What's New in Polaris® 4.1R2

This document summarizes what's new and different in Polaris 4.1R2.

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

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

- *Polaris Users Group (PUG) votes - represented by this icon*
- *I.Trac - represented by this icon*
- *Workflow analysis*
- *Other direct customer feedback and suggestions*

Additional features are prompted by new market opportunities, partnerships with other companies that serve our customers, new industry standards, and advances in the software and hardware that support library services.

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Contents

Administration/System - Wide

The following updates were made to Polaris Administration settings and system-wide Polaris functions.

New & Modified Polaris Administration Settings

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

Administration Settings	*Purpose*	*Default*	*Level*	*More Info*
Staff Client Profiles				
Automatic logon	Enables patrons with the appropriate permissions to log on to Polaris automatically	No	System, Library, Branch	See "Auto Staff Client Log-On & Active Directory" on page 5.
Receipts: Cash drawer opens for cash payments only	If the receipt printer is set up to open the cash drawer, this option stipulates that the drawer opens only when the payment is in cash.	No	System, Library, Branch	See "Set option to open the cash drawer only for cash fine receipts" on page 104.
Acquisitions Parameters				
Default payment option when paying/crediting invoices	Sets a default payment option, either Check or Voucher, to be selected automatically in the Check/Voucher dialog box when staff members prepay, pay, or credit an invoice	Voucher	System, Library, Branch	See "Default Payment Option for Paying/Crediting Invoices" on page 137.
Cataloging Profiles				
Delete MARC tags when saving Z39.50 records to local database	Delete specific tags from bibliographic records saved from a remote database	No	System	When this profile is set to Yes, the tags flagged for deletion in the Bibliographic Tags to Retain/Delete policy table are deleted from remote records when they are saved. See "Delete Tags From Bibs During Import" on page 127.

Administration Settings	*Purpose*	*Default*	*Level*	*More Info*
Cataloging Parameters				
Bibliographic record delete: Allow if there are holds	Delete bibs with linked hold requests	No	System	When set to Yes, bibs with holds can be deleted (as long as other conditions allow deletion). See "Deleting Bib or Item Records with Hold Requests" on page 73.
Bibliographic record Do not overlay feature enabled	Enables/disables the ability for staff members to protect bibliographic records from overlay	No	System	When set to Yes, the Do not overlay check box is available. See "Protect Staff-Approved Bibs" on page 121.
Item record delete: Allow if there are holds	Delete items with linked hold requests	No	System	When set to Yes, items with holds can be deleted (as long as other conditions allow deletion). See "Deleting Bib or Item Records with Hold Requests" on page 73.
Cataloging Permissions				
Modify Do Not Overlay setting in bib records: Allow	Allows staff to flag bibs as protected	At upgrade, assigned to Administrator group only	System	"Protect Staff-Approved Bibs" on page 121.
Patron Services Profiles				
Patron initiated circulation: Blocking conditions	Removed "renewal" from the profile	N/A	System, Library, Branch	Patron initiated renewal: Blocking conditions profile was renamed Patron initiated circulation: Blocking conditions. See "Patron Initiated Renewal Profile Renamed" on page 72.
Patron Services Parameters				
Accrued fine options	Set up accrued fine calculation options and blocking	N/A	System	See "Estimating and Blocking for Accrued Fines" on page 50.
Overdues: Add closed days/dates to grace days	Include closed days and dates in the library's grace days	No	System	Set the parameter to Yes to include closed days/ dates in grace day calculations. See "Grace Period Calculation" on page 66.
Circulation Permissions				
Access Credit Card Payment Manager: Allow	Required to access the Credit Card Payment Manager	All users granted permission at upgrade	System	See "E-Commerce with Comprise™ SmartPAY™" on page 78.

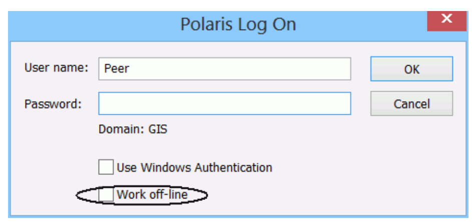
Administration Settings	*Purpose*	*Default*	*Level*	*More Info*
PAC Profiles				
Google Maps - new check box to enable Map It in Mobile PAC	Enable Map It in Polaris Mobile PAC	No	System, Library, Branch	Relocated Google MAPS SA dialog from Profiles, PowerPAC to Profiles, PAC. See "Google Maps in Mobile PAC" on page 41.
Enriched data profile updated - Service URL, Account ID, and API key on the ChiliFresh, Other features tab	Set up ChiliFresh Connections	N/A	System, Library, Branch	Restored URL element previously removed in 4.1. See "Polaris Social with ChiliFresh Connections" on page 20.
PowerPAC/Mobile PAC Profiles				
PowerPAC Title Display: Configure	Display the 264 tag for the publisher	N/A	System	See "Display and Indexing of 264 Tag" on page 39.
Mobile PAC Title Display: Configure	Display the 264 tag for the publisher	N/A	System	See "Display and Indexing of 264 Tag" on page 39.
Community Profiles				
Default view of events in PowerPAC	Sets the default view of events as a calendar or a list	View as list	System, Library, Branch	See "Events Display as Calendar or List" on page 44.
SelfCheck Unit Parameters				
Check-in: Claim Never Had, allow checkin (renamed parameter)	Controls status change to claimed items at SIP checkin	Settings other than In changed to No at upgrade. In setting changed to Yes at upgrade.	System, Library, Branch	Changed from menu options to Yes or No selection. See "SIP Claims Settings Simplified" on page 98.
Check-in: Claim Returned, allow checkin (renamed parameter)	Controls status change to claimed items at SIP checkin	Settings other than In changed to No at upgrade. In setting changed to Yes at upgrade.	System, Library, Branch	Changed from menu options to Yes or No selection. See "SIP Claims Settings Simplified" on page 98.
Policy Tables				
NCIP Medium Types: Outgoing	NCIP Medium Types Table converted to two tables	N/A	System	Outgoing table default mapping to Book NCIP instead of None. See "NCIP Medium Types Mapping Tables" on page 99.
NCIP Medium Types: Incoming	NCIP Medium Types Table converted to two tables	N/A	System	See "NCIP Medium Types Mapping Tables" on page 99.
Bibliographic Tags to Retain/Delete (renamed table)	Define tags to delete from new records	N/A	System, Library, Branch	Renamed and modified the Bibliographic Overlay Retention policy table to Bibliographic Tags to Retain/Delete. See "Delete Tags From Bibs During Import" on page 127.

Administration Settings	*Purpose*	*Default*	*Level*	*More Info*
Database Tables				
Network Domains	Specify the NetBIOS Name and DNS Name for each domain in your network	N/A	System	This new database table supports multiple domains in the same Polaris installation. See "Multi-Domain Support for Single Polaris System" on page 7.
Administration Permissions				
Modify bibliographic tags to retain/delete tables	Renamed the Modify bibliographic overlay retention table: Allow	N/A	System	See "Delete Tags From Bibs During Import" on page 127.
Modify NCIP Medium Types: Outgoing - Allow	Allow users to modify the policy table	N/A	System	See "NCIP Medium Types Mapping Tables" on page 99.
Modify NCIP Medium Types: Incoming	Allow users to modify the policy table	N/A	System	See "NCIP Medium Types Mapping Tables" on page 99.
Modify network domains table: Allow	Allow users to modify the network domains table	N/A	System	See "Multi-Domain Support for Single Polaris System" on page 7.
Permissions Interface				
The Permissions interface was streamlined so that multiple organizations are not loaded into the list unless the permission is organization-specific.	Improves system performance	N/A	System, Library, Branch, Workstation, Staff Member	See "Permissions Interface Changed" on page 15.

Auto Staff Client Log-On & Active Directory

The initial release of Polaris 4.1 introduced the ability to set a staff client workstation for automatic logon to the Polaris staff client using Windows Active Directory integrated security. When the Polaris staff client application is started, the log-on dialog box is skipped, and if the branch-level **Logon branch: Access permission** is set for the workstation, the user can select a log-on branch. If the permission is not set, the workstation is automatically logged on to the workstation's parent branch. The Staff Client profile **Automatic logon** (system, library, branch, and workstation levels) enables this feature.

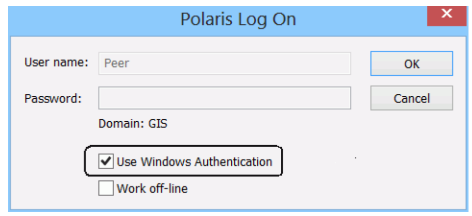
This update improves the automatic logon feature. When **Automatic logon** is enabled but a connection cannot be made to the application server, the actual error message and a message to the user are now displayed: **Unable to connect to the application server. Click OK to work offline or Exit to return to the Shortcut Bar.** If the user clicks **OK**, the Polaris Log On dialog box is displayed, where the user can select **Work off-line**. This feature is convenient for bookmobile staff members, for example.



If the user selects **Exit** instead, the Polaris Shortcut Bar is displayed. The user can select **File, Logon** or press **CTRL+L** to attempt to log on again, or close the application.

Note:
When **Automatic logon** is enabled, any user in the Polaris staff client application can select **File, Logoff** on the Shortcut Bar (or press **CTRL+L**). They can then select **File, Logon** (or press **CTRL+L**) to display the Polaris Log On dialog box, and log in as another user.

A new Staff Client profile, **Allow Windows authentication when Automatic logon is not enabled**, provides integrated security *without* automatic logon. This setting displays the Polaris Log On dialog box to users who want to log on more quickly but may sometimes need to log on with different credentials. The profile is available at the system, library, branch, and workstation levels. When the profile is set to **Yes**, the user can check **Use Windows Authentication** on the Log On dialog box. The **Name**, **Password**, and **Domain** fields are then grayed out, and clicking **OK** logs the user on with Windows credentials.



Important:

If the **Automatic Logon** profile is set to **Yes** for a workstation, no one else can log on to that workstation using their own credentials because the log-on dialog box does not appear.

Or, the user may choose to leave **Use Windows Authentication** unchecked, and log on with their own or other Polaris credentials.

Note:

If the user simply clicks **OK**, without checking **Use integrated security** or entering Polaris credentials, an error message prompts the user to enter a password.

If both **Automatic logon** and **Allow Windows authentication when Automatic logon is not enabled** are set to **No**, the Polaris Log On dialog box is displayed as in previous versions of Polaris, with the **Use Windows Authentication** option grayed out (unavailable).

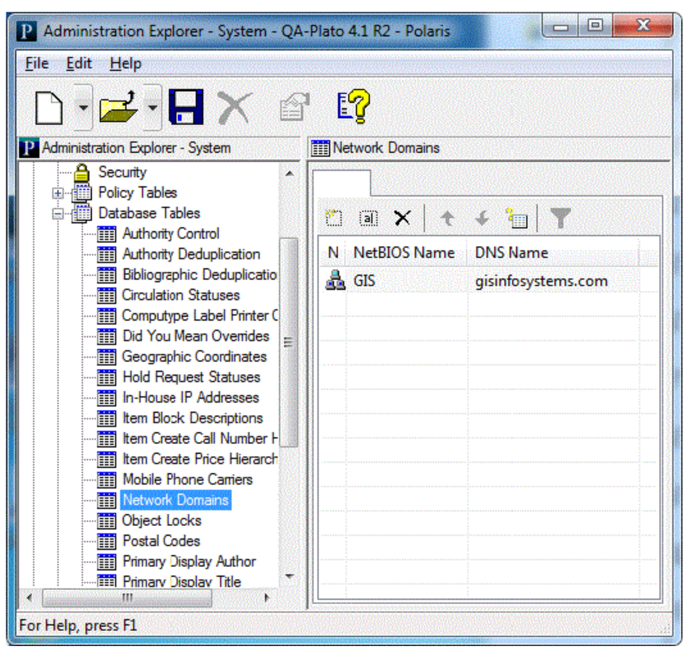
Multi-Domain Support for Single Polaris System

Polaris user and workstation names in a single Polaris system are no longer required to be unique across a multi-domain environment.

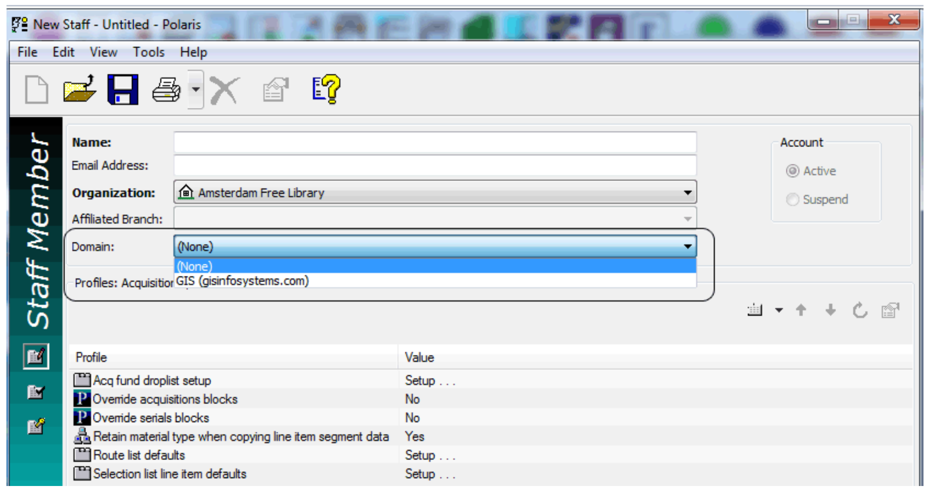
In the multi-domain environment, the workstation and staff member are associated with a domain in Polaris, and while the domain\workstation or domain\user combination must be unique, the workstation and user names themselves may be repeated as long as they are in different domains. You can choose to associate users with domains, workstations with domains, both, or neither (as in previous versions of Polaris). (Certain network requirements and configurations are necessary to use this feature; see "Network/Domain Requirements and Restrictions" on page 9 for details). In a single domain environment, users and workstations must be unique, as in previous versions of Polaris.

Note:
Polaris customers in a single domain environment will see no change in their current workstation and user implementation at upgrade.

To support this feature, the new Database table **Network Domains** is available in Polaris Administration. Use this table to specify the NetBIOS Name and DNS Name for each domain in your network. The NetBIOs and DNS names must be unique. The new System Administration permission **Modify network domains table: Allow** is required to work with this table. If you leave this table empty, users and workstations must be unique.

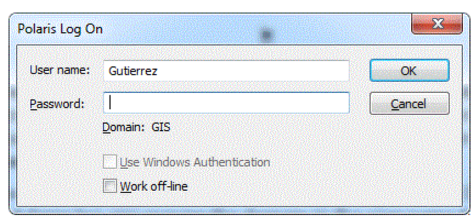


The entries in this table appear as selections in **Domain** drop-down lists in the Staff Member and Workstation workforms, where the domain is selected from the drop-down list to associate the user or workstation with the domain. If no domains have been entered in the Network Domains table, the field is not available for selection. The illustration shows the Staff Member workform.

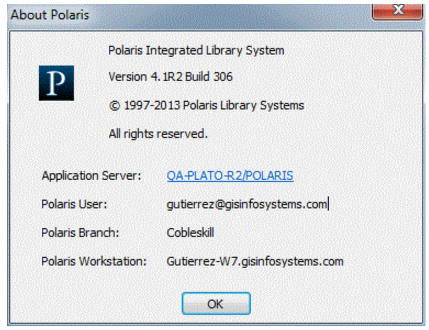


These changes also apply to staff client and ExpressCheck client log-on with a Terminal Server connection.

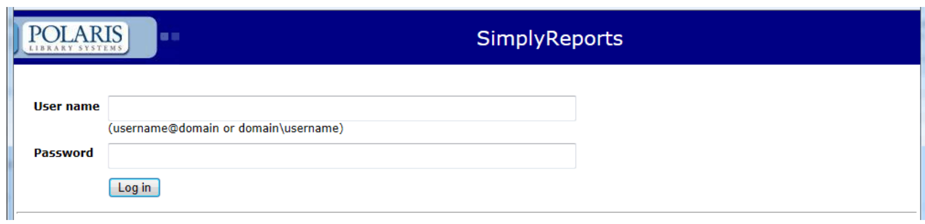
- **Log On dialog box** - The domain is displayed on the Polaris Log On dialog box. You can also enter a domain in the **Name** field; for example, **Lib\Reid** or **reid@thelibrary.org**.



- **About Polaris dialog box** - When you select **Help, About Polaris** on the Polaris Shortcut Bar, the About Polaris dialog box includes the user domain in the **Polaris User** field, and the workstation domain in the **Polaris Workstation** field.



- **Web-based application log-ons** - Polaris Fusion, Simply Reports, and Polaris WebAdmin log-ons require the domain in the user name field in the format username@domain or domain\username; for example, **reid@thelibrary.org** or **Lib\Reid.**



Network/Domain Requirements and Restrictions

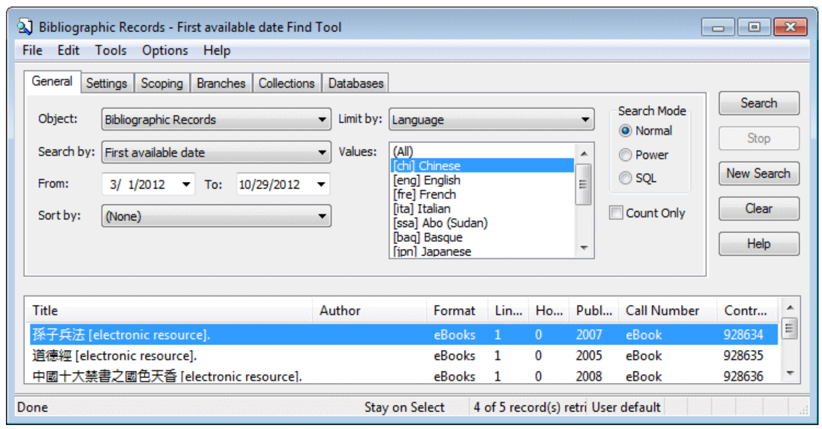
- Polaris recommends that the domain computer and user accounts are configured in Active Directory.
- All Polaris Servers should be members of the same domain, or members of domains that include, minimally, a one-way trust. One-way trusts require that the application server be in the trustee domain. (For example, if domain A trusts domain B, the application server must reside in domain A, if domain A users are expected to use Polaris). Two-way trusts are required if child domains will maintain the application server.
- An external domain controller can be used to authenticate users if the domain controller is trusted by the domain(s) in which the Polaris Servers are members.
- If an application server is running in workgroup mode:
  - When configuring a user account that is a member of the workgroup, leave the **Domain** field set to **None** in the Staff Member record.
  - When configuring a computer account that is a member of the workgroup, leave the **Domain** field set to **None** in the Workstation record.
- When configuring a workstation that has a NetBIOS name different from the DNS hostname, leave the **Domain** field set to **None** in the Workstation record.

- When configuring a workstation that is also a Polaris server, leave the **Domain** field set to **None** in the Workstation record. The NetBIOS name of a computer running Polaris server-side software must be unique among all trusted domains.
- Each network domain configured in the Polaris Network Domains table must have a unique NetBIOS domain name.
- Each network domain configured in the Polaris Network Domains table must have a unique DNS domain name.
- Remote desktop:
    - If the staff client is run on a Windows terminal server via a remote desktop connection from a workstation that is a member of a trusted domain, then the remote desktop client workstation can be domain-specific.
    - If the staff client is run on a Windows terminal server via a remote desktop connection from a workstation that is not a member of a trusted domain, then the remote desktop client workstation cannot be domain-specific.

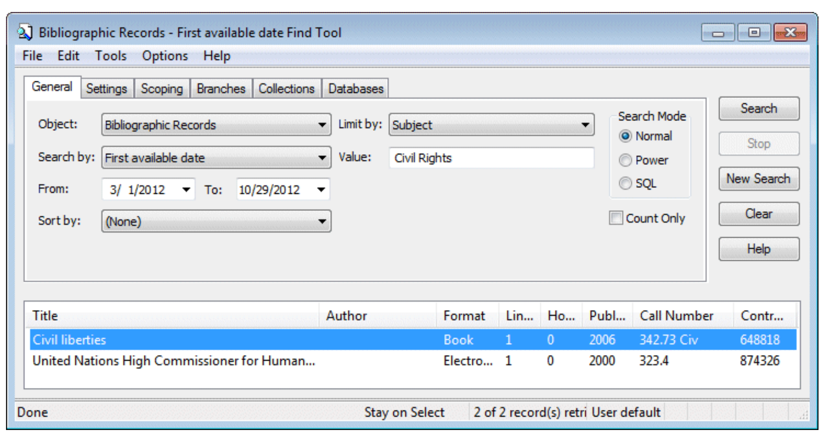
Limit By Value in Find Tool User Defaults

You can now save a selected **Limit by** value in the User Defaults for the Find Tool. Previously, you could select a **Limit by** option in the User Defaults, but the value was not saved in the defaults and had to be entered with each search.

If the **Limit by** option selected has a corresponding list from which you select the value, the selected value can be saved in the User Defaults.



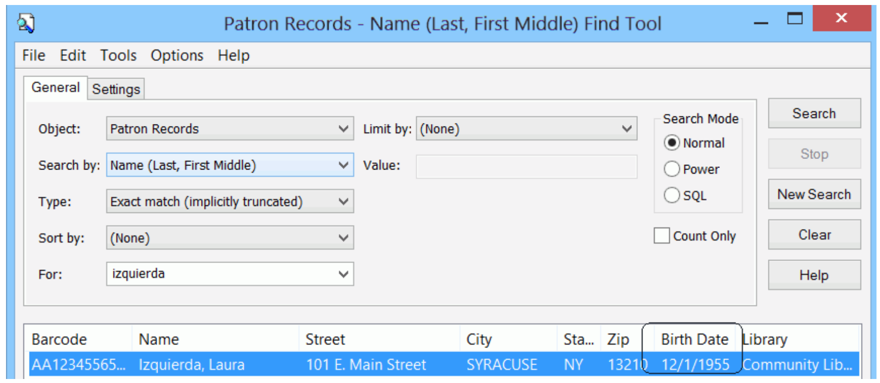
However, if the **Limit by** option requires a free-text entry for the value, the option is saved in the User Defaults, but not the free-text value. In the example below, the selected **Limit by** option is **Subject**, which requires a free-text entry, so the value cannot be saved in the User Defaults.



Find Tool Column & Access Points

LTrac

A new **Birth Date** list-view header and column was added to the Find Tool search results for patron records.



In addition, the following new access points are available:

Note:
All free text entries support wildcards and truncation on left and right, for example, ***term** or **term***.

Type of Record	*Search By*	*Limit By*	*Type of Entry*
Bibliographic Records		**Publication date** (from the MARC 008/07-10)	Free text
	Creator	**Creator**	Free text
	Creation date (bib record creation date, not MARC date)		**From** and **To** date range
Item Records	**Funding source**	**Funding source**	Free text (from **Funding source** field on the Source and Acquisition view of the Item Record workform; value is fund name if linked to a purchase order or invoice line item; also finds manually entered value)
	Creator	**Creator**	Free text (supports truncation on left and right, ***term** or **term***)
	Creation date		**From** and **To** date range
Patron Records	**Account charges** (total amount of outstanding charges on the Patron Status workform, Account view)		**From** and **To** amount range
	Record set ID	**Record set ID**	Numeric

Type of Record	*Search By*	*Limit By*	*Type of Entry*
Purchase Order	**Fiscal year Name**	**Fiscal year name**	Free Text
	Fund name	**Fund name**	Free Text
	PO date		**From** and **To** date range
	Total (PO total amount range)		**From** and **To** amount range
Invoices	**Fiscal Year name**	**Fiscal year name**	Free Text
	Fund name	**Fund name**	Free Text
	Total (invoice total amount range)		**From** and **To** amount range

Press Enter to Submit Reports

I.Trac

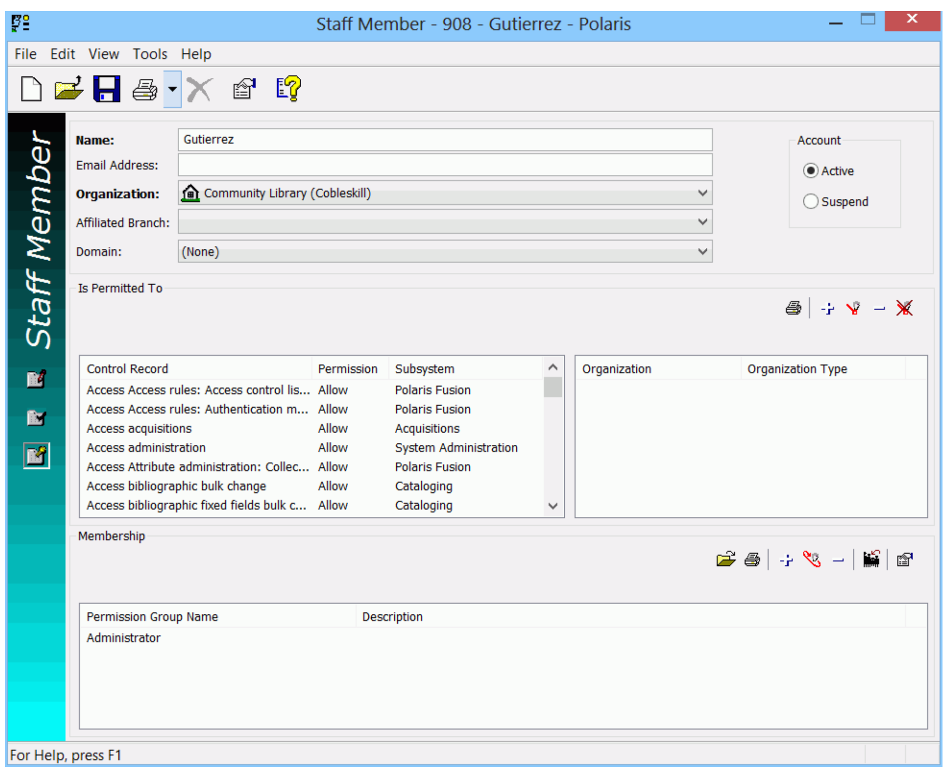
When you select a standard Polaris report and specify the parameters in the Report Wizard dialog box, you can now press **Enter** to generate the report. In addition, if you want to cancel the report creation, you can now press the **Esc** (escape) key. Before this change, it was necessary to click on the **Submit** button to generate the report and the **Cancel** button to cancel the report.

Permissions Interface Changed

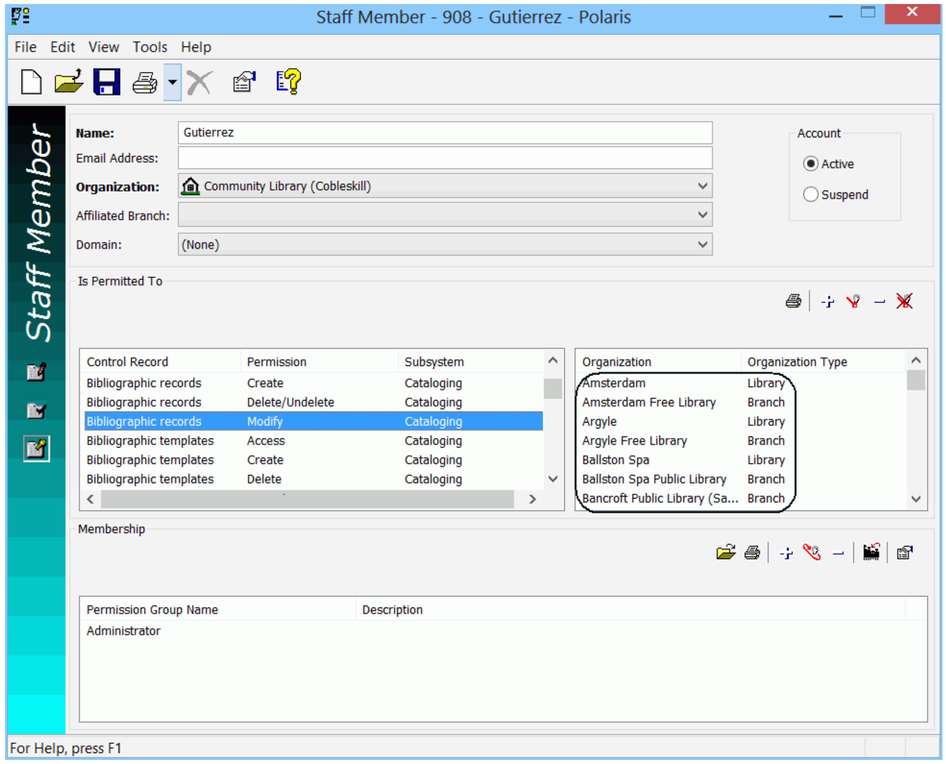
To improve system performance for customers with many library and branch organizations, the permissions interface has been changed in the locations listed below. With the new interface, multiple organizations are not loaded unless you explicitly select a permission that is organization-specific.

- Administration Explorer, System, Library, and Branch Levels, Permissions node
- Administration Explorer, Workstation and Staff Member Levels, Permissions view
- System, Library, Branch, Workstation, and Staff Member workforms, Permissions view
- Permission Groups Workform, Permissions view

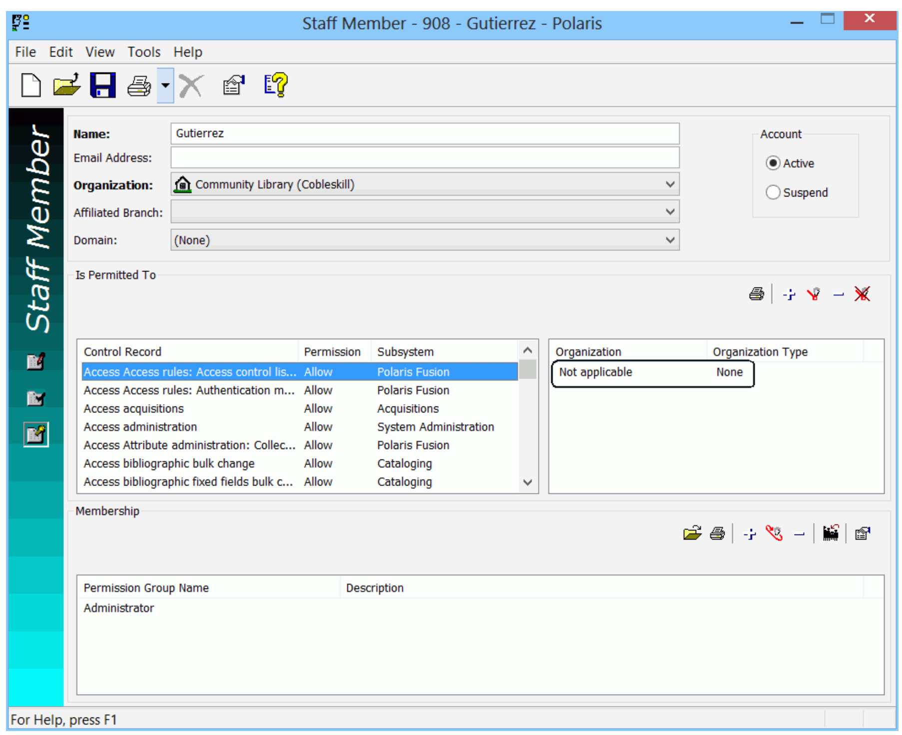
The illustration shows the Staff Member workform.



The left side lists the currently assigned permissions (Control Records). When you select a permission that is organization-specific, the organizations are loaded on the right side.



When you select a permission that is not organization-specific (task control record) the Organization list on the right side displays a **Not Applicable** message.



Methods to add and delete permissions and/or group membership have not changed.

PAPI Access Key in Polaris Language Editor (WebAdmin)

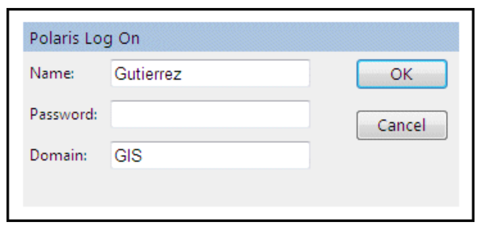
Libraries can now choose to grant access to the Polaris API (PAPI) service for a specified time period, without the intervention of a Polaris Support Engineer, using the new PAPI Key Management tool in Polaris Language Editor (WebAdmin). You need your library's PAPI access ID to use this tool. To find your access key, log in to the **My Account** section of the Polaris Developer Network. Your access key is listed on the Polaris API service control panel.

Generate a PAPI access key

Follow these steps to generate a PAPI access key.

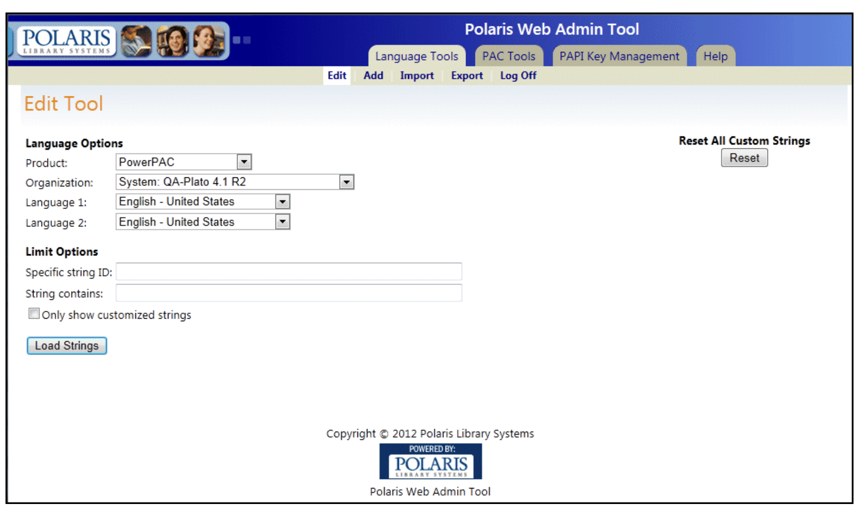
1. Navigate to the Language Editor (WebAdmin) site on your Web server.

   The Log On page opens.



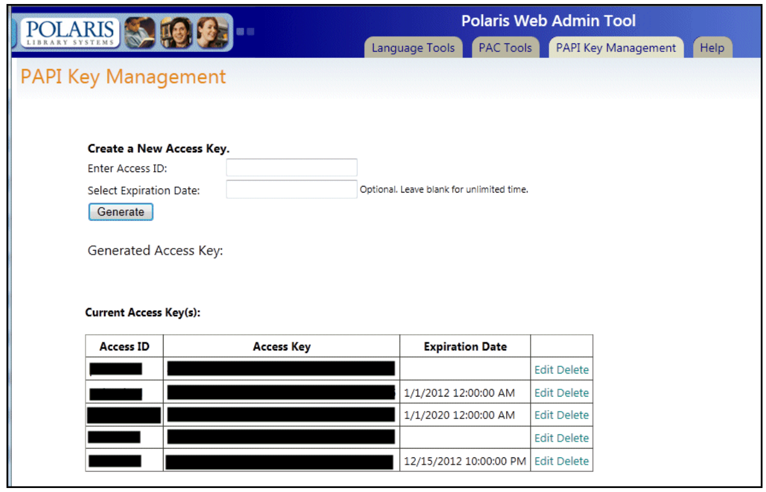
2. Type your name, password, and domain name, and click **OK**.

   WebAdmin opens to the Language Tools Edit page.



3. Click the PAPI Key Management tab.

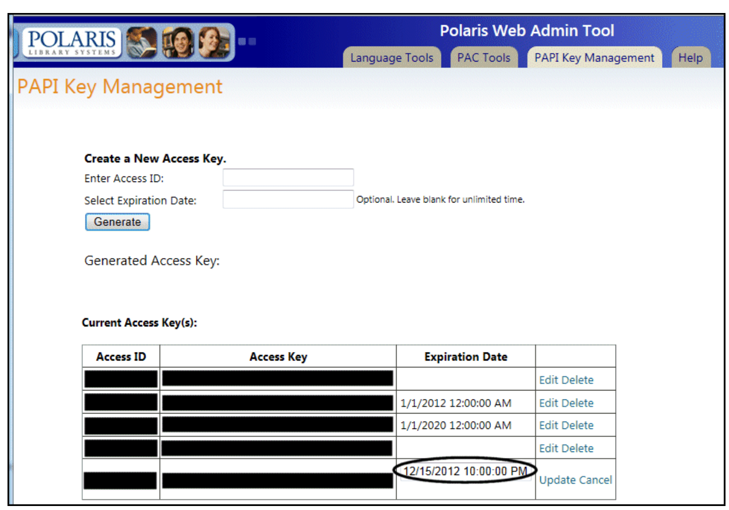
   The PAPI Key Management page is displayed.



