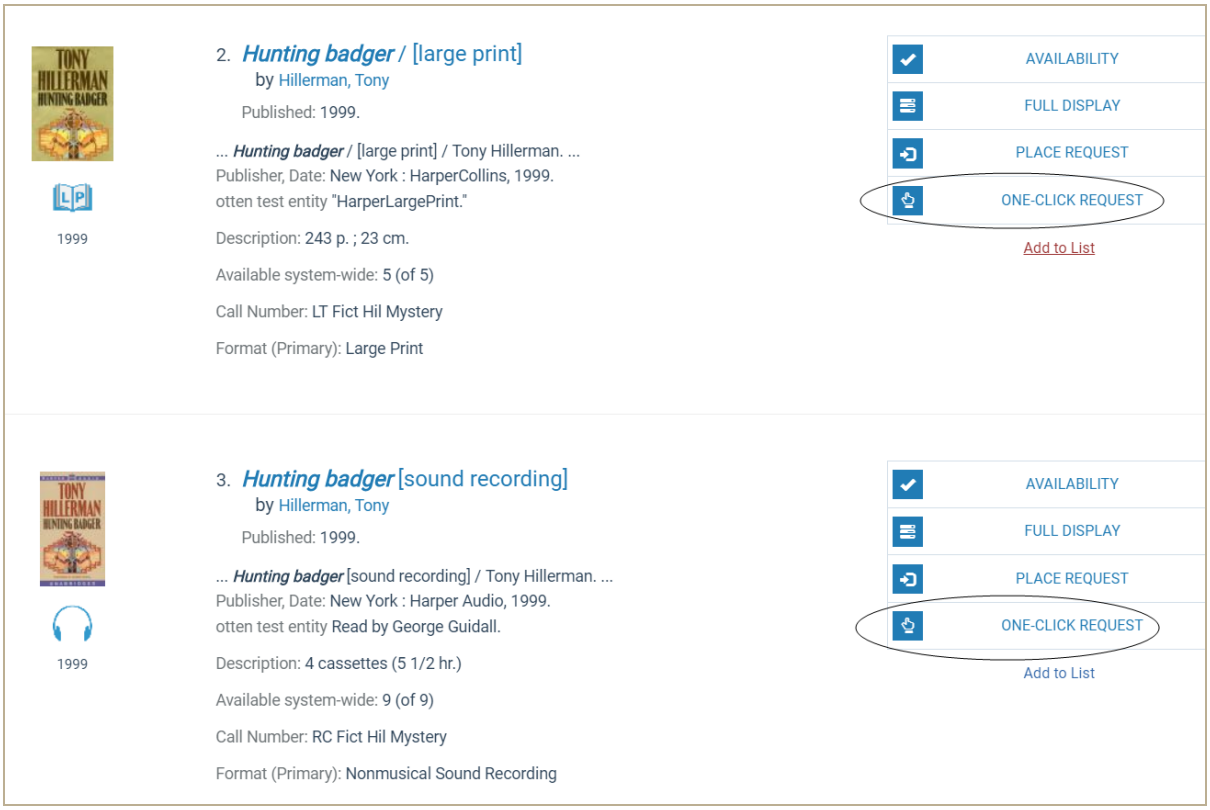
Location / Name	Purpose	Default	Level
PowerPAC Profiles - Changed			
Dashboards: Narrow your search & related searches to configure the facet.	Configure Lexile Reading Level facet (Narrow your search dashboard). See "Lexile Reading Level Facet in PowerPAC" on page 14.	No (does not display)	System, Library, Branch
Staff Client Profiles - Added			
Web App: Display reason and note fields during Reset Due Date	If set to **Yes**, the **Reason** drop-down list and **Notes** field are displayed when a user modifies the due date in the Polaris Web App, Leap. See "Leap - Display/Require Reason When Resetting Due Date" on page 52.	No	System, Library, Branch, Staff
Web App: Request Manager Default Hold request status filter Web App: Request Manager Default ILL request status filter Web App: Request Manager default INN-Reach requests status filter	These profiles specify the default request status filter for hold requests, ILL requests and INN-Reach requests displayed in the Leap Request Manager. See "Leap - Request Manager" on page 36.	Active (default status for hold request view) Inactive (default status for ILL request view) Active (default status for INN-Reach view)	System, Library, Branch, Staff
Web App: Recent records to retain: Bibliographic Web App: Recent records to retain: Item Web App: Recent records to retain: Patron	These profiles specify the default number of recent records that appear on the Workform Tracker in Leap. See "Leap - Recall Recent Records" on page 59.	2 (maximum of 99)	System, Library, Branch, Staff

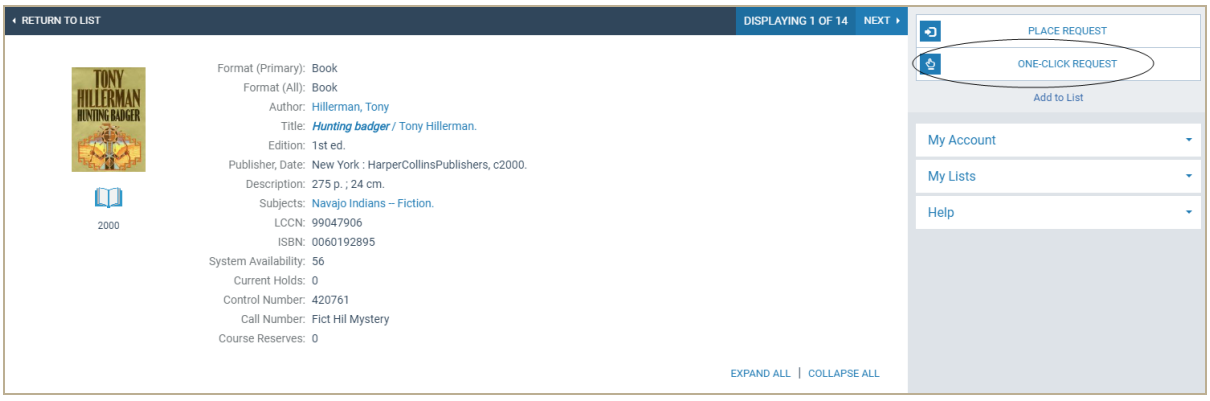
Location / Name	Purpose	Default	Level
Patron Services Profiles - Added			
Due date modification: Reason required	If set to **Yes**, a reason or note must be entered when a due date is reset in Leap. See "Leap - Display/Require Reason When Resetting Due Date" on page 52.	No	System, Library, Branch, Staff
Request Parameters - Changed			
Holds Options – Requests tab	Enable one-click requests in PowerPAC. See "One-Click Hold Requests in PowerPAC" on page 5.	Not checked	System, Library, Branch
Leap Parameter - Added			
Media dispenser: Use local security manager value	When set to **Yes**, the local security manager is used. See "Leap - Enable Circulation from a Media Dispenser" on page 45.	No	Workstation
Database Tables - Added			
Patron Address Types	Defines the patron address types. See "Patron Address Types " on page 28.	N/A	System
Database Tables - Modified			
Circulation Statuses	Banner text column added for defining the circulation status to display on the Item Record workform's book jacket image in Leap. "Leap - Circulation Status on Item Record Banner" on page 64.	N/A	System
Bibliographic Deduplication	A duplicate detection rule was added that matches the 001 (Control number) field of an incoming bibliographic record to the 001 field of the existing record in the Polaris database. See"Added Duplicate 001 Tag Rule for Bibs " on page 24.	N/A	System
Policy Tables - Added			
User Defined Due Date Modification Reasons	Defines the reasons that users can select when resetting the due date in Leap. See "Leap - Display/Require Reason When Resetting Due Date" on page 52.	N/A	System, Library, Branch

Location / Name	Purpose	Default	Level
Permissions - Added			
System Administration	Modify due date modification reasons table: Allow See "Leap - Display/Require Reason When Resetting Due Date" on page 52	Assigned to the Administrator permission group by default.	System
	Modify patron address types table: Allow See "Leap - Display/Require Reason When Resetting Due Date" on page 52.	Assigned to the Administrator permission group by default.	System
Permissions - Modified			
Circulation	Access hold request manager: Allow Access Ill request manager: Allow		Branch (These permissions were previously available at the System level only. They have been moved to the Branch level.)

One-Click Hold Requests in PowerPAC

Logged-in patrons can now place title-level hold requests with one click in Polaris PowerPAC. When you enable this feature, the **One-Click Request** button is displayed on search results pages and on full display pages for single titles, as shown in the following examples:

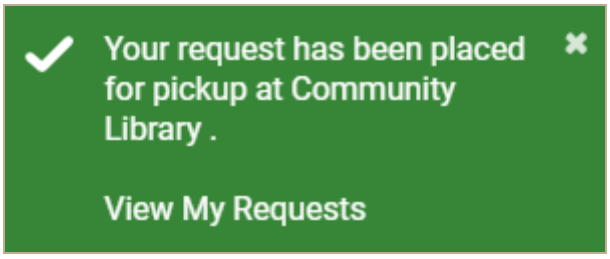




The one-click request activation date is the current date, and the pickup branch is automatically set to the patron's default pickup library. If the patron does not have a default pickup library, the system uses the default pickup location designated in system administration for the patron's

registered branch (**Parameters – Requests, Hold Options - Requests tab, Default pickup branch**). If a default pickup branch is not specified for the patron's registered branch, the system uses the patron's registered branch as the pickup location. (Borrow-by-mail is not available for one-click hold requests.)

If the request is successfully placed, a confirmation message appears:



You can edit the confirmation message in Polaris Language Editor (WebAdmin). The string ID for the message is **PACML_1CLICKHOLD_SUCCESS**. The patron can click or tap **View My Requests** on the confirmation message to go to the Requests page of the patron account. The string ID for the **View My Requests** link is **PACML_1CLICKHOLD_SUCCESS_LINK**.

Block Messages

If the patron clicks or taps the **One-Click Request** button but the request cannot be placed due to a block (for example, the request would exceed material type hold limits for the patron), a message indicates why the request cannot be placed. You can edit the block messages in Polaris Language Editor (WebAdmin). The table below lists the possible block messages.

Message String	String ID
The request cannot be placed because your account has exceeded the maximum number of requests. You can cancel some requests or wait for a request to be filled, then submit this request again.	ILL_TEXT_ EXCEEDEDMAXNUMREQS
The request cannot be placed because your account has exceeded the maximum number of requests for this material type. You can cancel some requests for this material type or wait for a request to be filled, then submit this request again.	ILL_TEXT_ EXCEEDEDMAXNUMREQS_ MAT
You cannot request all the volumes of this title. Please use the "{0}" button to request a specific volume.	ILL_TEXT_1CLICK_ NOREQUESTFORMULTIVOL
You cannot request all the issues of a journal or magazine. Please use the "{0}" button to request an individual issue.	ILL_TEXT_1CLICK_ NOREQUESTFORALLISSUES

In the above table, {0} represents the **Place Request** button. If you customize the text for this button, the system uses your customized text in the message instead of the default **Place Request**.

If there are multiple blocking conditions, only the top-level blocking message is displayed (maximum number of requests exceeded, then material type limit, then title-level errors for multi-part or serial requests).

If the system encounters a processing error, a general error message is displayed: **An error was encountered placing your request.** The string ID is **PACML_ONECLICK_ERROR_MSG**.

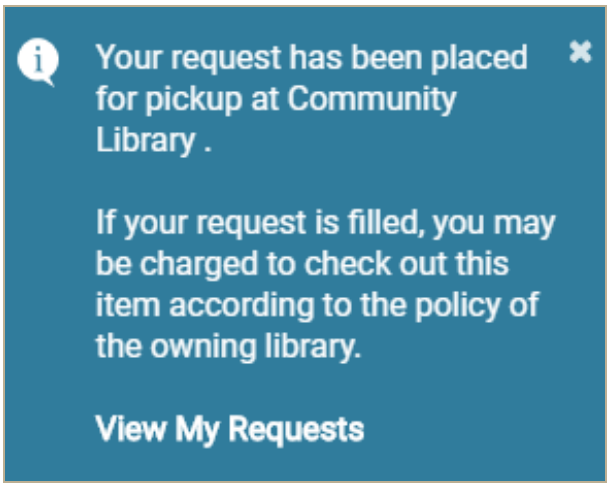
Even when enabled, the **One-Click Request** option is not displayed in these situations:

- The patron is blocked from placing any requests.
- The **Place Requests** button is not displayed for a title (for example, when the PAC profile **Suppress Availability and Requests** is set for the title's type of material).
- The system charges for holds.
- The title belongs to a remote database.
- The title represents integrated eContent.

The one-click option is never available for item-level or first available copy requests, or requests from Mobile PAC or Children's PAC.

Information Messages

If the patron clicks or taps the **One-Click Request** button and the request can be placed, the system displays an information message in certain circumstances (for example, a charge may be applied at checkout):

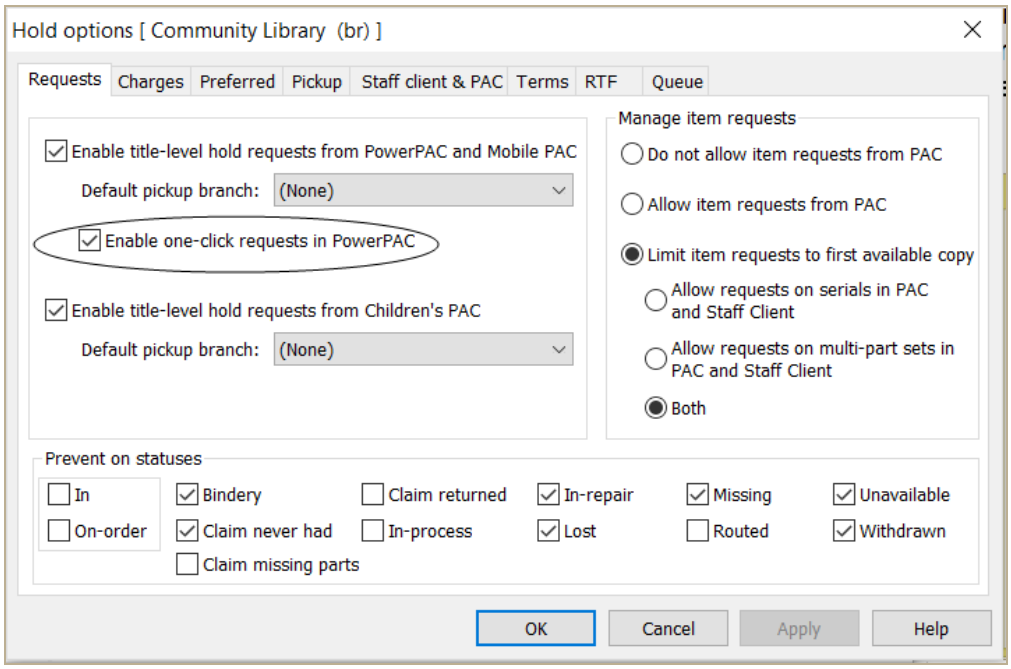


The system displays all information messages applicable to the request. The table below lists the possible information messages.

One-Click Request Situation	Message String	String ID
Request on a constituent bibliographic record (bound-with)	This item is bound with the title: your-title-here	PACML_BOUNDMSG3
Request where a charge may be applied at checkout	If your request is filled, you may be charged to check out this item according to the policy of the owning library.	ILL_BULK_CHARGECKOREQ
Request where no items are attached to the bibliographic record, and the Requests parameter - Hold Options, Staff client & PAC option **If no items are attached: Block in PAC** setting is disabled	This title has no items. Your request may not be filled.	ILL_TEXT_ NOITEMSAVAILABLE_BULK

Enabling One-Click Requests

Use the **Requests** parameter - **Holds options | Requests** tab to enable one-click requests. Select (check) **Enable one-click requests in PowerPAC**. The checkbox is available for selection when you have checked **Enable title-level hold requests from PowerPAC and Mobile PAC**. It is not checked by default.



Filtering Remote Z39.50 Target Search Results in PowerPAC

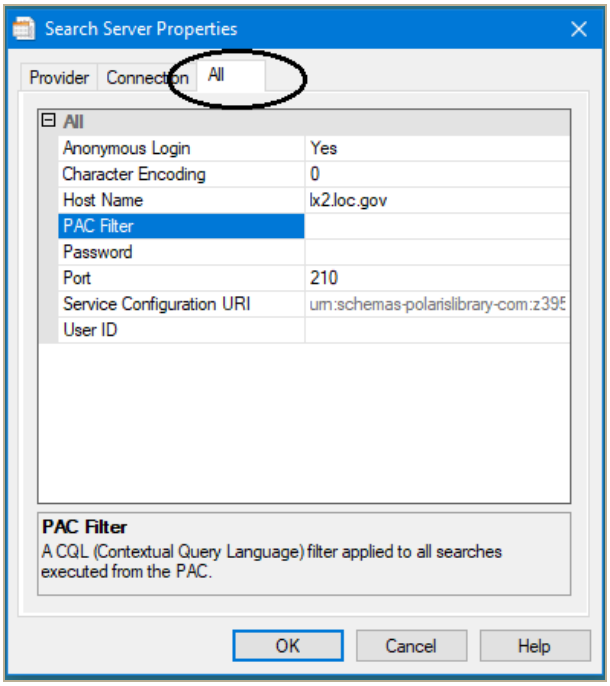
Previously, a remote Z39.50 database search returned all types of materials in PAC search results, regardless of whether patrons could actually request the materials via interlibrary loan. Beginning with Polaris 6.0, you can set up a Contextual Query Language (CQL) filter for a particular Z39.50 connection that filters the results to show only those materials that patrons can actually request.