4. Enter your PAPI service access ID.
5. Type an expiration date in mm/dd/yyyy format, or leave the field blank if you do not want the key to expire. (You can manually delete the key later.)
6. Click **Generate**.

   The generated access key is displayed, and the ID/key combination appears in the table. An Access ID can have only one access key at a time.

   - To edit the expiration date for an Access ID/Access Key combination, click **Edit** on the appropriate line in the table. A date entry field appears in the Expiration Date column. Edit the date and click **Update**, or click **Cancel** to cancel your changes.



- To delete an Access ID/Access Key combination, click **Delete** on the appropriate line in the table

Related Information

- **Polaris API and Polaris Developers Network** - http://developer.polarislibrary.com
- **Polaris Language Editor (WebAdmin)** - *Polaris Language Editor (WebAdmin) Guide*

PowerPAC and Mobile PAC

The following updates were made to Polaris PowerPAC and Mobile PAC.

Polaris Social with ChiliFresh Connections

With Polaris Social, the library's catalog becomes a gateway to a worldwide network of readers, allowing patrons to share the books they read, see what others are reading, and discover new books based on the social network connected to a title. Polaris Social offers integrated social functions in Polaris PowerPAC through a collaboration with ChiliFresh Connections, with interactions embedded in Polaris PowerPAC. Navigation to and from each ChiliFresh Connections feature is seamless, and users enjoy a single, unified interface in Polaris PowerPAC. Features include single sign-on through PAC; the ability to set up a patron profile; create lists of books that other readers can see; follow what readers with similar tastes are reading; see the network of patrons connected to a title; add recommendations, reviews and tags to titles, and more. For information about ChiliFresh Connections, see
http://www.chilifresh.com/html/connections.php

While ChiliFresh provides the library system administration options for controlling feature display and functionality, Polaris designates the placement of the ChiliFresh Connections features in Polaris PowerPAC. Accessing ChiliFresh Connections features from PowerPAC requires no further authentication once patron log-in occurs in Polaris PowerPAC, and the patron has registered for the first time in ChiliFresh Connections. Patrons can manage Connections user account information as part of My Account in Polaris PowerPAC. For any catalog items in the ChiliFresh database (see "Exporting Records to the ChiliFresh Database" on page 21) patrons can add tags and view library users related to the items.

Note:
The font type and color scheme for ChiliFresh Connections information displayed in Polaris PowerPAC matches the PowerPAC font type and color scheme. When ChiliFresh Connections information displays in PowerPAC, it always renders according to the PowerPAC theme. The PowerPAC display does not use any font or color customizations created by patrons in ChiliFresh Connections.

In the Polaris **themes\shared** folder, ChiliFresh Connections has its own style sheet (chilifresh.css). If your PowerPAC has a custom theme and you wish to override some of the default chilifresh.css file, copy the chilifresh.css file from the **themes\shared** folder to the custom theme folder and edit the custom version accordingly. Unlike the main styles.css page with overrides, the custom chilifresh.css page must contain *all* the CSS classes from the default version.

Polaris Social with ChiliFresh Connections is a separately licensed feature at the branch level. As in previous versions of Polaris, you can also offer reviews from ChiliFresh under a separate ChiliFresh contract, without offering the full features of ChiliFresh Connections. However, ChiliFresh reviews without ChiliFresh Connections require separate patron authentication.

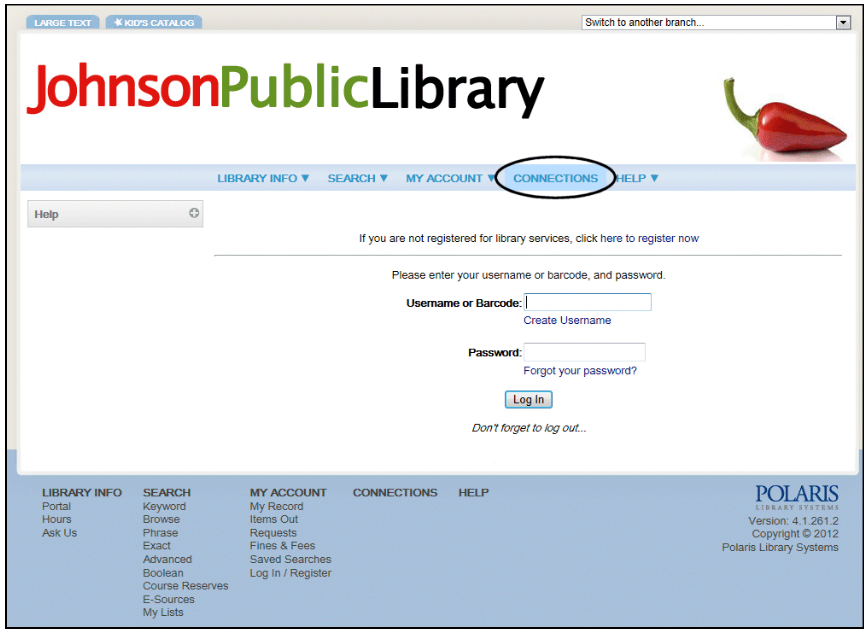
Exporting Records to the ChiliFresh Database

To display Chilifresh Connections content in PAC, you must initially export a file containing all your library's MARC bibliographic information to ChiliFresh. Use the Polaris staff client **Utilities, Export** function to upload the records, using the default option **Extract All Final MARC 21 Records**. Instructions are available on the ChiliFresh Connections Admin page. For subsequent exports of newly acquired titles, define the appropriate date range for the export using the **Extract Only MARC 21 Records Added / Changed from Date** option.

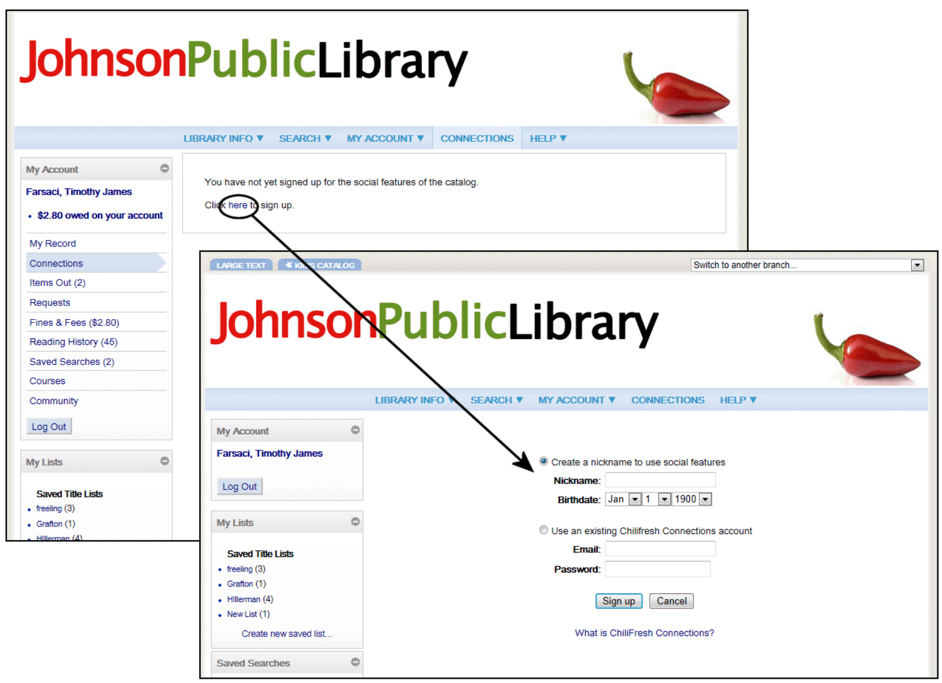
Patron Log-In and ChiliFresh Connections Registration

Within PowerPAC, a patron can easily link his or her library account to a new or existing ChiliFresh account. Once the link is established, the patron logs in with library account credentials to access Connections features within PowerPAC.

A patron who has not logged in can start this process by clicking any Connections function that requires login. For example, the registration process can be initiated from search results Connections functions in the patron's search results, or by clicking **Connections** on the menu bar and logging in.

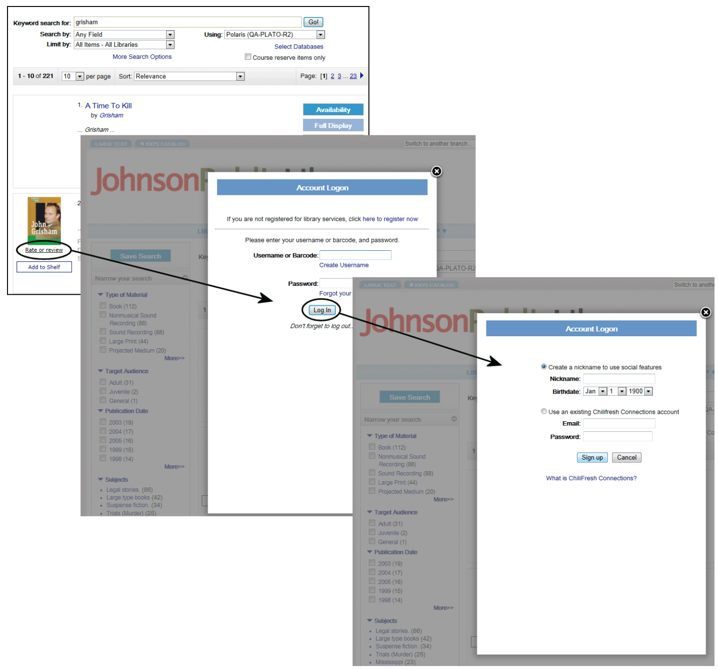


Once logged in, the patron receives a sign-up message for social features, and can click a link to connect the library account to a new or existing ChiliFresh account.



For new accounts, the patron clicks the **Create a nickname** option, supplies a nickname, and specifies the birth date. The nickname is the public name exposed to other users of Polaris Social functions. If the library’s setup with ChiliFresh requires a birth date and the patron is under 13, a message is displayed and the sign-up is canceled. To link an existing ChiliFresh account, the patron clicks the **Use an existing ChiliFresh Connections account** and supplies the email address and password associated with the account.

A similar process occurs when a patron who has not logged in clicks a ChiliFresh feature such as **Rate or review** in search results.



After the library account and the ChiliFresh account are linked, the patron who is logged into PAC does not have to log in to ChiliFresh Connections to use those Connections features in PAC that require log-in.

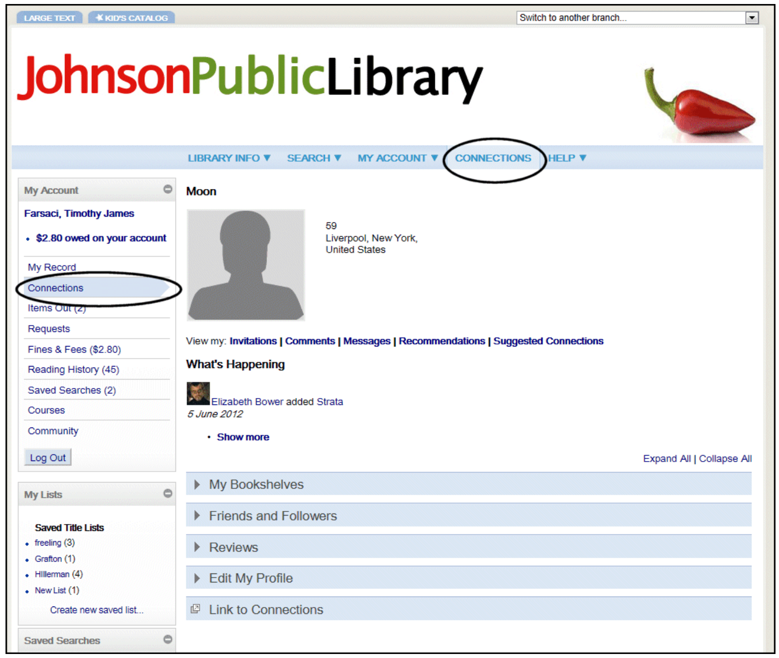
Logging out in PowerPAC also logs the patron out of the ChiliFresh Connections account.

Note:
Logging into ChiliFresh Connections from outside PowerPAC does not log the user into the PowerPAC (library) account.

When the library account and the ChiliFresh account are linked, deleting an existing Connections account from the ChiliFresh Connections site removes the shared login credential from PAC. The patron can create a new shared login credential between the PAC patron account and Connections by re-registering with Connections via PAC, as described above.

Social Features in the PowerPAC Patron Account

Social features are available to logged-in patrons from the PowerPAC patron account. The patron can click **Connections** in the dashboard or **Connections** in the menu bar to display these features.



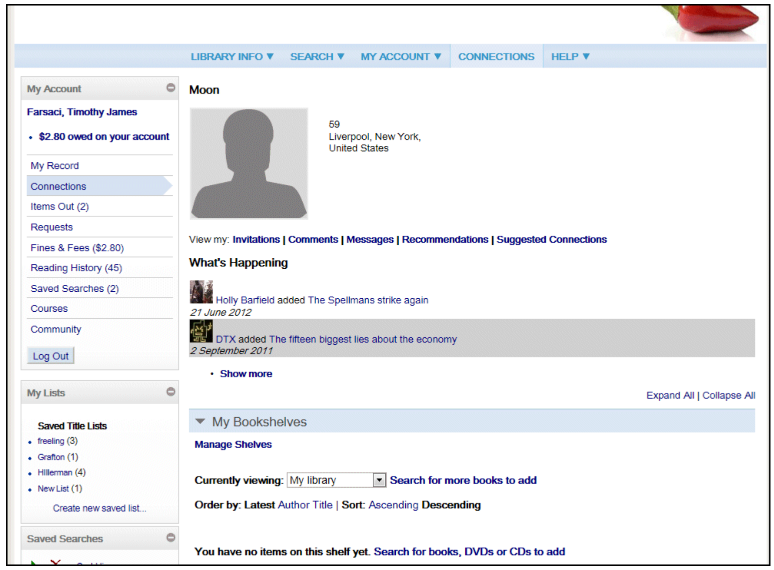
The Connections account page offers links for invitations, comments, messages, recommendations, and suggested connections. Each of these features opens in a lightbox. Below, five content "drawers" contain ChiliFresh Connections user account data. They are initially displayed as collapsed, but the user can choose to expand individual drawers, expand all, or collapse all.

ChiliFresh Connections notifies patrons by e-mail when they receive a new message, recommendation, invitation, or comment. The e-mail message contains a login link to the e-mail recipient's PAC branch. ChiliFresh Connections defines this notification functionality, including text of the e-mail message and which Connections actions will initiate a notification.

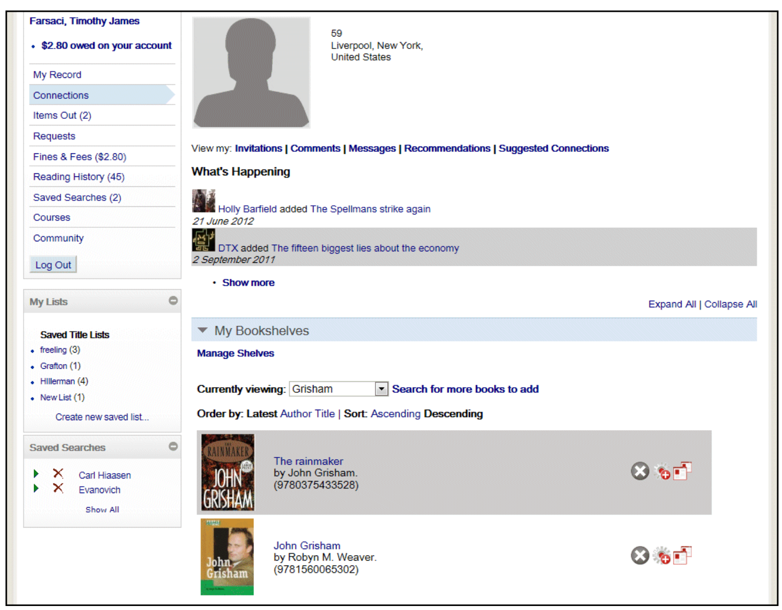
Note:
The patron's e-mail used for notifications can be set in the Edit My Profile section.

Bookshelves Drawer

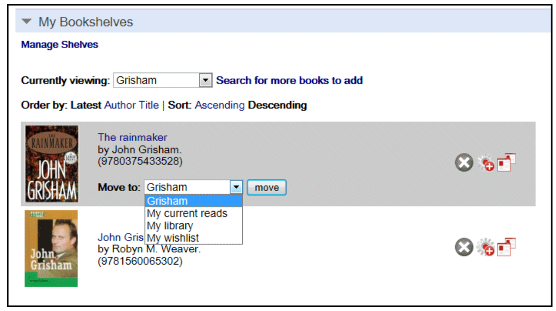
Bookshelves may include **My library**, **My current reads**, **My wishlist**, and any custom bookshelves (lists) the patron has created.



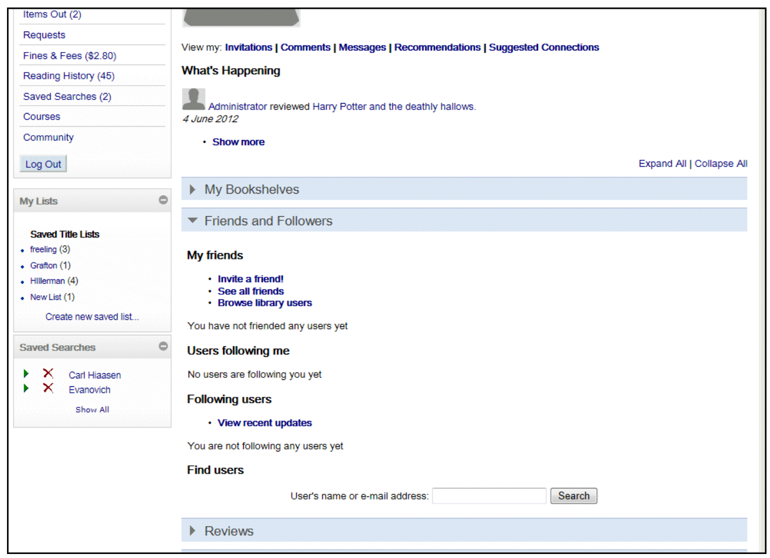
Books can be added to any bookshelf by clicking the **Search for more books** link. (Books can also be added to bookshelves from the patron's search results. See "Social Features in Search Results" on page 30.) If a bookshelf currently has contents, the list can be sorted by **Latest**, **Author**, **Title**, **Ascending** alphabetical, or **Descending** alphabetical.



Icons next to each title offer options to remove the title from the bookshelf, set the title as a current read, or move to the title to another shelf. The illustration shows the interface when the patron chooses to move the title to another shelf.

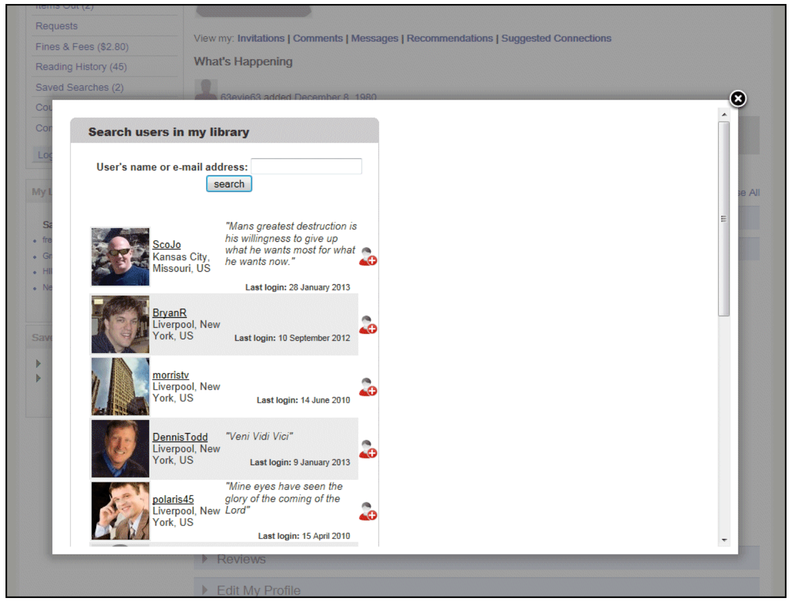


Friends and Followers Drawer

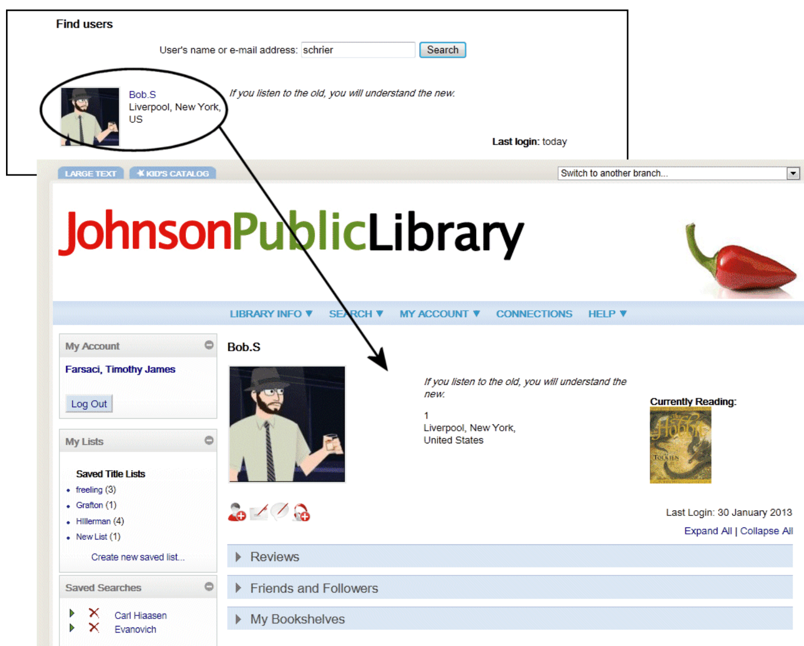


This drawer displays five sections:

- **My friends** - The patron's ChiliFresh Connections friends. The patron can invite friends, see all friends, or browse library users to find other Connections users registered at the library. Each library user's name is accompanied by an Add Friend icon . The illustration shows an example.



- **Users following me** - Users who follow the logged-in patron.
- **Following users** - Users whom the logged-in patron follows.
- **Find users** - The logged-in patron can search for any ChiliFresh Connections user by user name or email address. When the patron selects the link for another ChiliFresh Connections user, that user's profile page is displayed.

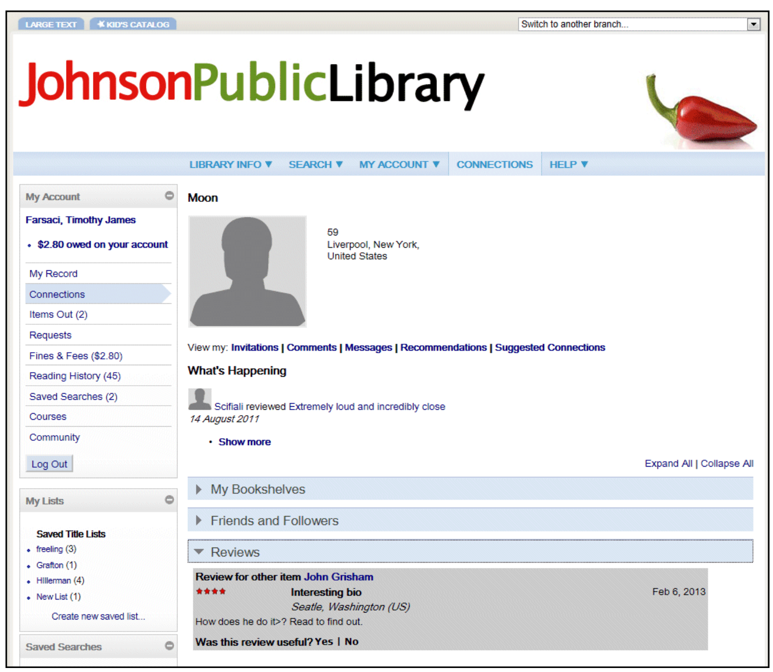


On that page, the logged-in patron can click a title to display the brief title information in PowerPAC, as in the patron's own profile. The social drawers are also the same. The following features are available by clicking the icons:

- **Add to friends** - Sends a friend request to the ChiliFresh user; if the user accepts, he or she is added to the patron's friends list.
- **Send message** - Sends a message to this user
- **Add comment to cork board** - This option adds a comment to the user's Comments list, and sends the user an e-mail alert.
- **Follow/unfollow this user** - Adds the patron to the Followers list on the ChiliFresh user's profile and adds the ChiliFresh user to the Following list on the patron's profile (or reverses the operation).

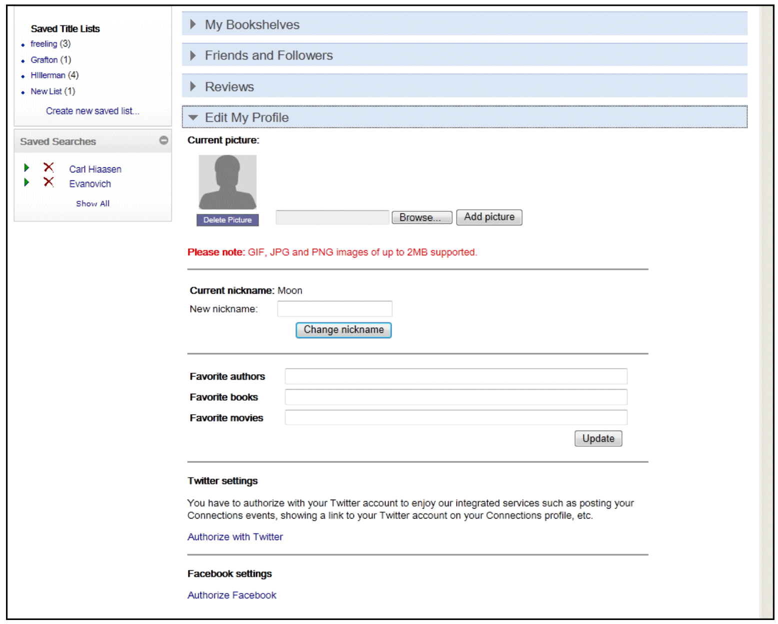
Reviews Drawer

This drawer displays the reviews the patron has already submitted. The patron can select a title to display search results for that title in PowerPAC. Reviews can be added from search results. See "Social Features in Search Results" on page 30.



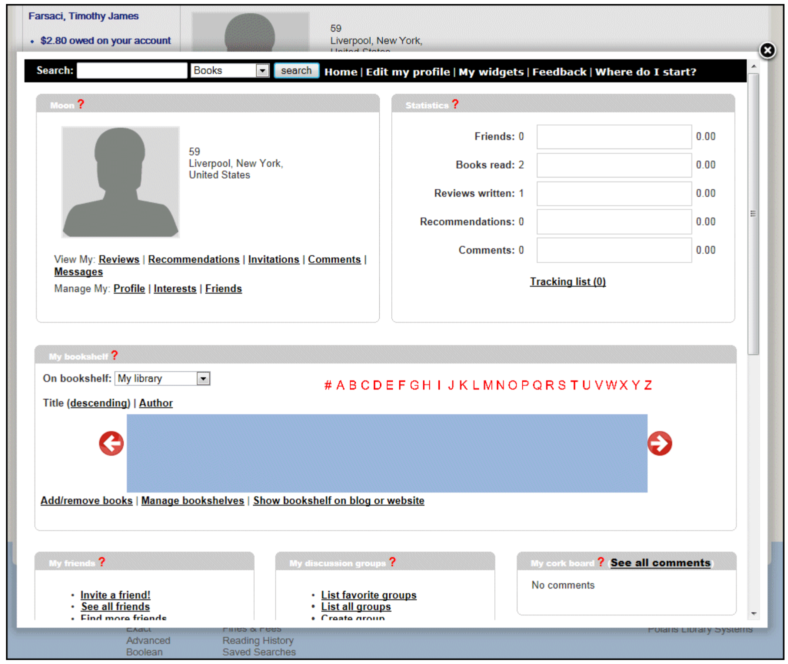
Edit My Profile Drawer

The patron can edit the Connections profile picture, nickname, "My Interests" (favorite authors, books, movies), and Facebook or Twitter link settings. The ChiliFresh site provides more information about these link settings.



Link to Connections Drawer

This drawer is a link to the ChiliFresh Connections site, which opens in lightbox. The system uses the linked ChiliFresh Connections authentication for the logged-in patron to log in to the ChiliFresh Connections site.

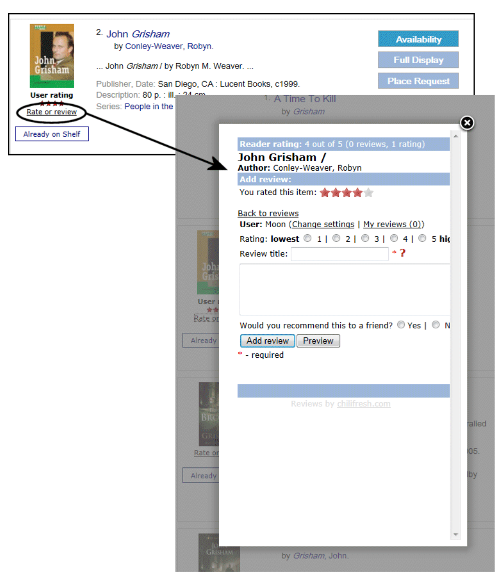


After the patron makes account changes in the Chilifresh Connections lightbox window, the PowerPAC patron account drawer content is refreshed when the account page is refreshed.

Social Features in Search Results

Ratings and Reviews

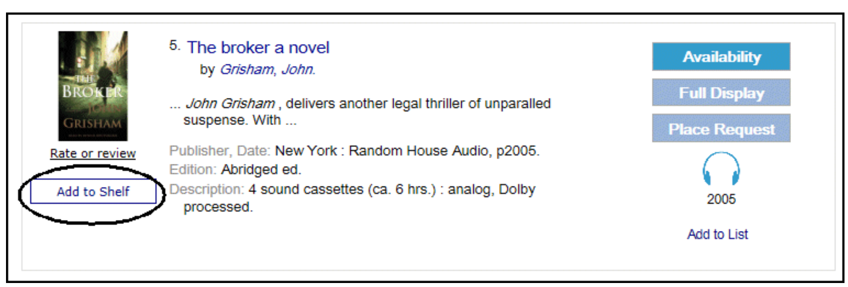
Logged-in users can rate titles, add reviews, and read reviews from other readers as in previous versions of Polaris. This illustration show the sequence for a title with no previous reviews.



This illustration shows the sequence for a title with existing reviews.

Add to Shelf

In PowerPAC initial (brief) search results, an option to add the title to a ChiliFresh Connections bookshelf is displayed under other Chilifresh content, such as the book jacket image and the ratings/reviews link.

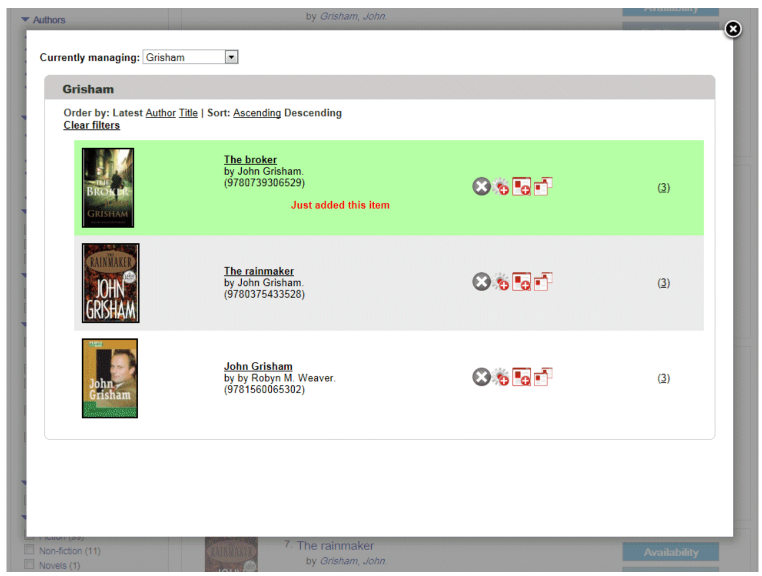


When the logged-in patron selects **Add to Shelf**, a list of bookshelves associated with the patron's account is displayed (see "Bookshelves Drawer" on page 25).

Note:
If the patron is not logged in, he or she is prompted to do so.

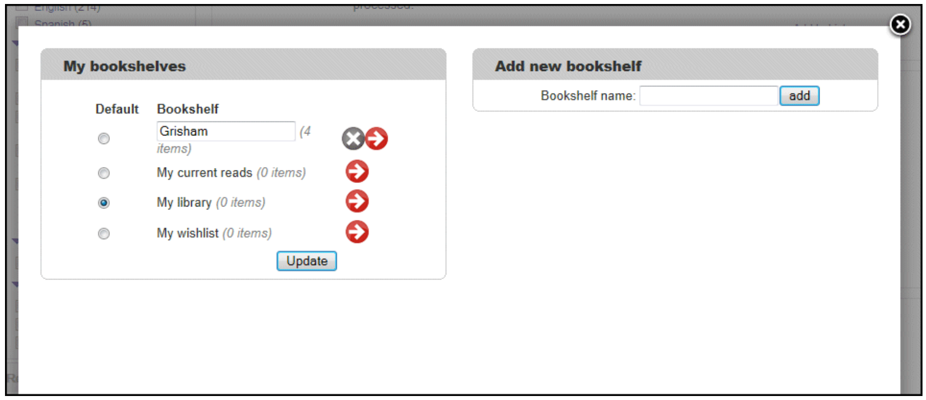
Note:
If the title has already been added to one of patron's bookshelves, the displayed link is **Already on Shelf**.

When the patron selects a bookshelf, the bookshelf opens in a lightbox, with the newly-added title at the top.



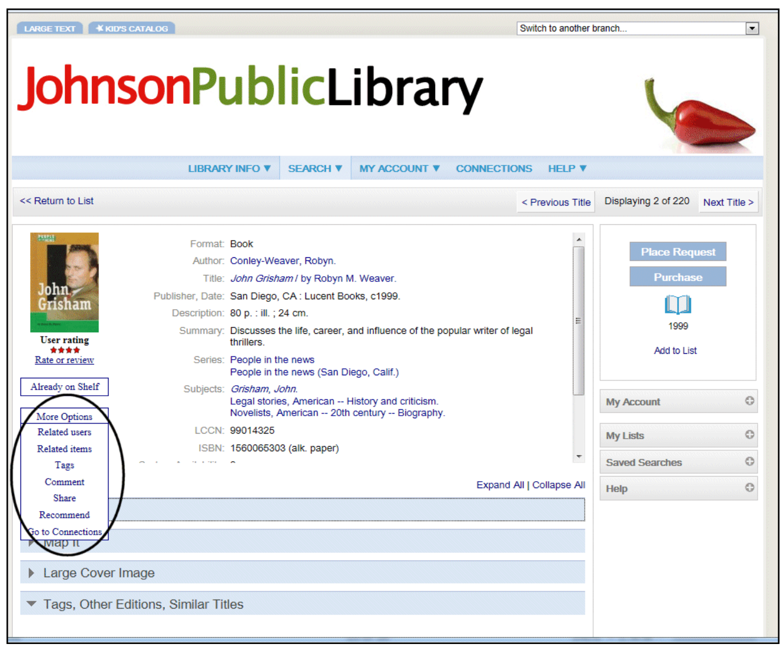
Icons next to each title offer options to remove the title from the bookshelf, set the title as a current read, recommend the title to a friend, or move to the title to another shelf.