Once you set up the filter for the remote database connection, it applies to every PowerPAC search on that remote database until the filter is removed from the server record. The filter is not visible to patrons and cannot be removed or altered from PowerPAC, but you can remove or modify it in the server record. You need system administration Servers permissions to work with CQL filters in server records. The CQL filter is optional, and is not set up by default.

> **Important:**
> After you set up the CQL filter, you must reboot the PAC server to restart the necessary processes.

To add a CQL filter to a Z39.50 database server record:

1. In Polaris Administration, search for and open the server record, or open it from the Administration Explorer.
2. Right-click the connection in the Connections list and select **Modify**. The Define Connection dialog box opens.
3. Click **Configure**. The Search Server Properties dialog box opens.
4. Click the **All** tab.



5. Type the CQL filter command in the PAC Filter field. See "About the CQL Filter" on page 12.
6. Click **OK** on the Search Server Properties dialog box.
7. Click **OK** on the Define Connection dialog box .
8. Select **File|Save** to save the server record.
9. Reboot the PAC server.

About the CQL Filter

The CQL filter for Z39.50 remote databases uses Polaris's existing CQL access points for custom "Limit by" search filters. See "PAC CQL Commands and Access Points" in Polaris staff client online Help for more information about constructing PAC "Limit by" filters. You can use Boolean operators; for example, **TOM=bks NOT TOM=ebk** or **TOM=ser OR TOM=bks**. The new **PAC Filter** field in the server record does not perform any syntax or validation checks on the CQL string.

The third-party remote database must be able to consume the Polaris access points. If the remote database cannot consume an access point and that access point is used in the filter, the search will fail. For example, the remote database may not support the Polaris **COL** (collection) access point.

If the remote database can consume the access point but cannot consume the data provided, the search may not return results. For example, **TOM=AAA** may return no results because the third-party remote database does not have a type of material code **AAA**. In a Boolean search, that portion of the filter is ignored. For example, **TOM=bks OR TOM=AAA** may return only books (**bks**) because the third-party remote database does not have the type of material code **AAA**.

More Information

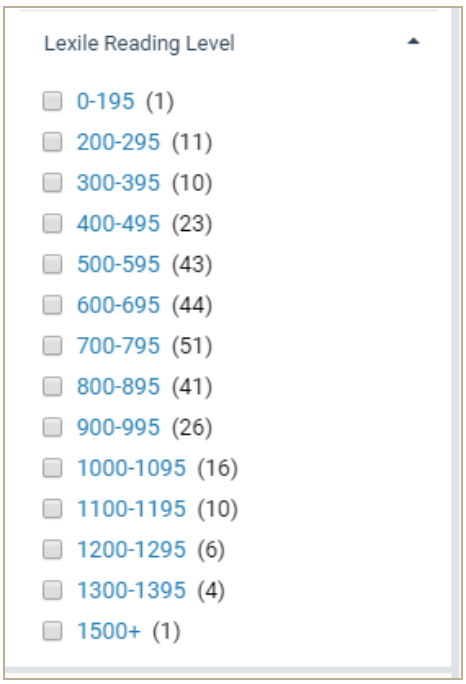
- **Setting up PAC Z39.50 search targets** - See "Managing Federated Search Targets" in Polaris staff client help.
- **Setting up Z39.50 server records** - See "Registering Remote Resource Servers" in Polaris staff client help.
- **CQL filter syntax** - See "PAC CQL Commands and Access Points" in Polaris staff client help.

Restricted Button Hover Text

When the Restricted button displays for eContent in the PAC, the default hover text that now appears is **Sorry, this title is currently not available at your registered branch**. This text can be modified in WebAdmin using the mnemonic: **PACML_EBRESTRICTED_TIP**.

Lexile Reading Level Facet in PowerPAC

PowerPAC users can now filter their search results by Lexile reading level range. The example shows a portion of the **Narrow your search** dashboard with the Lexile facet enabled:

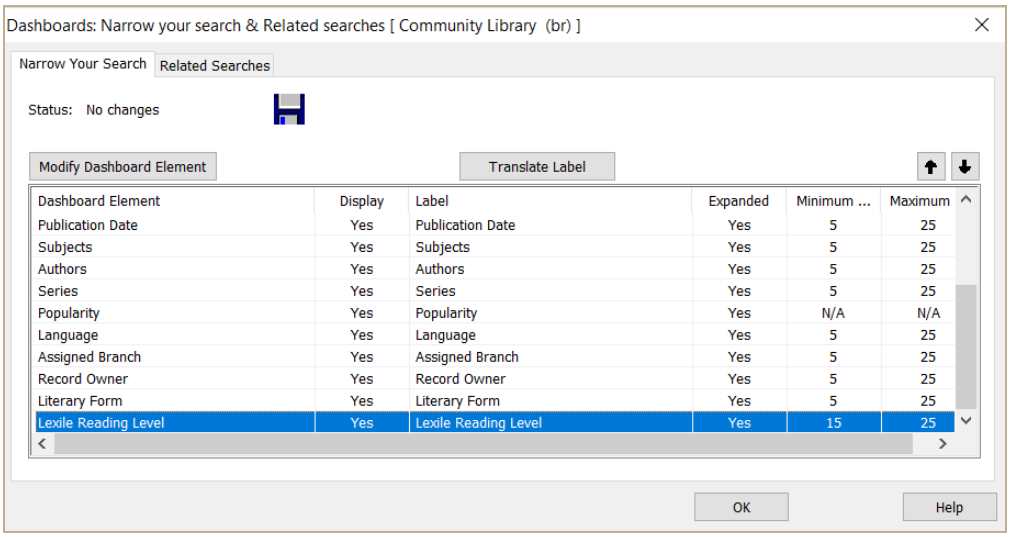


Lower ranges indicate easier reading levels, while higher ranges indicate more advanced reading levels. For more information about Lexile numbers and reading level equivalents, see https://lexile.com.

The Lexile number for a title is derived from the 521 tag in the MARC record, subfield $a. The first indicator must be 8; the second indicator is undefined (#). Subfield $b should always contain **Lexile**. When multiple tags exist in the bibliographic record, all tags meeting the criteria are considered. The system normalizes the data from the MARC tag and groups the facets into Lexile ranges; for example, **521 $a1150** is included in the displayed range facet **1100-1195**.

Enabling the Lexile Reading Level Facet

Use the PowerPAC profile **Dashboards: Narrow your search & related searches** to configure the facet. It is not displayed by default.



Note:
There are 15 possible Lexile levels. Typically you would leave the **Minimum to Display** setting at **15** to display all possible ranges if they exist in the search results, and leave the **Maximum to Display** setting at **25**.

For more information about setting up PowerPAC **Narrow your search** facets, see “Setting PowerPAC Narrow/Related Search Options” in Polaris staff client help.

Syndetics Unbound Integration in Polaris PAC

You can now offer enriched data from Syndetics Unbound in the Polaris PAC. Syndetics Unbound is a new service from Syndetics that combines existing Syndetics content with LibraryThing tags and reviews. To create the links to the Syndetics Unbound content in the Polaris PAC, libraries will need to export their ISBN data. The content is managed through a Syndetics administrator interface.

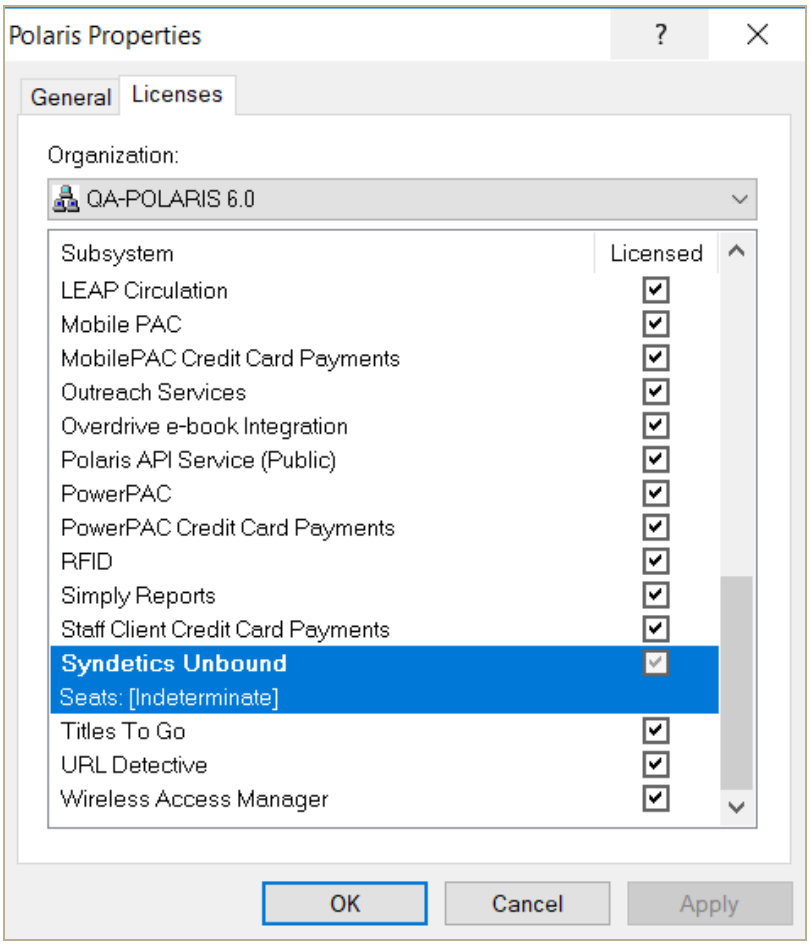
When the Syndetics Unbound service is enabled in Polaris Administration, your library can display enriched content including: cover images, annotations, author biographies, awards, recommendations, reader and professional reviews, other formats, tag clouds, and other content. The enriched data provided by Unbound will display in a single PAC drawer.

To prevent duplicate data from displaying, Innovative recommends that libraries using Syndetics Unbound disable any other Syndetics or LibraryThing content drawers. You can enable or disable enriched data content drawers using the Enriched data PAC profile.

Note:
Polaris Mobile PAC will not support the display of Syndetics Unbound content.

New License Key for Syndetics Unbound

When a library is licensed to use the Syndetics Unbound service with Polaris, the license is listed on the **Licenses** tab in the Polaris Properties dialog box.



Configuring Syndetics Unbound in Polaris Administration

Once your library has a license for Syndetics Unbound, your Polaris administrator can enable the service and configure the enriched data display in the PAC.

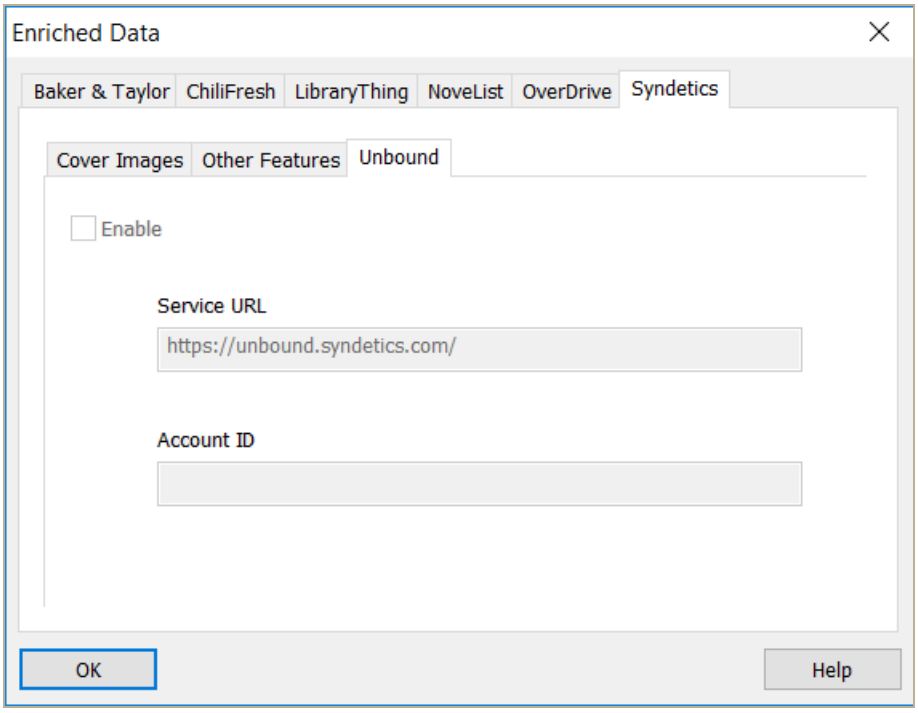
Enable the Syndetics Unbound Service

To enable the Syndetics Unbound service:

1. Click **Profiles** under the organization in the Administration Explorer tree view.
2. Click the **PAC** tab.
3. Click **Enriched data**.

   The Enriched Data dialog box appears.
4. Click the **Syndetics** tab and click the **Unbound** sub-tab.

   The **Unbound** sub-tab view appears.



5. Check the **Enable** box.
6. Enter the URL for the Syndetics Unbound JavaScript library in the **Service URL** box.
7. Enter your library's Account ID.
8. Click **OK**.

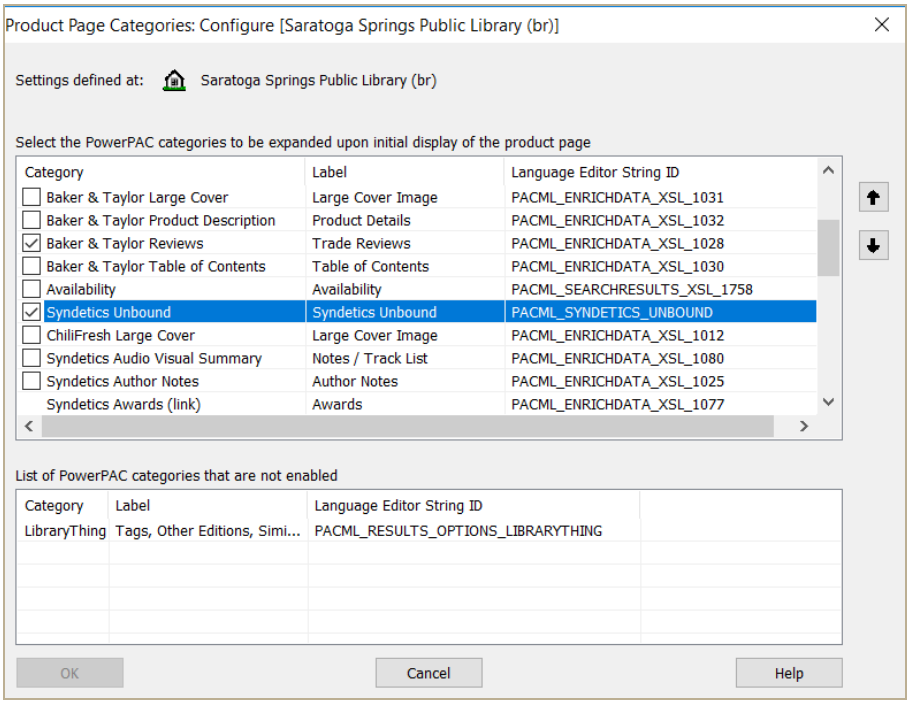
Configure the Syndetics Unbound Content Drawer

To expand the Syndetics Unbound content drawer by default:

1. Click **Profiles** under the organization in the Administration Explorer tree view.
2. Click **PowerPAC | Product Page Categories: Configure**.

   The Product Page Categories: Configure dialog box appears.

3. Click the **Syndetics Unbound** box to check it.

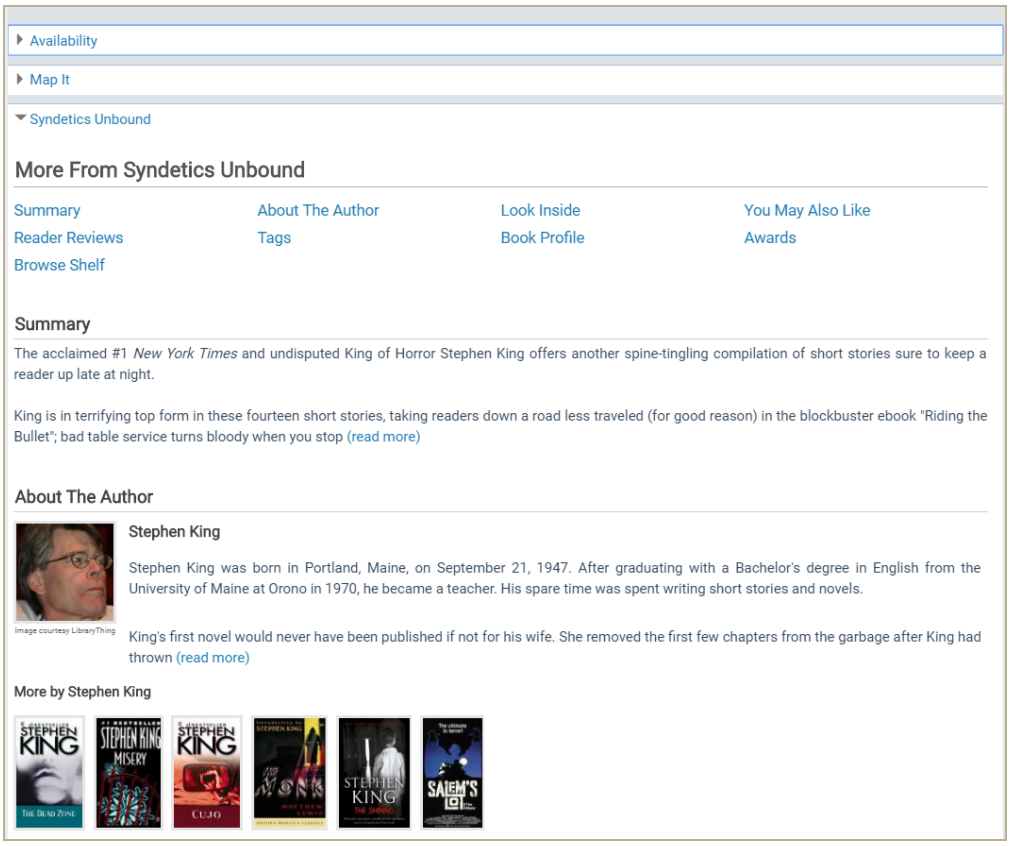


   When the box is checked, the drawer will be expanded by default in the initial PAC display.