The patron can also click **Manage shelves**. This option opens a light box where the patron can set up a new bookshelf, specify a default bookshelf, delete custom bookshelves, and choose a bookshelf for display in the lightbox.



More Options

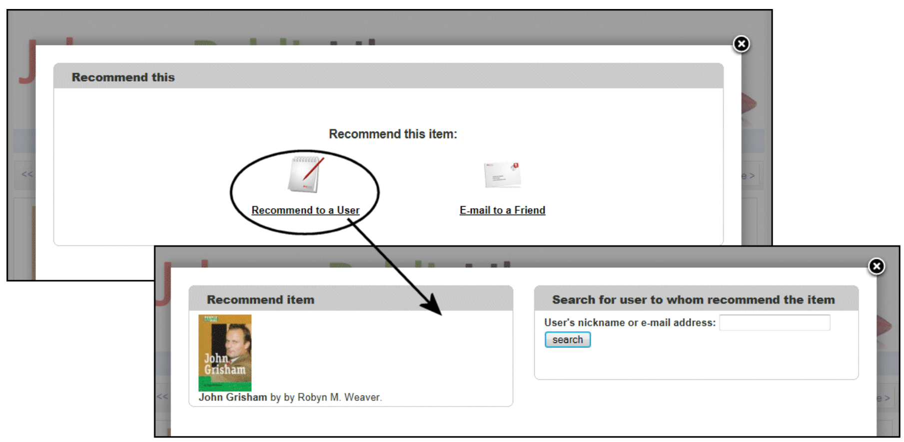
More options are available from the product page (full display) of a title in PAC. The product page includes the **Add to Shelf/Already on Shelf** option. In addition, the patron can click **More Options** to display additional ChiliFresh Connections options:



- **Related Users** - Selecting this link displays a lightbox that lists users who have taken an action on the item, such as adding it to their shelf or reviewing it. Selecting a Connections user in the lightbox opens the public profile display of that user (see "Friends and Followers Drawer" on page 26).
- **Related Items** - This option displays a lightbox with "you might also like" titles related to the currently displayed title. ChiliFresh determines what titles are "related." Selecting any item from the list of related items launches a search in PowerPAC and displays the product page for the selected title.

- **Tags** - Selecting **Tags** opens the Connections tags widget in a lightbox. The patron may add a new tag or select an existing one. Selecting a tag in the lightbox navigates within the lightbox to the ChiliFresh Connections list of titles associated with that tag; selecting a title launches a search and displays the brief result for the title.
- **Comment** - The patron can select this option to add the title as a favorite or post a comment. The Playback option shows any existing discussion (comment thread).
- **Share** - Selecting any of the options in the Share this lightbox shares a deep link to the PowerPAC product page for the title via e-mail or on the appropriate social media site.

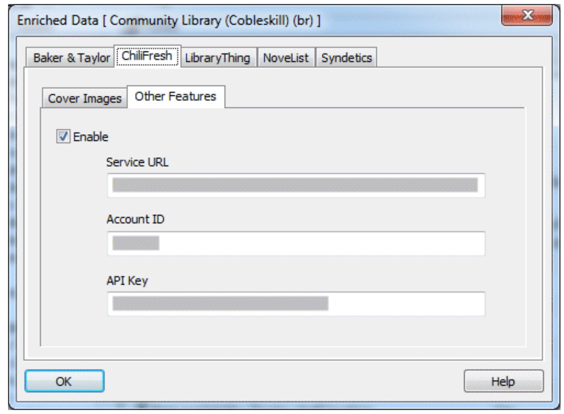
- **Recommend** - The patron can recommend the title to another Connections user, or e-mail the recommendation to a friend.



- **Go to Connections** - This option opens the ChiliFresh Connections site in a lightbox. See "Link to Connections Drawer" on page 29.

Set Up ChiliFresh Connections in Polaris Administration

Open the PAC profile **Enriched data** for the PowerPAC connection organization. On the ChiliFresh - Other Features tabbed page, select **Enable** and supply your ChiliFresh Service URL, account ID, and API key.



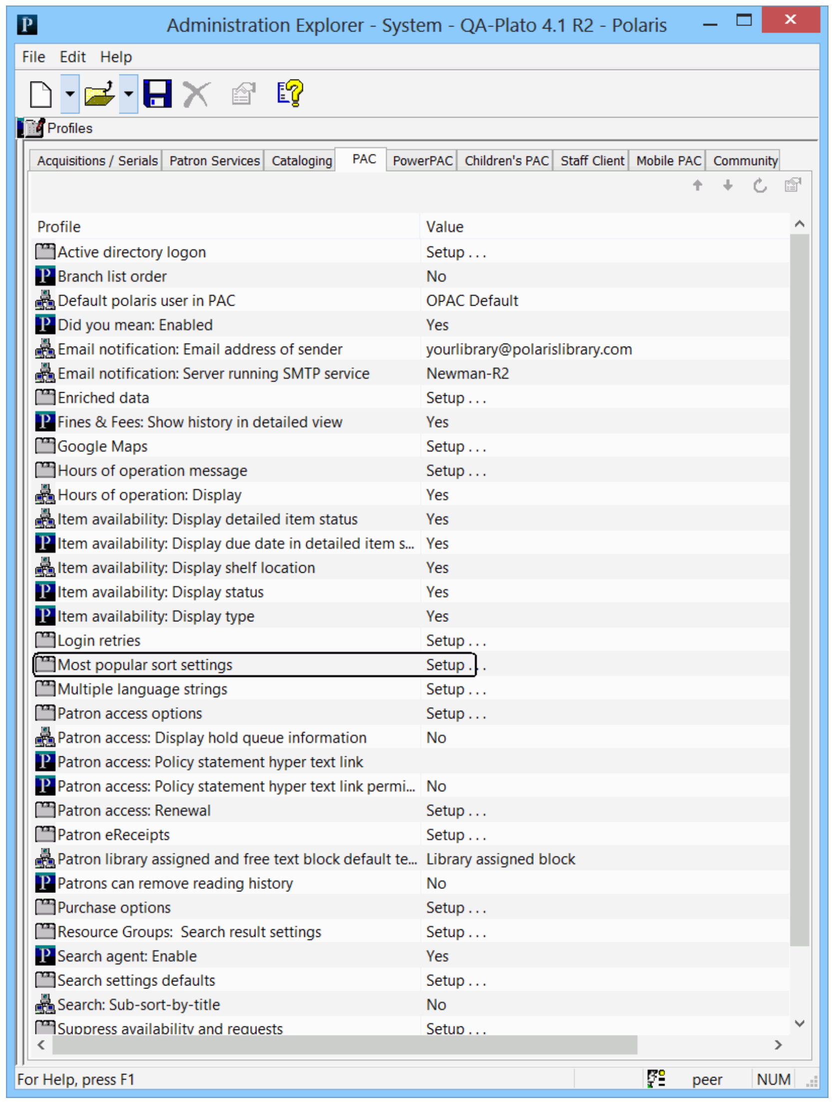
PowerPAC jQuery Upgrade

PowerPAC now uses jQuery 1.8.2. While most customers will see no difference in functionality, those who use the jQuery code library in their PAC customizations can use any additional jQuery functionality included in the update.

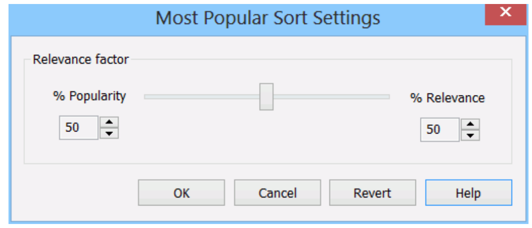
For more information about customizing Polaris PowerPAC, see the *Polaris 4.1 PAC Customization Guide*, available at **www.polaristown.com**.

Relevance Rank in Most Popular Sort

The new system-level PAC profile, **Most popular sort settings**, automatically incorporates relevance into the **Most popular** sort option if it is selected in the PowerPAC or Mobile PAC.



When you double-click the profile, the Most Popular Sort Settings dialog box opens with a default setting of 50% popularity and 50% relevance.



Before this change, no relevance ranking was applied to the **Most popular sort**. After upgrading, search results using the **Most popular** sort will be different because the new profile is set to a default 50/50 balance between popularity and relevancy. To restore the popularity sort to the formula that was used before upgrading, adjust the setting in the Most Popular Sort Settings dialog box to 100% popularity.

If 100% is selected in the **%Relevance** box, the result set will match a straight relevance sort. If you adjust the sort settings and do not like the results, click **Revert** to return to the default setting of 50% popularity and 50% relevance.

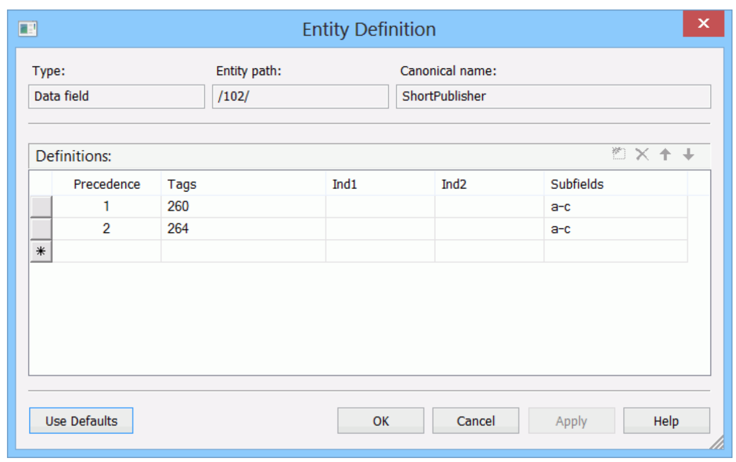
Display and Indexing of 264 Tag

To support Resource Description and Access (RDA), the 264 tag is now included in the default **Publisher** display entities in the Polaris Administration profiles: **PowerPAC Title Display: Configure** and **Mobile PAC Title Display: Configure**. In addition, the publisher keyword index was updated to include the 264$b as a default.

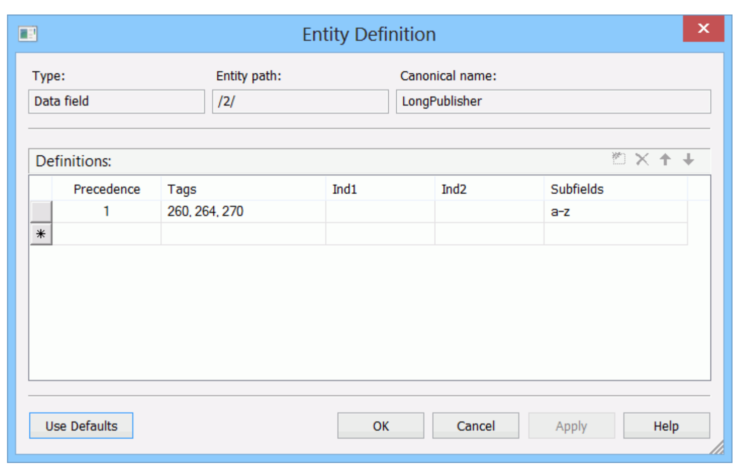
Note:
If your library already added the 264 tag to the publisher-short or publisher-long display entities, the changes are retained.

The title display can now be configured for PowerPAC or Mobile PAC to display the 264 tag for publisher:

- The **Publisher short** display entity now includes the 264 subfields a-c with a precedence of 2.



- The **Publisher long** display entity now includes the 264, and all subfields in the precedence 1 group.



Patron Inactivity Timeout Alert

As in previous versions of Polaris, the library can set the PowerPAC profile **Patron inactivity timeout** that causes a logged-in patron (or a patron who is attempting to log in or self-register) to be automatically logged out of the patron account when the patron is in the library, and the specified timeout limit is reached. In the original development, the timeout warning was displayed to the patron in the browser's status bar.

With this development, the following timeout warning is displayed in an alert box 30 seconds before the session is due to time out: **Your session will end in 30 seconds**. You can edit the message in Polaris WebAdmin except for the **30 seconds** portion of the string, which is not editable. If the user clicks **Continue session** button, the alert box closes, the session timeout clock is restarted, and the user remains on the current page. If a lightbox was open, it remains open.

The session countdown timer continues while the alert box displays. If the user does not click **Continue session,** when the session timeout limit is reached, the alert box is automatically closed, the session ends, and the interface returns to the URL specified in the **Patron inactivity timeout** profile.

> **Note:**
> This feature applies to PowerPAC only. It does not apply to Children's PAC or Mobile PAC.

This development corrects two problems:

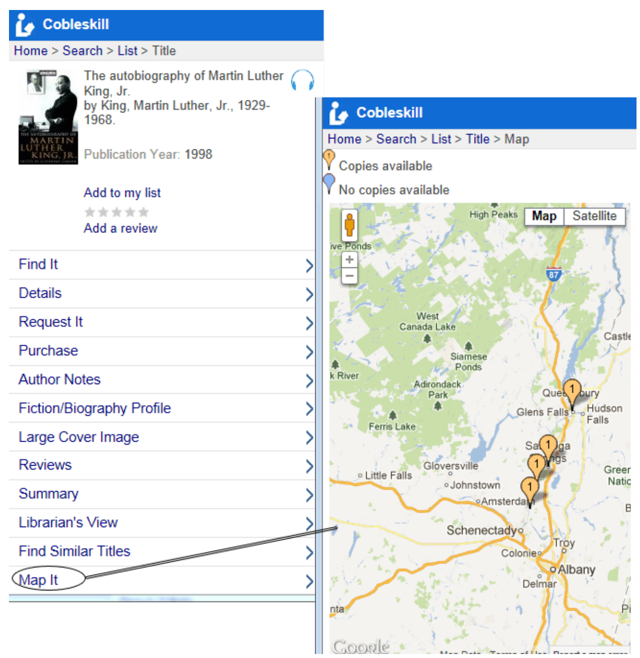
- The user may be logged in, view a record, and select Google Preview. While paging through Google Preview in the lightbox, the PowerPAC session might time out and close the lightbox. Or an organization representative may be editing a community or event record and have the session time out in the middle of the editing project. The new alert message allows the user to continue without interrupting the current activity.
- The patron inactivity countdown appeared in the browser status bar, but in a recent version of Firefox® the status bar shows only page loading activity and link previews. When neither of those are needed the status bar simply disappears. Since the status bar was not displayed, the patron inactivity countdown was not displayed.

Google Maps in Mobile PAC

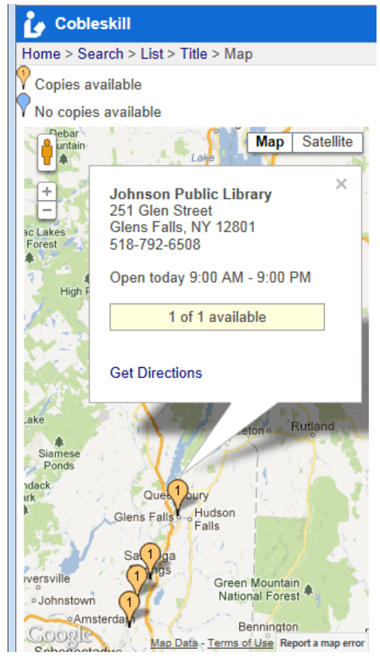
Using the JavaScript interface provided by Google Maps™, Mobile PAC now offers the Map It feature previously available in PowerPAC only, which provides a visual guide to the location of items linked to titles in the patron's search results list. When you enable this feature, the Mobile PAC Map It link is available to users who have enabled JavaScript on their mobile devices.

Map It Display in Mobile PAC

When the user clicks **Map It** in the title product page (full display), a map displays bubble markers for branch locations that have linked items.



The user can place the cursor over a marker bubble to see the branch name, or click the branch marker to see the branch's address and hours.

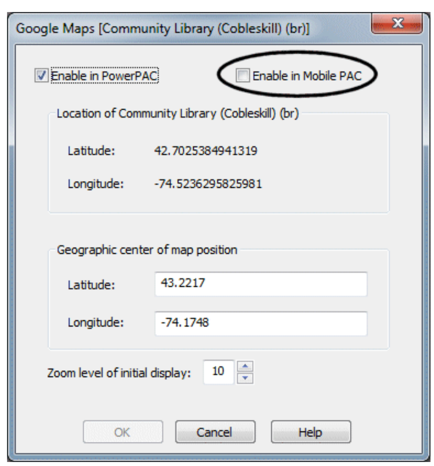


When the user clicks **Get Directions** in the hours window, directions to the branch are available from any address. The user enters the address and clicks Go!. (If the user is logged in, the primary address from the patron record is already filled in for convenience, but it can be changed.)

As in PowerPAC, the Mobile PAC Map It link is displayed for titles whose **# system items** count in the PAC brief display is greater than 0.

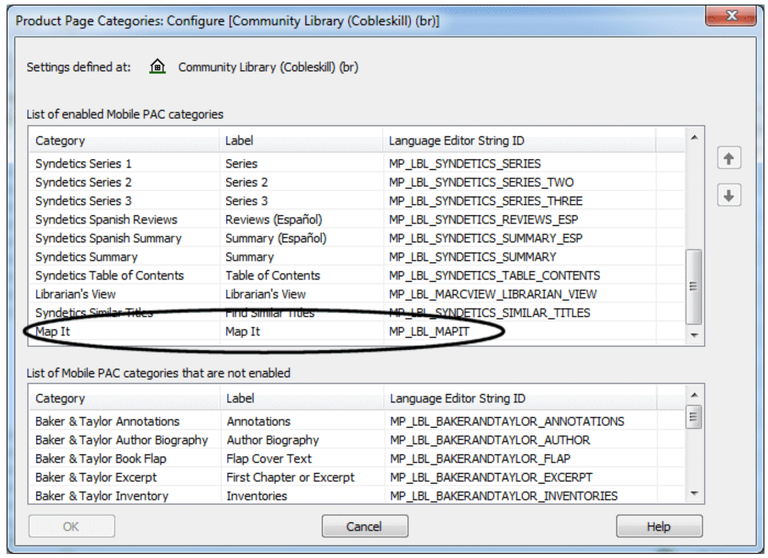
Setting Up Map It for Mobile PAC in Polaris Administration

The PowerPAC profile **Google Maps** has been moved to the PAC profiles tab in Polaris Administration, and includes a new check box to enable Map It in Mobile PAC. As in previous versions of Polaris, the profile is available at the system, library, and branch levels.



Mobile PAC and PowerPAC share the same geographic center and zoom level settings.

When you enable Map It for Mobile PAC, the link is automatically enabled for the Mobile PAC product page and placed by default at the end of the list for the enabled product page categories. You can change the position of the link on the page using the Mobile PAC profile **Product Page categories: Configure**.



Community Profiles

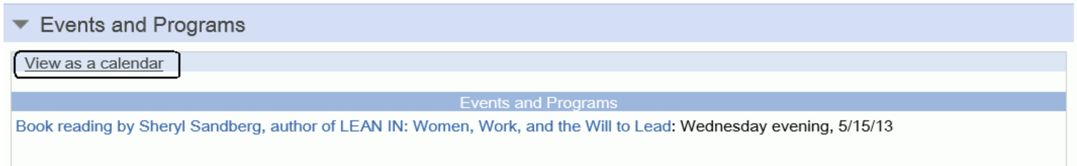
The following updates were made to Polaris Community Profiles.

Events Display as Calendar or List

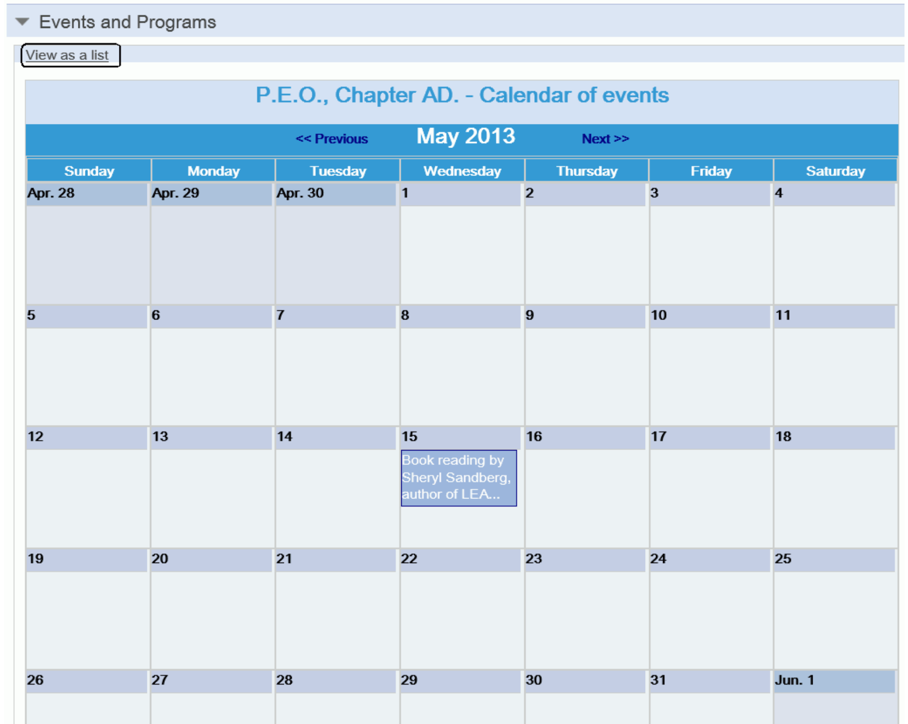
If the library has Polaris Community Profiles and the ContentXChange URL is defined in the server parameter **URL of the ContentXChange root** in Polaris Administration, events can be displayed in a calendar or a list view.

In the PowerPAC full display of the Community record, the Events and Programs drawer now includes an option to display events in a calendar or list view.

If the event is displayed in a list, the **View as a calendar** option is available. This label can be modified in WebAdmin.

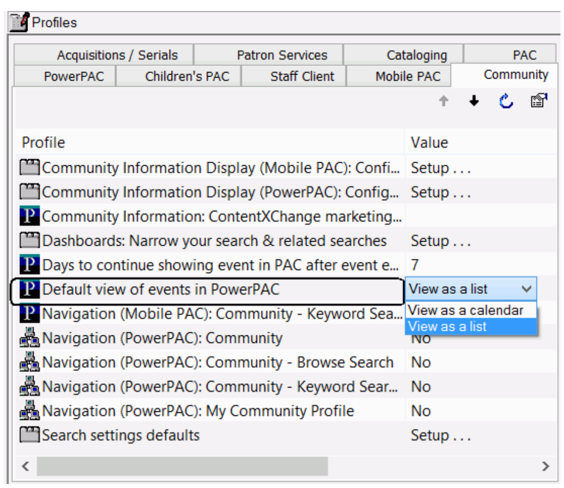


If the event is displayed in a calendar, the **View as a list** option is available. This label can be modified in WebAdmin.



When a user selects an event display option, the selected view remains in effect for the duration of the user's logged in session.

In addition, the library can select a default view for events by selecting **View as a list** or **View as a calendar** in the **Default view of events in PowerPAC** Community profile in Polaris Administration, which is available at the System, Library, or Branch level.

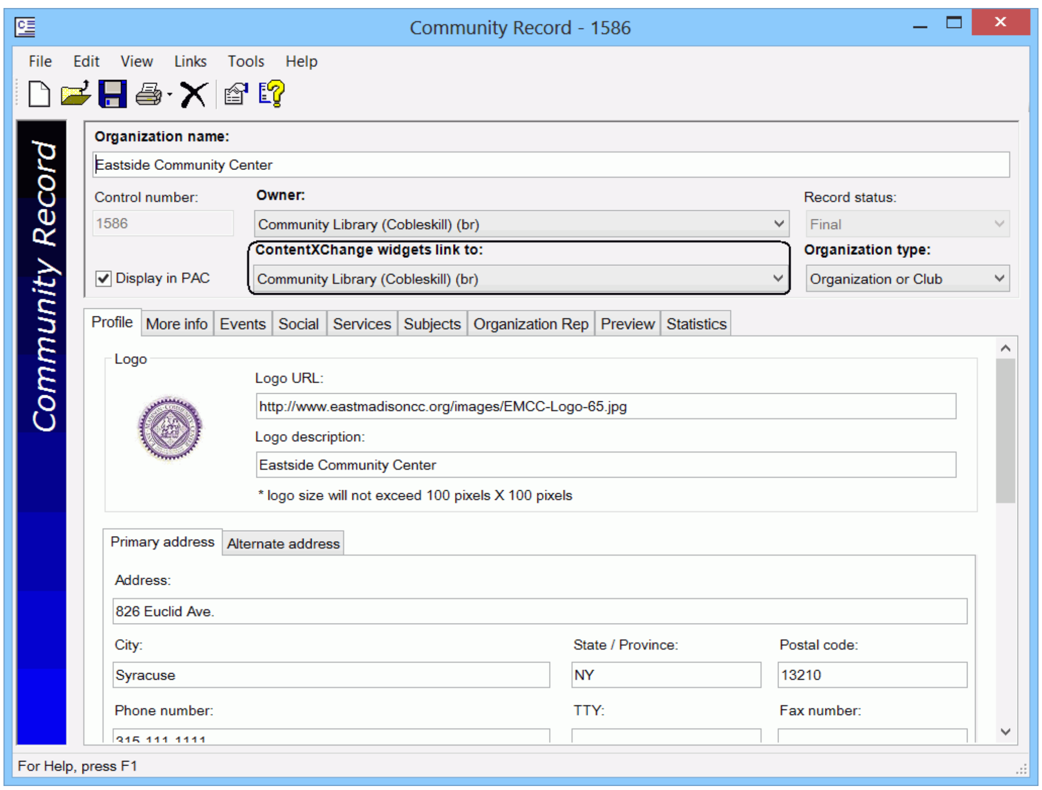


Branches Recognized for ContentXChange Widgets

Before this change, when a user clicked a link from a ContentXChange widget embedded outside of PAC, the system-level PAC results were displayed. Now the library can specify that branch-level PAC results display when a user clicks the ContentXChange link.

The Community Record in the Polaris staff client has a new **ContentXChange widgets link to** drop-down list box where you can select a branch or the system.

Note:
ContentXChange widgets that are already created cannot be updated to recognize the branch. After changing the branch, any existing ContentXChange widgets will no longer work; these widgets will need to be recreated on the ContentXChange tab in PAC, and the new iframe embed code should be used to replace the old code on the web site where the widget is being used.



When a search is launched from a ContentXChange widget, the PAC results display according to the selection in the **ContentXChange widgets link to** list box in the Community Record workform. If a branch is selected, the branch’s PAC results display. If the library system is selected, the PAC results display for the entire system. The default selection is the community record’s owner.

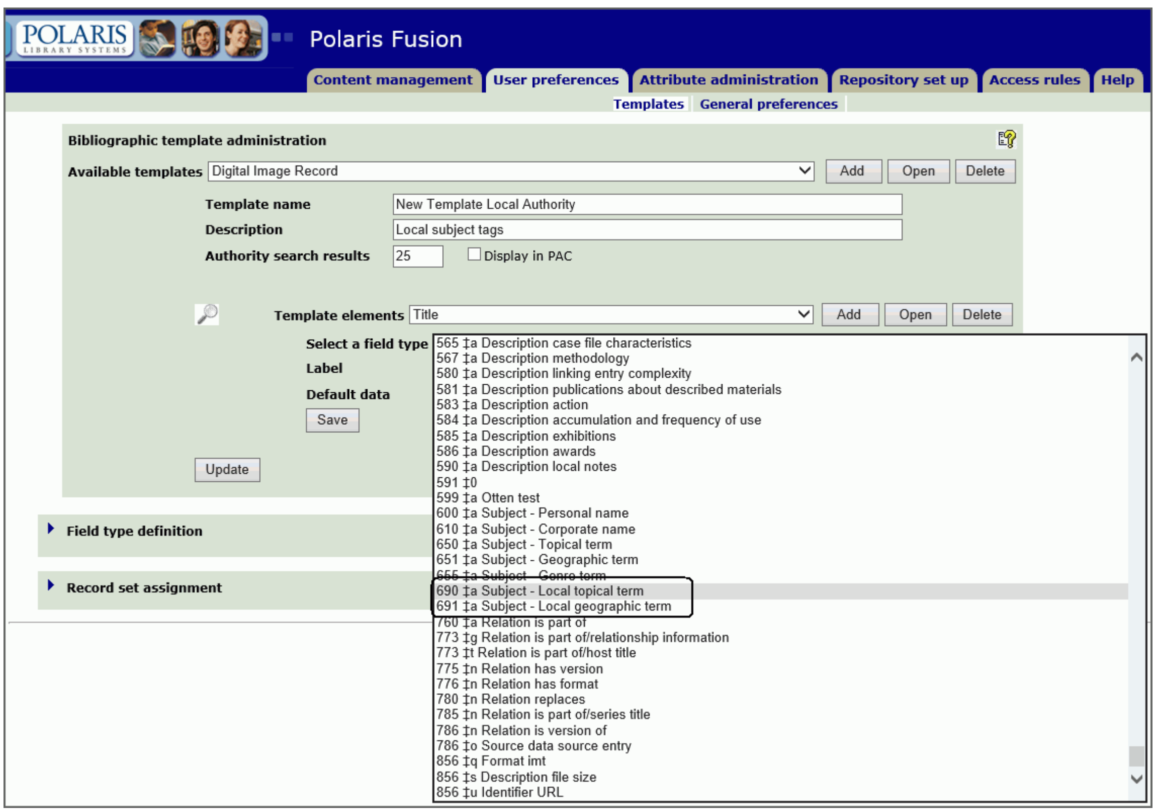
Fusion

The following updates were made to Polaris Fusion.

Local Subject Tags Added to Fusion

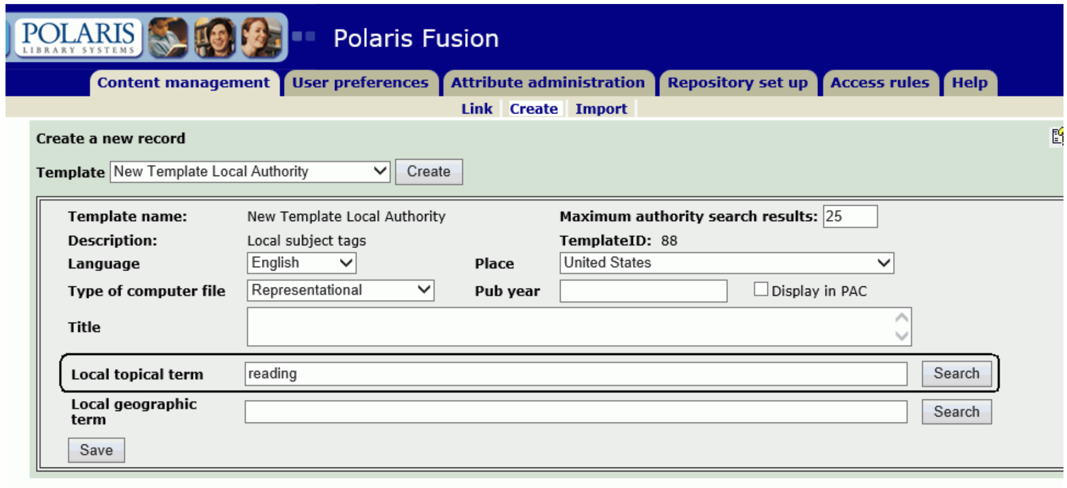
The following fields were added to the **Template elements** list on the Templates subtab of the User preferences tab:

- **690 $a - Subject - Local topical term**
- **691 $a - Subject - Local geographic term**

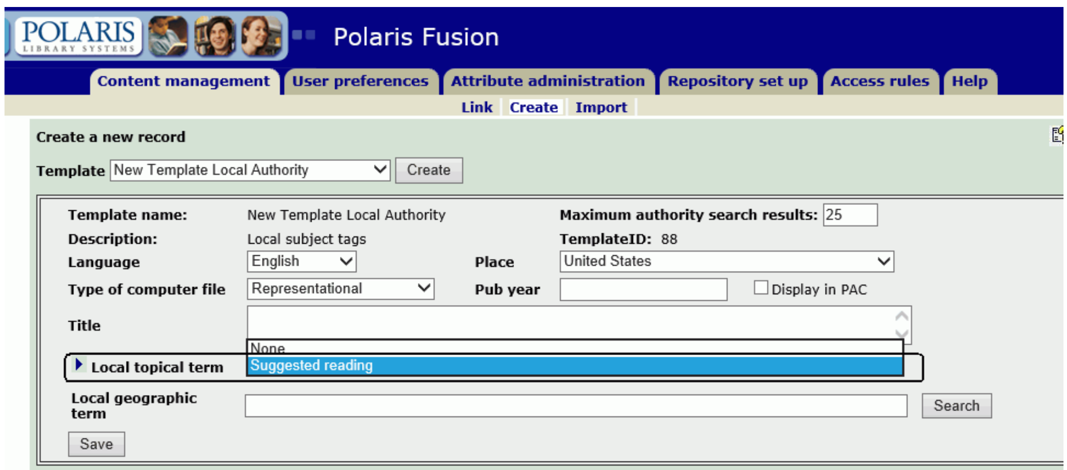


When this template is selected to create a new bibliographic record on the Create sub-tab of the Content Management tab, a **Search** button appears next to the local tags that are under authority control.

The user creating the new bibliographic record in Fusion enters a local topical or geographic term, and clicks the **Search** button to search for an authority record.



The user selects the heading and saves the record.



To be included in the list, the authority records for local topical terms (190) or local geographic terms (191) must have the following characteristics:

- First and second indicators are blank
- The 008/09 (Kind of record) values are a or f.
- The 008/11 (Subject heading system/thesaurus) value is z.
- The 008/15 (Heading use-subject added entry) for local subject headings value is a.

When the user selects one of the local headings from the list, bibliographic headings are generated with these values and linked to the corresponding authority records.

If the user enters a heading in the box, but does not select an authority record, the heading is saved as an unlinked heading.

Circulation

The following updates were made to Polaris Circulation.

Estimating and Blocking for Accrued Fines

Polaris now provides the ability to display an estimated fine amount (accrued fines) for items a patron has currently checked out. You can opt to include claimed and/or lost items in the estimate calculation. The estimated fine amount information is available in the staff client, the PowerPAC and Mobile PAC patron account, the Polaris ExpressCheck patron account, and via Polaris Phone Attendant (inbound telephony).

In addition, you can choose to block the patron for a threshold amount that is the total of actual fines and accrued fines, not just fines already on the patron account, using the normal fines block functionality. If you choose to include accrued fines in blocking calculations, the accrued fines are added to any existing fines in real time and patrons are blocked as appropriate, using the normal fines block. The option to include accrued fines in blocking calculations is available at the system level only. This function applies to all check-out and renewals in Polaris, including staff client check-out and renewal, ExpressCheck check-out and renewal, renewal from PowerPAC or Mobile PAC, telephony renewal, and SIP check-out and renewal.

- **Governing library** - The calculation of the accrued amount is based on the setting of the governing library for fine calculation, set in the system-level Patron Services parameter **Consortium circulation**. (If that option is set to **Use transacting branch**, the calculation is based on the lending branch's settings.)

  Note:
  In some lost item scenarios it is possible to have a lost item where the replacement and overdue charges have not been charged. If the Transacting branch (the branch where the item is checked in) has been selected as the governing library for lost item recovery, that branch's charges would apply when and where the item is finally recovered, which cannot be known in advance. In this case the estimated amount will be based on the loaning branch's settings.

- **Hourly loans** - Accrued fines on hourly loans are calculated in real time and added to any actual fines at the time the block is calculated.