For more information on configuring the PowerPAC product page, see Polaris Help.

Syndetics Unbound Enriched Data Display in PAC

When Syndetics Unbound has been enabled and configured for your library, the enriched data appears in the PAC content drawer.



Failure Messages for cloudLibrary Checkout and Place Hold

The default generic failure messages for Bibliotheca's cloudLibrary checkouts and hold requests have changed in Polaris PowerPAC and Mobile PAC. As in previous versions, you can edit the messages in Polaris Language Editor (WebAdmin).

Failed Checkout Messages

String ID	Message
PowerPAC: **PACML_ECKOFAIL**	There was a problem checking out this title. Please try again later, or use the cloudLibrary app to access this title.
Mobile PAC: **MP_MSG_CLOUD3M_ CHECKOUT_ERR_ACCNT**	

Failed Hold Request Messages

String ID	Message
PowerPAC: **PACML_EREQFAILED**	There was a problem placing a hold on this title. Please try again later, or use the cloudLibrary app to access this title.
Mobile PAC: **MPAC_3MHOLD_FAILED_ CLOUDLINKISSUE**	

Use Multiple Character Sets in the MARC Editor

The MARC Editor was modified to support multiple fonts for the display of Unicode characters. As part of this change, the new default font is Segoe. If a character does not exist in Segoe, a different font that supports that Unicode character will be used to display the character, provided that font has been installed on the workstation. The fonts are included in the language service packs from Microsoft. If Segoe and the other fonts used to display the characters are not installed, the MARC Editor will use Arial Unicode.

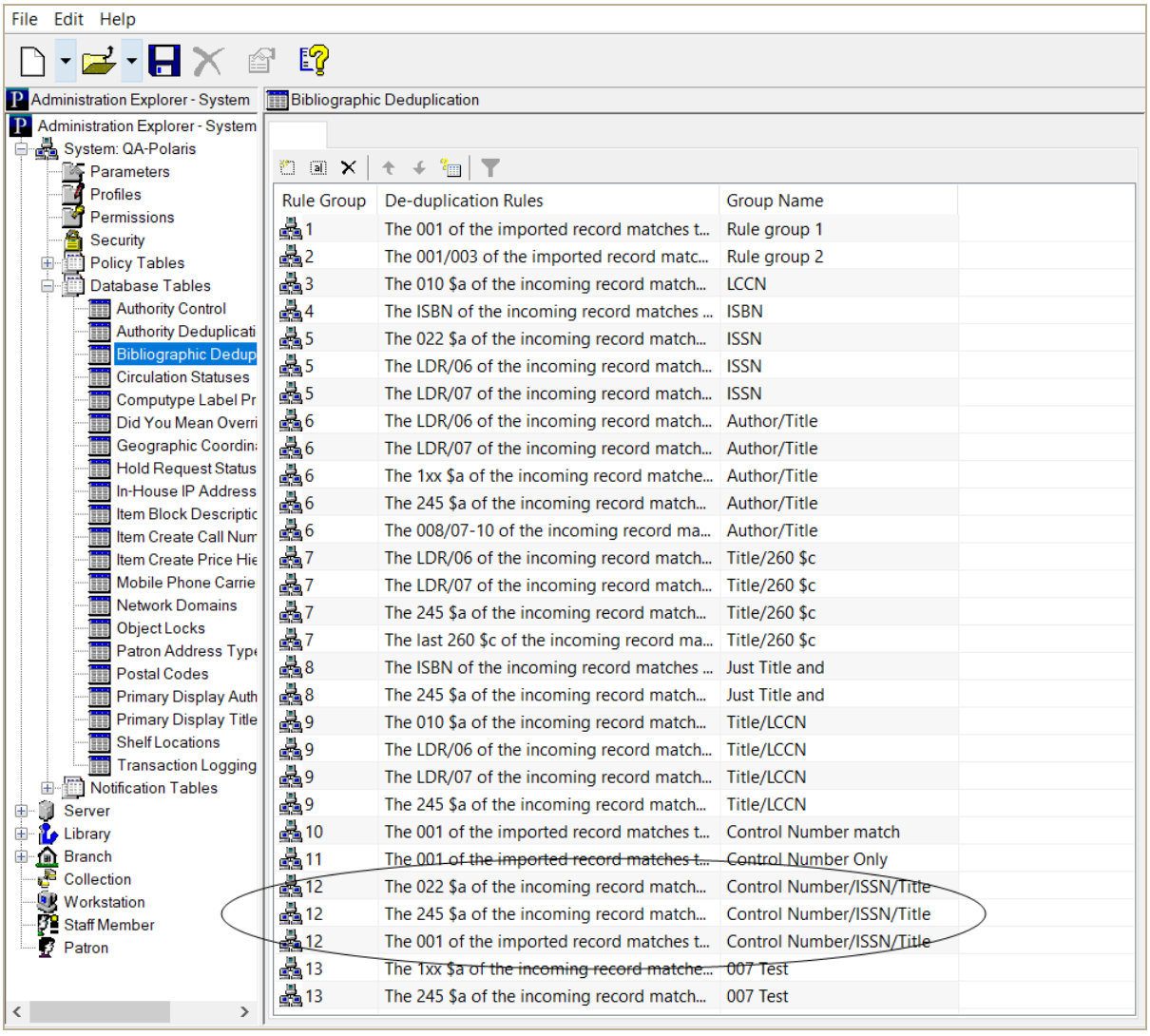
Lower Encoding Level for OverDrive EContent Bibs Created During the Automatic Import Process

When you import integrated eContent bibliographic records from OverDrive, the encoding level is set to 5 - Partial (MARC LDR 17) so that these records can be overlaid automatically with more complete records that have a higher encoding level. The encoding level change applies only to newly imported records; existing records are not changed.

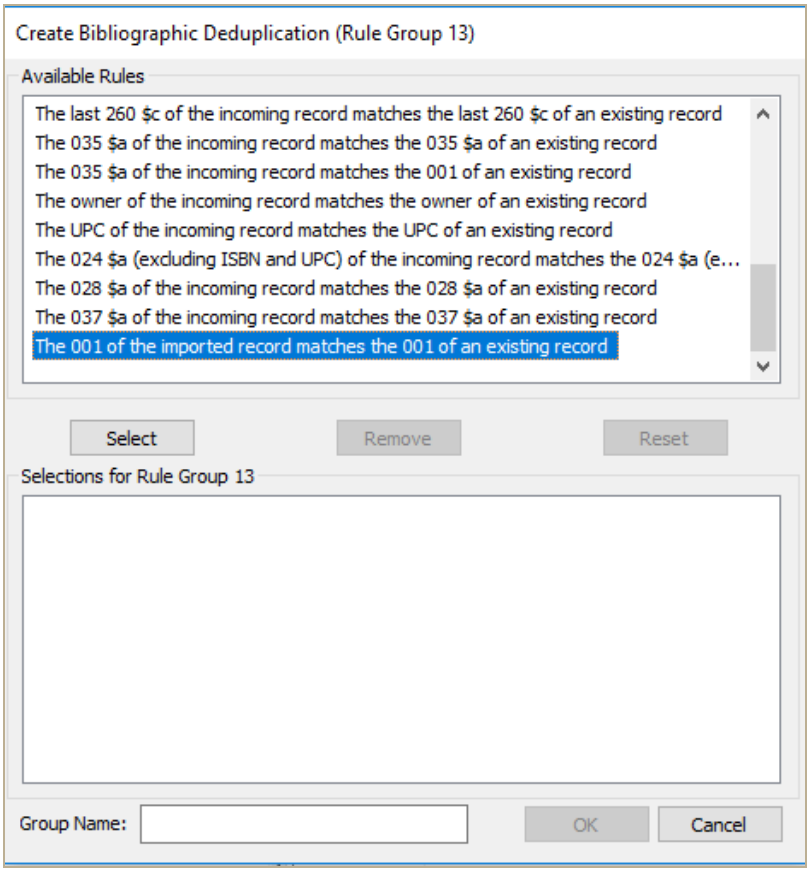
Added Duplicate 001 Tag Rule for Bibs

A duplicate detection rule was added that matches the 001 (Control number) field of an incoming bibliographic record to the 001 field of the existing record in the Polaris database. This rule was added so that bibliographic records exported to a third party for improvements can be re-imported into Polaris by matching on the 001 field. When this new rule is applied in an import profile, vendors no longer need to move the 001 to the 035 for duplicate detection.

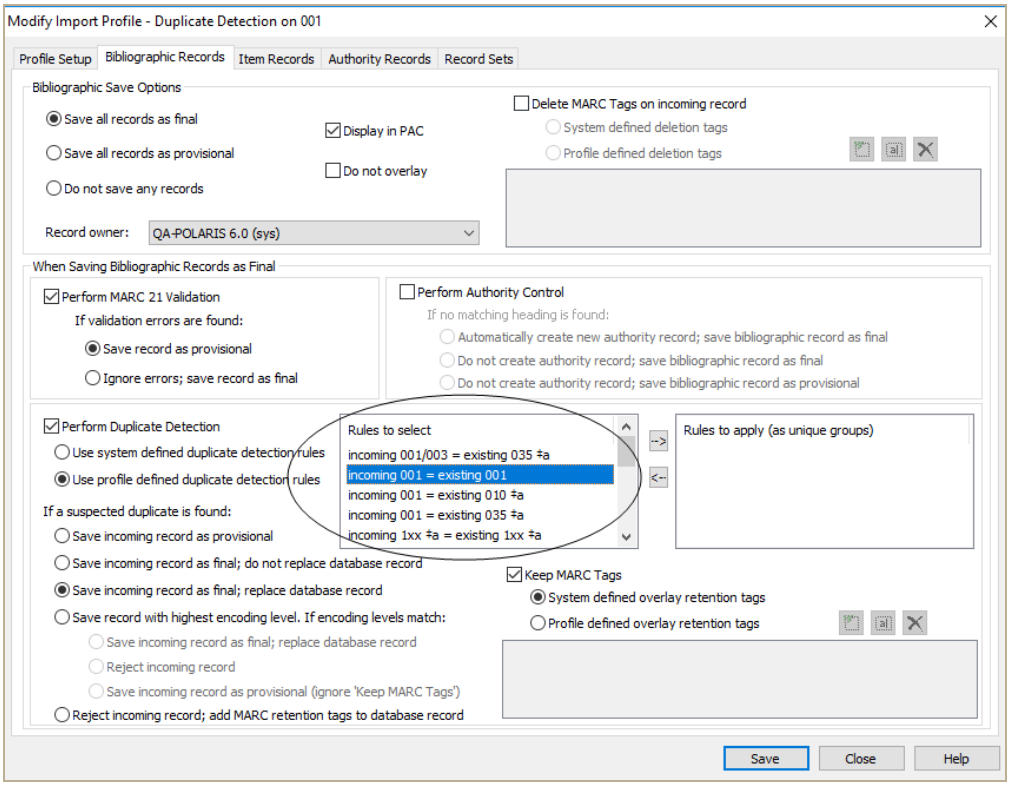
The 001 to 001 duplicate detection rule was added to the Bibliographic Deduplication table.



It is available in the Create Bibliographic Deduplication Rule dialog box.



And it can be selected in the Import Profile.



Your library can determine how to implement this new rule. For example, if the rule is added to the system-defined duplicate detection rules groups, it will be used by the import process. It is also available in the **Rules to select** list when the **Use profile defined duplicate detection rules** option is selected in the import profile for both Express Import and Full Import. You can use the 001 to 001 duplicate detection rule in combination with other rules.

When a duplicate 001 is detected during import, the process continues according to the action for handling duplicate records defined in the import profile. For example, if the **incoming 001 = existing 001** duplicate detection rule is applied, and the option **Save incoming record as final; replace database record** is selected, the incoming record replaces the database record when a duplicate 001 is found.

While it is possible to add the 001 to 001 duplicate detection rule to a rule group for consideration when saving records, a duplicate 001 tag cannot exist in the Polaris database and therefore will never be found. This rule is designed to be used in system-defined or profile-defined duplicate detection rules employed during importing.

Implement MARC Technical Notices

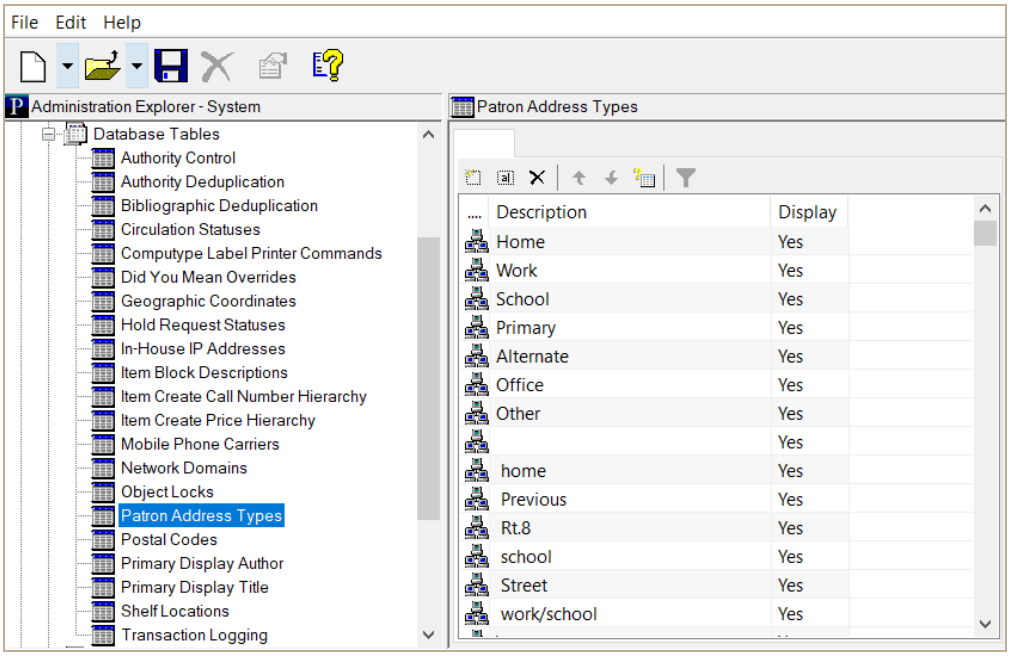
The updates specified in the following MARC notices were implemented in Polaris 6.0:

- MARC 21 Update No. 23
- MARC 21 Update No. 24
- Technical Notice (July 13, 2017)
- Technical Notice (July 28, 2017)
- Technical Notice (August 25, 2017)
- Technical Notice (September 15, 2017)
- Technical Notice (October 20, 2017)
- Technical Notice (November 21, 2017)
- Technical Notice (December 1, 2017)
- Technical Notice (December 21, 2017)

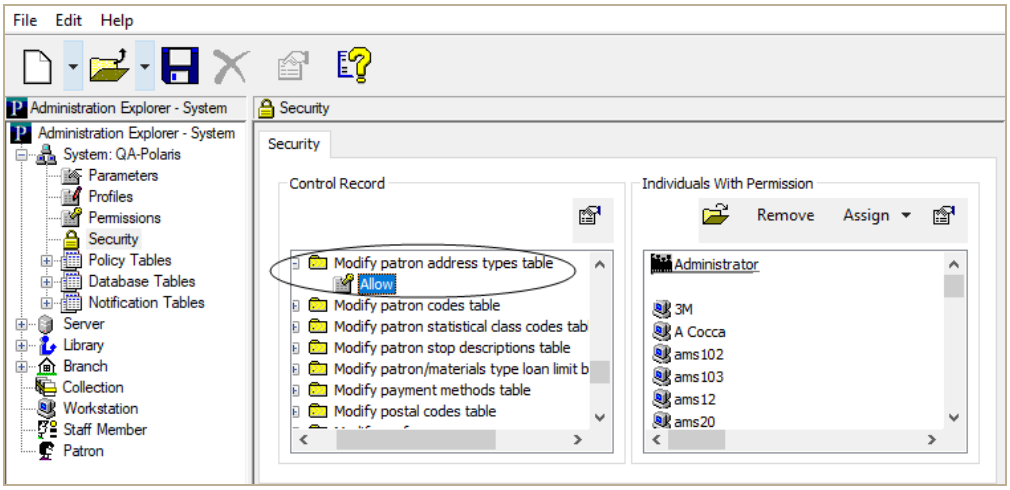
Patron Address Types

To standardize patron address types, a new database table was implemented. Now, when you enter a patron's address in Leap or in the Polaris staff client, the entries in the **Address Types** drop-down list are defined in the new Patron Address Types database table.