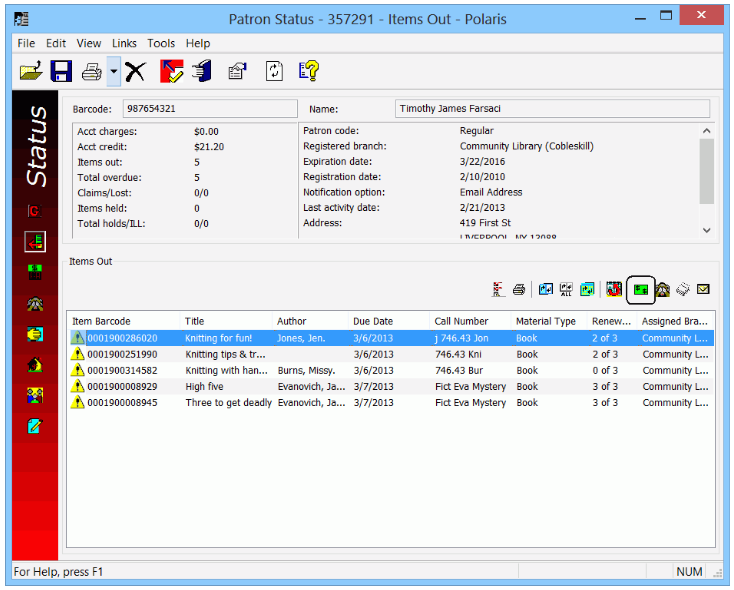
- **Maximum fine limit** - When the total amount is calculated and displayed, the displayed amount will not exceed the maximum fine limit per material type as defined in the Fines policy table, even if the calculated amount is greater. In other words, the patron will not be charged for an amount greater than the maximum fine limit.
- **Lost items with overdues** - You can opt to include items in the estimated fine calculation that are declared or billed lost but the overdue fine has not been charged. See “Setting Up Accrued Fine Options” on page 59.
- **Claimed items** - You can also opt to include claimed items in the estimated fine calculation. See “Setting Up Accrued Fine Options” on page 59.
- **Claimed and lost items in PAC patron account display** - The PAC patron account display does not include claimed or lost items, so the patron may be blocked for accrued fines that are not obvious in the display. However, many libraries have a lost item limit block and/or a claimed item limit block, and these may block the account before or in addition to the accrued fines block.
- **Notification and reporting** - The accrued amounts are not included on overdue notices, in the calculation for billing, or in calculations for collection agency reporting.

Displaying Estimated Fines

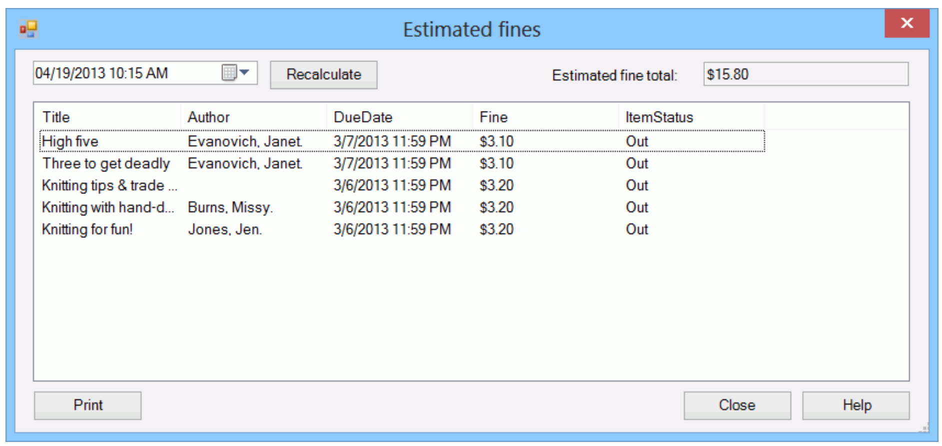
Estimated fines are available for display in both the staff client and PAC. (Including accrued fines in blocking calculations is optional and set at the system level.)

Patron Status Workform - Items Out View

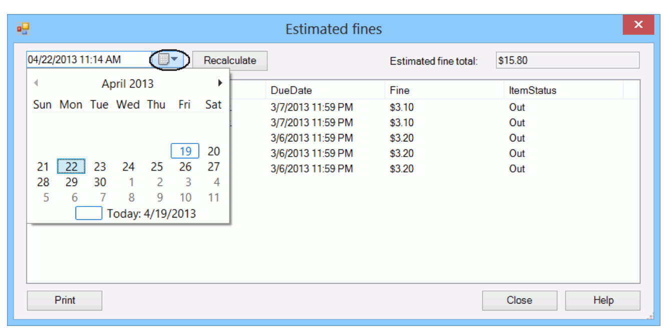
You can view a patron’s estimated fines from the Patron Status workform - Items Out view when one or more items are overdue. Click the Estimated Fines icon  above the Items Out list.



The Estimated Fines dialog box opens.



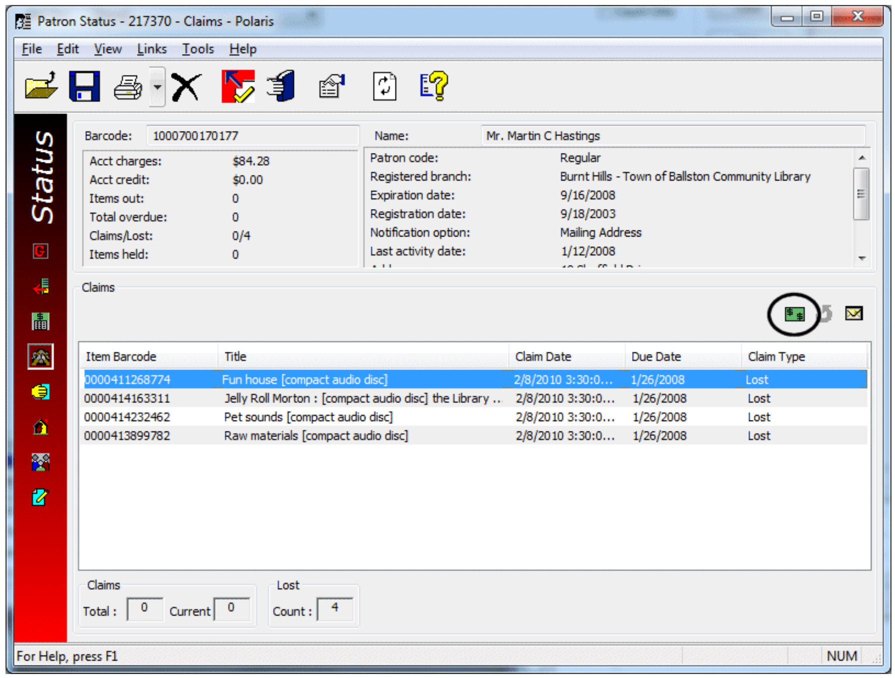
The dialog box shows the fine on each item and the total estimated fines if the items are returned today. To view the estimated fines if the items are returned at a future date, use the calendar control to set the date; then click **Recalculate.**



You can click **Print** to print the information on the printer specified for the workstation. The information is formatted for a receipt printer and includes the title, author, due date, and estimated fine. If you have opted to include claimed and/or lost items in the calculation (see "Setting Up Accrued Fine Options" on page 59), these are included in the printed information.

Patron Status Workform - Claims View

The Estimated Fines icon is also available on the Patron Status workform - Claims view.

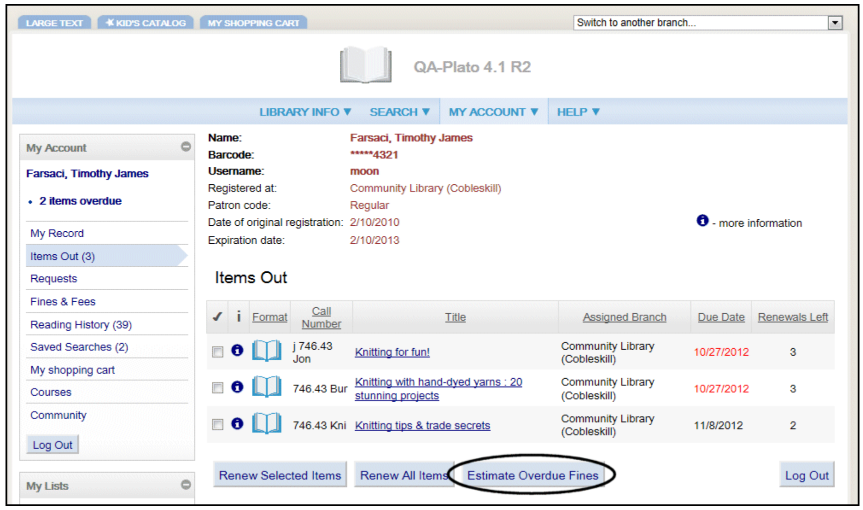


If you have opted to include claimed and/or lost items in the estimated fines calculation, the Estimated Fines icon is displayed. Click the icon to estimate fines as described for the Items Out view (see "Patron Status Workform - Items Out View" on page 51). Additional Claim Type Information is also displayed for these items. See "Setting Up Accrued Fine Options" on page 59.

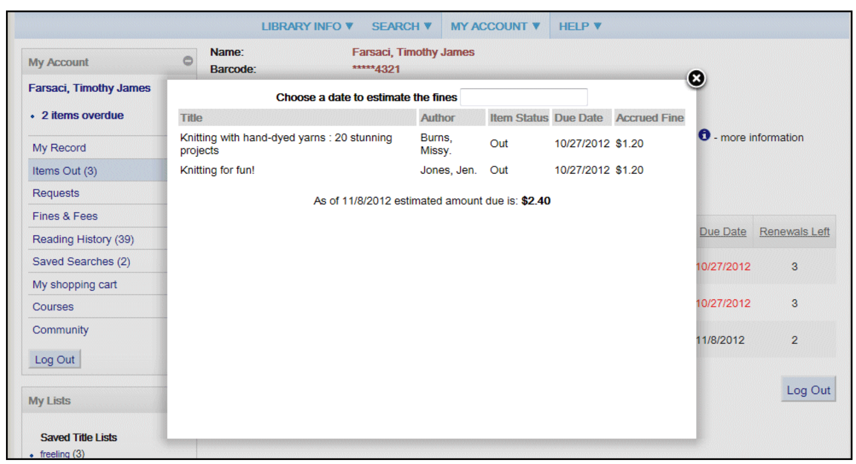
You can click **Print** to print the information on the printer specified for the workstation, as described in "Patron Status Workform - Items Out View" on page 51. The printed list includes items out in addition to lost and/or claimed items.

PAC Patron Account Display

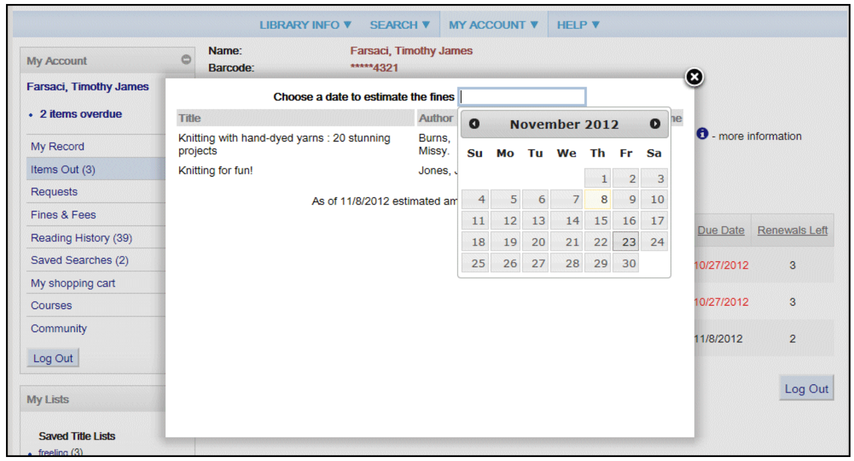
In PAC, the patron can estimate accrued fines from the Items Out page and from the Fines & Fees page of the patron account. In PowerPAC, the option to estimate overdue fines appears below the list if there are overdue items.



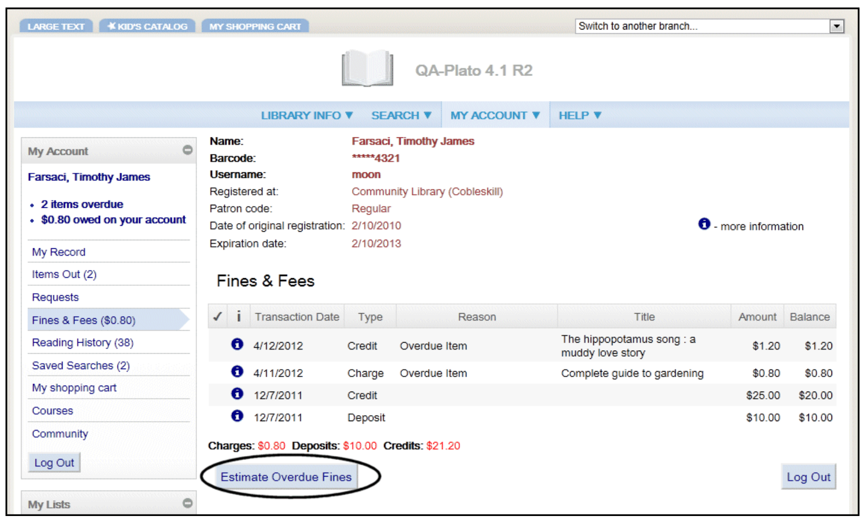
When the patron clicks **Estimate Overdue Fines**, a light box displays the title, author, item status, due date, and accrued fine for each overdue item, as well as the total due as of the current date. If you have opted to include claimed and/or lost items in the estimate, these are included in the display and calculation.



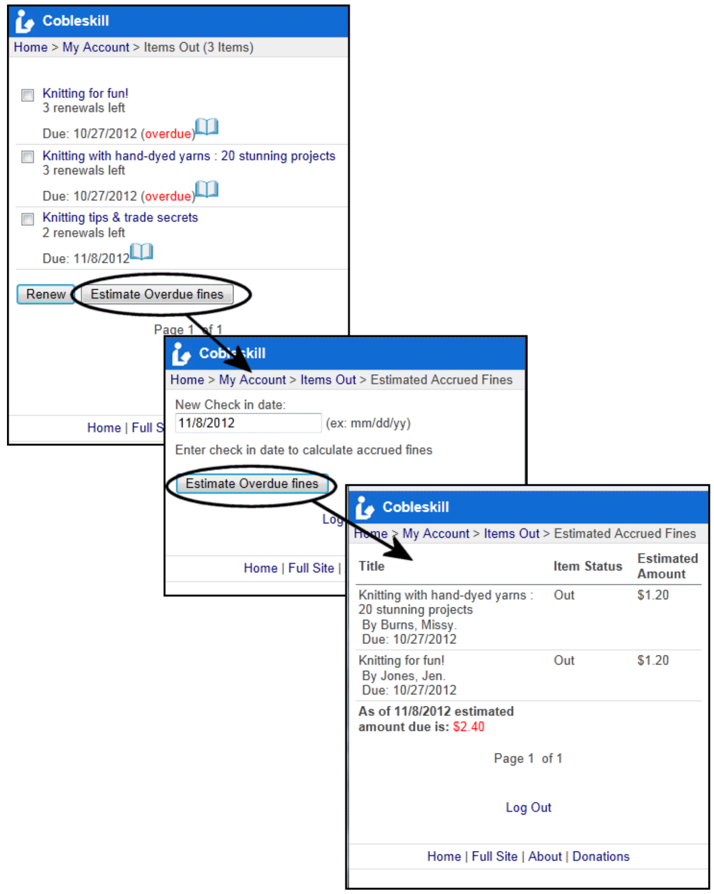
The patron can click the date field to select a different estimation date from a calendar.



The function is the same from the Fines & Fees page.



Mobile PAC offers similar features.



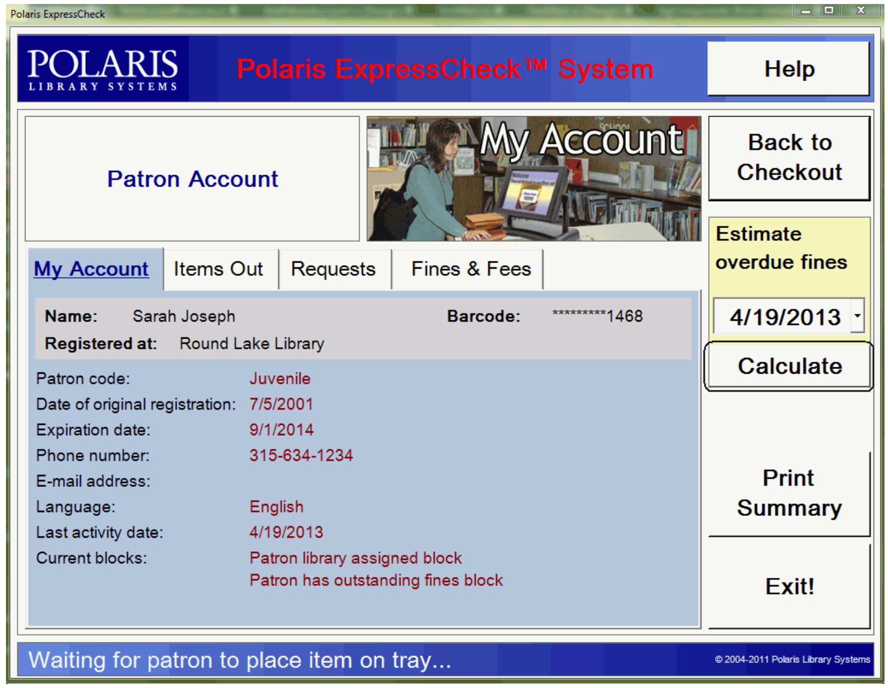
If you choose to include accrued fines in the patron blocking calculation, the patron fine block message appears when appropriate in PAC and the patron cannot renew items.

Note:

If the estimated amount includes lost item overdues or claimed items, the patron account is blocked but claimed and lost items are not displayed in the PAC patron account.

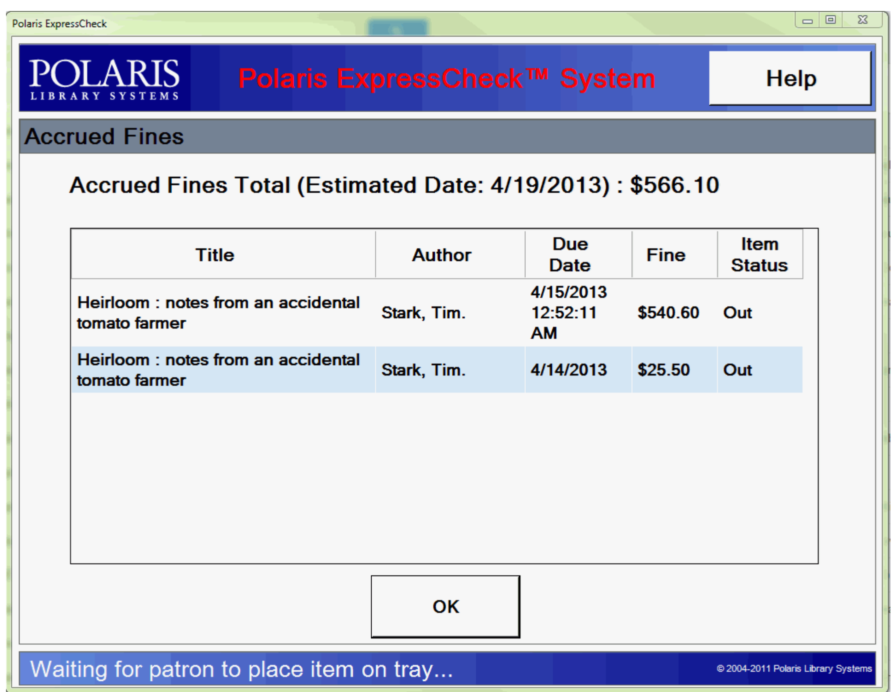
ExpressCheck Patron Account Display

ExpressCheck users can estimate fines using a dashboard control in the patron account. The patron sets the date and clicks **Calculate**.



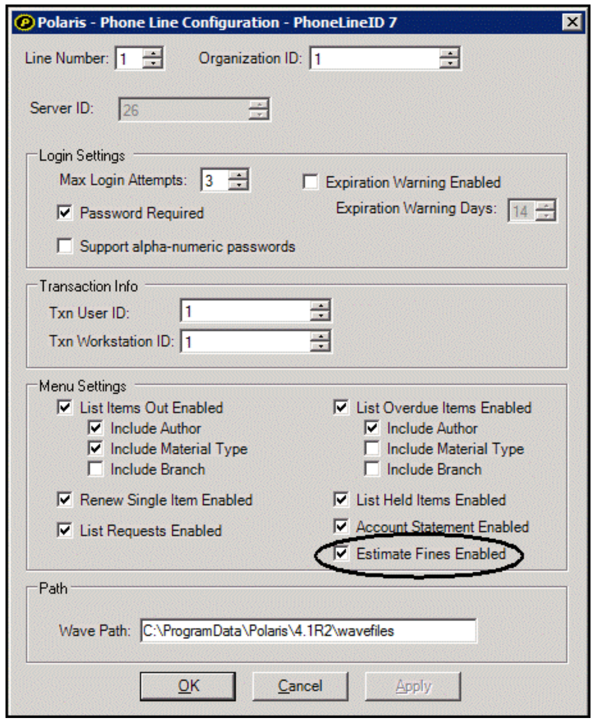
The accrued fines are displayed according to the selected date.

Note:
The time is displayed only for hourly or minute loans.



Polaris Phone Attendant (Inbound Telephony)

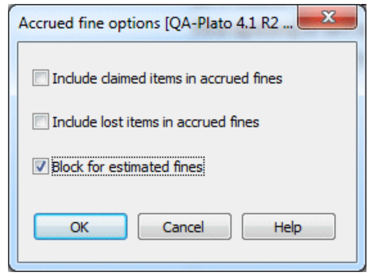
You can enable a new selection to hear estimated fines at the top-level menu. (If the patron does not have any overdue or claimed items, the option is not available.) When the patron selects this option, the message includes the author, title, due date, and estimated amount for each item, and the total due. To enable this option, select (check) **Estimate Fines** in the Phone Attendant configuration utility.



If the patron has lost or claimed items and overdue items, an additional message states **Additional charges are due for lost or claimed items, please contact the library for more information.** If the patron has only lost or claimed items but no overdue items, only the **Additional charges message** is played.

Setting Up Accrued Fine Options

In Polaris Administration, use the new Patron Services parameter **Accrued fine options** to set up accrued fine calculation options and blocking. The parameter is available at the system level only.



- If you want to include overdue fines for claimed items in the estimated fine calculation, select (check) **Include claimed items in accrued fines**. If this option is checked, the claims list view in the Patron Status workform displays **Claimed/Accruing** for claimed items with accruing overdue fines.

  Note:
  If the system-level Patron Services parameter **Overdues: Charge fines for claimed items** is set to **No**, and the **Include claimed items** option for accrued fines is set to **Yes**, no overdues will accrue. The **Include claimed items** option setting has no impact in this case.

- If you want to include overdue fines for lost items in the calculation, select (check) **Include lost items in accrued fines**. If this option is checked, the claims list view in the Patron Status workform displays enhanced information for lost items with accruing overdue fines as follows:

  Overdue is charged when the item is billed:

  - Lost with unpaid replacement and unpaid overdue: **Lost/Unpaid**
  - Lost with paid replacement and unpaid overdue: **Lost/Accruing**
  - Lost with unpaid replacement and paid overdue: **Lost/Unpaid**

  Overdue is charged when returned:

  - Lost with unpaid replacement and accruing overdue: **Lost/Unpaid**
  - Lost with paid replacement and accruing overdue: **Lost/Accruing**

  Note:
  If the branch-level Patron Services parameter **Lost items charge options: Charge overdue** when returned is set to **No**, and the **Include lost items** option for accrued fines is set to **Yes**, no overdues will accrue. The **Include lost items** option setting has no impact in this case.

  If applied, the lost item charge options are applied according to the governing library for fines.

- If you want to block patrons based on estimated fine amounts, select (check) **Block for estimated fines**.

In summary, accrued fines are calculated for overdue items if the Patron Code/Fine Code Fine Amount definition is greater than $0.00 and any one of the following conditions is true:

- The circulation status is Out and the item is overdue, but the overdue fine is not charged.
- You have opted to included claimed items in the calculation, the item circulation status is Claimed, and the system-level Patron Services parameter **Overdues: Charge fines for claimed items** is set to **Yes**. The table summarizes the effects of claimed items settings:

Include claimed items in accrued fine calculation	*Overdues: Charge fines for claimed items*	*Include in estimated amount calculation and block?*
Y	Y	Y
Y	N	N
N	Y	N
N	N	N

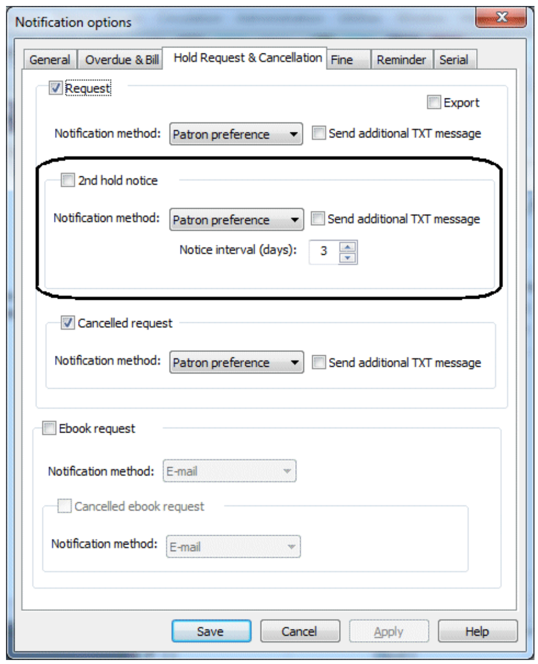
- You have opted to include lost items in the calculation, the item circulation status is Lost, and the overdue fine has not been charged. The table summarizes the effects of lost items settings:

Include lost items in accrued fine calculation	*Lost items charge options: Charge overdue*	*Include in estimated amount calculation and block?*
Y	Y	Y
Y	N	N
N	Y	N
N	N	N

Second Hold Pick-Up Notice

You can now follow up a patron's first hold pick-up notice with a second notice, sent after a time interval you specify, for requests that remain with a Held status. The second notice can be sent by print, phone, e-mail, or TXT message. The default text is the same as that defined for the first notice, and can be edited in Polaris Language Editor (WebAdmin).

Use the **Notification options** parameter, Hold Request & Cancellation tabbed page, to set up the second hold notice. The option is available at the system, library, or branch level. Select (check) **2nd hold notice**, then select the delivery method. The default setting is **Patron Preference**.



Next, set the **Notice Interval** for the number of days to wait from the date the request became Held before sending the second notice. The count includes the date held. For example, if the item was Held on the 1st of the month and the interval is set to 3 days (the default), the notice is sent on the 3rd. You can also opt to send an additional TXT message for the second hold notice.

Note:
If you export the regular hold request notice to a third-party service, the second hold notice is also exported.

The notice is sent if the number of days specified is reached and the request status is still Held. If the hold request status becomes Unclaimed after the process to send the second notice runs, the notice will be removed from the notification queue. Your settings also apply to ILL requests, which do not have an Unclaimed status; in this case, the second notice is sent if the item has not been checked out within the specified period.

Note:
There is no program dependency between the notice interval for the 2nd hold notice and your setting for **Number of days held for pickup**, specified in the Requests parameter **Holds options**. If the notice interval is greater than the number of days held for pickup, the notice is never sent, so you may want to coordinate these settings.

When the notice is sent, it appears in the patron's notification history as **2nd hold notice**. The item record also shows the notice date. Status reports such as Delivery Failure reports include the second hold notice with the hold notices. The second hold notice is also included in the total hold notice count for statistical reports.

Note:
Because multiple first and second hold notices may appear in a single print, e-mail, or text message notice, the notification log lists the type for all hold pick-up notices as 2 (regular hold notice request).

For best results with printed notices, the **Holds overnight processing** job should run before the **Notices processing** job. Polaris 4.1R2 also includes a new SQL job, **Hold Notice Processing**, which processes e-mail and text message (SMS) hold notices (including second hold notices) separately. By default, the new job runs every 4 hours from 9:00 a.m. to 8:00 p.m. For details, see "Hold Notice Processing for E-Mail and Text Message Notices" on page 63.

Hold Notice Processing for E-Mail and Text Message Notices

A new SQL job, **Hold Notice Processing**, processes e-mail and text message (SMS) first and second hold notices separately from print notices and phone notices. Designed to run multiple times per day, the new job runs every 4 hours from 9:00 a.m. to 8:00 p.m by default.

With the new job, e-mail and text message notices are not longer sent in the early morning when the print notification job runs. Patrons can receive their notices sooner because the notification can be scheduled to be more closely timed with your library's workflow for filling the requests. If your library has self-pickup for requested materials and you stock the shelves at certain times during the day, you can time the notices to go out near the time the items will be ready for pickup.

Note:
Phone notification has not changed. Hold notices by phone are sent according to the phone notice calling schedule.

Collection Agency Reporting for Item Fees Only

Patron accounts can now be sent to collection based only on lost item charges (combined replacement and processing fees). No other charges are included when determining if the patron account should be reported. However, if the patron account does qualify for reporting based on lost item fees, the total amount owed, including all charges such as overdue fines or printing, is sent to the agency. Similarly, after a patron account is submitted to the collection agency, all new charges of any type are included in the Update report, not just lost item fees.

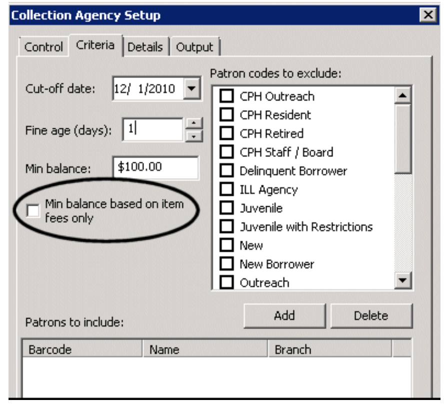
As in previous versions of Polaris, a patron account is sent to collection based on a threshold amount you specify. If you set the new "item fees only" option, the calculation to determine if the patron meets the minimum balance for reporting is based only on combined replacement and processing fee charges. For example, if the threshold amount is $25:

- A patron who owes $30 in combined replacement cost and processing charges for lost items will be reported to the collection agency. If this patron owes an additional $10 in overdue fines, making his total owed $40, when the account is submitted to the agency his amount owed will be $40, and the account will not be cleared until the balance is $0.
- A patron who owes $20 in combined replacement cost and processing charges and $10 in overdue fines will not be reported.

The "item fees only" option is available only at the system level. If selected, it affects all calculations to determine if a patron account qualifies for reporting, regardless of the **Reporting Level** setting (System, Library, Branch) or **Reporting By** setting (Patron Branch, Item Branch, Loaning Branch).

Note:
When you set the "item fees only" option, calculations for new collection agency submissions from that point on will be affected. Patron accounts reported under previous rules are not affected.

To set the new option, open the Patron Services parameter **Collection agency options** at the system level, click the **Criteria** tab, and select (check) **Minimum balance based on item fees only.** The setting is not checked by default.



Grace Period Calculation

As in previous versions of Polaris, a grace period allows a patron to return an item just a little late without incurring a fine. The item is still marked as overdue in the patron record. Grace periods are set in association with specific patron code/item fine code combinations in the Fines policy table.

A grace period differs from free days in that free days are omitted from the overdue fine calculation no matter when the item is checked in, whereas if an item is checked in after a grace period, the fine is calculated from the day or hour after the item due time (unless free days are specified to be omitted from the charge calculation).

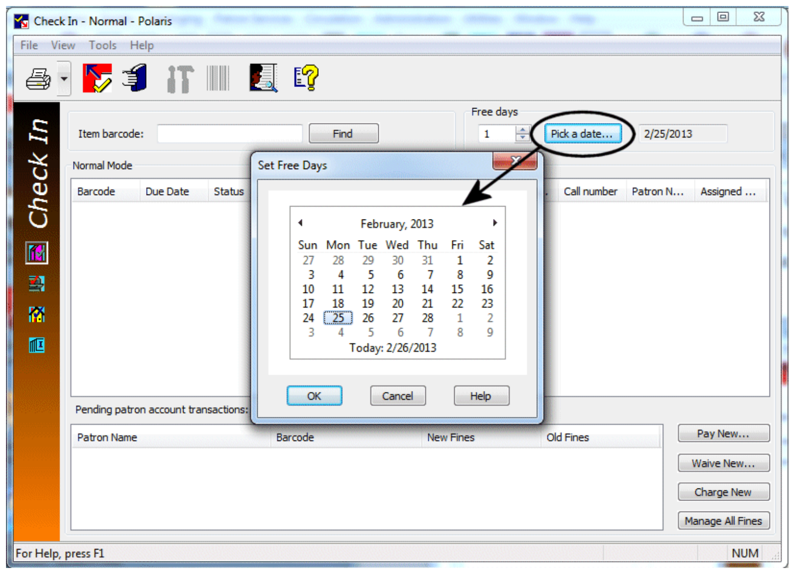
You can now optionally include closed days and dates in your system's grace period calculations. Set the new system-level Patron Services parameter **Overdues: Add closed days/dates to grace days** to **Yes** to include these in the calculation. The default setting is No, which maintains the behavior of previous versions of Polaris.

If you set the option to **Yes**, and the grace period includes one or more "days closed" as defined in the Patron Services parameter **Hours of Operation** or "closed dates" as defined in the **Dates Closed** policy table according to the governing library for fine calculation, the grace period will be extended by the number of closed days or dates. For example, if the number of grace days is 2 and if Sunday is a closed day, no fine will be assessed if the item is due on Friday and returned on Monday. But if the new option is set to No (the default value), only the two grace days, Saturday and Sunday, would be considered, and the fine would be assessed if returned on Monday.

Important:
The Free Days setting and the calculation of the actual fine amount are not affected by this change. The grace period exempts the patron from the fine, but if grace days are exceeded, the fine is calculated as if there were no grace period.

Check-In Free Days Set by Calendar Date

Staff members can now use a calendar control to apply free days according to a selected date. The control is available on the Check In workform (Normal and Bulk views) and the Bookmobile workform to set a number of free days when an item is checked in or offline transactions are uploaded. Click **Pick a date** to open the calendar.



Libraries that allow items to be returned to non-Polaris libraries may find this feature especially useful. Prior to this change, an item might be returned to a non-Polaris library, but not arrive at the Polaris library for several days, during which time the item might go overdue; the patron is then unfairly charged when the item is checked in at the Polaris library. Without the new Free Days calendar, a staff member would have to manually calculate the number of free days to allow at checkin, knowing which were closed or no-fine days.

Picking a date with the calendar feature automatically sets the corresponding number of free days, and the patron account is charged accordingly if necessary. The date field shows the date selected from the calendar (or calculated from a manual number entry in the **Free Days** box). The check-in date recorded by the system is the actual date of the transaction.

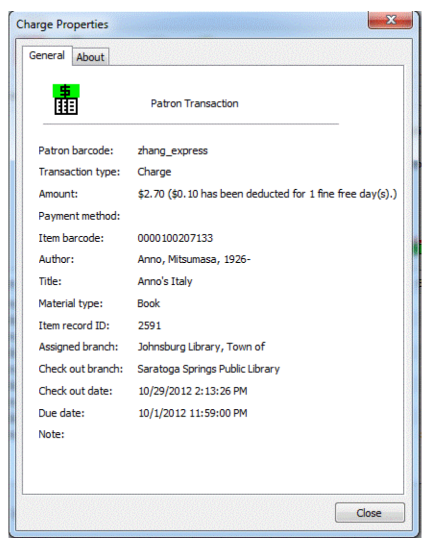
Selecting a date and clicking **OK** automatically sets the correct number of days in the Free Days numerical control. (However, selecting a date greater than 9999 days in the past will set the Free Days numerical control to 999.)

The Free Days numerical control can be changed manually at any time. If the number is changed after a date has been set on the calendar, the number of days set in the control becomes the number the system will use, and the date is changed accordingly in the calendar. Selecting a date from the calendar on one view, such as the Check In workform - Normal view does not affect the setting in another view, such as the Check In workform - Bulk view.

Staff members need the existing system-level permission **Modify free days: Allow** to use this feature. Like the existing Free Days control, the option must be set before the item is checked in. The Free Days setting is automatically cleared when the workform closes.

There is no change in how or when fines are calculated. The overdue fine is calculated when the item is scanned at the receiving branch. In the case of systems that allow patrons to return items to non-Polaris libraries, and the item is sent from the non-Polaris branch to a Polaris branch, staff would set the calendar to the date the item was received at the remote (non-Polaris) branch.

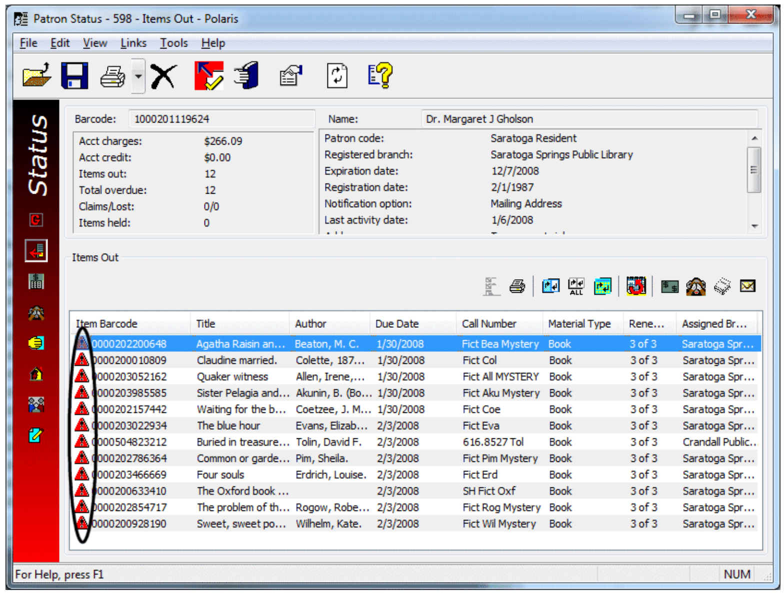
A new check-in transaction subtype indicates how many free days were applied when the item was checked in. If the patron was charged overdue fines when the item was checked in, the Properties dialog box for the charge in the patron account shows how many free days were applied and the amount that was deducted for the free days. To open the dialog box, right-click the charge in the Patron Status workform - Account view.



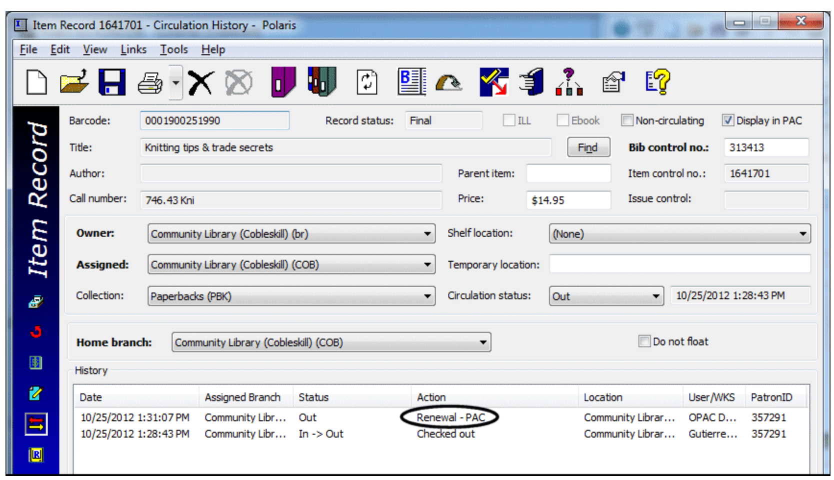
Item Status Display Improvements

Several improvements have been made to update the patron and item record displays when an item status changes.

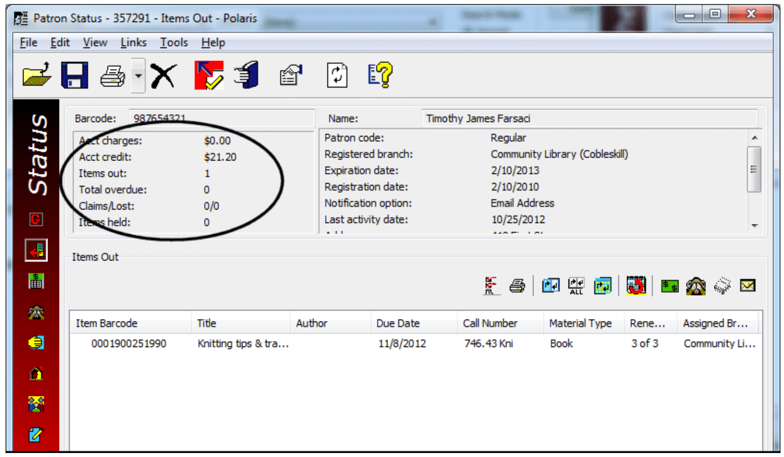
- A new red icon is displayed on the Patron Status workform - Items Out view to indicate that an item has been billed. The new icon is similar to the yellow icon that indicates an item is overdue.



- The Item Record workform - Circulation History view now shows the method by which an item checkout or renewal occurred. Subtypes for phone, PAC, Mobile PAC, self-check (includes Polaris ExpressCheck and SIP self-check) and third-party actions have been added.



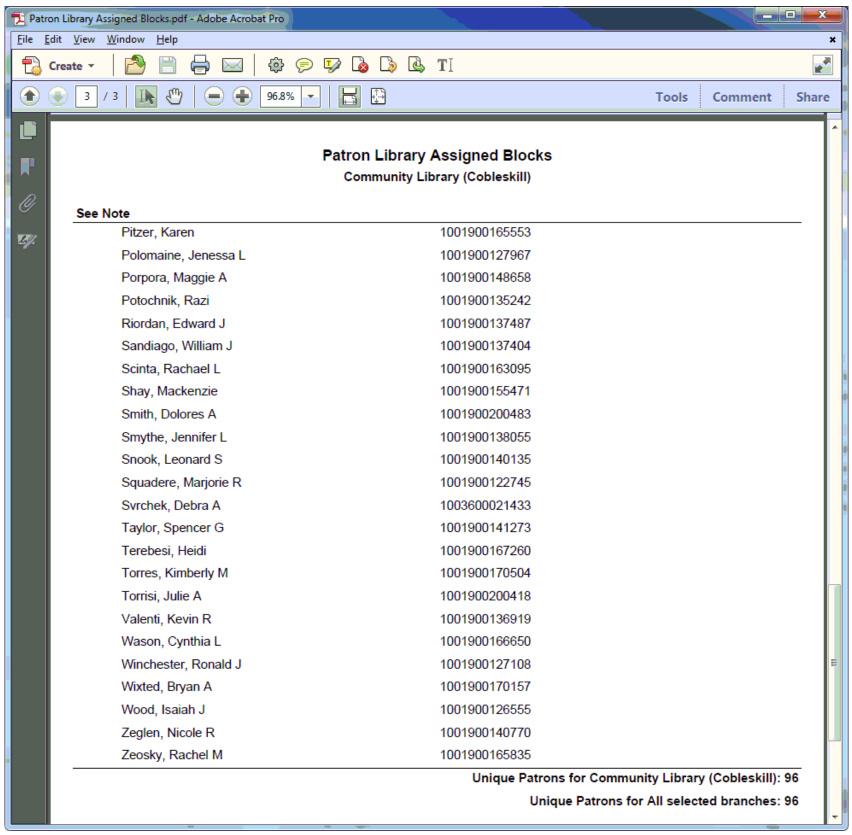
- When an item is checked in from the Patron Status workform - Items Out view, or an account transaction occurs on the Patron Status workform - Account view, the summary information on the left side of the workform header is now immediately updated to reflect the changes.



Library-Assigned Blocks Report

A new standard report, Patron Library Assigned Blocks, lists patron records with library-assigned blocks. To access the report from the Polaris Shortcut bar, select **Utilities, Reports and Notices, Public Services, Patron Services**.

You can select one, many, or all organizations, and select one, many, or all library-assigned blocks. The list of block available for selection depends on the organizations you have selected. The report lists currently blocked patron records according to your selections, and totals the number of unique patrons. That is, if a patron has more than one block, that patron is counted only once for the total. A sample page is shown below:


Patron Library Assigned Blocks

Community Library (Cobleskill)

See Note

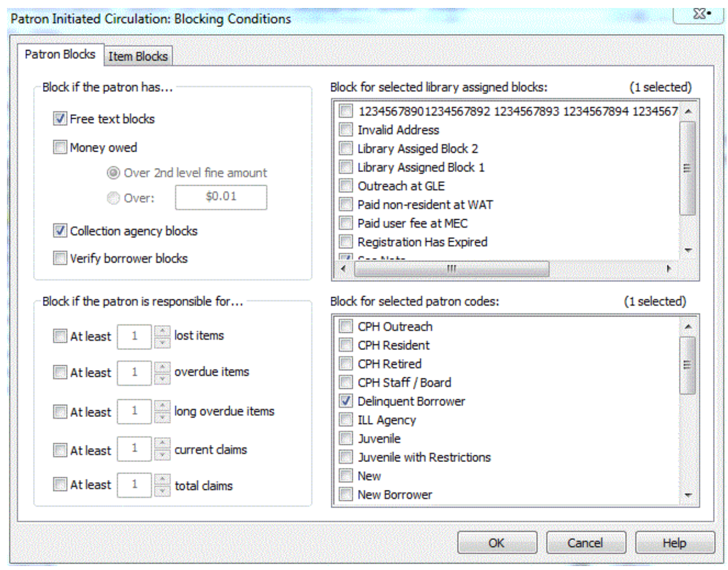
Pitzer, Karen	1001900165553
Polomaine, Jenessa L	1001900127967
Porpora, Maggie A	1001900148658
Potochnik, Razi	1001900135242
Riordan, Edward J	1001900137487
Sandiago, William J	1001900137404
Scinta, Rachael L	1001900163095
Shay, Mackenzie	1001900155471
Smith, Dolores A	1001900200483
Smythe, Jennifer L	1001900138055
Snook, Leonard S	1001900140135
Squadere, Marjorie R	1001900122745
Svrchek, Debra A	1003600021433
Taylor, Spencer G	1001900141273
Terebesi, Heidi	1001900167260
Torres, Kimberly M	1001900170504
Torrisi, Julie A	1001900200418
Valenti, Kevin R	1001900136919
Wason, Cynthia L	1001900166650
Winchester, Ronald J	1001900127108
Wixted, Bryan A	1001900170157
Wood, Isaiah J	1001900126555
Zeglen, Nicole R	1001900140770
Zeosky, Rachel M	1001900165835

Unique Patrons for Community Library (Cobleskill): 96

Unique Patrons for All selected branches: 96

Patron Initiated Renewal Profile Renamed

In Polaris Administration, the Patron Services profile **Patron initiated renewal: Blocking conditions** has been renamed to **Patron initiation circulation: Blocking conditions**. The word "renewal" has also been removed from the tabbed pages in the profile's dialog box. The Patron Blocks tabbed page is shown in the example below.



These changes reflect this profile's new use in blocking ebook circulation as well as patron-initiated renewals (its only function in previous versions of Polaris).

Deleting Bib or Item Records with Hold Requests

In previous versions of Polaris, the link between a bibliographic or item record and a hold request has been an unbreakable link. That is, in order to delete the record, the hold request had to be cancelled or transferred to another record. You can now use new Polaris Administration settings, one for bibliographic records and one for items records, to designate the link as breakable for hold requests with certain statuses.

Note:
An unbreakable link is a link between two records that prevents one record from being deleted in order to preserve data integrity.

The new Cataloging parameters are available at the system level only:

Bibliographic record delete: Allow if there are holds - The default setting is **No** (do now allow bibliographic record deletion if hold requests are attached). When this option is set to **Yes**, if the record is linked to one or more hold requests with a status of Active, Pending, or Inactive, and no other circumstances prevent the deletion, the deletion is allowed and the request status is set to Not Supplied. A canceled hold notice is generated according to your library's settings for this type of notice.

Regardless of your setting for this parameter, the deletion will be allowed and the request deleted if the request has a status of Not-supplied, canceled, Expired, or Out. The deletion will not be allowed if the request status is Unclaimed, Shipped, Held.

Item record delete: Allow if there are holds - The default setting is **No** (do now allow item record deletion if hold requests are attached). When this option is set to **Yes**, if the record is linked to one or more bibliographic-level or item-level hold requests with a status of Active, Pending, or Inactive, and no other circumstances prevent the deletion, the deletion is allowed and the request status is set to Not Supplied. A canceled hold notice is generated according to your library's settings for this type of notice.

As with the bibliographic record parameter, the deletion will be allowed and the request deleted if the request has a status of Not-supplied, Canceled, Expired, or Out. The deletion will not be allowed if the request status is Unclaimed, Shipped, Held.

Note:
The new parameter applies only when there is more than one item record available for requests attached to the bibliographic record. As in previous versions of Polaris, if you delete the only available item linked to a bibliographic record, all bib-level requests and requests for that specific item are automatically cancelled.

Your settings for the new parameters are also applied where multiple records can be selected for deletion, such as a record set. In this case the user can opt to be prompted or not for circumstances that might block the delete.

Scanning Driver's License for Patron Account

California libraries can now enter information for a new patron in the patron record by scanning the barcode on a California driver's license or ID. Normal barcode scanners will not read data from a driver's license. The license data is stored in a 2D (two-dimensional) format using PDF417 barcode symbology. Polaris recommends the Datalogic Gryphon™ I GD4430 USB scanner. However, most 2D PDF417 USB wedge-type scanners should work.

Note:
This feature is separately licensed.

A free-text Polaris user-defined field must also be designated in Polaris Administration for the driver's license number. Currently Polaris Library Systems designates the appropriate user-defined field for you; the default is UDF 1.

Note:
The designated user-defined field must be a free text field. If it is changed to a drop-menu field in Polaris Administration, the registration data is entered appropriately when the driver's license barcode is scanned, but the ID number is not entered in the user-defined field on the patron record.

When the driver's license is scanned during patron registration, the following driver's license information is entered in the appropriate fields in the patron record:

- Name (Last, First Middle)
- Street address (up to two lines)
- City
- State
- Postal code

Note:
The address information is entered in the Home address fields in the Patron Registration workform.

- Birth date
- Gender
- License number (entered in the designated user-defined field)

Technical Notes

- The Gryphon scanner must be programmed before use to add a suffix of **$** to the driver's license barcode.
- The code requires the file **DriversLicenseParser.js**. When the Polaris staff client is installed, the folder **ProgramData\Polaris\[version]\Scripts** is created. The file **DriversLicenseParser.js** must be placed in the **Scripts** folder.

Contact your Polaris Site Manager for technical assistance.

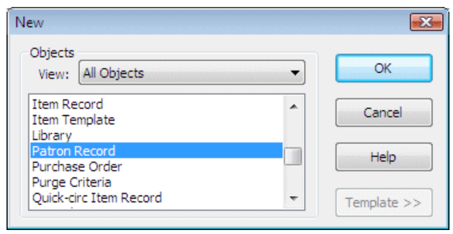
Scanning the License for a New Patron Record

The staff member follows these steps to enter the driver's license information in a new patron record.

Tip:
The staff member can also find and open an existing patron record. When the driver's license is scanned, existing data is overwritten by the driver's license data. Driver's license address information overwrites the Home address in the patron record.

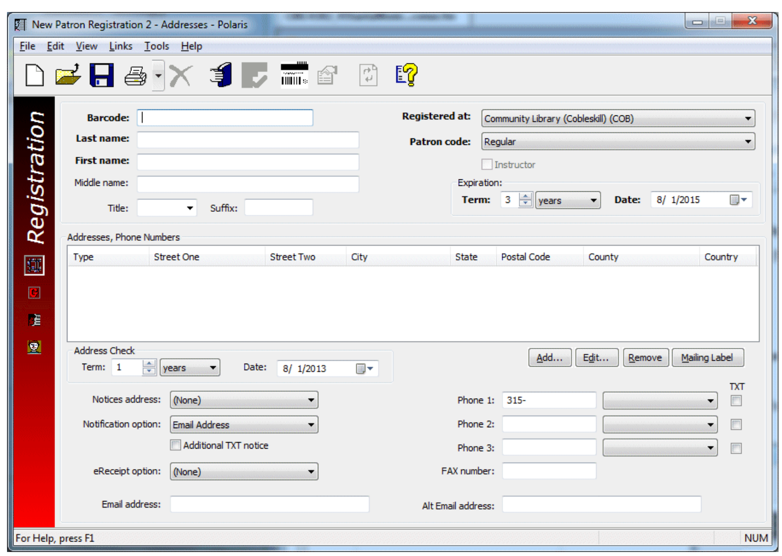
1. Select **File, New** from the Polaris Shortcut Bar, click , or press **CTRL+N**.

   The New dialog box appears.



2. Select **Patron Record** in the **Objects** box, and click **OK**.

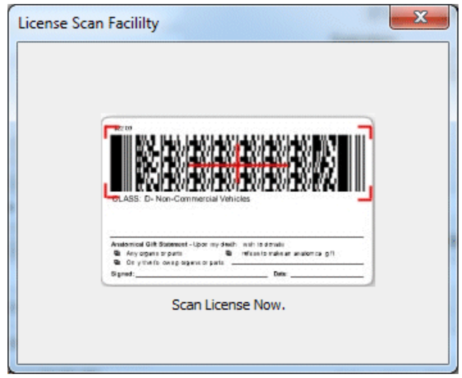
   The Addresses view of the Patron Registration workform opens.



Tip:
The menu option, icon, and shortcut key combination are not available if the Drivers License Scan Facility license is not active.

3. Select **Tools, Scan Driver's License**, click on the toolbar, or press **CTRL-L**.

   The License Scan message box opens.



4. Scan the driver's license with the message box open, then close the message box.

   The driver's license data is entered in the patron record, and the ID number is saved in the user-defined field specified for that purpose (Patron Registration workform - General view).

   Note:
   If the data cannot be scanned properly (for example, the barcode image is worn), a message is displayed and no data is entered in the patron record. You can continue to register the patron by filling in the required information manually.

5. Enter any additional data as needed, and save the record.

E-Commerce with Comprise™ SmartPAY™

Polaris now supports e-commerce with Comprise SmartPAY Merchant Service Program (MSP) from Comprise Technologies, Inc., a PCI-compliant payment solution suitable for both Polaris Virtual Private Cloud (Hosted) and Polaris ILS turnkey customers in the United States and Canada. Comprise SmartPAY, which handles authorization requirements, is responsible for PCI compliance. Polaris stores only the last four digits of the credit card number and the store order when payment is made through Comprise SmartPAY. For more information about the Comprise SmartPAY solution, see
http://www.comprisetechnologies.com/?page_id=32

With Comprise SmartPAY MSP, the library can accept credit card and debit card payments made from the Polaris staff client, Polaris ExpressCheck, Polaris PowerPAC, and Mobile PAC.

Requirements

Comprise SmartPAY uses a single SmartServer linked with your library's Polaris database, and the library will have a single Comprise account for all payment portals. Each staff client and ExpressCheck workstation that will accept credit card payments must have a Comprise SmartTerminal (the SmartPAY card reader device) connected to it.

A single Polaris license is required to enable SmartPAY in the staff client, PowerPAC, Mobile PAC, and Polaris ExpressCheck. If both SmartPAY and some other e-commerce solution are used in a single system, both Polaris licenses are required.

Partial Payments

Partial payments are supported in the staff client only; from the patron Account Fines and Fees page in PAC and ExpressCheck, the patron can select specific fines to pay or opt to pay all, but cannot make partial payments. For fine payments from PAC, both the PAC connection branch and the patron's registered branch must support credit card processing. The patron's registered branch settings determine the specific credit card processor and parameters. For donations, the selected recipient branch's settings determine the specific credit card parameters.

Note:
Credit card payments for Polaris Fusion digital materials through SmartPAY are not available at this time.

Refunds to Credit Card

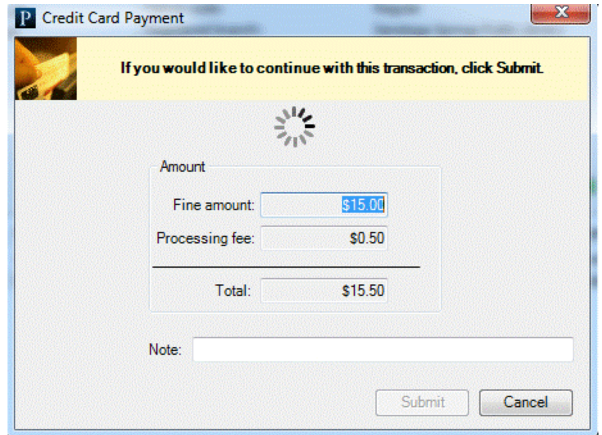
Refunds must be performed at a staff client workstation with a SmartPAY SmartTerminal device attached. Both the branch that took the payment and the branch issuing the refund must use SmartPAY. The refund transaction is initiated in Polaris, for example from the Patron Account. The user is prompted to swipe the card in the SmartTerminal device. The same card that made the payment must be used. Each refund requires a card swipe. If the user is refunding 3 separate payments, the card must be swiped 3 times.

SmartPAY refunds are issued "per payment," not per charge. For example:

- If 3 charges were paid with a single payment transaction, the total of all 3 can be refunded with a single refund transaction/card swipe.
- If 3 charges were paid with 3 separate payment transactions, then each must be refunded with separate refund transactions—3 card swipes.
- Partial refunds are supported when refunding any payment. If 3 charges were paid with a single transaction, a partial refund of each payment is supported.
- Automatic refunds related to lost item recovery are not supported. Polaris recommends that you disable any Refund option for lost-and-paid recovery when using SmartPAY. If automatic Refund is enabled with SmartPay, the payment will be left as is in the patron account. No refund is created.

Staff Client Payment Workflow

The staff member can pay a patron's charges via Comprise SmartPAY when Comprise SmartPAY is the selected payment gateway for the staff member's log-on branch (see "Set up Comprise SmartPAY processing in Polaris Administration" on page 87), and a SmartTerminal is connected to the workstation. The system checks whether the payment is an overpayment, which is not allowed, or under the minimal amount set for credit card transactions, and displays appropriate messages to stop the transaction in these cases. Otherwise, the Credit Card Payment dialog box opens.



Note:
Entries in the Note field on this dialog box appear on the Polaris Store Order.

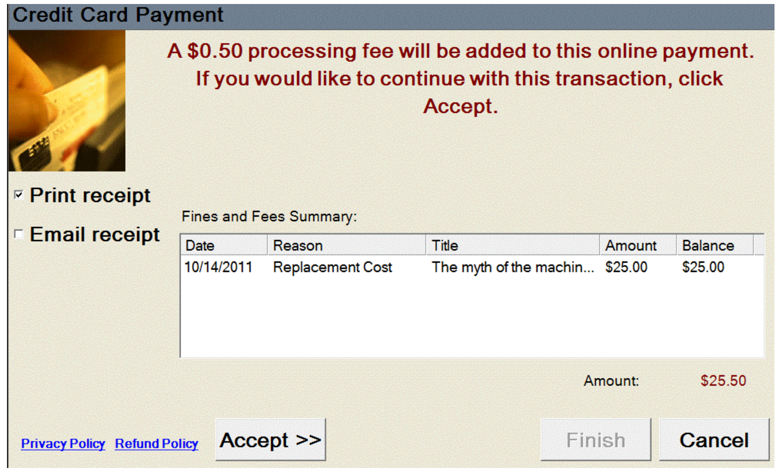
When the staff member clicks **Submit**, the system creates Store Order, Store Transaction, and Store Details entries with Pending status, sends the request to SmartPAY, and sends a query result request to SmartPAY every 5 seconds. When the credit card is swiped at the SmartTerminal device and authorized, the system notifies SmartPAY the the transaction is finished, the ILS Store Order is updated to Complete status and the ILS Store Transaction to Success status, and the patron account is updated. A confirmation message is displayed after a few seconds, and a receipt is generated as with any other payment method.

Possible error messages include the following:

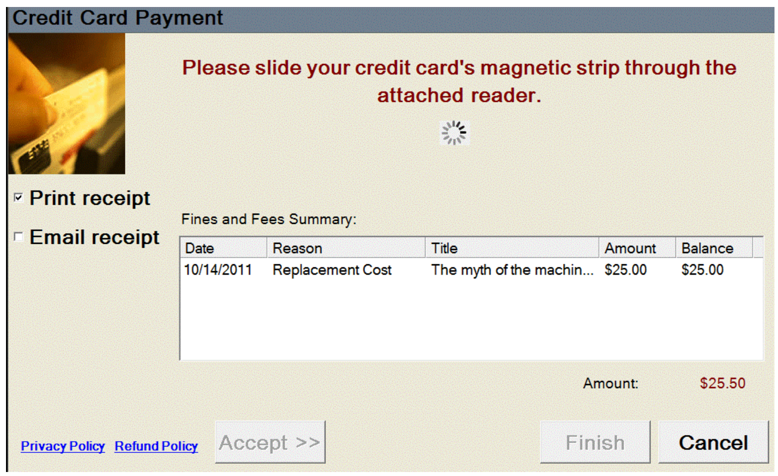
- **Timeout message** - The transaction timed out and is cancelled.
- **Payment did not go through as entered** - Transaction is not authorized or is canceled by SmartPAY.
- **Update patron account failed** - The patron's credit card was charged, but the patron account was not updated.

ExpressCheck Payment Workflow

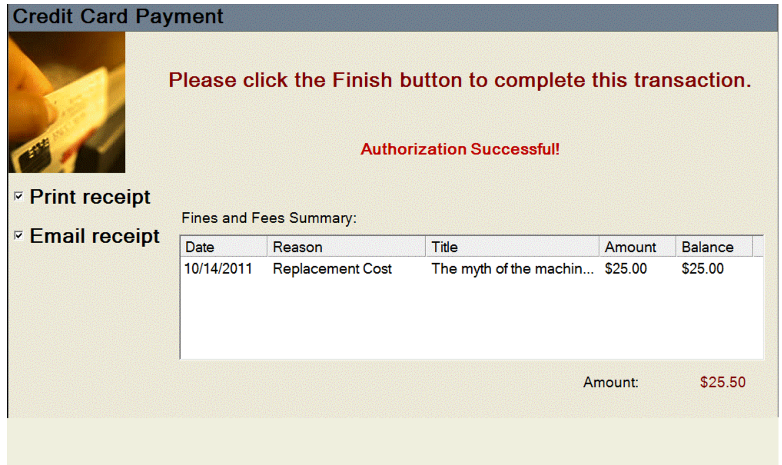
The ExpressCheck workstation must be equipped with a SmartTerminal card reader. The logged-on ExpressCheck user selects the charges to pay on the patron account Fines & fees page, and selects **Pay**. The confirmation screen is displayed.



When the user selects **Accept**, the screen instructs the user to swipe the credit card at the SmartTerminal device.



The Polaris system creates Store Order, Store Transaction, and Store Details entries with Pending status, sends the request to SmartPAY, and sends a query result request to SmartPAY every 5 seconds. When the credit card is swiped at the SmartTerminal device and authorized, a success message is displayed and the user selects **Finish**.



The Polaris system then notifies SmartPAY the the transaction is finished, the ILS Store Order is updated to Complete status and the ILS Store Transaction to Success status, and the patron account is updated. A print or e-mail receipt is generated according to the receipt option the user selected.

Possible error messages include the following:

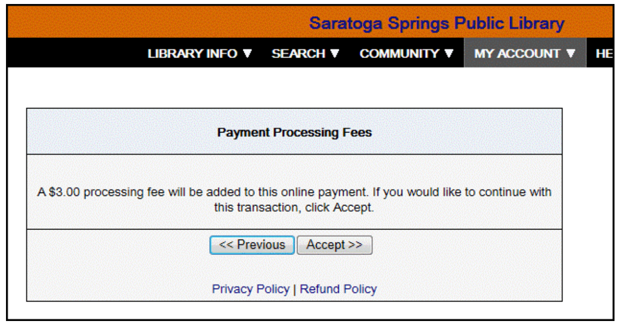
- **Timeout message** - The transaction timed out and is cancelled.
- **Payment did not go through as entered** - Transaction is not authorized or is canceled by SmartPAY. The user selects **Cancel** to cancel the transaction and return to the Patron Account view.
- **Update patron account failed** - The user's credit card was charged, but the patron account was not updated. The user is advised to select **Finish** and contact a librarian.

PAC Payment Workflow

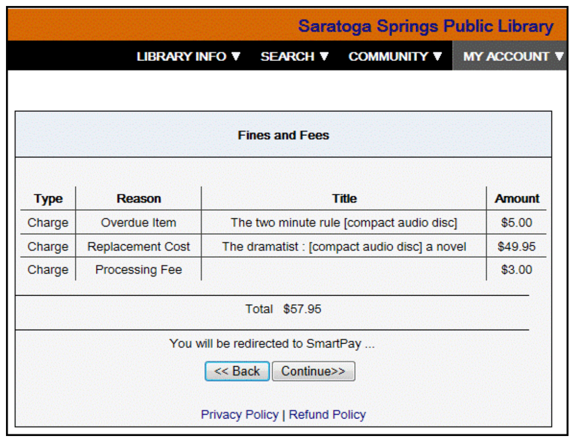
Payments from PowerPAC and Mobile PAC are Web-based, and patrons enter their credit card information by typing it in an on-screen form.

Note:
You can prevent Web-based credit card payments from within the library by setting the system-level Credit Card Payments parameter **Exclude local workstations from web based payments** to **Yes**. See "Excluding In-House Workstations from Web-Based Payments" on page 85.

The logged-on PAC user selects the charges to pay on the patron account Fines & Fees page, and clicks **Pay Fines Now**. If the library has specified a processing fee, a message is displayed.

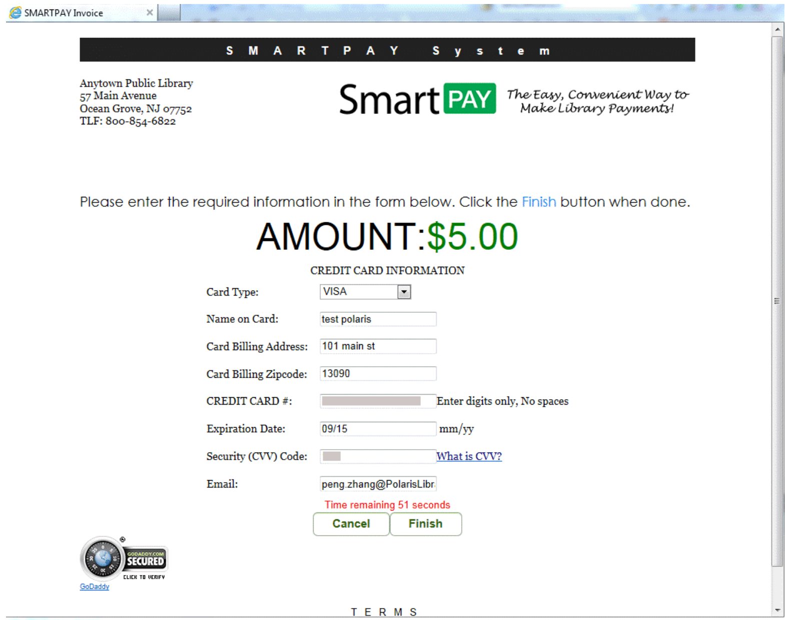


When the user clicks **Accept**, the Fines & Fee summary page is displayed. This page totals the selected charges and processing fee, if any, and informs the user that they will be redirected to SmartPAY.

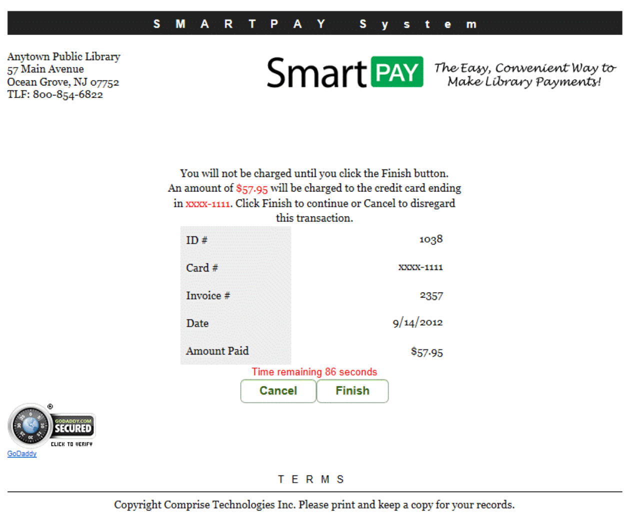


When the user clicks **Continue**, the SmartPAY checkout page opens.

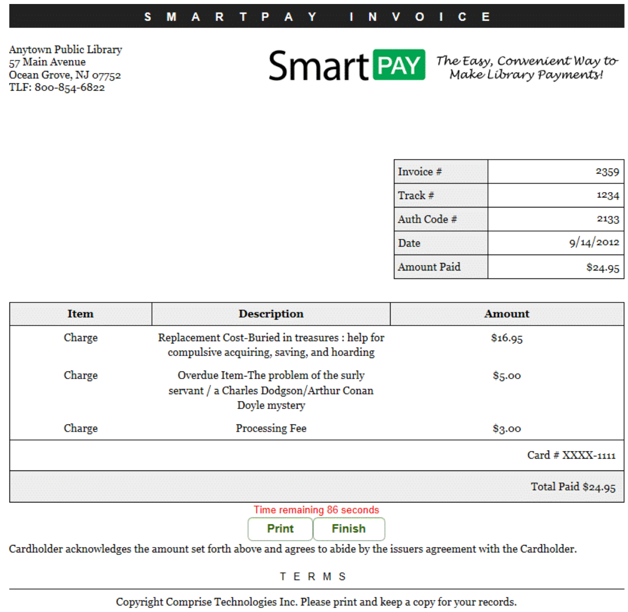
Note:
The "time remaining" value on this page is configured by Comprise SmartPAY. The default value is 90 seconds.



The user enters credit card payment information and an e-mail address. SmartPAY will send an e-mail receipt for the payment to the e-mail address specified on this page. When the user clicks **FINISH**, the SmartPAY payment confirmation page is displayed. The ID number on this page is the Polaris patron record ID, and the invoice number is the Polaris Store Order ID.



When the user clicks **Finish**, a printable receipt page is displayed. The library information shown on the e-mail receipt and on this page is specified by Comprise as part of your setup process. The Invoice number is the Polaris Store Order ID, and the Track number is the Comprise transaction ID. The user can click **Print** to print the receipt, or click **Finish** to return to the Polaris PAC page specified in Polaris Administration (see "Set up Comprise SmartPAY processing in Polaris Administration" on page 87).



S M A R T P A Y   I N V O I C E

Anytown Public Library
57 Main Avenue
Ocean Grove, NJ 07752
TLF: 800-854-6822

SmartPAY The Easy, Convenient Way to Make Library Payments!

Invoice #	2359
Track #	1234
Auth Code #	2133
Date	9/14/2012
Amount Paid	$24.95

Item	Description	Amount
Charge	Replacement Cost-Buried in treasures : help for compulsive acquiring, saving, and hoarding	$16.95
Charge	Overdue Item-The problem of the surly servant / a Charles Dodgson/Arthur Conan Doyle mystery	$5.00
Charge	Processing Fee	$3.00
		Card # XXXX-1111
		Total Paid $24.95

Time remaining 86 seconds

Print Finish

Cardholder acknowledges the amount set forth above and agrees to abide by the issuers agreement with the Cardholder.

T E R M S

Copyright Comprise Technologies Inc. Please print and keep a copy for your records.

Similar processing is available for donations.

Excluding In-House Workstations from Web-Based Payments

To prevent web-based credit card payments from within the library, set the system-level Credit Card Payments parameter **Exclude local workstations from web based payments** to **Yes**. This setting supports a lower level of PCI compliance responsibility on the library's part by preventing web-based payments through SmartPAY from within the library network. "Local workstations" are those defined in the In-House IP Addresses database table. Add the library's wi-fi connection to the table if you also want to exclude payments from mobile devices within the library.