The Patron Address Types database table has three columns: **AddressLabelID** | **Description** | **Display** (**Yes**/**No**). The default address types are: **Home**, **Work**, **School**, **Primary**, **Alternate**, **Office**, and **Other**. System-defined address types and any address type used in a patron's record cannot be deleted from the database table.



To modify or delete patron address types, you must have the permission, **Modify patron address types table: Allow**.



Note:
At upgrade to 6.0, any existing custom values that have been defined are added to the database table and the patron records that use any of the custom values are added to a record set named: **Patron Address Type Cleanup**. This record set is owned at the System level. The content of the record set are all patron records where the **AddressLabelID>7**.

INN-Reach: Auto-Renew Disabled for Lending Library Items Out to Virtual Patrons

In previous versions of Polaris, if you enabled auto-renewal at your library, INN-Reach items you lent to borrowing libraries for virtual patrons were automatically renewed when the due date was reached. However, the due date for an INN-Reach item is calculated when the borrowing library receives the item and has no bearing on the due date of the item once it is checked out from the borrowing library to that library's patron.

Since an Owner Renew Item transaction (API 102) was being automatically sent at auto-renewal, and had no bearing on the borrowing library's renewal policies, auto-renewal has been disabled in Polaris 6.0 for the lending library's INN-Reach items.

For more information about INN-Reach circulation features and workflows in Polaris, see "Implementing and Using INN-Reach Integration" in Polaris staff client help.

Branch-Level Permissions for Hold Requests

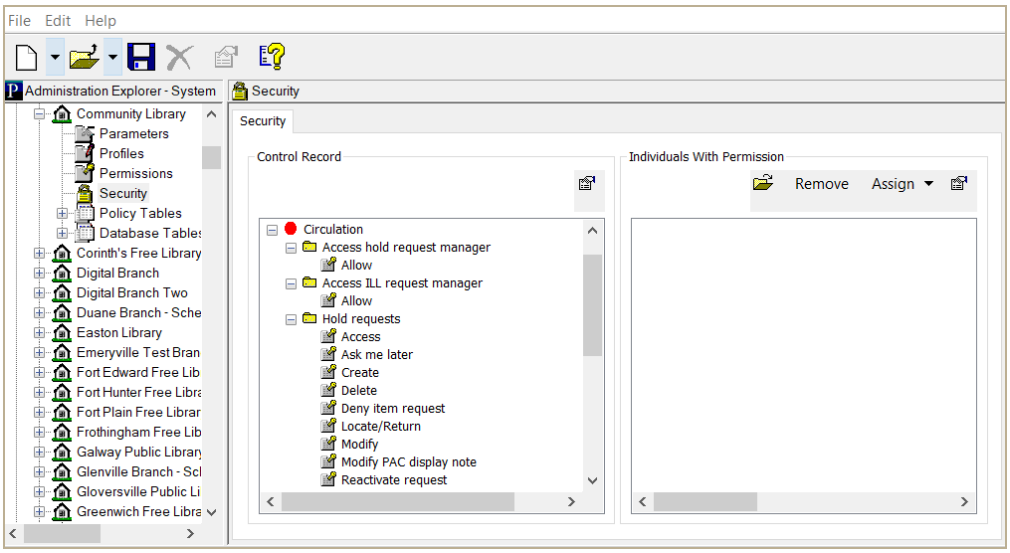
To provide more levels of permission control, the following permissions were moved or added to the branch level in Polaris Administration:

- **Access hold request manager: Allow**
- **Access ILL request manager: Allow**

Note:
Staff members who were previously granted either or both these permissions at the system level will be granted the permissions for all branches.

- **Hold requests**
  - **Locate/Return**
  - **Ask me later**
  - **Deny**

Note:
The Hold request permissions for the actions performed from the Picklist and the Holds view of the Patron Record workform in Leap (Locate/Return, Ask Me Later, and Deny) are now based on the user's logged-in branch. In addition, these permission updates apply to the Polaris staff client. If the branch you are logged into is the same as the item's assigned branch, you can perform these actions if you have the required permissions.

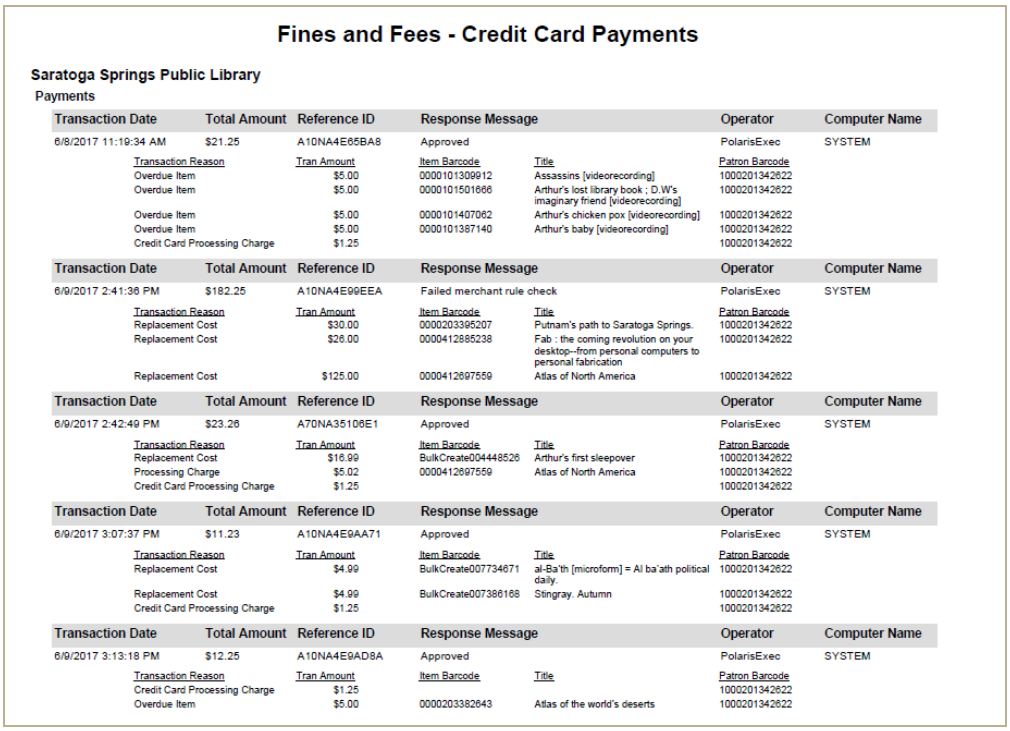


Important:
These branch-level permissions are granted by default unless you set the system-level Staff Client profile, **Permissions: Use Polaris-defined new permission defaults** to **No** before you upgrade to 6.0. When this profile is set to **No**, all new permissions in the release are not granted at upgrade, except to the Administrator group. The setting does not affect existing permission assignments.

Fines and Fees - Credit Card Payments Report Modified

The Fines and Fees - Credit Card Payment report was modified to group payments made through Smart Pay and Envisionware separately by patron and date. The report is now grouped by the ILSStoreOrderID, Patron Barcode, and Date.

Note:
If a patron makes multiple credit card payments in a single day, the payments will all be grouped under the first transaction of the day.



Fines and Fees - Credit Card Payments

Saratoga Springs Public Library

Payments

Transaction Date	Total Amount	Reference ID	Response Message	Operator	Computer Name
6/8/2017 11:19:34 AM	$21.25	A10NA4E65BA8	Approved	PolarisExec	SYSTEM

Transaction Reason	Tran Amount	Item Barcode	Title	Patron Barcode
Overdue Item	$5.00	0000101309912	Assassins [videorecording]	100020134262
Overdue Item	$5.00	0000101501666	Arthur's lost library book ; D.W's imaginary friend [videorecording]	100020134262
Overdue Item	$5.00	0000101407062	Arthur's chicken pox [videorecording]	100020134262
Overdue Item	$5.00	0000101387140	Arthur's baby [videorecording]	100020134262
Credit Card Processing Charge	$1.25			100020134262

Transaction Date	Total Amount	Reference ID	Response Message	Operator	Computer Name
6/9/2017 2:41:36 PM	$182.25	A10NA4E99EEA	Failed merchant rule check	PolarisExec	SYSTEM

Transaction Reason	Tran Amount	Item Barcode	Title	Patron Barcode
Replacement Cost	$30.00	0000203395207	Putnam's path to Saratoga Springs.	100020134262
Replacement Cost	$26.00	0000412885238	Fab : the coming revolution on your desktop--from personal computers to personal fabrication	100020134262
Replacement Cost	$125.00	0000412697559	Atlas of North America	100020134262

Transaction Date	Total Amount	Reference ID	Response Message	Operator	Computer Name
6/9/2017 2:42:49 PM	$23.26	A70NA35106E1	Approved	PolarisExec	SYSTEM

Transaction Reason	Tran Amount	Item Barcode	Title	Patron Barcode
Replacement Cost	$16.99	BulkCreate004448526	Arthur's first sleepover	100020134262
Processing Charge	$5.02	0000412697559	Atlas of North America	100020134262
Credit Card Processing Charge	$1.25			100020134262

Transaction Date	Total Amount	Reference ID	Response Message	Operator	Computer Name
6/9/2017 3:07:37 PM	$11.23	A10NA4E9AA71	Approved	PolarisExec	SYSTEM

Transaction Reason	Tran Amount	Item Barcode	Title	Patron Barcode
Replacement Cost	$4.99	BulkCreate007734671	al-Ba'th [microform] = Al ba'ath political daily.	100020134262
Replacement Cost	$4.99	BulkCreate007386168	Stingray. Autumn	100020134262
Credit Card Processing Charge	$1.25			100020134262

Transaction Date	Total Amount	Reference ID	Response Message	Operator	Computer Name
6/9/2017 3:13:18 PM	$12.25	A10NA4E9AD8A	Approved	PolarisExec	SYSTEM

Transaction Reason	Tran Amount	Item Barcode	Title	Patron Barcode
Credit Card Processing Charge	$1.25			100020134262
Overdue Item	$5.00	0000203382643	Atlas of the world's deserts	100020134262

Updated Language String for Fine Notices

The default fine notice text was updated for print and emailed notices to eliminate text regarding further collection activity. The updated default string is: **Our records show an outstanding fine balance on your account. Please contact the library as soon as possible to resolve these fines.**

> **Note:**
> The string has been updated for English, Spanish, and French in 6.0; translated text will be updated in the next release.

The string mnemonics are as follows:

- Mailed notice: NT_FINE_M_TEXT
- Emailed notice: NT_FINE_EM_TEXT

If your library has customized these language strings for fine notice text, the notice text will not be affected.

ExpressCheck Responsive to Monitor Resolution

The ExpressCheck user interface was modified to display on larger 16:9 and 16:10 monitors in addition to monitors at 1024 x 768 resolution.

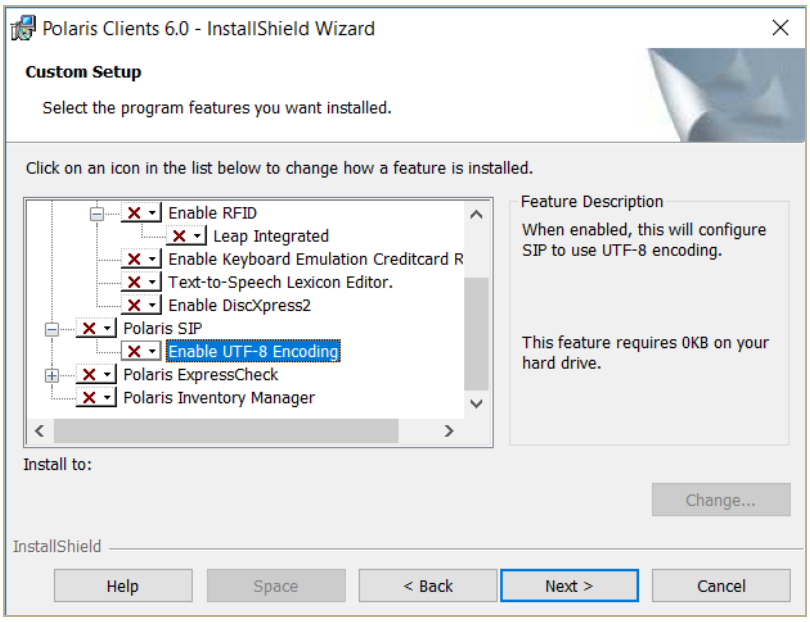
> **Note:**
> The minimum resolution for the ExpressCheck remains at 1024 x 768.

Content in the header and footer is responsive, dialog boxes and applets are centered, and other UI elements are docked to the left or right.

SIP with UTF-8 Added to Installer

When installing Polaris, you can select a new option under Polaris SIP so that self-check machines display the correct characters and diacritics for titles in languages other than English, including Chinese, Japanese, and Korean (CJK) characters.

Important:
Before updating your SIP service, verify that your SIP vendors can support UTF-8 character encoding.



Leap - Request Manager

The Hold Request Manager workform was added to Leap. You can use the Hold Request Manager to manage regular hold requests and interlibrary loan requests. To access the workform, you must have the following permissions: **Access Circulation: Allow** and **Access Hold Request Manager: Allow**.

Three new Staff Client profiles were added in Polaris Administration so that you can specify the default filter selected for each view of the Request Manager. These profiles can be set at the System, Library, Branch, Staff, or Workstation level. See "Set the Default Status Filter for the Request Manager Views in Leap Settings" on page 41.

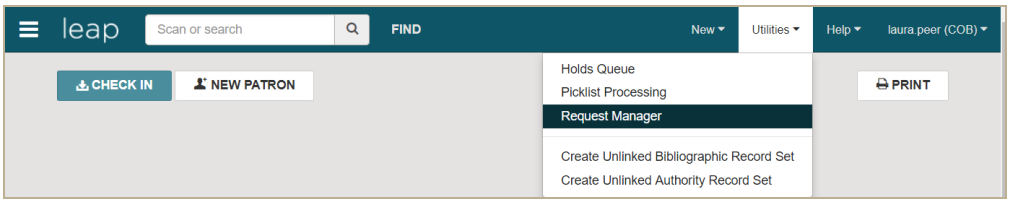
Manage Hold Requests from the Request Manager

You can view and manage regular hold requests from the Holds view of the Request Manager workform.

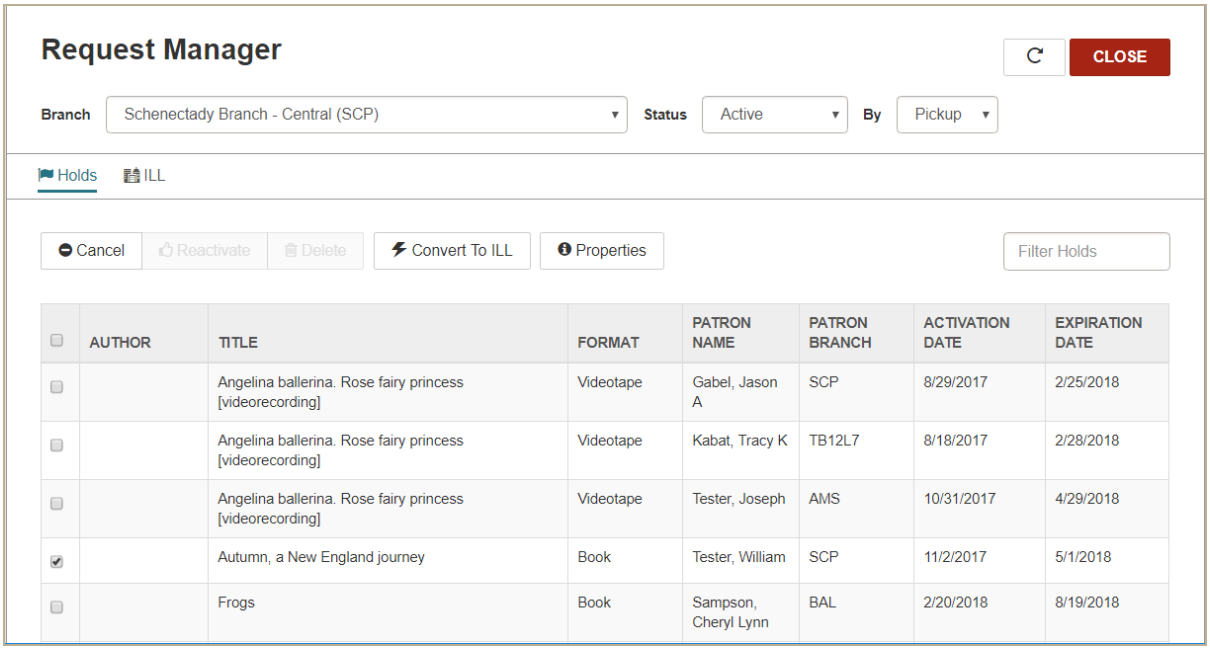
> **Note:**
> You can click on a hold request to open it in the Hold Request workform.

To use the Leap Request Manager to manage hold requests:

1. Select **Utilities | Request Manager**.



   The Request Manager workform | Holds view appears.



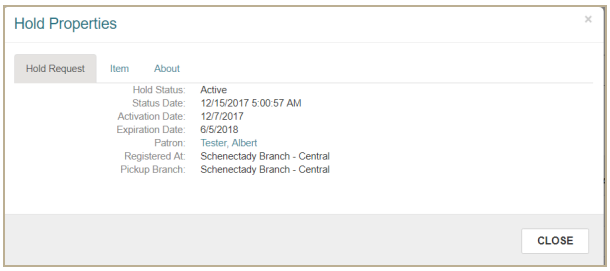
2. To limit the number of hold requests that appear in the list, select a status or branch option or start typing in the **Filter Holds** box:

- Select one of the following options in the **Status** drop-down list:
  - **Active**
  - **Cancelled**
  - **Expired**
  - **Held**
  - **Inactive**
  - **Not supplied**
  - **Out to patron**
  - **Shipped**
- Select one of the following options in the **By** drop-down list:
  - **Pickup** - Limits the hold requests by the pickup branch
  - **Item** - Limits the hold requests by the item's assigned branch
  - **Patron** - Limits the hold requests by the patron's registered branch
- Type text in the **Filter Holds** box to limit the holds list by the text. The list responds immediately as you type.

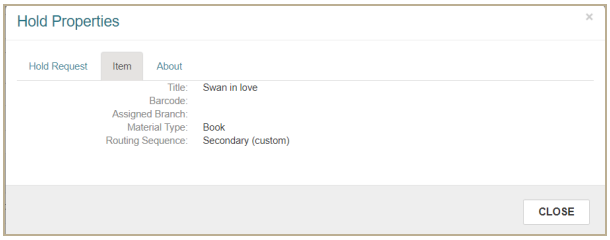
4. To view a hold request's properties, select the check mark next to the hold request, and click the **Properties** button.

   The Hold Properties window appears with the following tabs:

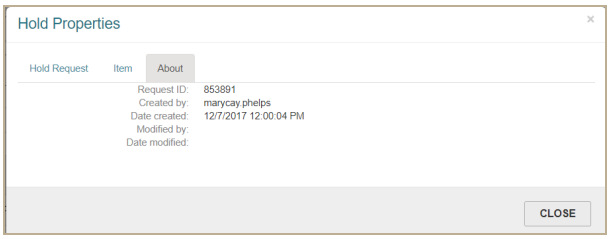
   - Hold Request



- Item



- About



5. To perform an action on a hold request in the list, select the check box next to a hold request, and click one of the following buttons:

   Note:
   The action buttons are active only when the action can be performed on the selected hold request.

   - **Cancel**
   - **Reactivate**
   - **Delete**
   - **Convert To ILL**
   - **Properties**

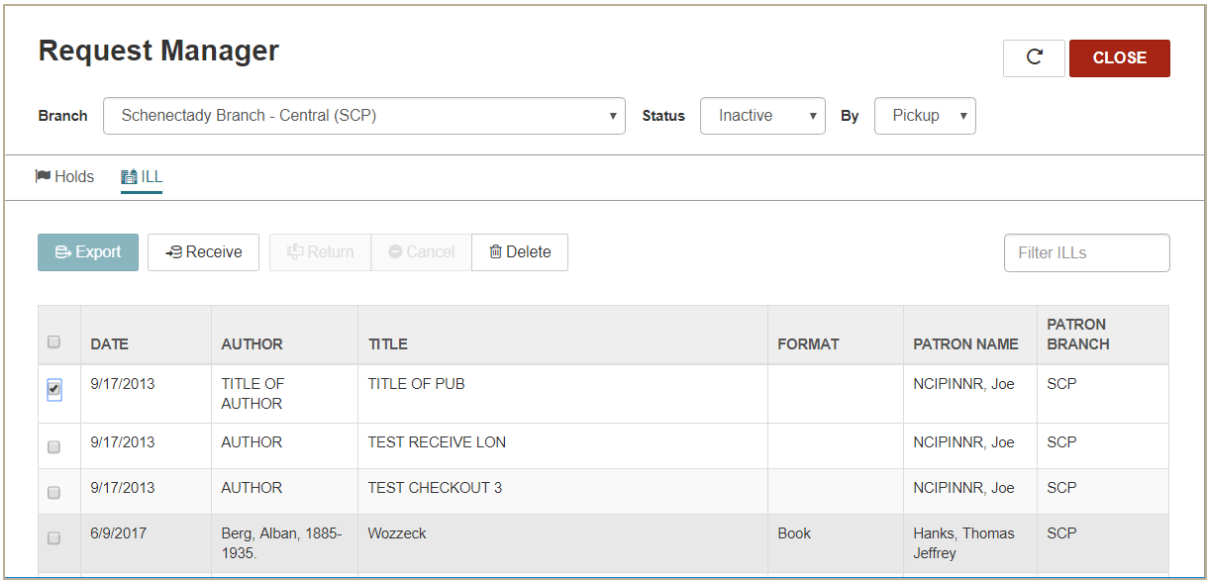
Manage ILL Requests from the Request Manager

You can view and manage ILL hold requests from the ILL view of the Request Manager workform.

> **Note:**
> You can click on a row to open the ILL Request workform.

To view and manage ILL requests:

1. On the Request Manager workform, click the ILL tab to go to the ILL view.

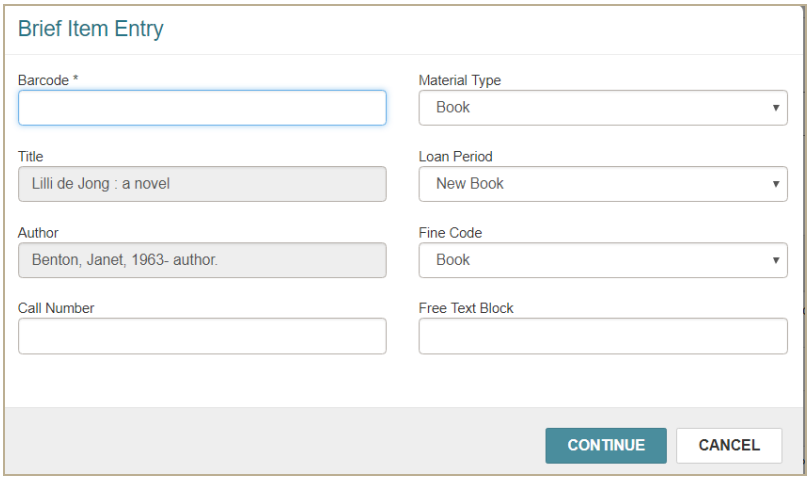


2. To perform an action on an ILL request in the list, select the check box next to the request, and click one of the following buttons:

> **Note:**
> The action buttons are active only when the action can be performed on the selected hold request.

   - **Export**
   - **Receive**
   - **Return**
   - **Cancel**
   - **Delete**

3. If you click the **Receive** button, the Brief Item Entry dialog box appears where you enter the barcode and other information so that the item can circulate. When you click **CONTINUE**, the item is created.

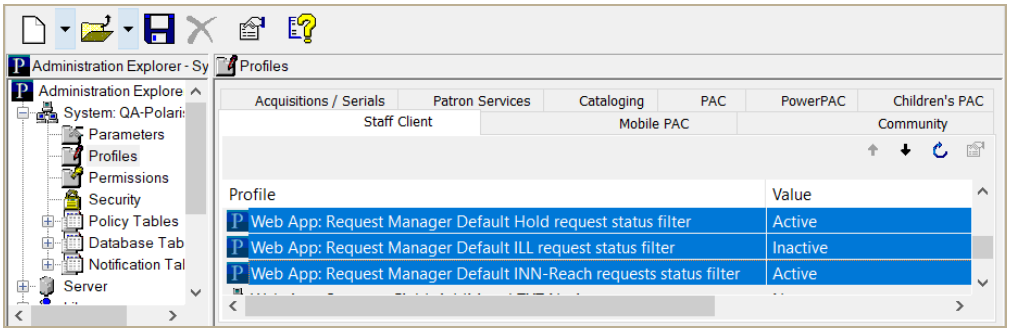


Set Default Status Filter for the Request Manager Views

To change the default filtered view for the Request Manager:

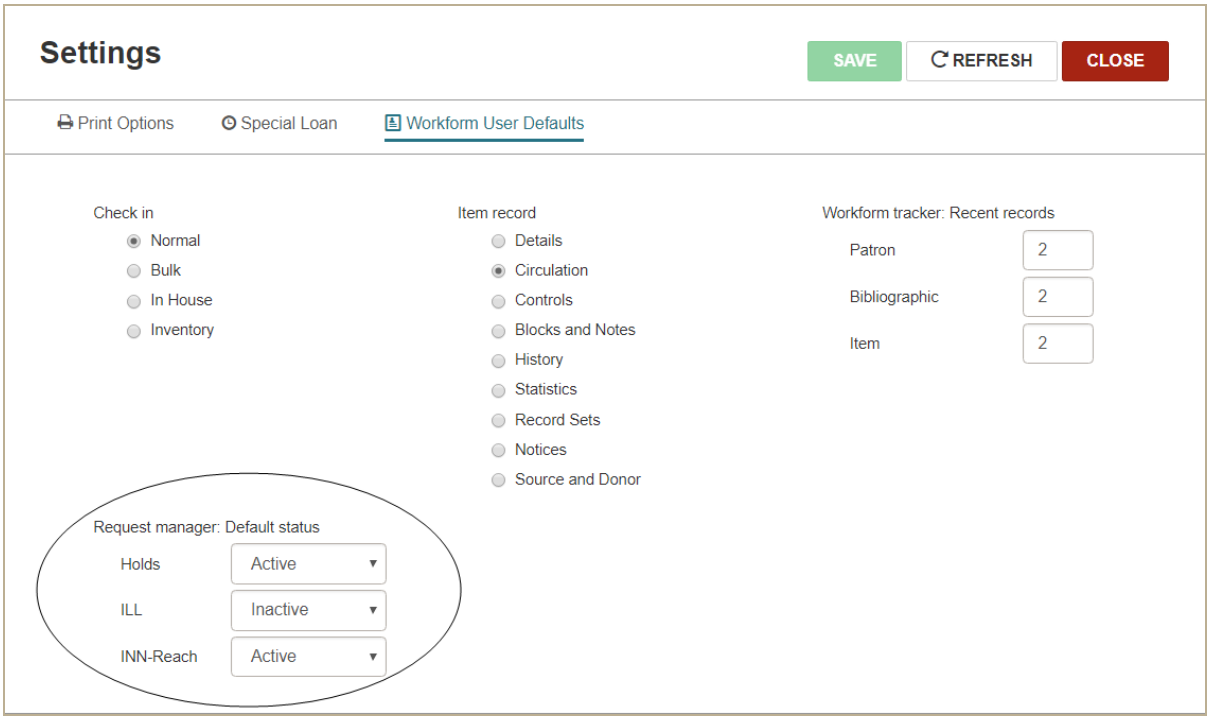
1. In the Administration Explorer, select **Profiles** under the organization, staff member, or workstation
2. Select the Staff Client tab.
3. Select a different status for the following Staff Client profiles:
   - **Web App: Request Manager Default Hold request status filter** - Default filter is Active
   - **Web App: Request Manager Default ILL request status filter** - Default filter is Inactive
   - **Web App: Request Manager Default INN-Reach request status filter** - Default is Active

   Note:
   The INN-Reach view will be implemented in the next release.



Set the Default Status Filter for the Request Manager Views in Leap Settings

Users can set the default status filter for the Holds, ILL, or INN-Reach view of the Request Manager by selecting a different status in the corresponding status drop-down list under Request manager: Default status on the Workform User Defaults view of the Settings page. This allows users to update their own settings without needing access to Polaris Administration.

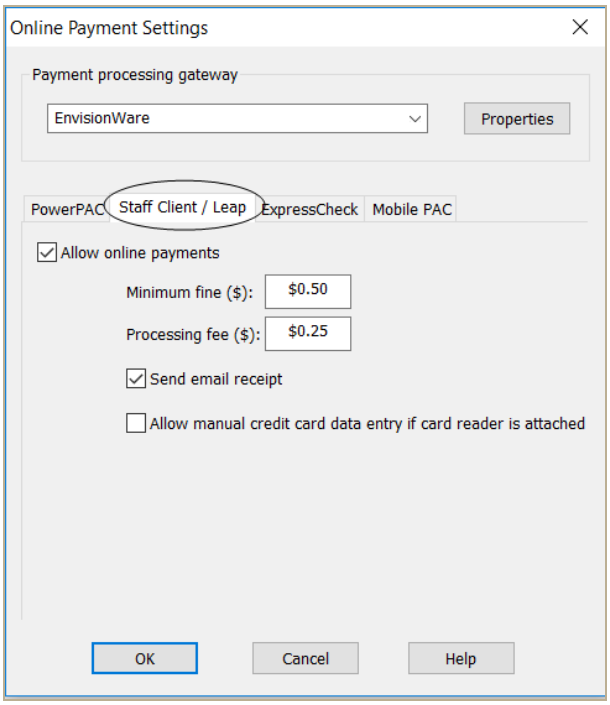


Leap - ECommerce Implemented

You can now accept credit card payments from Leap if your library has a license for Polaris credit card payments and a license for the payments gateway (EnvisionWare or Comprise), and the licensed gateway is configured in Polaris Administration.

Updates to Online Payments Settings

The label on the Online Payments Settings dialog box (Parameters | Online Payments: Configure) was updated to **Staff Client / Leap**. When you select EnvisionWare or Comprise as the payments gateway, and your library has the appropriate license for one of these gateways, the settings on the Staff Client / Leap tab apply to credit card payments from both the staff client and Leap.



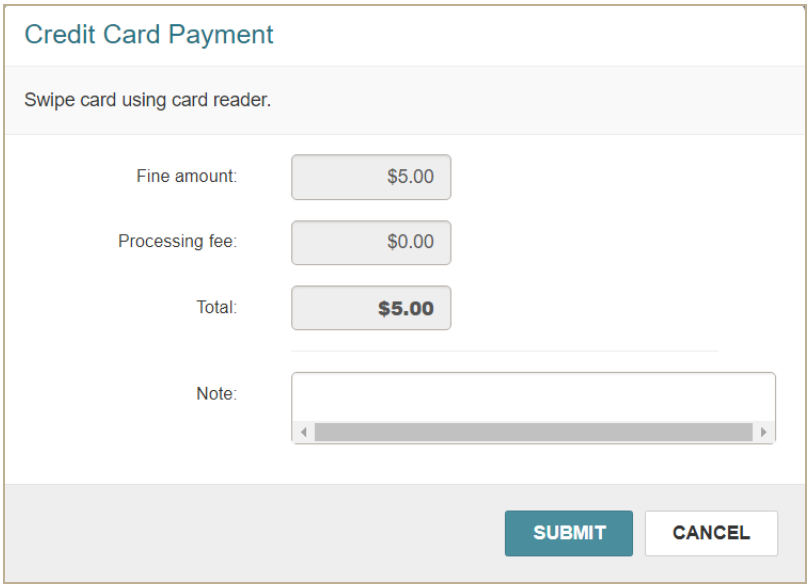
Receiving Credit Card Payments in Leap

Credit card payments can be made from the following Leap workforms:

- Patron Record | Account view - Pay charges.

- Patron Record | Items out view - Declare lost and pay for lost item; Pay for renewal if your library charges for check-outs and renewals; Pay for an overdue or chargeable item at renewal.
- Check Out - If your library charges for check-outs, pay at check-out.
- Check In - Pay for a billed or lost item at check-in.
- Check In - Pay an overdue fine for an item at check-in.
- Item Record - Check in an overdue item and pay the fine.
- Patron Registration - Pay registration fee, if your library charges to register new patrons.

When you click **Pay** and select Credit Card from **Method** drop-down list box, the Credit Card Payment dialog box appears. The Fine amount appears, and if your library includes a processing fee, the amount appears in the **Processing fee** box. The total amount also appears. You can add an optional note.



Then, you swipe the patron's credit card through the card reader, and click **SUBMIT** on the Credit Card Payment dialog box.

Notes:
If you attempt to enter an amount greater than the amount owed, the Overpayment Message box appears with the message: **Overpayment not allowed when paying by credit card.**
If you attempt to pay an amount less than the minimum defined for the logged on branch, the Minimum payment required box appears with the message: **Fines must total at least $x.xx for integrated credit card payments**.

Payments are then applied to the patron's account, and a payment receipt is generated. If the patron only receives an Ereceipt, a message displays: **EReceipt submitted for fine payment.**

Leap - Language Strings Added in Web Admin

You can use Polaris Web Admin to translate or change the titles, labels, and messages displayed in the Leap user interface. New string mnemonics added to Web Admin include titles, labels, and messages for:

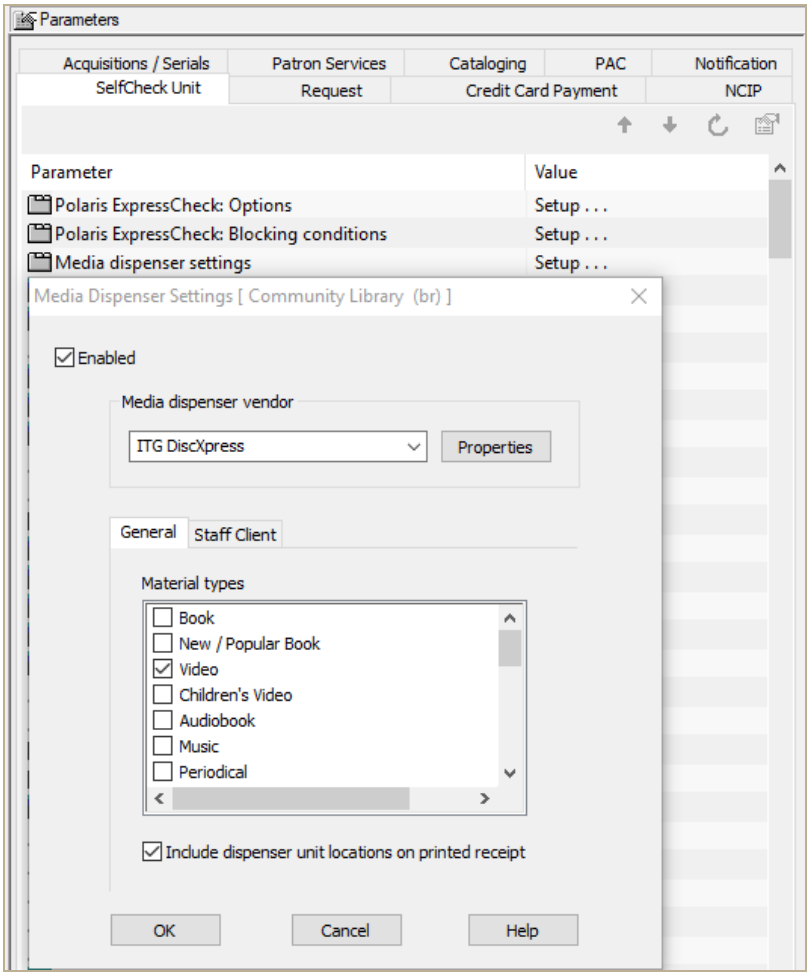
- Find Tool
- Workstations
- Branches
- Security Manager
- Patron Registration
- Patron Record
- Permission Override
- Settings
- Bibliographic Record
- Item Record
- Authority Record
- Hold Request
- Holds Queue
- Record Sets

For more information, refer to the *Polaris Web Admin Guide* for Polaris 6.0.