When you exclude local workstations from web-based payments, the **Pay** option is suppressed from the patron account Fines & Fees page, and the **Donation** link displays a message.

Credit Card Payment Manager

As in previous versions of Polaris, you can view transaction details and refund payments made with a credit card using the Credit Card Payment Manager, available from the Utilities menu on the Polaris Shortcut Bar. A new system Circulation permission, **Access Credit Card Payments Manager: Allow**, is now required to access the Credit Card Payment Manager. At upgrade, all users have the new permission by default.

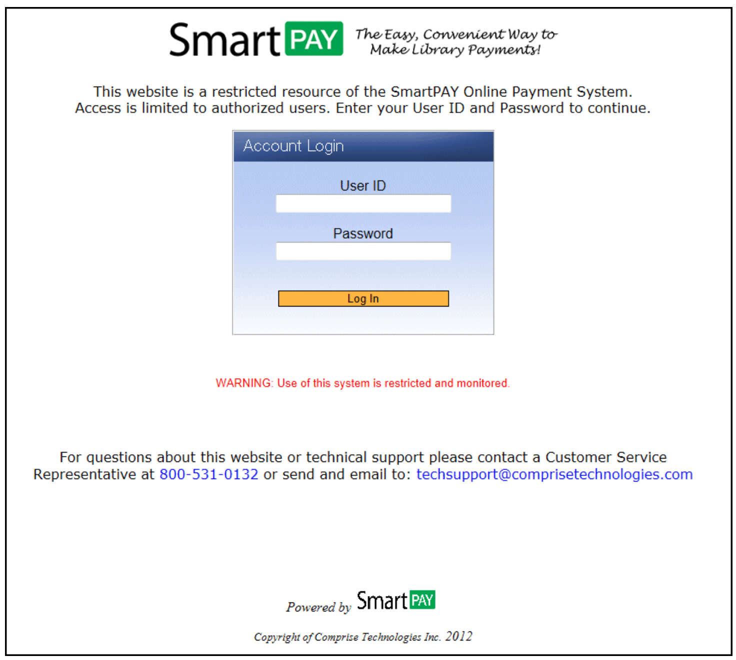
The Credit Card Payment Manager now shows only those orders and transactions where the staff client workstation's log-on branch and the transacting branch use the same payment gateway. SmartPAY transactions are included in the Credit Card Payment Manager, and you can process credits and refunds to a payment made via SmartPAY through the Credit Card Payment Manager's Store Order workform. Polaris patron records are updated appropriately. A SmartTerminal connected to the workstation is required for credits and refunds.

Note:
The patron address is not displayed in the Credit Card Manager for payments made via SmartPAY.

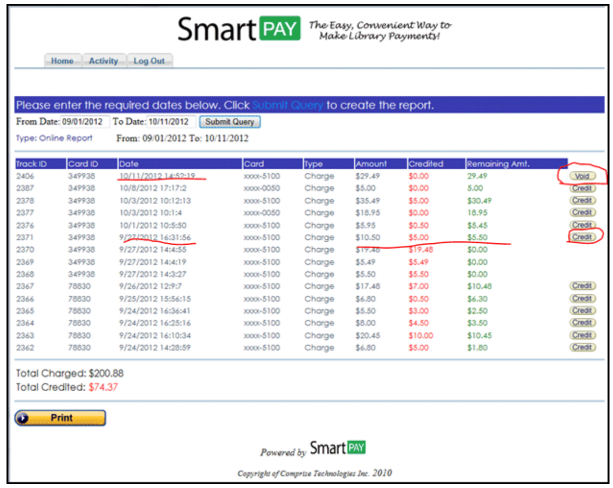
SmartPAY Staff User Interface

SmartPAY also provides a SmartPAY API Staff User Interface at **https://dev.comprisetechnologies.com/SMARTPAYAPI/WEBSMARTPAY.dll?Adminlogin**

You can use this interface to get a transaction report, and credit or void transactions.



Supply the username and password provided by SmartPAY, and log in. From the **Activity** tab, you can list all transactions made from SmartPAY terminals or online for the specified time period.



Credits can be made for any transactions that made before today and have remaining payment balance. Voids can be made for payment transactions that made today. However, Credits and Voids made from the SmartPay API Staff User Interface do not update the patron account in Polaris. The staff member must manually reconcile these transactions within Polaris.

Polaris Standard Reports

SmartPAY transactions are included in the following standard Polaris toolbar reports, available in the **Public Services - Patron Financial** folder.

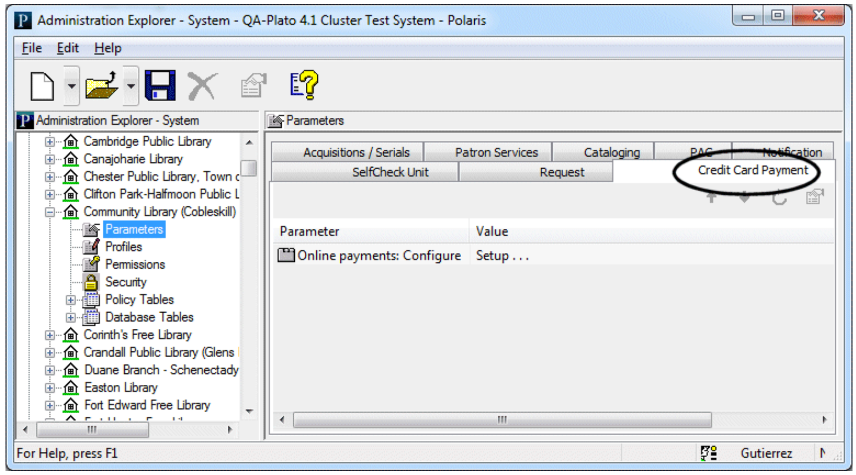
- Donations - Credit Card Payments
- Fines and Fees - Credit Card Payments
- Refunds to Credit Card Payments

Set up Comprise SmartPAY processing in Polaris Administration

Only one payment gateway can be selected for a branch or library organization. However, within a consortium that uses the Polaris turnkey ILS, branch and library organizations may implement different gateways; some may use Comprise SmartPAY, while others may choose other gateways. Follow these steps to set up Polaris for Comprise SmartPAY credit card processing in Polaris Administration to the appropriate organizations.

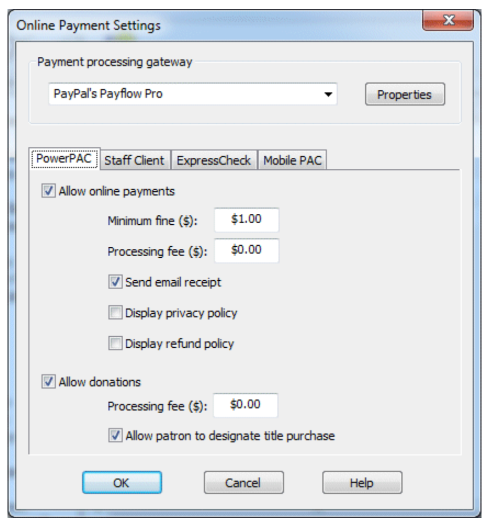
Important:
To accept PowerPAC online payments, you must enable secure socket layer (SSL) in Polaris Administration. Set the **SSL: Enable PowerPAC** parameter for the Web server to **Yes**. For Mobile PAC, set the **SSL: Enable Mobile PAC** parameter for the Web server to **Yes**. Patrons must have SSL protocol enabled for their Web browser and must accept the certificate the first time they log on from outside the library.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and click the **Credit Card Payment** tab in the details view.

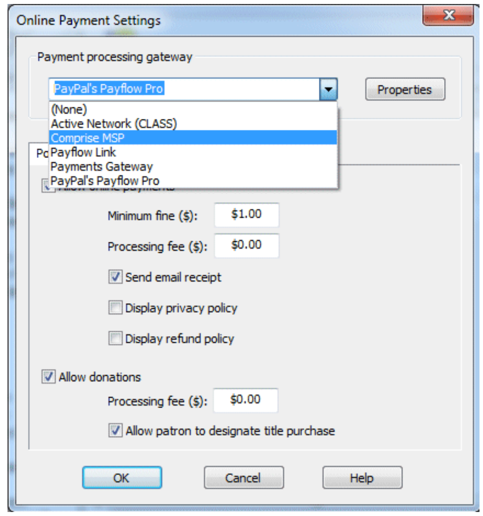


2. Double-click **Online Payments: Configure**.

The Online Payments Settings dialog box opens.

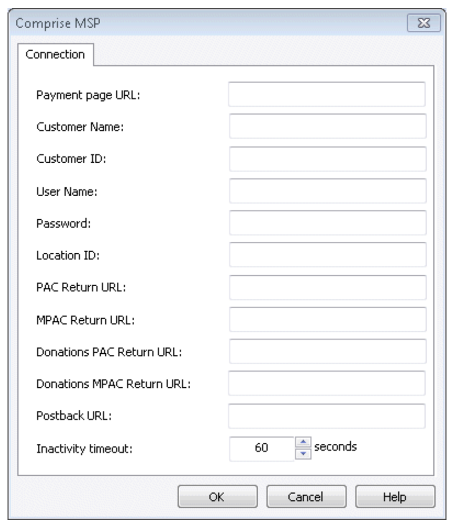


3. Select **Comprise MSP** in the **Payment processing gateway** list.



4. Click **Properties**.

   The Comprise MSP Properties dialog box opens.



5. Enter the following settings on the Connection tabbed page, then click **OK**:
   - **Payment page URL** (SmartPay API Address) - System level only. Provided by Comprise. This is the SmartPAY payment page.
   - **Customer Name** - System level only. Provided by Comprise, passed to SmartPay during the payment transaction. A branch can opt to use a different payment gateway, but all organizations that use Comprise MSP will use the same Customer Name and Customer ID.
   - **Customer ID** - System level only. Provided by Comprise, passed to SmartPay during the payment transaction. A branch can opt to use a different payment gateway, but all organizations that use Comprise MSP will use the same Customer Name and Customer ID.

- **User name** - Provided by Comprise. Each branch has its own user name.
- **Password** - Provided by Comprise. Each branch has its own password.
- **Location ID** - Identifies the branch associated with in-house PAC workstations. (For online payments from remote workstations, the system uses the patron's registered branch.)
- **PAC Return URL** - PowerPAC page to which the user is returned after fines payment, typically the patron account page. Maximum 250 alphanumeric characters.
- **MPAC Return URL** - Mobile PAC page to which the user is returned after fines payment, typically the patron account page. Maximum 250 alphanumeric characters.

  Note:
  When a patron cancels a payment from PowerPAC or Mobile PAC, the appropriate Return URL page is displayed.
- **Donations PAC Return URL** - PowerPAC page to which the user is returned after a donation payment. Maximum 250 alphanumeric characters.
- **Donations MPAC Return URL** - Mobile PAC page to which the user is returned after a donation payment. Maximum 250 alphanumeric characters.
- **Postback URL** - The location on the library Web site used to update the Polaris database. This location applies to both PowerPAC and Mobile PAC, and is not branch-specific. Maximum 250 alphanumeric characters. Format:

  https://servername:port/payments/PostbackSmartpay.aspx

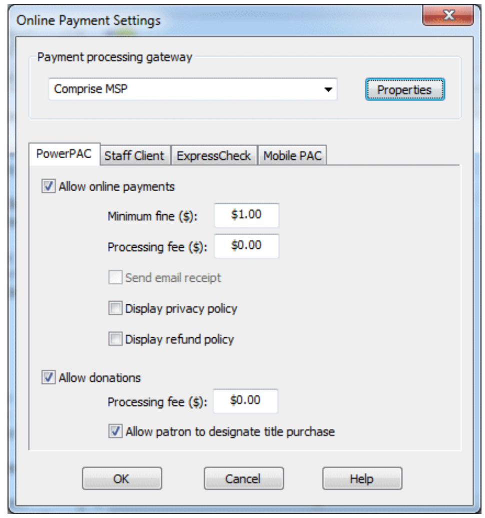
  For example:

  https://mylibrary.com/polaris/payments/PostbackSmartpay.aspx
- **Inactivity timeout** - Specifies how long Polaris waits for the credit transaction to be processed before canceling it. This control applies to ExpressCheck and the staff client only (not to PowerPAC or Mobile PAC).

  Note:
  You can also set an **Inactivity timeout** value set for ExpressCheck transactions (SelfCheck Unit parameters, **Polaris ExpressCheck: Options**). The default value for both settings is 60 seconds. Polaris ExpressCheck times out after the total of both settings to ensure that the ExpressCheck application never times out before the credit card transaction processing time.

6. To set up credit card payments from Polaris PowerPAC, be sure **Comprise MSP** is still selected in the Online Payments Settings dialog box, and follow these steps:

   a) Click the **PowerPAC** tab on the Online Payments Settings dialog box, if it is not already selected.



b) Select (check) **Allow online payments**. The payment options become available.

> **Note:**
> The link for paying fines is on the Fines and Fees page of the patron account. Be sure the PowerPAC profile **Navigation: Fines & fees** is set to **Yes** for the organization.

c) Set the minimum fine amount you want to accept by credit card payment.

The default value is the lowest possible value, $0.01. If the amount the patron owes falls below your setting, the **Pay fines** link is not displayed in the PAC.

d) To charge a processing fee for fine payments, specify the amount in the **Processing fee** box for online payments. The maximum value is $20.00.

> **Note:**
> The e-mail receipt option is not applicable, because SmartPAY sends the receipt to the e-mail address the patron specifies on the SmartPAY payment page.

e) To display a privacy policy link in Polaris PowerPAC, select (check) **Display privacy policy**.

Specify your privacy policy text using Polaris WebAdmin (Language Editor.) The message ID is **PACML_PAYMENT_PRIVACYPOLICY_1066**. The system uses the text specified for the patron's registered branch.

f) To display a refund policy link in Polaris PowerPAC, select (check) **Display refund policy**.

Specify your refund policy text using Polaris WebAdmin (Language Editor). The message ID is **PACML_PAYMENT_REFUNDPOLICY_1067**. The system uses the text specified for the patron's registered branch.

g) To accept credit card payments for donations, select (check) **Allow donations**.

In general, the list of "receiving" organizations in PAC is limited to those with credit card processing enabled. When a donation is made, the receiving organization's credit card settings are applied. If the connection organization is a branch, and that branch has enabled credit card processing and donations, donations can only be made to that branch. However, if the PAC connection organization is the system and the system organization does not have donations enabled, the system checks to see if any library or branch organizations accept donations. If so, a donation can be made, and the list of receiving organizations includes those that accept donations. (The system organization does not appear in the list.) Thus systems that do not allow branch switching in PAC can still accept branch-level donations.

Important:
The donation Web part appears in the PowerPAC dashboard when you assign it to the page. Be sure to assign the donation Web part to the pages where you want it to appear.

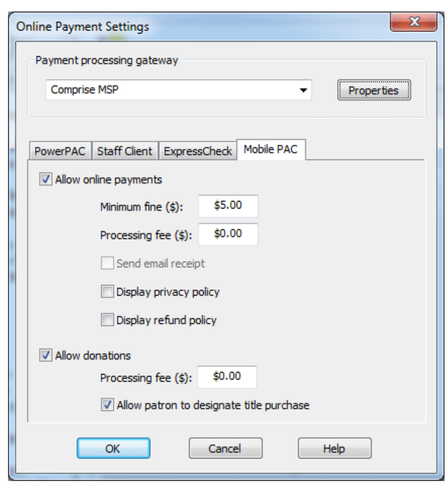
h) To charge a processing fee for donations, specify the amount in the **Processing fee** box for donation payments. The maximum value is $20.00.

i) To allow donors to direct a donation toward a title purchase in a specific subject area, select (check) **Allow patron to designate title purchase**.

This option places an appropriate control on the donations page, where the donor can specify a title purchase.

7. To set up credit card payments from Mobile PAC, follow these steps:

a) Click the **Mobile PAC** tab on the Online Payments Settings dialog box.



b) Select (check) **Allow online payments**. The payment options become available.

Note:
The link for paying fines is on the Fines and Fees page of the patron account. Be sure the Mobile PAC profile **Navigation: Fines & fees** is set to **Yes** for the organization.

c) Set the minimum fine amount you want to accept by credit card payment.

The default value is the lowest possible value, $0.01. If the amount the patron owes falls below your setting, the **Pay fines** link is not displayed in Mobile PAC.

d) To charge a processing fee for fine payments, specify the amount in the **Processing fee** box for online payments. The maximum value is $20.00.

> **Note:**
> The e-mail receipt option is not applicable, because SmartPAY sends the receipt to the e-mail address the patron specifies on the SmartPAY payment page.

e) To display a privacy policy link in Mobile PAC, select (check) **Display privacy policy**.

Specify your privacy policy text using Polaris WebAdmin (Language Editor). The message ID is **MP_CRUMBS_FINESANDFEES_PRIVACY**. The system uses the text specified for the patron's registered branch.

f) To display a refund policy link in Mobile PAC, select (check) **Display refund policy**.

Specify your refund policy text using Polaris WebAdmin (Language Editor). The message ID is **MP_CRUMBS_FINESANDFEES_REFUND_POLICY**. The system uses the text specified for the patron's registered branch.

g) To accept credit card payments for donations, select (check) **Allow donations**.

In general, the list of "receiving" organizations in PAC is limited to those with credit card processing enabled. When a donation is made, the receiving organization's credit card settings are applied. If the connection organization is a branch, and that branch has enabled credit card processing and donations, donations can only be made to that branch. However, if the PAC connection organization is the system and the system organization does not have donations enabled, the system checks to see if any library or branch organizations accept donations. If so, a donation can be made, and the list of receiving organizations includes those that accept donations. (The system organization does not appear in the list.) Thus systems that do not allow branch switching in PAC can still accept branch-level donations.

> **Important:**
> To display the donation link in Mobile PAC, set the Mobile PAC profile **Navigation: Donations** to **Yes**.

h) To charge a processing fee for donations, specify the amount in the **Processing fee** box for donation payments. The maximum value is $20.00.

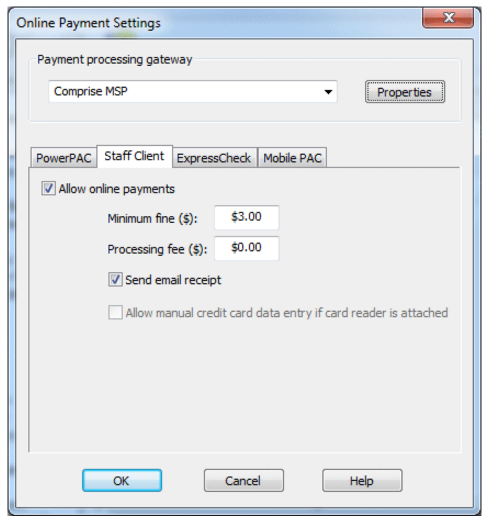
i) To allow donors to direct a donation toward a title purchase in a specific subject area, select (check) **Allow patron to designate title purchase**.

This option places an appropriate control on the donations page, where the donor can specify a title purchase.

8. To set up credit card payments from the staff client, follow these steps:

Note:
To accept credit card payments, the staff client workstation must be equipped with a Comprise SmartTerminal credit card reader, and you must specify the SmartTerminal ID for each workstation. See step 11.

a) Click the **Staff Client** tab on the Online Payments Settings dialog box.



b) Select (check) **Allow online payments**.

The payment options become available.

c) Set the minimum fine amount you want to accept by credit card payment.

d) To charge a processing fee for fine payments, specify the amount in the **Processing fee** box for online payments. The maximum value is $20.00.

e) To provide an automatic e-mail payment receipt to patrons, select (check) **Send email receipt**.

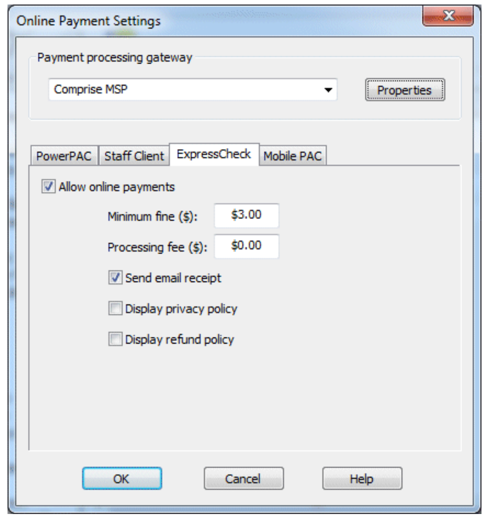
The e-mail receipt is sent to the e-mail address in the patron record. If the patron record does not include an e-mail address, no e-mail receipt is sent. The staff member cannot specify an e-mail address during the payment process.

Note:
The manual data entry option is not applicable. Staff client workstations must use the Comprise SmartTerminal to swipe the patron's credit card.

9. To set up credit card payments from Polaris ExpressCheck, follow these steps:

> **Note:**
> To accept credit card payments, the Polaris ExpressCheck workstation must be equipped with a Comprise SmartTerminal credit card reader, and you must specify the SmartTerminal ID for each workstation. See step 11.

a) Click the **ExpressCheck** tab on the Online Payments Settings dialog box.



b) Select (check) **Allow online payments**. The payment options become available.

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

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

c) Set the minimum fine amount you want to accept by credit card payment.

d) To charge a processing fee for fine payments, specify the amount in the **Processing fee** box for online payments. The maximum value is $20.00.

e) To provide an automatic e-mail payment receipt to patrons, select (check) **Send email receipt**.

The e-mail receipt is sent to the e-mail address in the patron record. If the patron record does not include an e-mail address, no e-mail receipt is sent. The patron cannot specify an e-mail address during the payment process.

f) To display a privacy policy link on the processing fee, payment, and payment verification pages in Polaris ExpressCheck, select (check) **Display privacy policy**.

When this option is checked, your privacy policy message is displayed when the patron selects the privacy policy link. Specify your privacy policy text using Polaris WebAdmin (Language Editor). The message ID is **EC_TEXT_POLICY_PRIVACY**.

g) To display a refund policy link on the processing fee, payment, and payment verification pages in Polaris ExpressCheck, select (check) **Display refund policy**.

When this option is checked, your refund policy message is displayed when the patron selects the refund policy link. Specify your refund policy text using Polaris WebAdmin (Language Editor). The message ID is **EC_TEXT_POLICY_REFUND**.

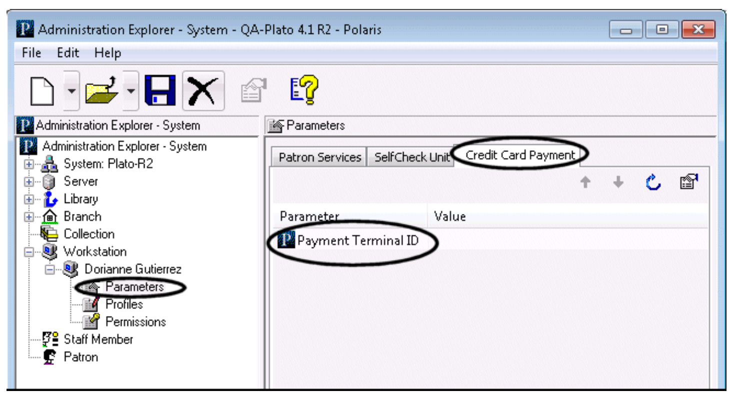
10. Click **OK** to save your settings.

11. *For each staff client and ExpressCheck workstation with a SmartTerminal*, specify the payment terminal ID by following these steps:

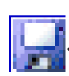
Note:
Comprise supplies the terminal ID values for your workstations.

a) From the workstation listed in Administration Explorer or the workstation workform, select **Parameters**, **Credit Card Payment**.

The illustration shows the Administration Explorer.



b) Double-click **Payment Terminal ID** and enter the workstation SmartTerminal ID.

c) Select **File, Save**, or click .

Related Information

For more information about preparing for e-commerce, including compliance with PCI Security Council industry standards, see the following documents, available at **www.polaristown.com**.

- *E-Commerce for Polaris Libraries* - Answers questions you may have as you prepare for e-commerce.
- *Polaris E-Commerce Data Security Standard Implementation Guide* - Outlines secure data storage, network structure, and best practices for protecting cardholder data and meeting PCI-DSS standards.
- PCI PA-DSS “Attestation of Validation” - Records PCI compliance certification for Polaris software, which Polaris customers can use to prove compliance for their payment application software as they proceed with their own PCI compliance process.

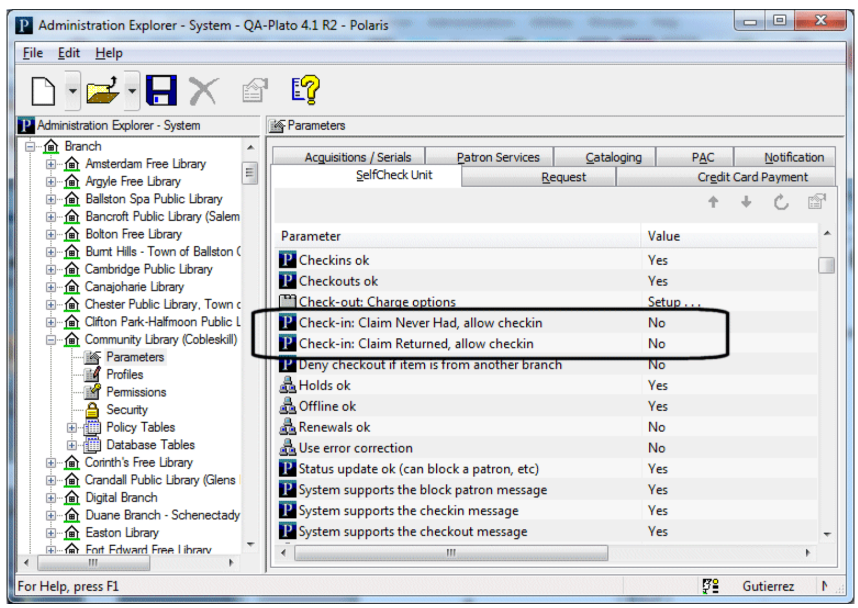
SIP Claims Settings Simplified

Two SelfCheck unit parameters that control status changes to claimed items at SIP checkin have been renamed as follows:

Previous Parameter Name	*New Parameter Name*
Checkin: Preferred item status for CLAIM NEVER HAD items	Check-in: Claim Never Had, allow checkin
Checkin: Preferred item status for CLAIM RETURNED items	Check-in: Claim Returned, allow checkin

Both parameters have been changed from sets of menu options to simple Yes/No selections to reflect actual functionality. Any existing settings are converted to **No** (do not allow checkin) at upgrade, unless the previous setting was **In**. This setting is converted to **Yes** at upgrade (allow checkin).

The renamed parameters have been relocated on the SelfCheck Unit parameters tab and now appear just below the **Check-out: Charge options** parameter.



You will see no change in application behavior as a result of these changes.

NCIP Medium Types Mapping Tables

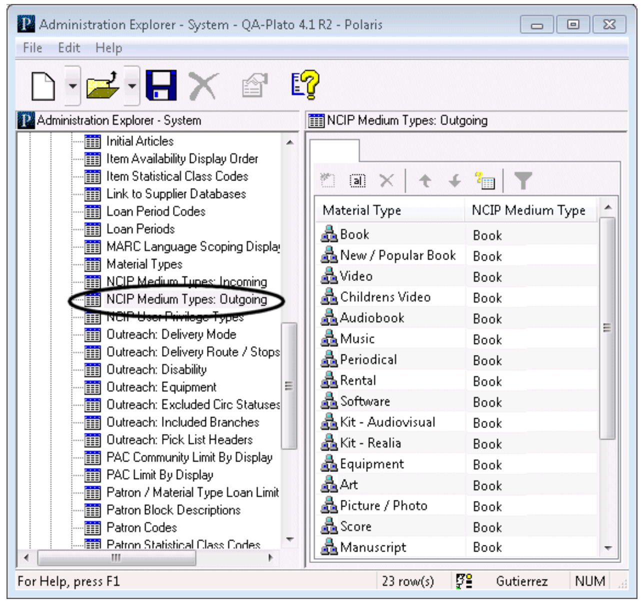
NCIP (NISO Circulation Interchange Protocol) is a standard suite of messages designed to allow disparate systems, such as the Polaris ILS and regional resource sharing solutions or ILL applications, to exchange data in support of lending and circulating material among members of the two systems. For more information about preparing for NCIP and Polaris ILS transactions, see *NCIP Lending & Borrowing with Polaris*, available at **www.polaristown.com**.

NCIP supports a limited number of medium types, as shown in the table below.

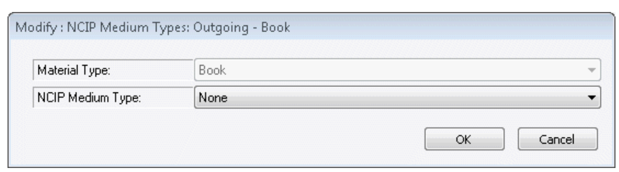
NCIP Medium Type ID	Description
1	Audio tape
2	Blu-Ray
3	Book
4	Book with Audio Tape
5	Book with Compact Disc
6	Book with Diskette
7	Bound Journal
8	CD-Rom
9	Compact Disc (CD)
10	Diskette
11	DVD
12	Magazine
13	Microform
14	Video Tape

To support the interchange of materials, NCIP medium types must be associated with your library's item material types. In previous versions of Polaris, two mapping tables associated Polaris item material types with NCIP medium types. They were not exposed in the initial Polaris 4.1 user interface, and were populated during installation. Two new system-level policy tables, **NCIP Medium Types: Outgoing** and **NCIP Medium Types: Incoming**, are now available in Polaris Administration for this purpose.

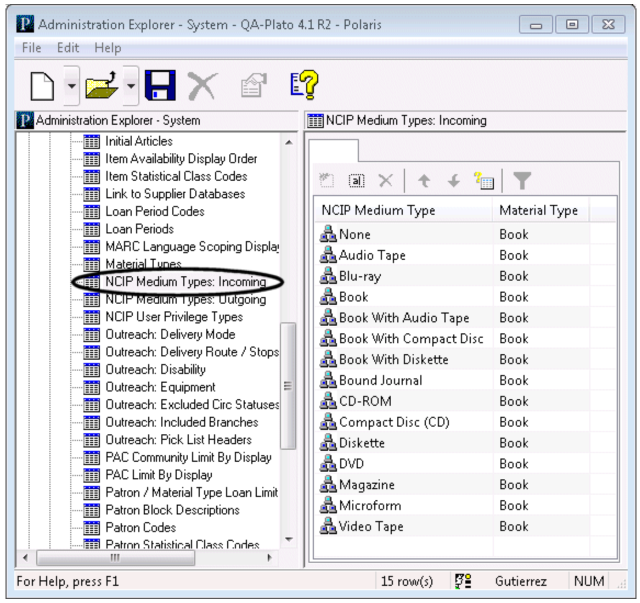
NCIP Medium Types: Outgoing maps the library's Polaris item material types to NCIP medium types and is used for requests where the Polaris library is the lender.



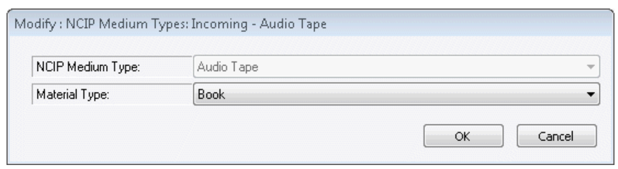
You can assign none, one, or more than one item material type to each NCIP medium type, but an item material type can be assigned to only one NCIP medium type. The default NCIP medium type is Book. If you select **None** for the Medium Type, an item material type cannot be assigned to that medium type. To map an item material type to an NCIP medium type, double-click the material type. The Modify dialog box appears. Select an NCIP Medium Type from the list and click **OK**.



NCIP Medium Types: Incoming maps NCIP Medium to Polaris item material types for incoming requests, and is used for requests where the Polaris library is the borrower. This table allows the library to create ILL items with different material types. The default item material type is ID 01 (typically Book, as in the following example, but your library may assign a different material type to ID 01 in the Material Types policy table).



To map an NCIP medium type to an item material type, double-click the medium type. The Modify dialog box appears. Select a Polaris material type from the list and click **OK**.



Two new System Administration permissions control the ability to work with these tables:

- **Modify NCIP Medium Types: Outgoing - Allow**
- **Modify NCIP Medium Types: Incoming - Allow**

Cash Drawer Options for Receipts

You can now set an option in the Polaris Administration system-level Staff Client profile **Receipt printer control codes** so that a cash drawer opens automatically when a receipt is printed. With an additional option, you can specify that the payment must be in cash to open the drawer when a receipt is printed.

The option to automatically open a cash drawer should function with most any manufacturer's receipt printer model that supports a connection to a cash drawer via an RJ11 connector. This connector extends from the back of the printer to the drawer and carries the pulse that opens the drawer. The pulse is generated according to a code sent to the printer, which most printer manufacturers include in their documentation.

Polaris Library Systems has tested these codes for Epson TM series and Star TSP series printers. The code must be inserted for each selected printer driver to be used with a cash drawer.

For Epson TM series printers the control code is:

- Start Code: **0x1B 0x70**
- End Code: **0x1B 0x00**

For Star TSP printers the code is:

- Start code only (end code is not required): **%7%A%32%7**

If the option to print a second fine receipt is set in Polaris Administration, the drawer opens once after the second receipt is printed. Waived charges do not trigger the drawer opening even if a receipt is printed.

If the drawer is not closed when a payment is taken, the receipt will print; leaving the drawer open does not affect printing the receipt.

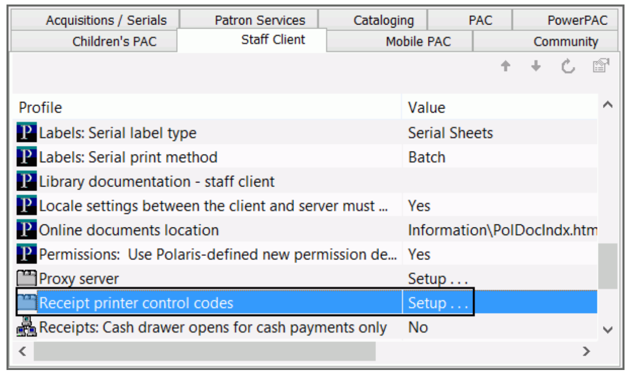
When a patron makes multiple payments while checking out or renewing items, a single receipt is generated at the end of the check-out transaction, and the cash drawer opens (provided the profile is set to Yes). If the option to open the drawer only for cash payments is set, the drawer opens when the receipt is printed if the patron has made at least one cash payment.

This functionality is also available to hosted customers without any special setup.

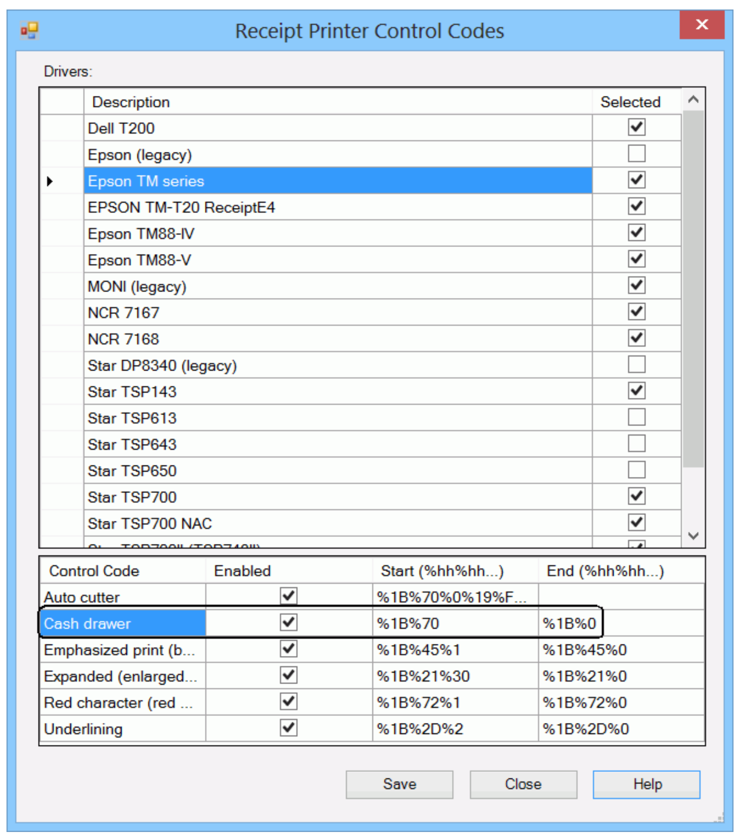
Enter control codes to open a cash drawer when receipt is printed

Follow these steps to enter the printer control codes that will open the cash drawer when a receipt is printed from that printer type.