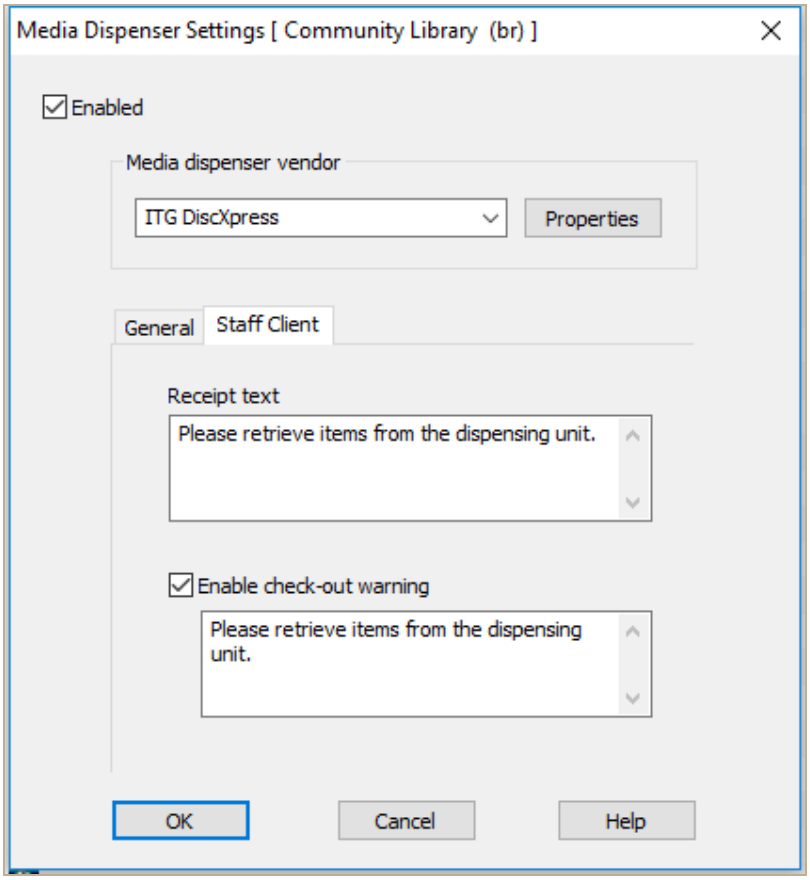
Leap - Enable Circulation from a Media Dispenser

You can now use Leap for circulating media from an integrated media dispenser. The media dispenser interacts with Leap using the existing Media Dispenser parameter settings in Polaris Administration.

DVDs can be queued in the media dispenser from Leap if your library is licensed for the media dispenser unit, and the **Enable** check box is checked in the existing Media Dispenser Settings parameter (Staff Client, SelfCheck Unit.) In addition, the location of the unit is printed on the receipt if the **Include dispenser unit locations on printed receipt** box is checked.



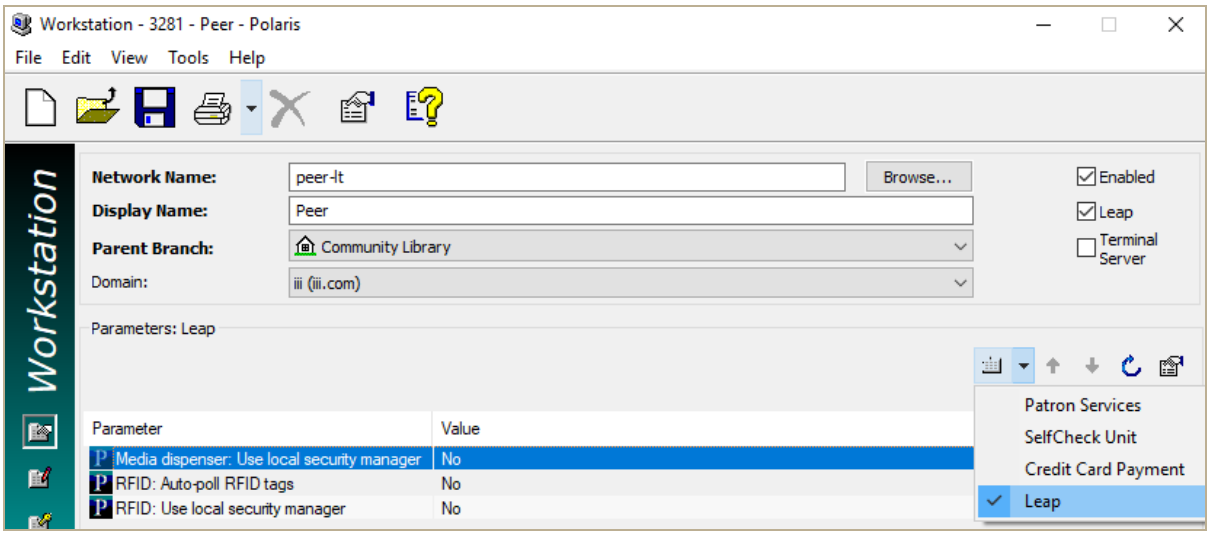
If additional text has been defined on the **Receipt text** box, it is printed on the receipt. And, if the **Enable check-out warning** box is checked and warning text is defined, the warning message appears in Leap with the title **Media to dispense** and the text as defined in the parameter.


Media Dispenser Settings [Community Library (br)]
Enabled
Media dispenser vendor
ITG DiscXpress
Properties
General
Staff Client
Receipt text
Please retrieve items from the dispensing unit.
Enable check-out warning
Please retrieve items from the dispensing unit.
OK
Cancel
Help

In addition, a new local security manager setting was added to the Leap workstation parameters.

To use the local security manager for the media dispenser:

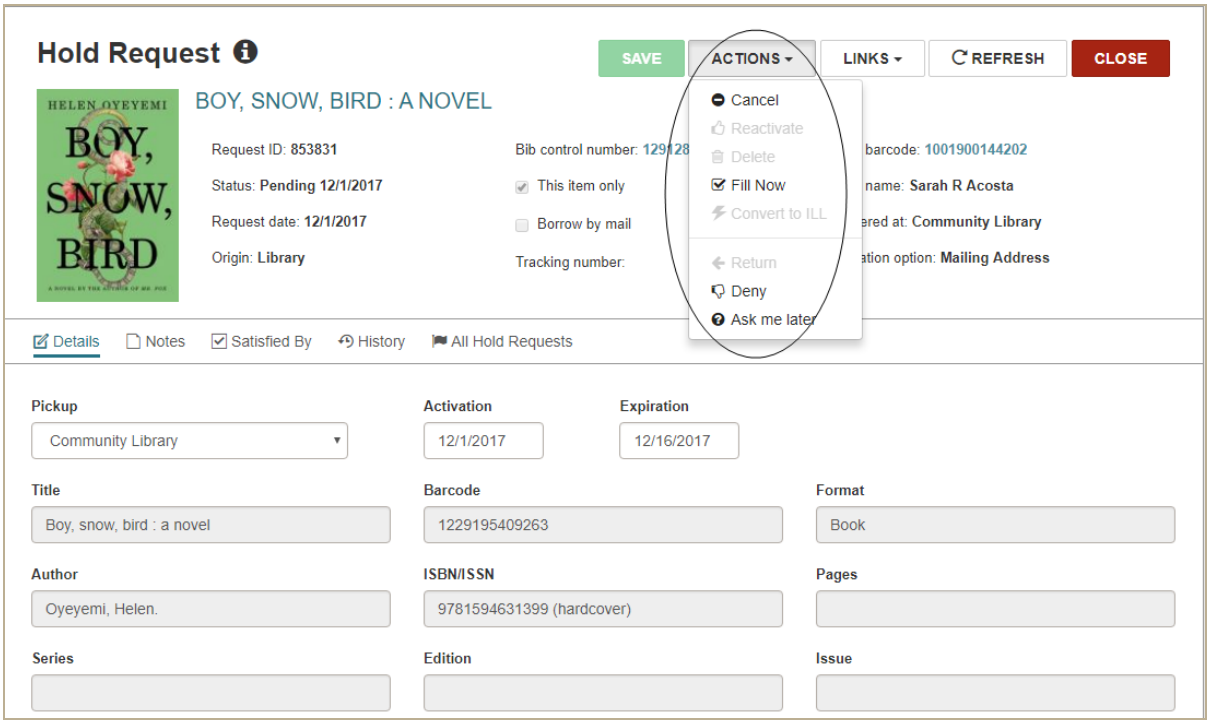
1. In the Polaris staff client, open the Workstation workform for your workstation record.
2. Click **Leap** in the Parameters drop-down list.
3. Double-click **Media dispenser: Use local security manager** and change the value from **No** to **Yes**.



4. Select **File | Save** to save the workstation record.

Leap - Actions Added for Hold Requests and Modified Patron Holds View

The following options were added to the **Actions** menu on the Hold Request workform: **Return**, **Deny**, **Ask me later**.

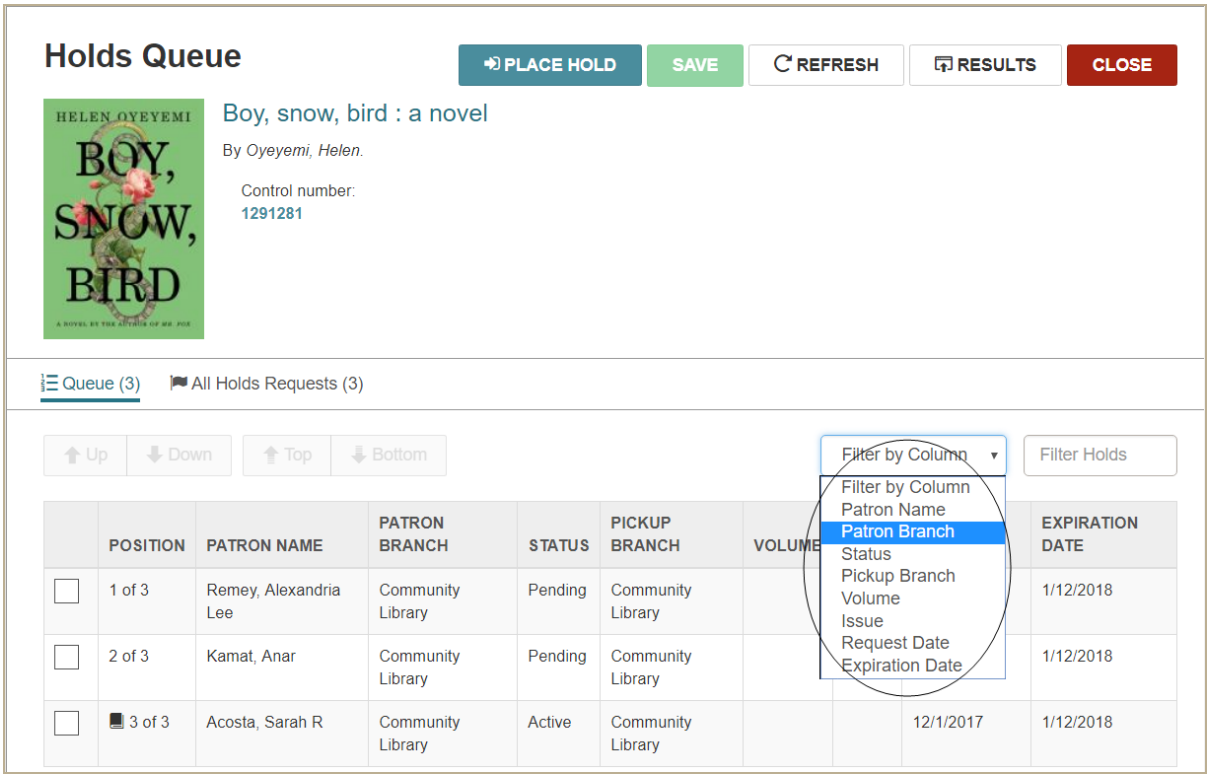


In addition, the Holds view of the Patron Record workform was modified. Now, when you click anywhere on an existing hold request entry, the Hold Request workform opens instead of an inline view of the hold request. The inline view still appears when you add a new hold request.

Leap - Holds Queue Filter

You can now filter the Leap Holds Queue by selecting one of the following options from the **Filter by Column** drop-down list:

- **Patron Name**
- **Patron Branch**
- **Status**
- **Pickup Branch**
- **Volume**
- **Issue**
- **Request Date**
- **Expiration Date**



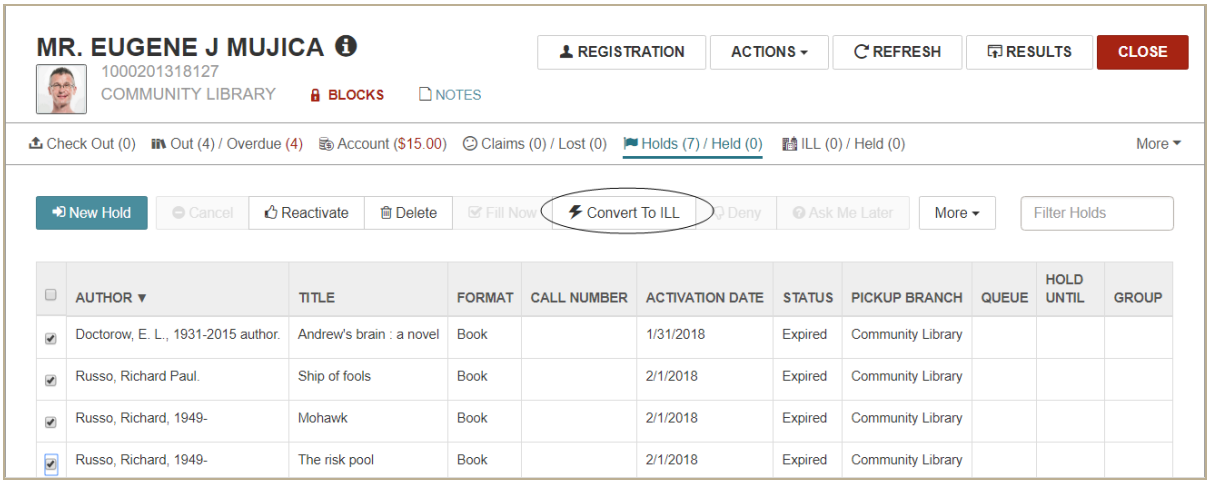
Leap - Convert Multiple Hold Requests to ILL Requests from Patron Record

You can convert multiple hold requests to ILL requests from the Patron Record | Holds view.

The **Convert to ILL** button is enabled only when all the selected hold requests have a status of Active, Inactive, Expired, or Not Supplied.

To convert multiple hold requests to ILL requests from the Patron Record:

1. Click the **Holds ( ) / Held ( )** tab on the Patron Record workform.
2. Select the check marks next to the hold requests you want to convert to ILL requests.
3. Click **Convert to ILL**.



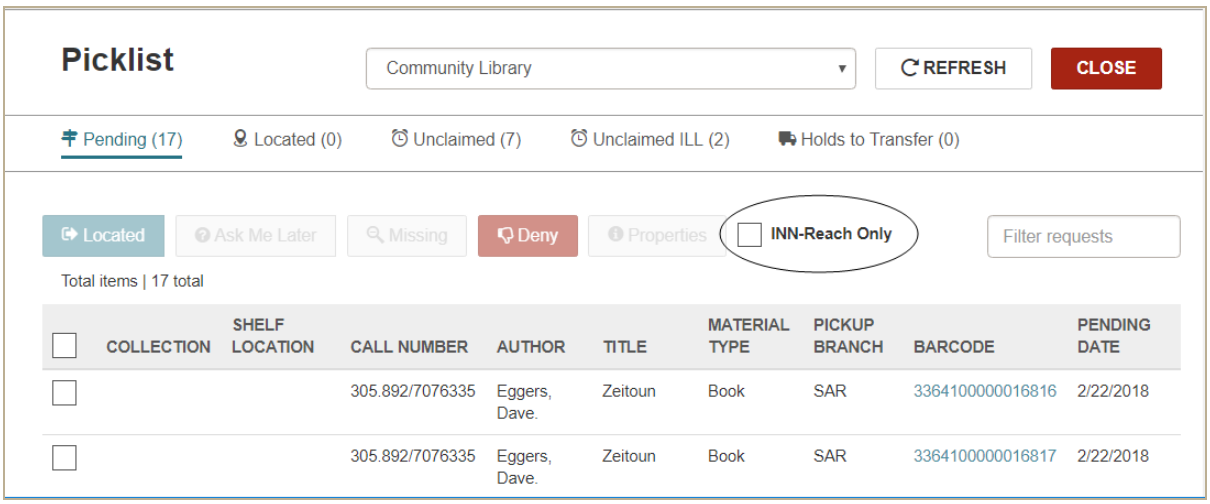
   If the patron is over the limit set for ILL requests, a message box appears.