1. In Polaris Administration, select **Profiles, Staff Client, Receipt printer control codes.**



2. Select the printer in the list, and select **Enabled** in the **Cash drawer row**, and enter the printer control codes.



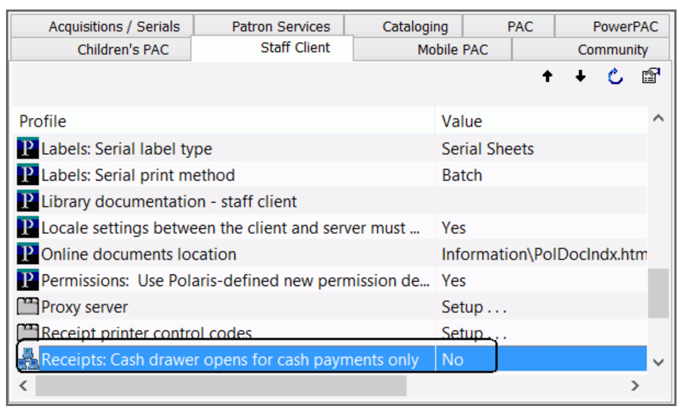
Set option to open the cash drawer only for cash fine receipts

The receipt printer must be set up in Polaris Administration at the system level to open the cash drawer automatically when a receipt is printed. See “Enter control codes to open a cash drawer when receipt is printed” on page 103. You can set an additional option at the system, library, or branch level that opens the cash drawer only when a fine receipt is printed and the payment method is cash, check, collection agency, or voucher. Fine receipts are still printed for credit card payments, but the cash drawer does not open.

Follow these steps to set the option to open the cash drawer only when fine receipts are printed for cash payments.

1. In the Administration Explorer tree view, open the **Profiles** folder at the system, library, or branch level, and select the **Staff Client** tabbed page in the details view.
2. Double-click **Receipts: Cash drawer opens for cash payments only**, and select **Yes**.

   If the profile is left at the default, **No**, the drawer opens for any payment type when a receipt is printed, provided the printer is set up to open the drawer.



If the receipt printer is set up to open the cash drawer automatically when a payment is made, and the **Receipts: Cash drawer opens for cash payments only** is set to **Yes** for the organization at which the payment is made, the cash drawer will open only for the following types of payments:

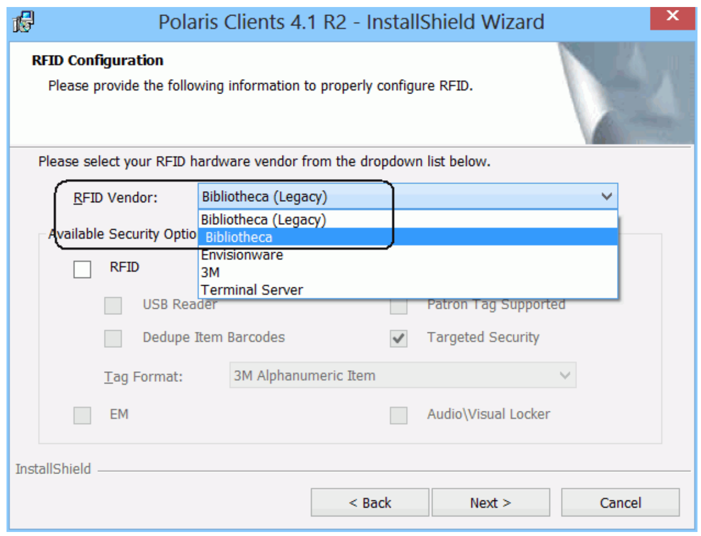
- Cash
- Check
- Voucher
- Collection Agency

Only Functional Icons Display in Off-Line Circulation

When operating in off-line mode, the Check In, Check Out, and Patron Registration workforms now display only the toolbar icons for tasks that can be done in offline mode. Before this change, the icons were grayed out if the function was not available in offline mode.

RFID Installation - ITG Now Bibliotheca

When you install RFID, the **RFID Vendor** drop-down list no longer includes Integrated Technology Group (ITG). If you previously selected ITG when you installed RFID, select **Bibliotheca** in the **RFID Vendor** drop-down list. If you previously selected Bibliotheca, select **Bibliotheca (Legacy)** in the RFIP Vendor drop-down list box.



RFID Circ for Polaris Hosted/ Terminal Server

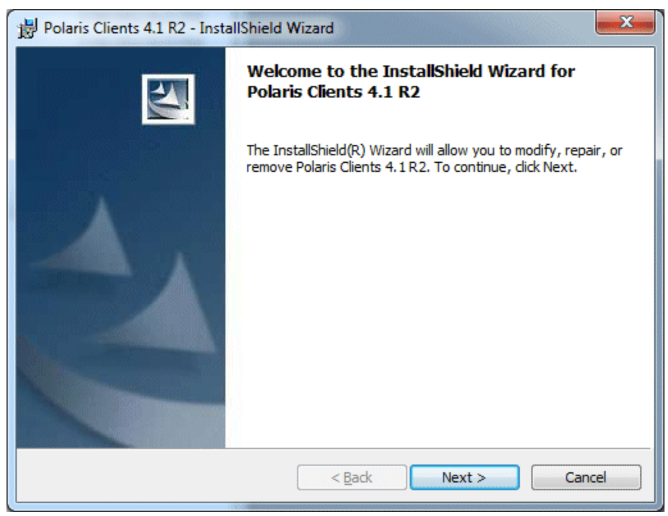
Polaris now supports integrated RFID circulation on Polaris workstations that are used in a hosted environment or otherwise use an RDP connection to Terminal Server. To use this functionality, you perform a Polaris client installation on the Terminal Server, specifying Terminal Server as the RFID "vendor," and then install a new standalone Polaris Security Manager application on the RFID-enabled workstations that will communicate with the Terminal Server.

Install the client on Terminal Server

Follow these steps to install the Polaris staff client application with RFID on the Terminal Server.

1. On the Terminal Server computer, navigate to the Polaris staff client setup.exe application and start the application.

   The Welcome screen opens.



2. Click **Next**.

   The License Agreement dialog box appears.

3. Click **I accept the terms in the license agreement**, and click **Next**.

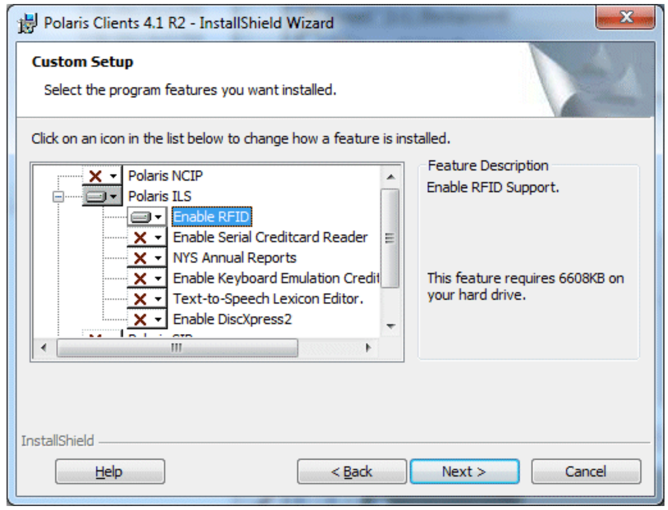
   The Customer Information dialog box appears.

4. Type the appropriate information in the **User Name** and **Organization** boxes.

5. Select a user permission option, and click **Next**.

   The Custom Setup dialog box appears. Polaris ILS, the staff client application, is enabled by default.

6. Select **Enable RFID** from the list under **Polaris ILS**.



7. Click **Next**.

   The Offline Transactions Folder Files dialog box appears.

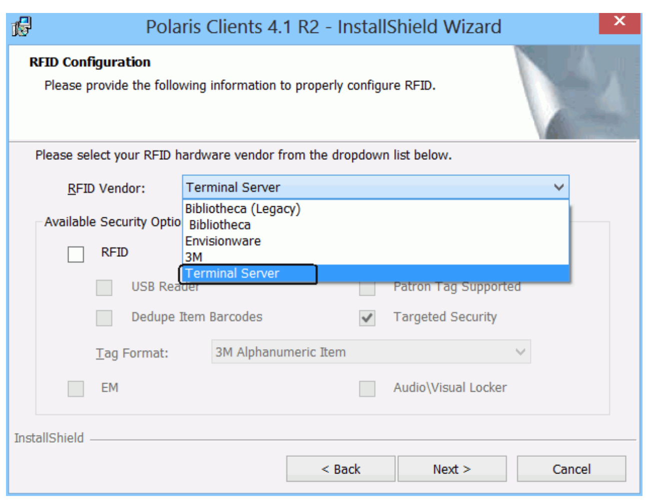
8. Leave the location set to the default value, and click **Next**.

   The Server Information dialog box appears.

9. Type the application server name in the **Application Server Name** box, and click **Next**.

   The RFID Configuration dialog box appears.

10. Select **Terminal Server** in the **RFID Vendor** list.



11. Click **Next**.

    The Ready to Install the Program dialog box appears.

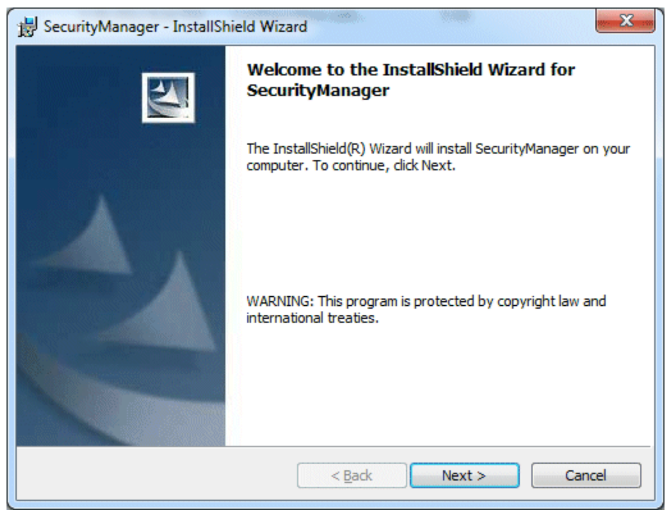
12. Click **Install** to start the installation. The Installation Complete dialog box appears when the installation is finished.

Install the Security Manager on the local workstation

Follow these steps to install the standalone Security Manager application on the local RFID-enabled workstation.

1. On the local workstation, navigate to the Security Manager setup.exe application and start the application.

   The Welcome screen opens.



2. Click **Next**.

   The License Agreement dialog box appears.

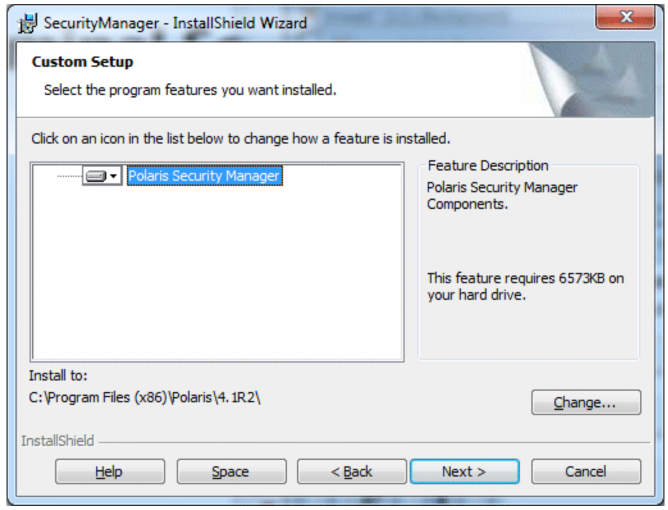
3. Click **I accept the terms in the license agreement**, and click **Next**.

   The Customer Information dialog box appears.

4. Type the appropriate information in the **User Name** and **Organization** boxes.

5. Select a user permission option, and click **Next**.

   The Custom Setup dialog box appears. Polaris Security Manager, the only option, is enabled by default.



6. Click **Next**.

   The RFID Configuration dialog box appears.

7. Select your RFID vendor in the **RFID vendor** box, and select (check) **RFID**.

   If you selected **Bibliotheca (legacy)**, select one of the following options, as appropriate for your Bibliotheca equipment setup:

   - **USB Reader** - Select this option if the workstation uses a USB RFID reader.
   - **Patron tag supported** - Select this option if your Bibliotheca installation supports patron RFID tags.
   - **Dedupe item barcodes** - Select this option if your library places RFID tags with duplicate item barcodes on all items in a set. When this option is selected, at check-out duplicate item barcodes are removed from the list of RFID tags currently on the antenna pad (reader) so that the set is checked out once.

   If this workstation runs Polaris ExpressCheck and you selected **Bibliotheca**, select from the following options, as appropriate for your equipment setup:

   Note:
   See “RFID Installation - ITG Now Bibliotheca” on page 106.

   - **USB Reader** - Select this option if the workstation uses a USB RFID reader.
   - **Dedupe item barcodes** - Select this option if your library places RFID tags with duplicate item barcodes on all items in a set. When this option is selected, at check-out duplicate item barcodes are removed from the list of RFID tags currently on the antenna pad (reader) so that the set is checked out once.
   - **Patron tag supported** - Select this option if your ITG installation supports patron RFID tags.

- **Targeted security** - Select this option for the ability to set RFID security to off for certain items in a stack of items. If the option is not selected, RFID security is set to off for the entire stack of items on the reader.

  Note:
  The **EM** (electromagnetic) security and **Audio-VIsual Locker** options are not currently supported in Terminal Server or Polaris Hosted environments.

If you selected **Envisionware**, select from the following options, as appropriate for your EnvisionWare equipment setup:

- **USB Reader** - Select this option if the workstation uses a USB RFID reader.
- **Patron tag supported** - Select this option if your Envisionware installation supports patron RFID tags.
- **Dedupe item barcodes** - Select this option if your library places RFID tags with duplicate item barcodes on all items in a set. When this option is selected, at check-out duplicate item barcodes are removed from the list of RFID tags currently on the antenna pad (reader) so that the set is checked out once. However, the security bit is turned off in all the Envisionware RFID tags on the antenna pad with that barcode.

If you selected **3M**, select from the following options, as appropriate for your 3M equipment setup:

- **USB Reader** - Select this option if the workstation uses a USB RFID reader.
- **Patron tag supported** - Select this option if your Envisionware installation supports patron RFID tags.
- **Dedupe item barcodes** - Select this option if your library places RFID tags with duplicate item barcodes on all items in a set. When this option is selected, at check-out duplicate item barcodes are removed from the list of RFID tags currently on the antenna pad (reader) so that the set is checked out once.
- **Tag Format** - Select **3M Alphanumeric Item** (default) or **3M Numeric Item,** as appropriate for your 3M RFID item tag format.

8. Click **Next** on the RFID Configuration box.

   The Ready to Install the Program dialog box appears.

9. Click **Install** to start the installation. The Installation Complete dialog box appears when the installation is finished.

Accessing Remote Client Logs

Open the remote client Security Manager first, then the Terminal Server Security Manager. The Terminal Server Security Manager (vendor is set to Terminal Server) connects to the Client Security Manager at startup.

In the Terminal Server Security Manager, select the **Remote Clients Log** tab. The window shows the remote client logs and offers the option to save the logs in the Polaris Security Manager Log folder. Remote client and Terminal Server log files are saved separately.

SimplyReports

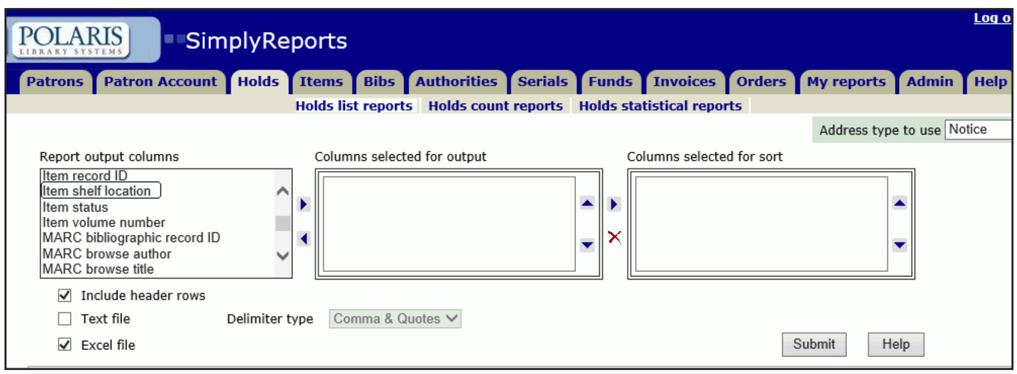
The following updates were made to Polaris SimplyReports.

New SimplyReports Selections

The following report types have new selections for filters, output columns, and statistical subcategories:

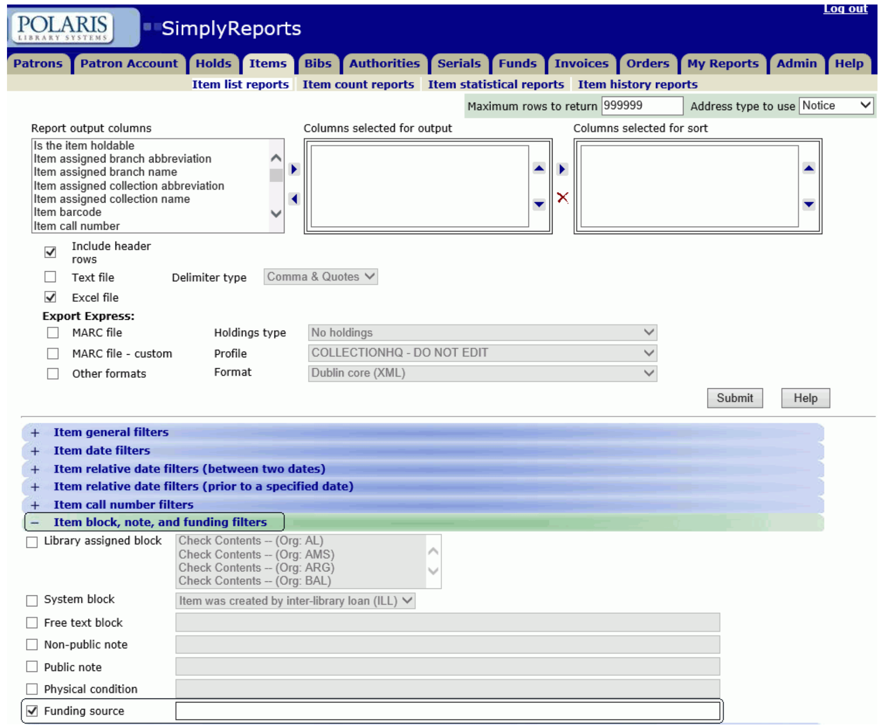
Holds List and Count Reports

- **Item shelf location** is available as a report output column.



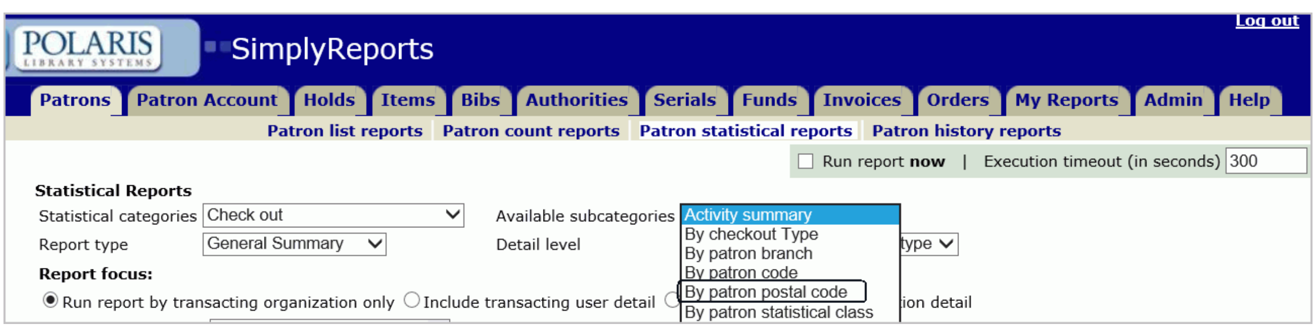
Item List and Count Reports

- The **Funding source** filter was added, and the filter category heading was changed to **Item block, note and funding filters**.



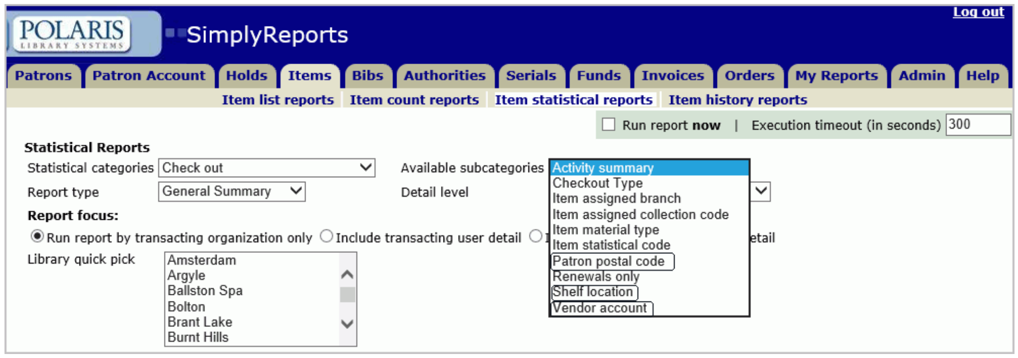
Patron Statistical Reports

- The subcategory **By patron postal code** was added to the **Check out** statistical category filter.



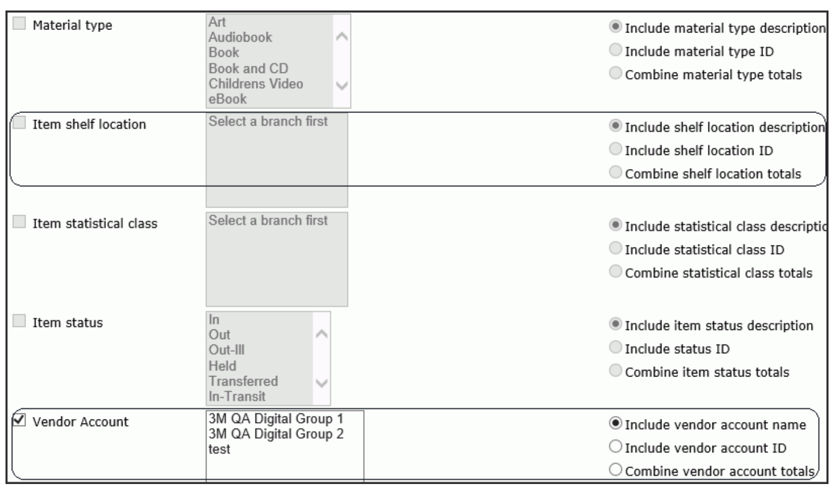
Item Statistical Reports

- **Patron postal code** subcategory added to Statistical Category Check Out.
- **Shelf location** subcategory added to Statistical Check In and Check Out
- **Vendor account** subcategory added to Statistical Categories Check in and Check Out



- **Item shelf location** filter added
- **Vendor Account** filter added

Note:
As with other statistical report filters, these new filters are available depending on the selected subcategory. For example, if you select the **Vendor account** subcategory, you can select the **Vendor account** filter.



Cataloging

The following changes were made to Cataloging.

Bibliographic Bulk Change - Permission Checking

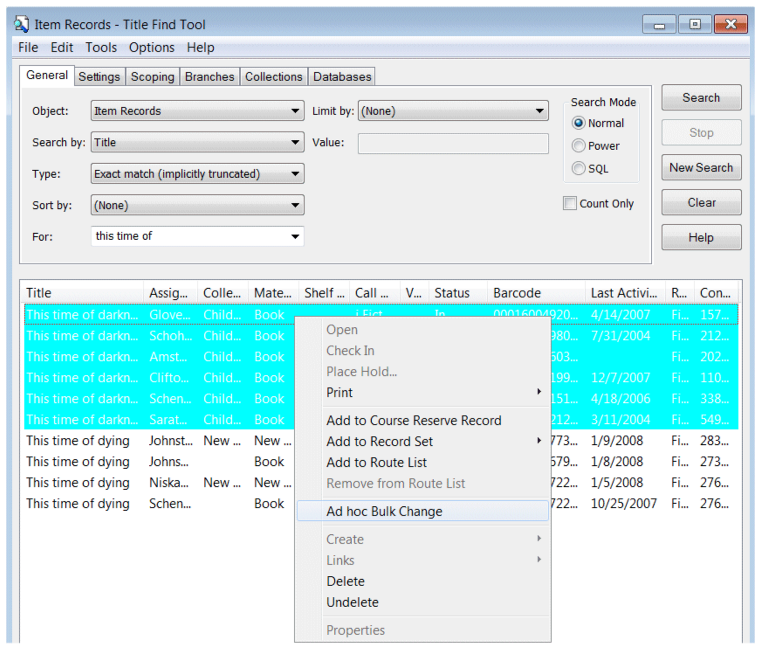
When a staff member bulk changes bibliographic records, the system will now check permissions for creating and modifying bibliographic records, in addition to the bulk change permission. If the staff member does not have permission to modify any records that are selected for bulk change, no bulk change will be performed on those records. When changing the bib record ownership during bulk change, if the staff member has modify permission for all records, but lacks the permission to create bibliographic records for the new record owner, she can bulk change the records using any option except changing the record owner because that requires the create permission for the bibliographic record's owning branch. Any records that are skipped are listed in the Bulk Change report.

Ad Hoc Bulk Change Available from All Item Lists

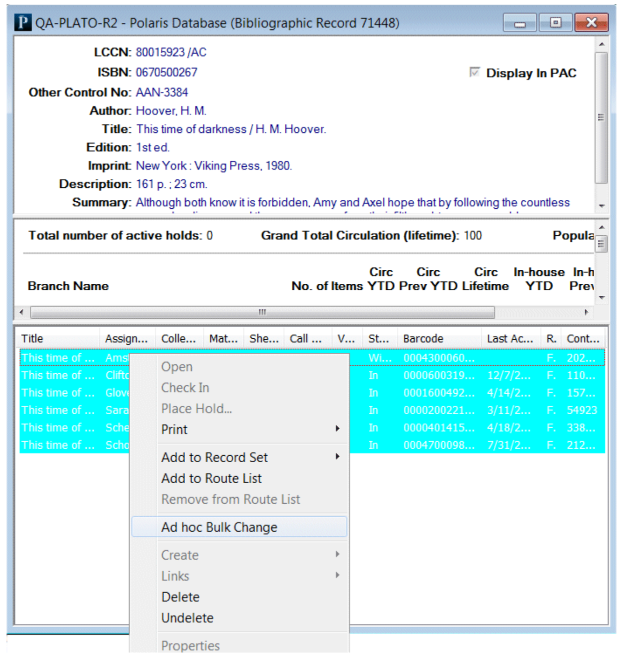
ITrac

If you have the permission to bulk change items, you can now select multiple items wherever they appear in lists, such as in Find Tool results, the Bibliographic preview, and linked list boxes, and select the **Ad hoc Bulk Change** option from the right-click menu.

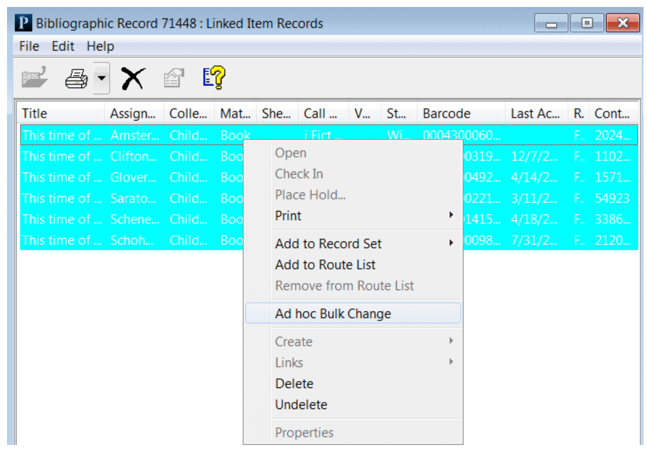
Items selected in Find Tool results



Items selected in the Bib Preview window



Items selected in a linked list box

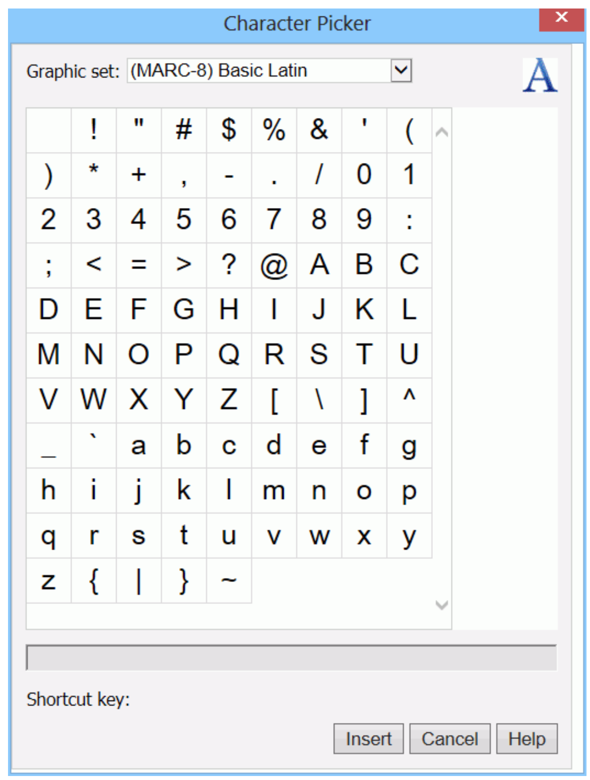


;

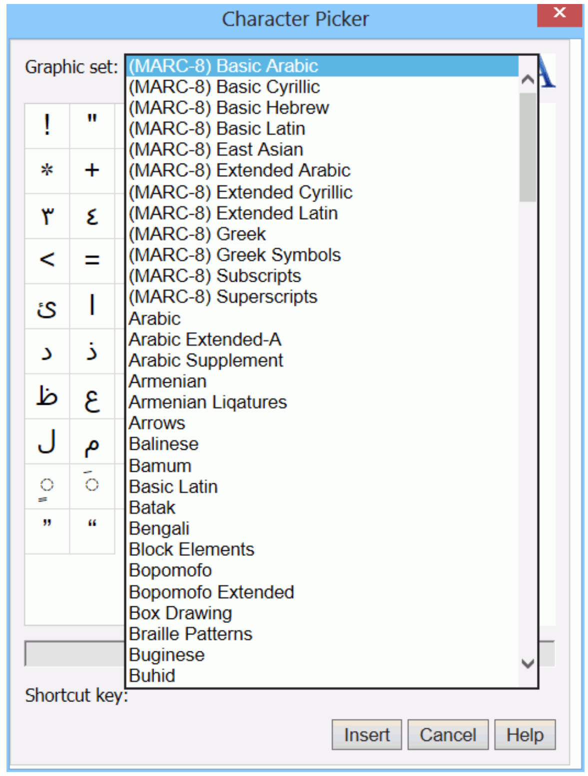
Before this change, the **Ad hoc Bulk Change** option was available only when item linked list boxes were opened from the Bibliographic Record, Purchase Order, or Purchase Order Line Items workforms. You can still gather items in a record set and use the Bulk Change option.

Character Picker Dialog Improved

A new web-based Character Picker dialog box is now available from the MARC 21 view of the Bibliographic Record or Authority Record workform, the Community Record workform, Label Manager, the Bibliographic Record Bulk Change dialog box, and various Polaris Administration controls. The new Character Picker dialog box has more options for inserting diacritics and non-Roman characters. When the dialog box opens, the Basic Latin code chart opens with the space character selected.



The Graphic set drop-down list contains the traditional MARC 8 code ranges and most Unicode code charts.



Note:
All characters are stored in the database using Unicode encoding. The MARC-8 charts are included for convenience in locating familiar characters.

If a particular character cannot be displayed using the fonts that are available to the workstation, a missing glyph box displays where the character would normally appear. When the missing glyph box is displayed, the correct Unicode character is stored in the record.

Use the Character Picker dialog box to do the following:

- **Insert a character** - Position the cursor where you want the character to appear, and double-click on the character, or select the character and click Insert.
- **See the Unicode value of any character in the MARC Editor** - Select the character and press **Alt+Shft+X**. Press **Alt+X** to re-display the character.
- **Switch between large and small font sizes** - Click A.
- **Close the Character Picker dialog box** - Click ✕, or press **Alt+F4**.

Protect Staff-Approved Bibs

Your library can now flag certain bibliographic records to protect them from being overlaid during duplicate detection when new records are imported or saved, and when a staff member attempts to replace the record with another bib that is not identified as a duplicate. Once the feature is enabled for your library system, library staff members with the appropriate permissions can set the **Do not overlay** check box so that these records cannot be overlaid or replaced.

Staff members with the appropriate permissions can still change protected records by making changes to the Bibliographic Record workform and by bulk changing the records. If an import profile is set up to reject incoming duplicate records and retain tags in the database record, the retention tags are added to the database record even if it is protected.

If you want to protect records that were created in Polaris Fusion, they must be set to **Do not overlay** in the Polaris Staff Client. You can gather digital collection records created in Polaris Fusion in a record set and set the **Do not overlay** option using bulk change.

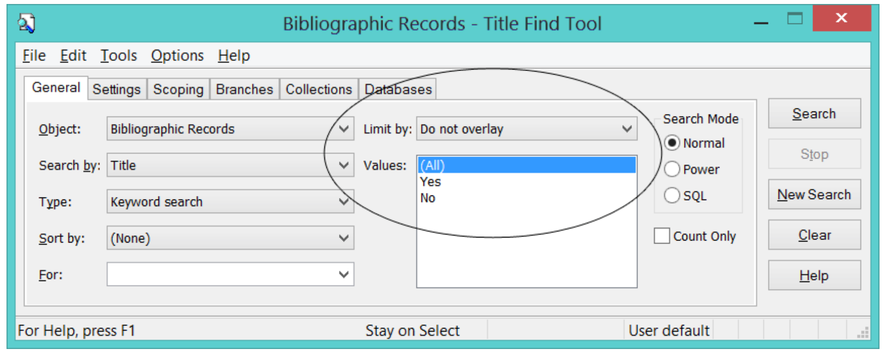
Polaris Administration Updates

The following updates were made to Polaris Administration:

- A new system-level only **Bibliographic Record Do Not Overlay feature enabled** Cataloging parameter enables or disables this function for your library system. If the parameter is set to **Yes**, staff members with the appropriate permissions can select the **Do not overlay** check box in the Bibliographic Record workform, the Bibliographic Bulk Change dialog box, the Bibliographic Record template workform, and the Bibliographic Records tab of the Import Setup window. If the parameter is set to **No**, the **Do not overlay** check box does not appear on these workforms or dialog boxes.
- A new system-level permission **Modify Do Not Overlay setting in bib records: Allow** controls who can modify this setting. At upgrade, this new permission is automatically assigned to members of the Administrator permission group only. To check or uncheck the **Do not overlay** check box in bibliographic records, you must have the **Modify Do Not Overlay setting in bib records: Allow** permission as well as the permission to modify bibliographic records for the branch.