4. If the **Exceeded total ILL request limit** message box appears, click **Continue** to continue converting the requests.

The selected hold requests are converted to ILL requests with a status of Inactive, the hold requests are deleted, and ILL requests are created for each.

Leap - INN-Reach Filter on Picklist

The Pending and Located views of the Picklist now have a **INN-Reach only** check box that you can click to see only the INN-Reach requests. The filter appears only if your library has a license for INN-Reach.



Leap - Display/Require Reason When Resetting Due Date

Your library administrator can set up a new database table with reasons for resetting a due date and set a new profile to display this **Reasons** drop-down list when a staff member resets a due date in Leap. Another new profile can be set to require a reason when a due data is reset in Leap.

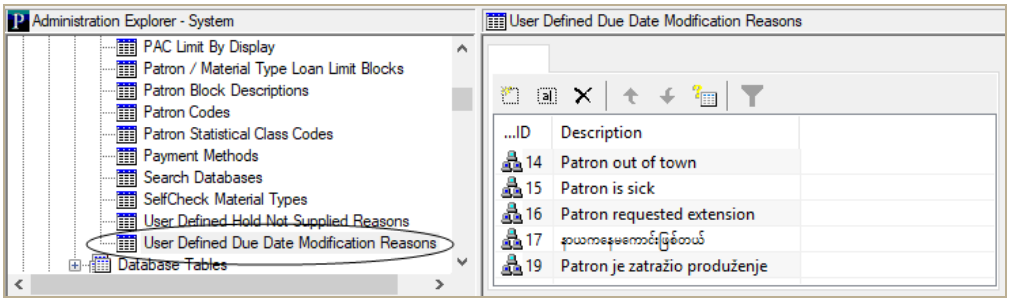
> **Note:**
> Before this release, an error message appeared when a user selected a due date in the past. Now, dates in the past cannot be selected from the calendar.

Defining the Reasons for Resetting a Due Date in Leap

Use the new **User Defined Due Date Modification Reasons** policy table to define the entries that appear in the **Reasons** drop-down list when staff members reset the due date in Leap:

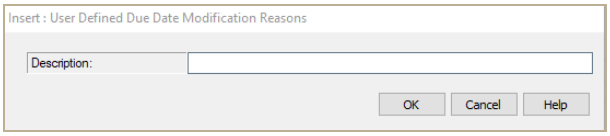
> **Note:**
> The new permission **Modify the due date modification reasons: Allow** is required to modify the new User Defined Due Date Modification reasons policy table. This permission was added to the Administrator permission group.

1. Open the Polaris Administration Explorer, and select the organization in the tree view.
2. Select **Policy Tables** to open the list of policy tables.
3. Select **User Defined Due Date Modification Reasons** in the tree view to display the table in the details view.



4. Click .

   The **Insert: User Defined Due Date Modification Reasons** dialog box appears.



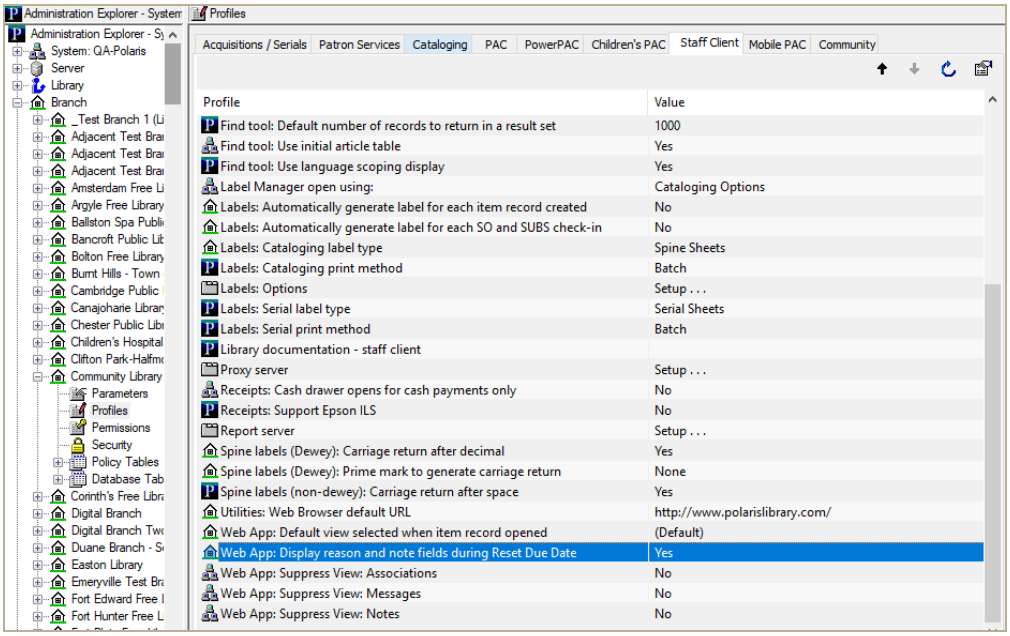
5. Type a description for the due date modification reason.
6. Click **OK**.

   The modification reason is added to the table, and it will appear when users modify the due date in Leap.

- Displaying a Reason When Resetting a Due Date in Leap

To display the **Reason** drop-down list and the **Notes** field when users reset the due date in Leap:

1. Open the Polaris Administration Explorer, and select the organization or staff member in the tree view.
2. Click **Profiles** to display the profiles in the details view.
3. Click the **Staff Client** tab.
4. Double-click **Web App: Display reason and note fields during Reset Due Date** profile, and select **Yes**.



Note:
The default setting is **No**.

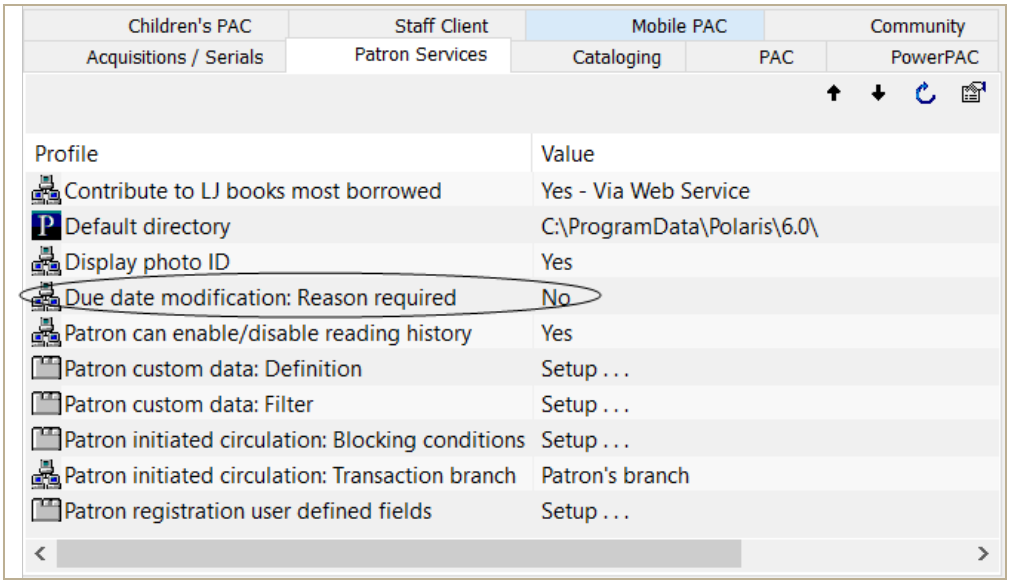
5. Save the changes.

Requiring a Reason When Resetting a Due Date

To require staff members to enter a reason when they change a due date in Leap:

> **Note:**
> The **Web App: Display reason and note fields during Reset Due Date** staff client profile, must also be set to **Yes** for the fields to appear at all. However, you can set the profile to display the reason and notes field at a higher organizational level than the profile to require a reason. For example, you could set the profile to display the reason and notes fields at the branch level, and then set the profile to require a reason at the staff level.

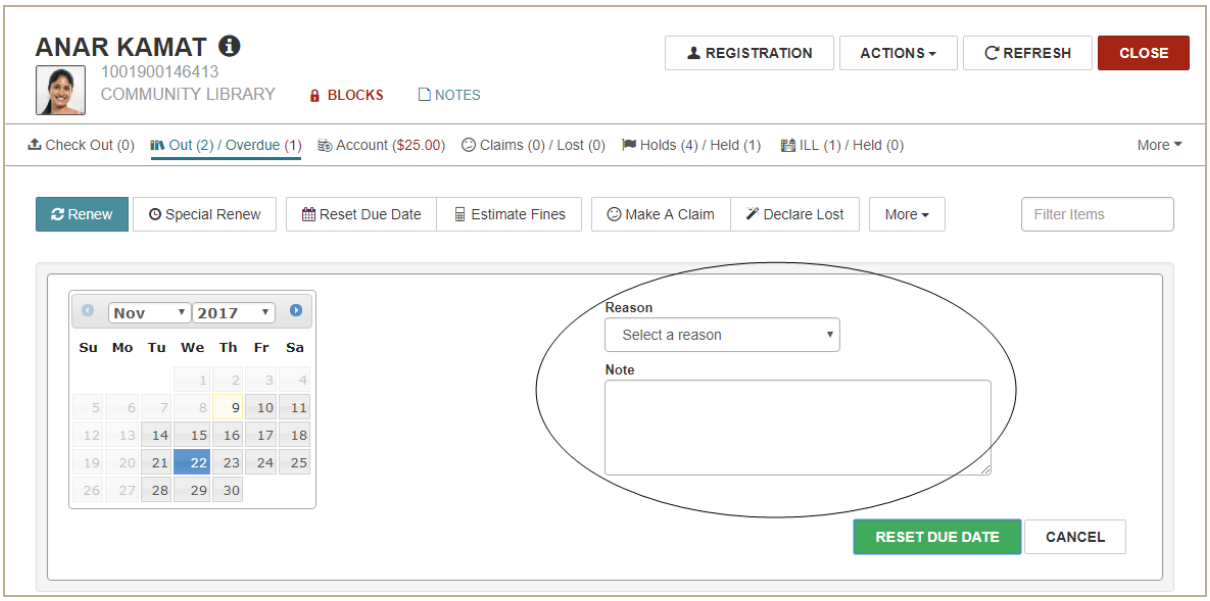
1. Open the Polaris Administration Explorer, and select the organization in the tree view.
2. Click **Profiles** to display the profiles in the details view.
3. Click the **Patron Services** tab.
4. Double-click **Due date modification: Reason required**, and select **Yes**.



5. Save the changes.

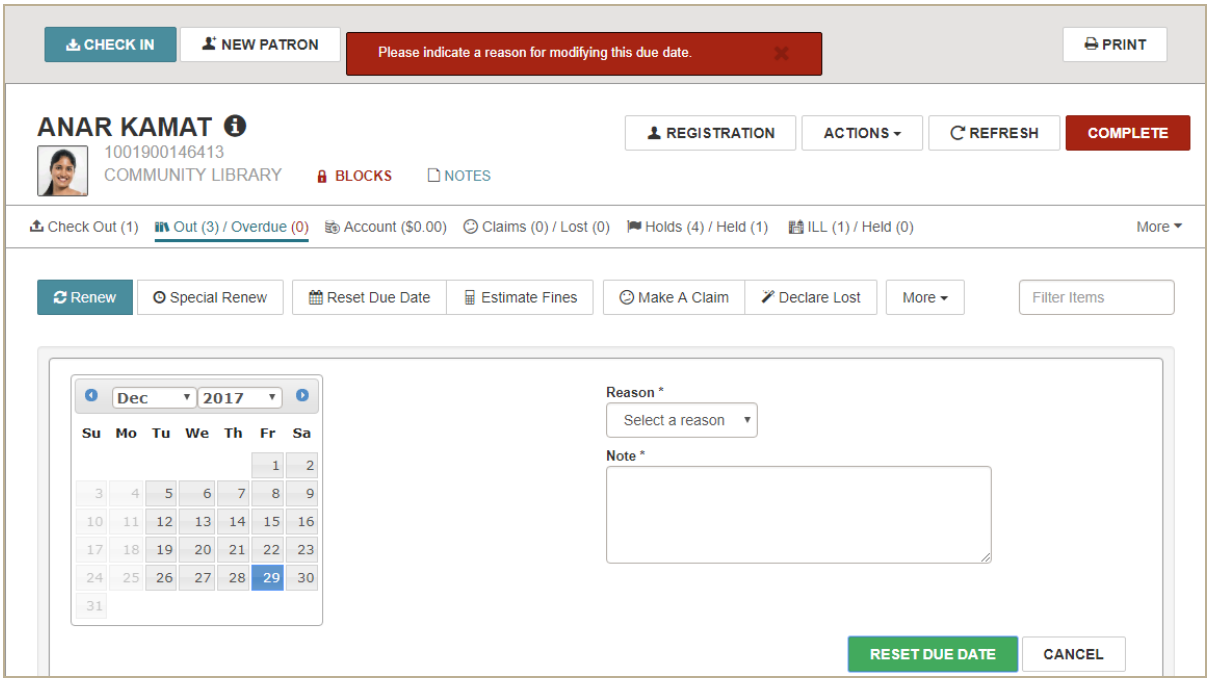
Resetting the Due Date in Leap

If the **Web App: Display reason and note fields during Reset Due Date** profile is set to **Yes**, and a staff member selects the **Reset Due Date** button from the Check Out or Items Out view of the Patron Record workform, the **Reason** drop-down list and **Notes** field appear.



If the **Due date modification: Reason required** profile is also set to **Yes**, the staff member must select a reason from the **Reason** drop-down list or type a note in the **Note** field when modifying a due date in Leap.

When a reason is required, and the staff member does not select one, the due date is not changed, and a message appears.



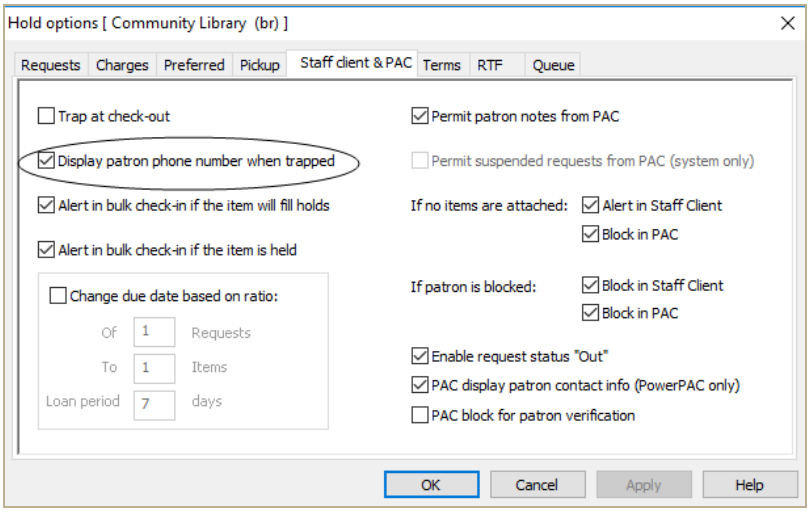
Reset Due Date Transaction Added

When users reset a due date from Leap, a new transaction Reset due date - 6003 is generated. This transaction is not logged by default but you can add it to your transaction logging.

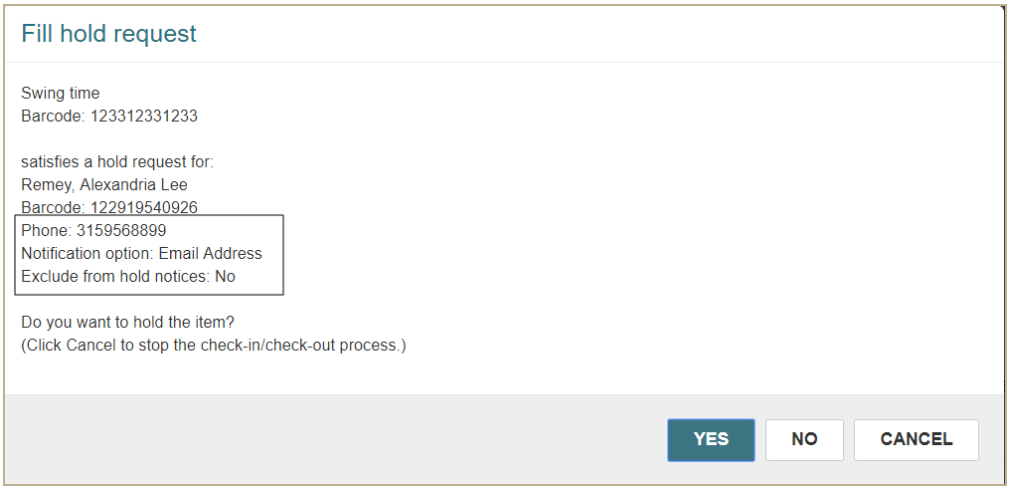
Leap - Fill Hold Request Notification Information

When you check in an item in Leap that can satisfy a hold request, two new data elements appear on the Fill Hold Request dialog box when the **Display patron phone when trapped** option is selected in the Hold Options Parameter in Polaris Administration.

The hold options are displayed on the Fill hold request dialog box according to the setting in: **Parameters |Holds Options | Request | Staff Client & PAC**.



The Notification option from the Patron Registration and the Exclude from notices setting (**Yes** or **No**) have been added to the Fill hold request dialog box.



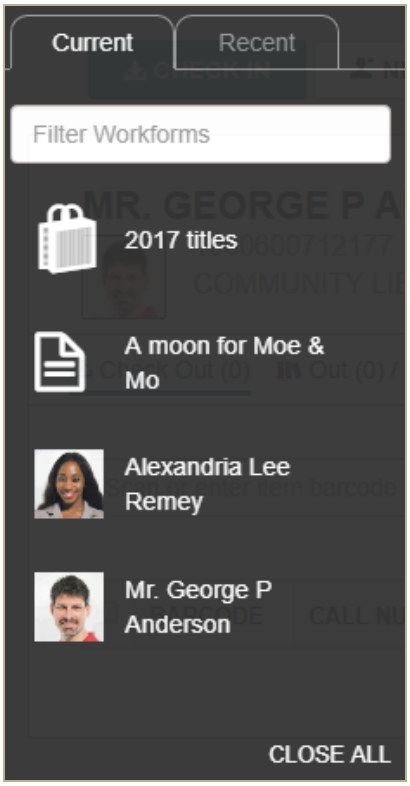
Leap - Recall Recent Records

During a Leap session, you can now recall recently opened records after you have closed them by clicking the new Recent tab on the Workform Tracker. You can use three new Staff Client profiles in Polaris Administration to define the number of recent records of each type that you want to appear on the Recent tab in the Workform Tracker.

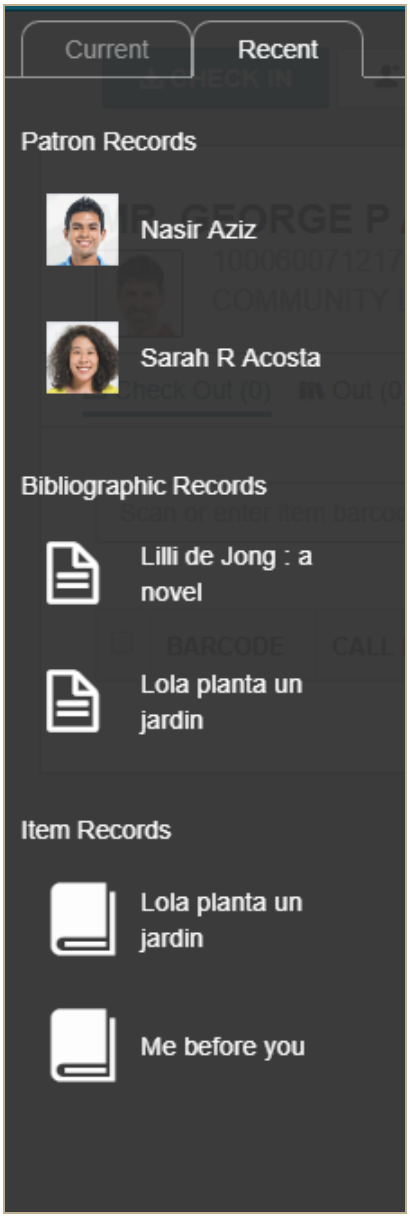
Workform Tracker in Leap

The Workform tracker now has two tabs: the **Current** tab displays the records and record sets you have open, and the **Recent** tab displays recently-opened patron, item, and bibliographic records.

Current Tab



Recent Tab

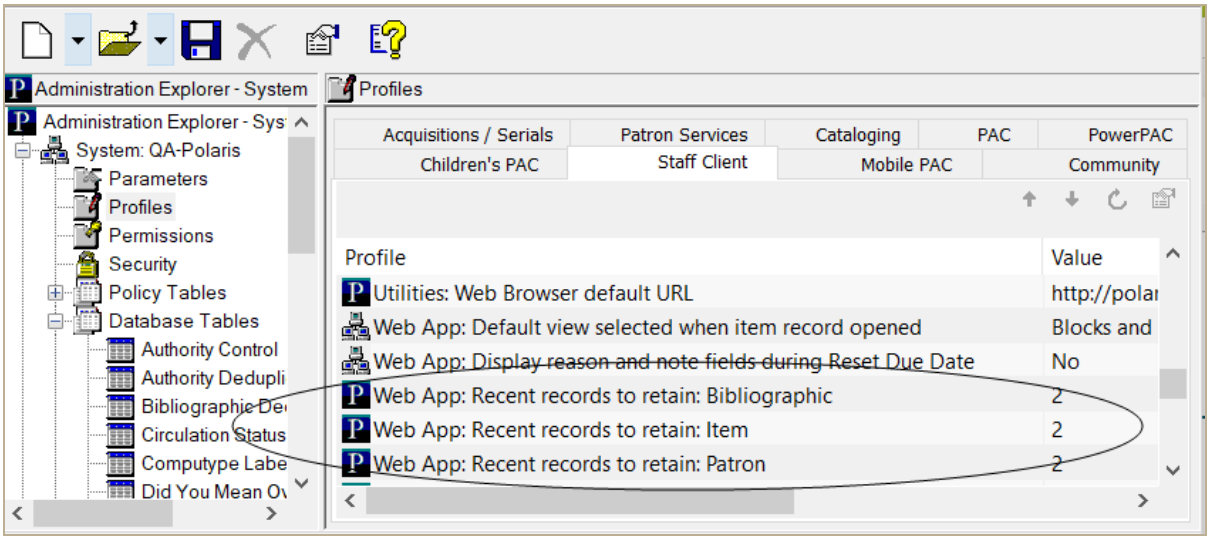

Current
Recent
Patron Records
Nasir Aziz
Sarah R Acosta
Bibliographic Records
Lilli de Jong : a novel
Lola planta un jardin
Item Records
Lola planta un jardin
Me before you

Polaris Administration Profiles

You can set the following Staff Client profiles (available at the System, Library, and Branch level) to specify how many records of each type to display in the Workform Tracker in Leap:

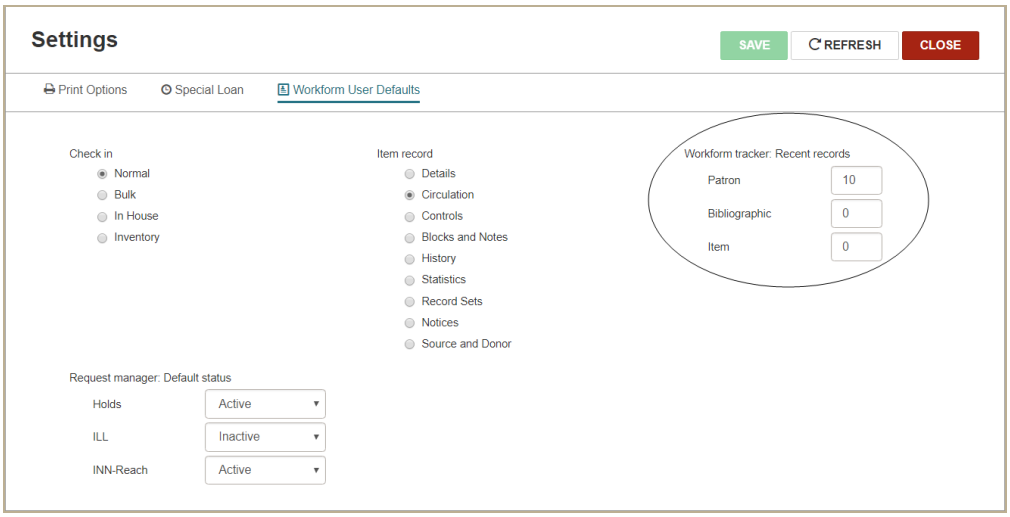
> **Note:**
> The default setting is 2 and the maximum is 99.

- **Web App: Recent records to retain: Bibliographic**
- **Web App: Recent records to retain: Item**
- **Web App: Recent records to retain: Patron**



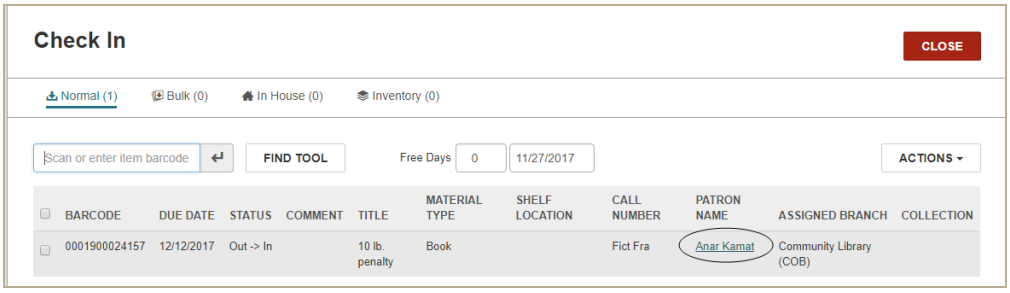
Leap Settings

Users can set their own values in the Settings page in Leap by typing a different number in the **Patron**, **Bibliographic**, or **Item** box under **Workform tracker: Recent records**. This allows users to update their own settings without needing access to Polaris Administration.



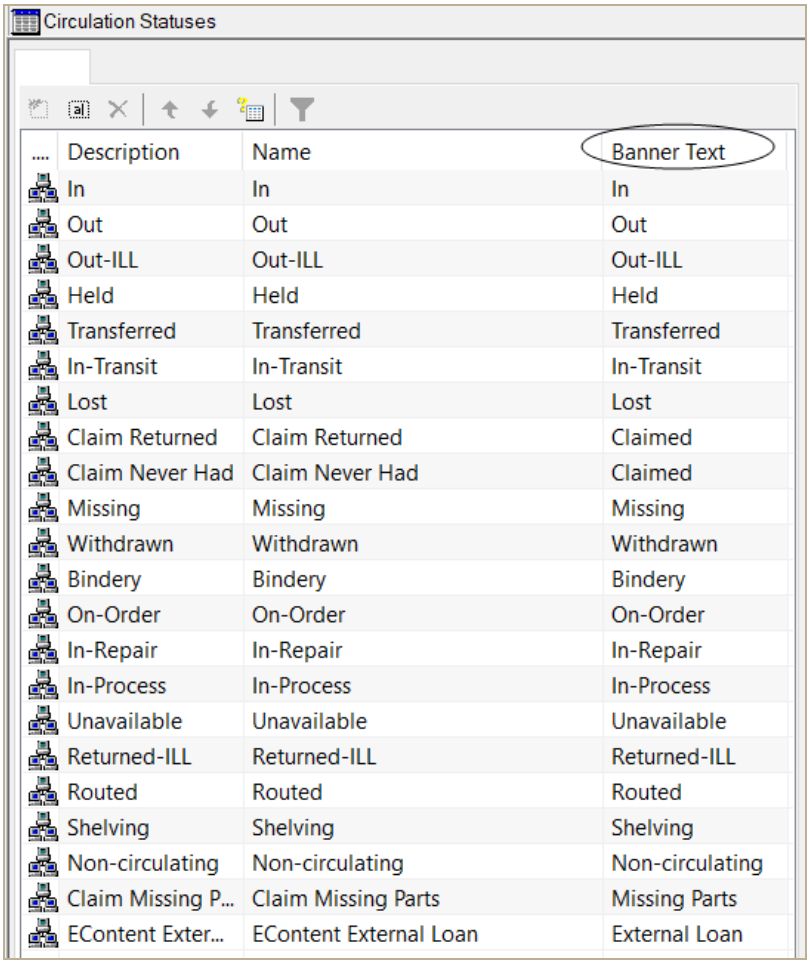
Leap - Link to the Patron or Item from Check In

When checking in items in Leap, you can select a row to open the item record or open the patron record from the patron name link.



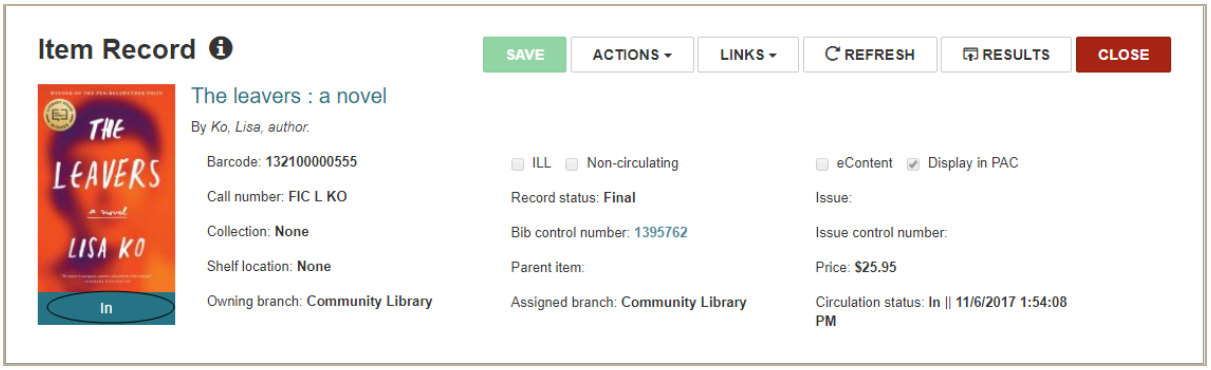
Leap - Circulation Status on Item Record Banner

The Polaris Circulation Statuses database table now contains a new **Banner Text** column that defines the circulation status displayed on the Leap Item Record workform. The maximum width for the banner text is 13 characters. The banner text is applied at the System level to all item records.



....	Description	Name	Banner Text
	In	In	In
	Out	Out	Out
	Out-ILL	Out-ILL	Out-ILL
	Held	Held	Held
	Transferred	Transferred	Transferred
	In-Transit	In-Transit	In-Transit
	Lost	Lost	Lost
	Claim Returned	Claim Returned	Claimed
	Claim Never Had	Claim Never Had	Claimed
	Missing	Missing	Missing
	Withdrawn	Withdrawn	Withdrawn
	Bindery	Bindery	Bindery
	On-Order	On-Order	On-Order
	In-Repair	In-Repair	In-Repair
	In-Process	In-Process	In-Process
	Unavailable	Unavailable	Unavailable
	Returned-ILL	Returned-ILL	Returned-ILL
	Routed	Routed	Routed
	Shelving	Shelving	Shelving
	Non-circulating	Non-circulating	Non-circulating
	Claim Missing P...	Claim Missing Parts	Missing Parts
	EContent Exter...	EContent External Loan	External Loan

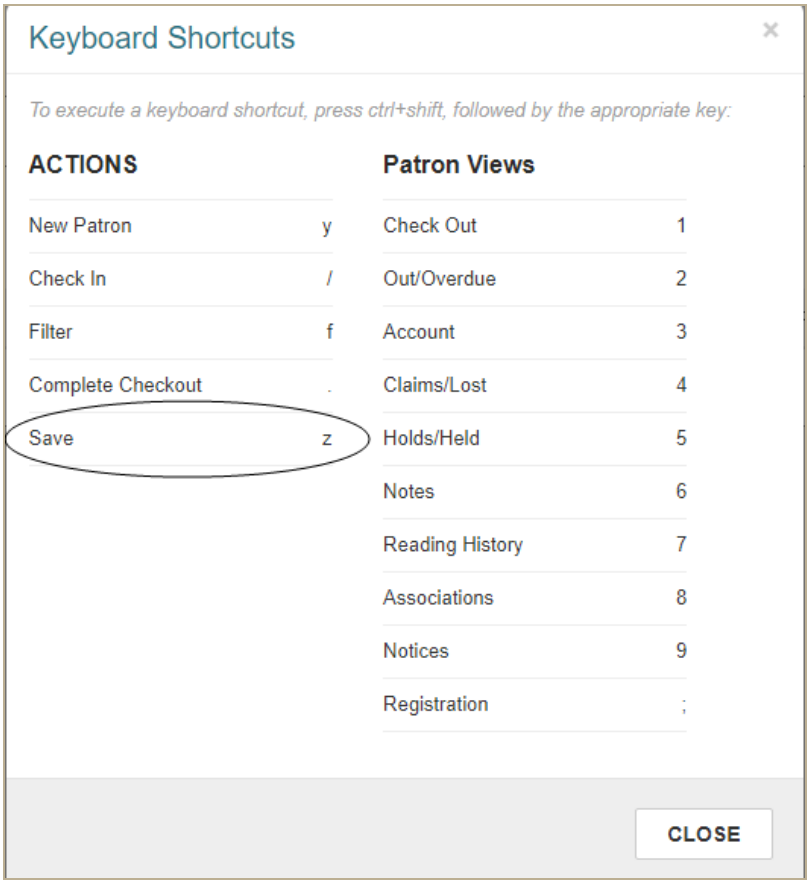
When the banner text is defined in the Circulation Statuses database table, it appears on the banner at the bottom of the book jacket on the Leap Item Record workform.



If the title does not have a book jacket image, a placeholder image displays the format icon and the banner text.

Leap - Keyboard Shortcut for Saving Updates

The keyboard shortcut, **CTRL + SHIFT + Z**, was implemented as an alternative to clicking the **SAVE** button when you make a change to one of the following workforms:

- Bibliographic Record
- Holds Queue
- Hold Request
- ILL Request
- Item Record
- Patron Registration
- Record Set
- Settings

The **Save** action was added to the **Keyboard Shortcuts** list available under **Help**.