Find Tool Updates

You can search for bibliographic records using a new **Limit by** option that filters the search results by the state of the **Do not overlay** check box. The limit by values include **All** (the **Do not overlay** box is checked or unchecked), **Yes** (the **Do not overlay** box is checked), and **No** (the **Do not overlay** box is unchecked).



Cataloging Record Updates

The **Do not overlay** check box was added to the following workforms and dialog boxes:

- Bibliographic Record and the Bibliographic Template workforms.
- Bibliographic Record Bulk Change dialog box.
- Bibliographic Records tab of the Import Setup window.

Import Processing Updates

The following updates were made to bibliographic record processing during importing.

Protected Database Records Never Overlaid

If an import profile is set to perform duplicate detection and overlay the database records when incoming duplicates are detected, any database record that is protected (the **Do not overlay** box is checked) is not overlaid with the incoming duplicate. When the import process encounters a protected database record that would have been overlaid by an incoming duplicate record, the protected database record remains unchanged, the incoming duplicate is saved provisionally, and no item records are created (even if the profile is set to build item records from embedded holdings in the incoming records). The import report includes the following message for each protected record that was not replaced: **Record <control number> was not replaced because 'Do not overlay' is checked on that record; record was saved provisionally.**

If the import profile is set to reject incoming duplicates but retain certain tags, such as 970 tags, these tags are copied to the database record regardless of whether the record is protected or not. If the incoming duplicate is rejected and 852 tags are retained, the tags are copied to the database record, and item records are created and linked to the database record.

Incoming Records Can Be Protected Upon Import

If the **Do not overlay** check box is checked in the import profile, all incoming records (either provisional or final) will be protected. The check box is checked or unchecked on the incoming bibs after all other import processing is done. For example, if the profile is set to reject incoming duplicates, the incoming records are rejected, and no changes are made to the **Do not overlay** setting in the database record that was retained. The import report shows how the **Do not overlay** check box was set in the import profile.

Replace/Check for Duplicates Updates

If you attempt to manually replace a bibliographic record using the Replace/Check for Duplicates (Bibliographic Records) dialog box, the protected record that cannot be replaced appears in red in the **Records to replace** list. If you want to continue replacing the record, you can open it in the Bibliographic Record workform and uncheck the **Do not display** box, and save the record. Then, refresh the Replace/Check for Duplicates (Bibliographic Records) dialog box. The record is displayed in black text.

If the record cannot be replaced, and you click **Replace all** or you select the record displayed in red, and click **Replace selected**, a message box identifies the records that cannot be replaced.

Procedures

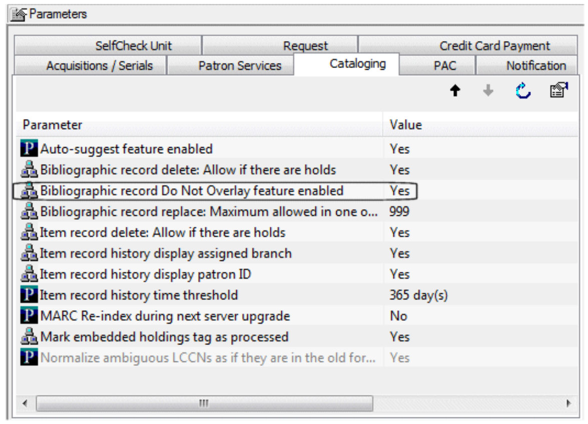
After enabling the feature and granting permissions to the appropriate staff members, bibliographic records can be protected by checking the **Do not overlay** check box on the Bibliographic Record workform, the Bulk Change dialog or, the Bibliographic Records tab of the Import Setup window.

Enable the *Do not overlay* feature

Follow these steps to enable the **Do not overlay** feature for protecting bibliographic records from being overlaid.

1. Select **Administration**, **Explorer**, **System**, **Parameters**, and select the **Cataloging** tab.

   The system-level Cataloging parameters are displayed.



2. Double-click the **Bibliographic record Do not overlay feature enabled** parameter, and select **Yes**.

   When the parameter is set to **Yes**, the **Do not overlay** check box appears, unchecked by default, on the Bibliographic Record workform, the Bibliographic Record Template workform, the Import Profile, and the Bibliographic Record Bulk Change dialog box. When the parameter is set to **No**, the **Do not overlay** check box does not appear on any workforms or dialog boxes.

   If the parameter is enabled and is subsequently disabled, the state of the **Do not overlay** bit in the records, templates, and import profiles (checked or unchecked) is saved, but it is ignored in any subsequent processing. However, if the library subsequently re-enables the parameter, and any bib records, bib templates or import profiles have the **Do not overlay** bit selected, a message informs the user that the *Do not overlay setting will be restored for ## records, ## bibliographic templates, and xx import profiles.* The user can select **OK** to re-enable the parameter and set all previously-protected bibliographic records to **Do Not Overlay**, or **Cancel** to keep the parameter disabled.

Protect an existing bib from being overlaid

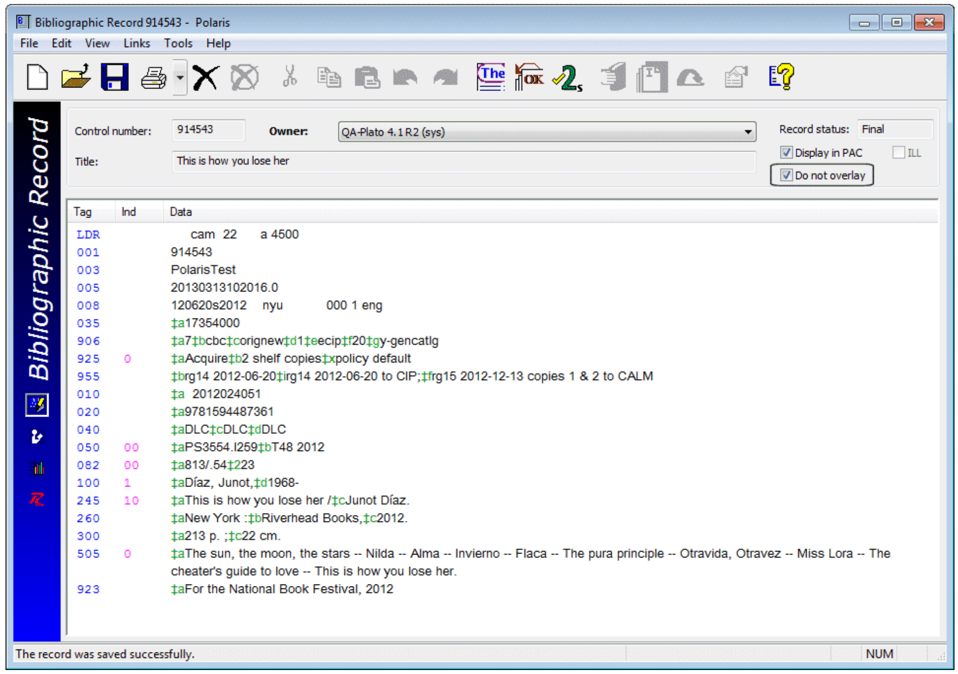
Follow these steps to protect an existing bibliographic record from being overlaid.

> **Note:**
> You can also save a bibliographic record template with the **Do not overlay** box checked. New bibliographic records created from the template will have the **Do not overlay** box checked.

1. Use the Find Tool to search for and select the bibliographic record you want to protect.

   The Bibliographic Record workform opens.

2. Select the **Do not overlay** check box.
3. Save the bibliographic record.

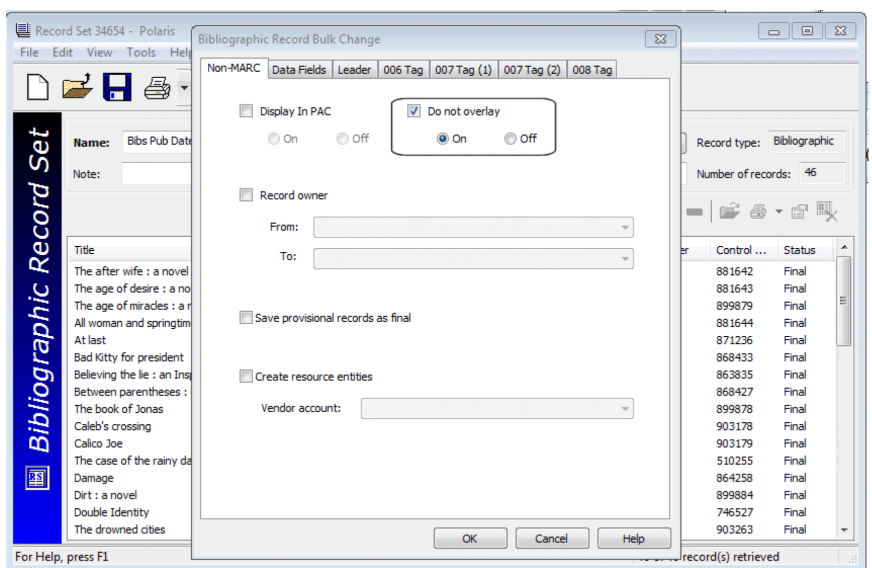


Protect multiple existing bibs from being overlaid

Follow these steps to protect multiple records from being overlaid.

1. Create a bibliographic record set of the staff-approved bibs.
2. Select Tools, Bulk change on the record set workform.

   The Bulk Change dialog box opens.
3. Select the **Do not overlay** check box and click the **On** button.



4. Click **Ok** to bulk change the records.

   The **Do not overlay** box is checked for all bibliographic records that are not already protected.

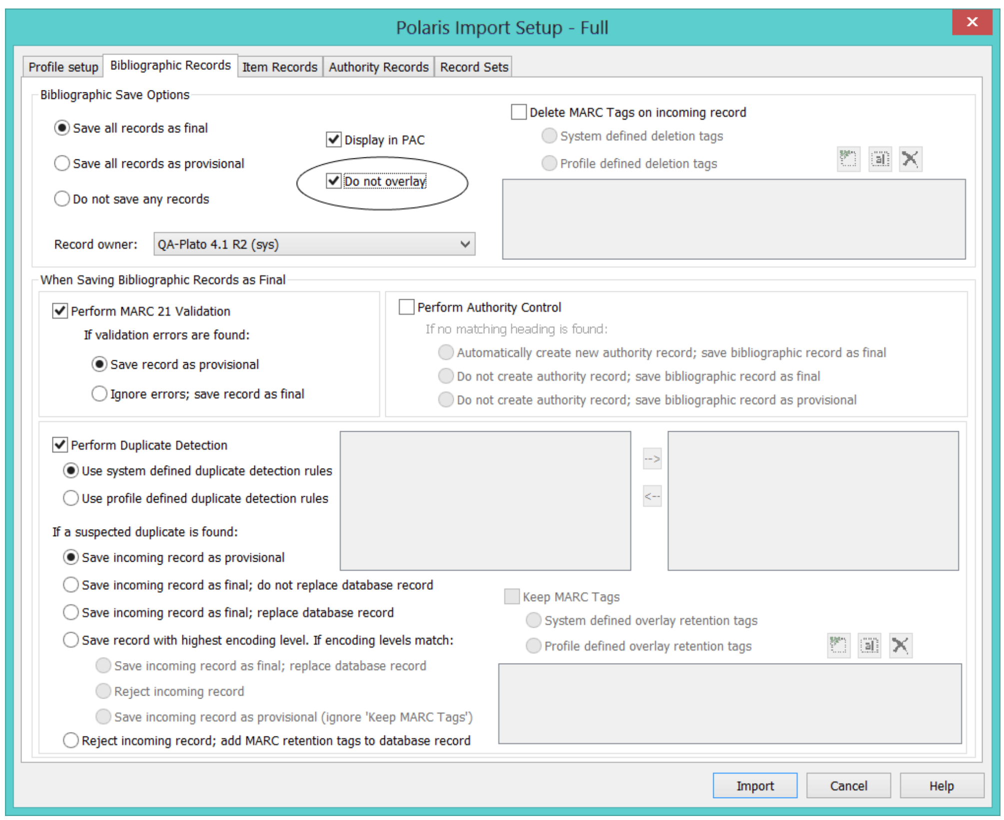
Protect new imported bibs from being overlaid

If you import records that you want to be protected from overlay, you can check the **Do not overlay** box on these records as soon as they are imported. The **Do not overlay** box is checked on incoming records only after all other processing specified in the Import Setup window is done, and the record is saved to the database. For example, if the import is set to perform duplicate detection and reject incoming duplicates, a rejected incoming record would not be saved to the database.

Follow these steps to protect imported bibliographic records from being overlaid in any future processes.

Note:
You can also set up an import profile with the **Do not overlay** box checked and use the profile whenever you want to protect incoming records.

1. Select **Utilities, Importing, Full Import**.
2. Add the files you want to import on the Profile Setup tab.
3. Select the Bibliographic Records tab.
4. Select the **Do not overlay** box.



5. Import the records.

   The **Do not overlay** check box is checked for all the imported bibliographic records that are saved to the database as either final or provisional records.

Delete Tags From Bibs During Import

You can specify certain tags that your library wants removed automatically from bibliographic records when the records are imported, or when they are saved from a remote database. The tags can be defined for the organization using the Bibliographic Tags to Retain/Delete (formerly Bibliographic Overlay Retention) policy table.

Once the tags are flagged for deletion in the policy table, they are removed during an import if **Delete MARC tags** and **System defined deletion tags** are selected in the import profile. Deletion tags can also be defined in the import profile.

If the new Polaris Administration Cataloging profile **Delete MARC tags when saving Z39.50 records to local database** is set to **Yes**, the tags flagged for deletion in the Bibliographic Tags to Retain/Delete policy table are deleted from records copied from a remote database.

The following tags cannot be selected for deletion in either the Bibliographic Tags to Retain/Delete policy table or in the import profile:

- **LDR**
- **001**
- **003**
- **005**
- **008**

These tags, used in duplicate detection, should not be deleted.

- **010$a**
- **020$a**
- **022$a**
- **024$a**
- **028$a**
- **035$a**
- **037$a**
- **1xx$a**
- **245$a**
- **246$a**
- **247$a**
- **260$c**

Tags are never automatically deleted from bibliographic records when: the new bibliographic record is created manually by entering tags in the MARC 21 view of the Bibliographic Record workform; a new bibliographic record found during a Z39.50 search is saved as a Bibliographic Record template; or, a new bibliographic record is overlaid by the database record during importing.

Polaris Administration Updates

The following updates were made in Polaris Administration:

Renamed and modified policy table

The Bibliographic Overlay Retention policy table was renamed Bibliographic Tags to Retain/Delete, a new **Retain/Delete** column was added to the table, and the dialog box where you specify the tag now has a drop-down list box with the options:

- **Retain from deleted or rejected record (occurs only when duplicate is detected)**
- **Delete from incoming record (whether duplicate or not)**.

See “Specify tags to delete for an organization” on page 130.

Renamed permission

To reflect this table name change, the permission was also changed:

- **Modify bibliographic overlay retention table: Allow** was renamed **Modify bibliographic tags to retain/delete tables**

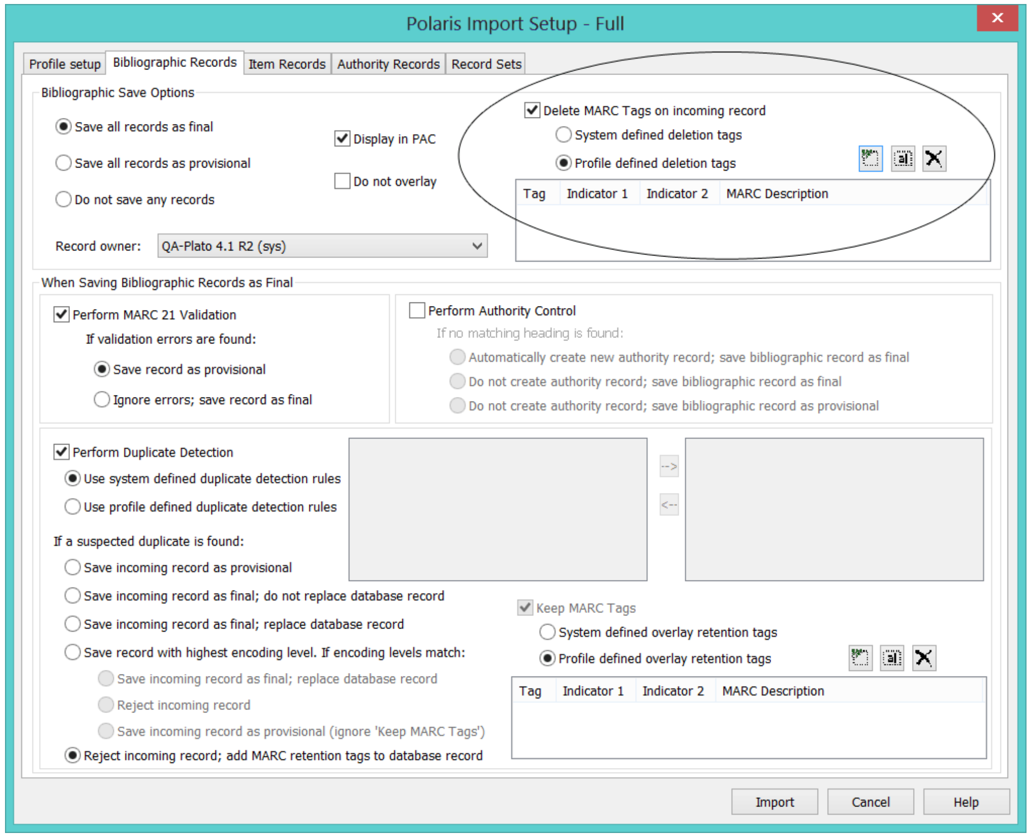
New Cataloging profile

When the new profile **Delete MARC tags when saving Z39.50 records to local database** is set to **Yes**, the tags flagged for deletion in the Bibliographic Tags to Retain/Delete policy table are deleted from remote records when they are saved to the Polaris database. See “Enable tag deletion for bibs from remote databases” on page 131.

Importing Updates

The following updates were made to the Import Setup, Bibliographic Records tab:

A new **Delete MARC Tags on incoming record** check box was added. When this check box is selected, the user can select **System defined** or **Profile defined**. If **Profile defined** is selected, the user can specify the deletion tags in the import profile. See “Setting an import profile to delete tags” on page 132.



The import report now includes information on tags that were deleted automatically.

Initial Settings at Upgrade

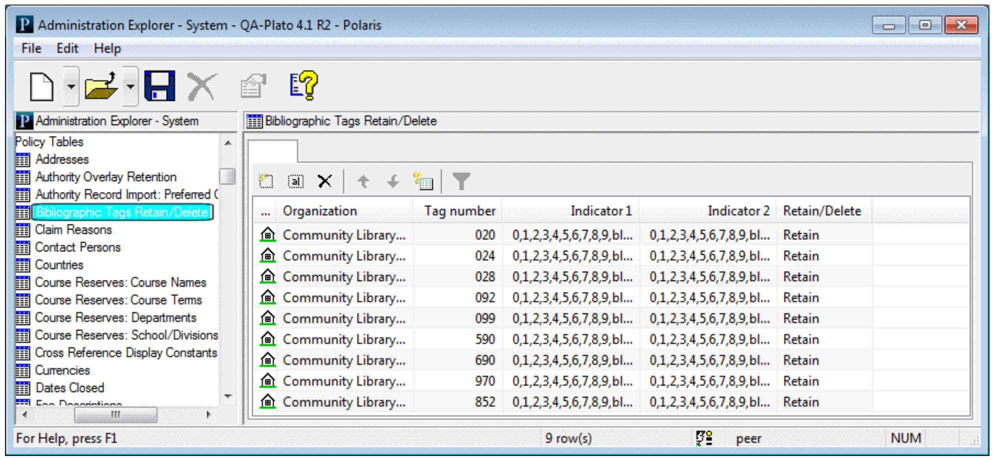
When an organization upgrades to the Polaris version containing this new feature, all tags selected for retention in the previously-named Bib Overlay Retention Table are selected for retention in the renamed policy table. No tags are selected for deletion in the policy table or in the import profile, and the **Delete MARC tags** check box on the import profile is not selected (unchecked).

Specify tags to delete for an organization

Follow these steps to specify bibliographic tags to delete when importing records or when saving a record from a remote database to the Polaris database.

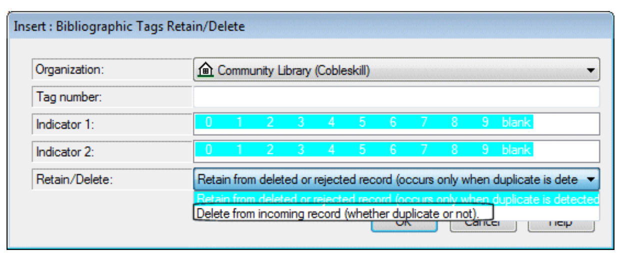
1. Open the Administration Explorer, and select the organization, (System, Library, or Branch) for which you are defining the tags to be deleted from bibliographic records that are saved to the database.
2. Select **Policy tables** and select the **Bibliographic Tags to Retain/Delete** table.

   The Bibliographic Tags to Retain/Delete table opens.



3. Click to insert a tag to be retained or deleted.

   The Insert Bibliographic Tags to Retain/Delete dialog box opens.



   a) Enter the tag number in the **Tag number** box tag.

   b) If you want to all indicator values included, leave them highlighted in the **Indictor 1**and **Indicator 2** boxes. Click an indicator to un-highlight it if you do not want it included.

   c) Select **Delete from incoming record (whether duplicate or not)**.

4. Click **OK** to insert the tag.
   - If the tag/indicator combination is already in the table, a message appears:

     Warning: This table already contains a retain/delete row for this tag.

- If the tag indicator/combination has already been specified as a tag to be retained, and you attempt to define it as a tag to be deleted, the following message appears:

  Warning: The same tag/indicator combination cannot be selected for both retention and deletion.

5. Select **File, Save**.

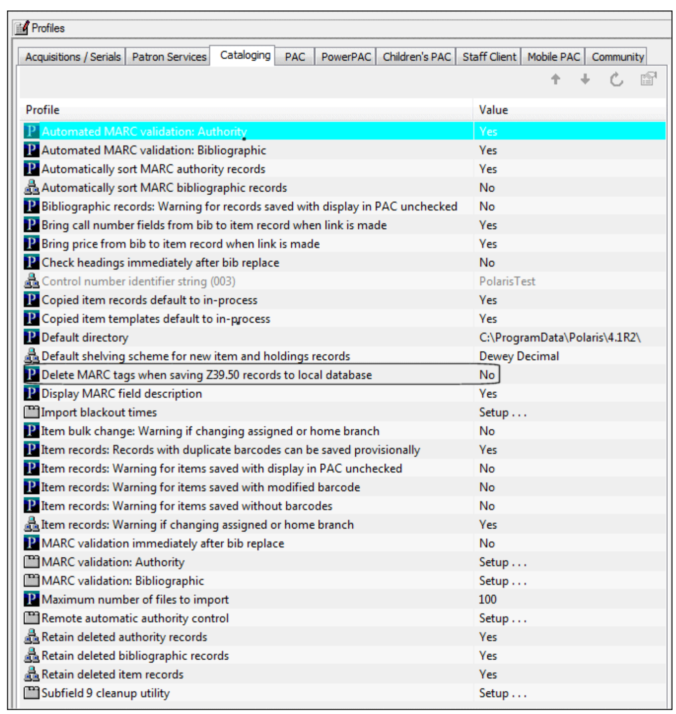
Enable tag deletion for bibs from remote databases

When tags are flagged for deletion in the Bibliographic Tags to Retain/Delete policy table, they are automatically deleted from imported bibliographic records if the import profile is set to **Delete MARC tags using system-defined tags**. A separate Polaris Administration Cataloging profile can be set to automatically delete these tags when records found via a Z39.50 search of a remote database are saved to the local database.

Follow these steps to enable or disable tag deletion when saving a bibliographic record found via a Z39.50 search of a remote database.

1. Open the Administration Explorer, and select the organization, (System, Library, or Branch) for which you are setting the profile.
2. Select **Profiles, Cataloging**.
3. Select **Delete MARC tags when saving Z39.50 records to local database** and select **Yes** or **No.**

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



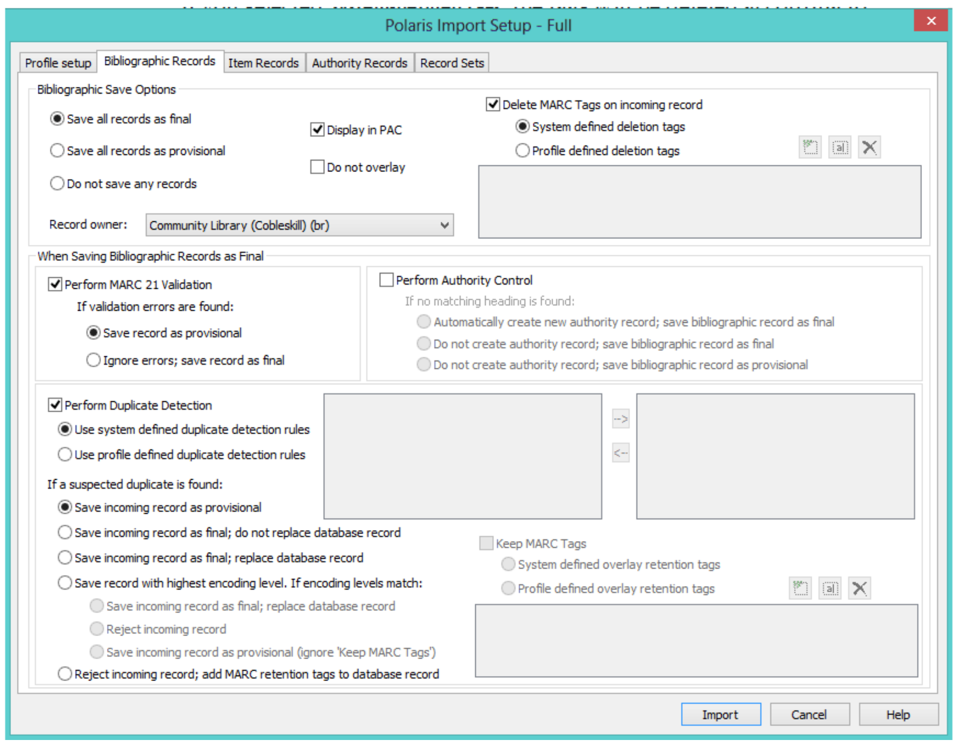
4. Select **File, Save** to save the changes to the profile.

If this profile is set to **Yes**, a staff member who retrieves a record via a Z39.50 search will see a brief message in the status bar of the Bibliographic Record workform before saving the retrieved record to the local database. This message informs the user that MARC tag deletion is enabled and that the tags selected for deletion in the Bibliographic Tags to Retain/Delete policy table will be removed when the record is saved. When the user saves the record in Polaris, the tags will be removed.

Setting an import profile to delete tags

Follow these steps to define tags to delete from incoming records in an import profile. You can set up an import profile to delete tags from incoming records and save the profile for staff members to select, or you can set up the import for a single import.

1. On the Bibliographic Record tab of the import profile, select the **Delete MARC tags** check box.

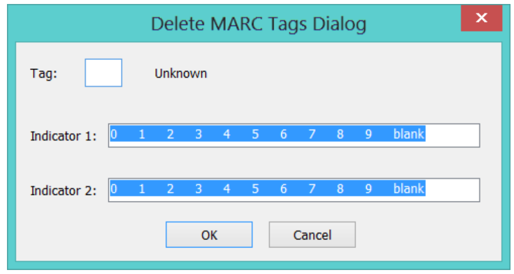


2. Select **System-defined tags** or **Profile-defined tags**.

   If you selected **System-defined tags**, the tags will be deleted according to the settings in the Bibliographic Tags to Retain/Delete policy table for the organization to which you are logged in.

3. If you select **Profile-defined deletion tags**, specify the tags to be deleted in the import profile by following these steps:

   a) Click to insert a tag to be deleted.



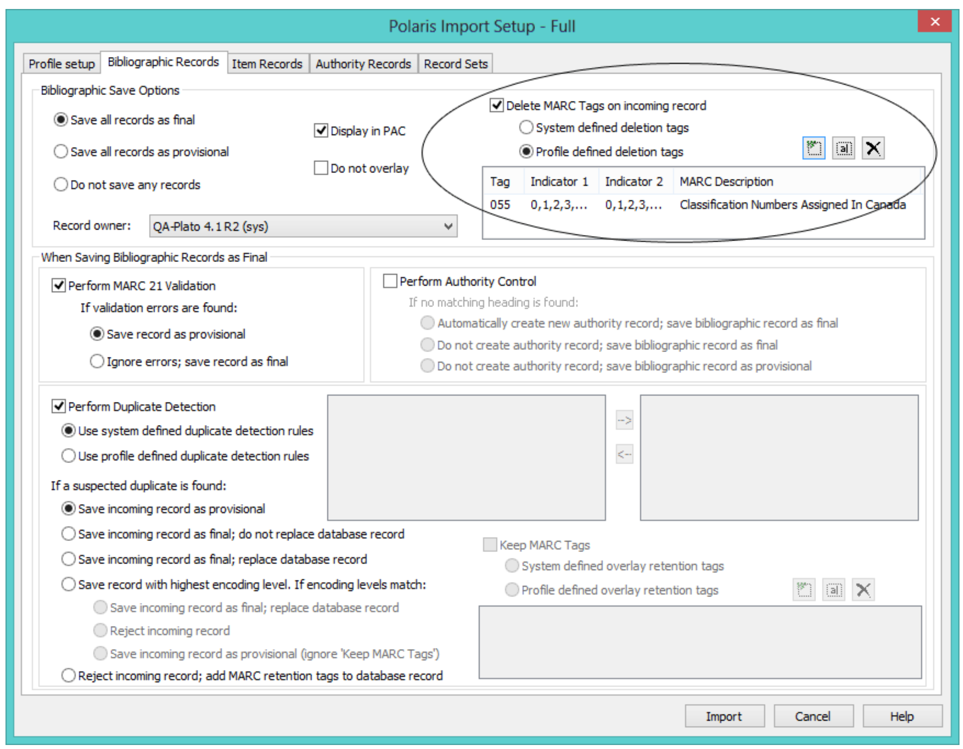
b) Enter the tag to be deleted in the **Tag** box.

> **Note:**
> Tags, such as the 852, that carry embedded holdings information or 970 tags that carry order information should not be deleted upon import. These tags can be deleted by a utility after all processing has occurred.

c) If you want all indicator values included, leave them highlighted in the Indicator 1 and Indicator 2 boxes. Click an indicator if you do not want it included.

> **Note:**
> If you leave all indicator values highlighted, the tag is deleted regardless of the indicator values.

The tag and indicator values are added to the list of profile-defined deletion tags.



When the import is launched, the tags are deleted after duplicate detection and any record replacement that occurs as a result of duplicate detection.

If the import profile is set to both retain some tags from duplicate records that are overlaid and delete other tags from incoming records whether they are duplicates or not, the following occurs depending on duplicate detection and overlay settings:

- If an incoming duplicate record is rejected, the retention tags are copied to the database record and no tags are deleted.
- If an incoming duplicate record replaces a database record, the tags specified for deletion are removed from the incoming record, and the retention tags are retained in the replacement record.

View the import report

The tags that were selected for deletion at the time of the import are listed in the import report, and the individual tags with their indicators, subfields and field contents are also listed. In addition, the report lists tags that should have been deleted from each record but were not because the tags were used in a duplicate detection rule, or there were conflicts about whether to retain or delete the tag.

Acquisitions

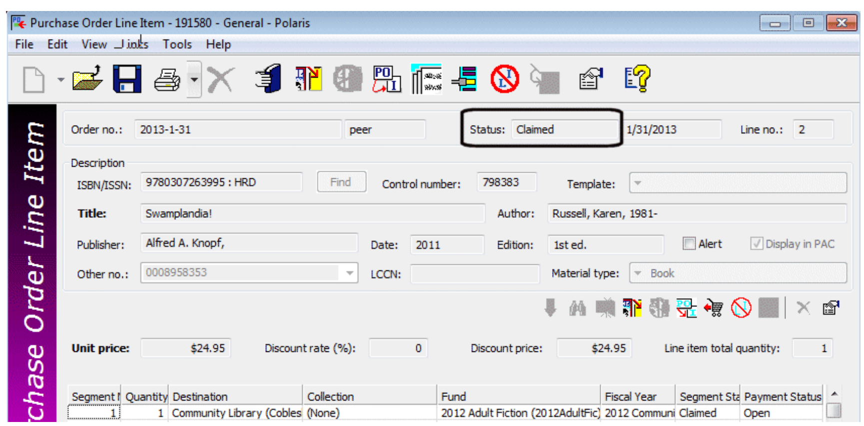
The following updates were made to Polaris Acquisitions.

Rapid Receipt for Additional PO Line Statuses

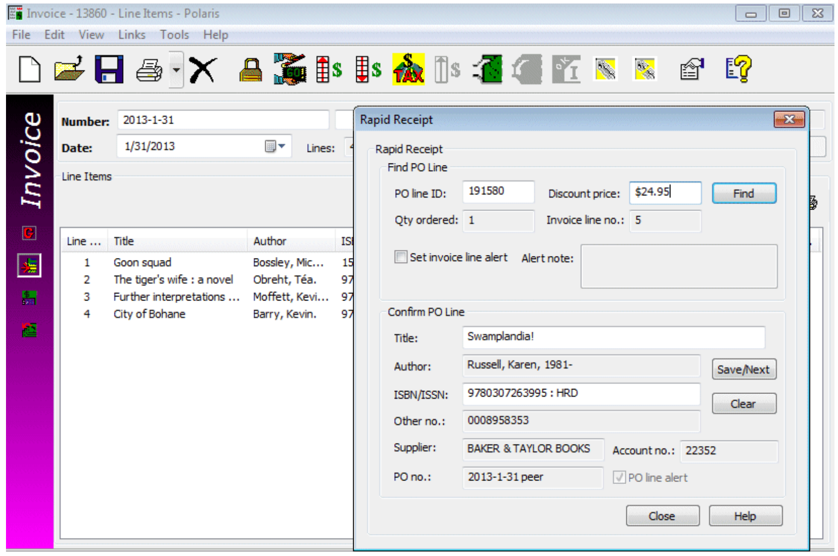
I.Trac

To bring Rapid Receipt in line with other receiving methods in Polaris Acquisitions, you can now use Rapid Receipt to receive purchase order line items with the following statuses: Claimed, Never published, Pending claim, or Returned. Before this change, purchase order line items with any of these statuses could be received using other methods, but not using Rapid Receipt.

In this example, the purchase order line item has a status of Claimed.



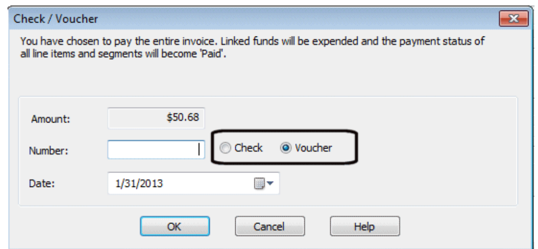
It is received from the Invoice workform using Rapid Receipt.


Invoice - 13860 - Line Items - Polaris
File Edit View Links Tools Help
Invoice
Number: 2013-1-31
Date: 1/31/2013
Lines:
Line Items
Line ... Title Author
1 Goon squad Bossley, Mic...
2 The tiger's wife : a novel Obreht, Téa.
3 Further interpretations ... Moffett, Kevi...
4 City of Bohane Barry, Kevin.
Rapid Receipt
Rapid Receipt
Find PO Line
PO line ID: 191580
Discount price: $24.95
Find
Qty ordered: 1
Invoice line no.: 5
Set invoice line alert
Alert note:
Confirm PO Line
Title: Swamplandia!
Author: Russell, Karen, 1981-
Save/Next
ISBN/ISSN: 9780307263995 : HRD
Clear
Other no.: 0008958353
Supplier: BAKER & TAYLOR BOOKS
Account no.: 22352
PO no.: 2013-1-31 peer
PO line alert
Close
Help

Default Payment Option for Paying/Crediting Invoices

I.Trac

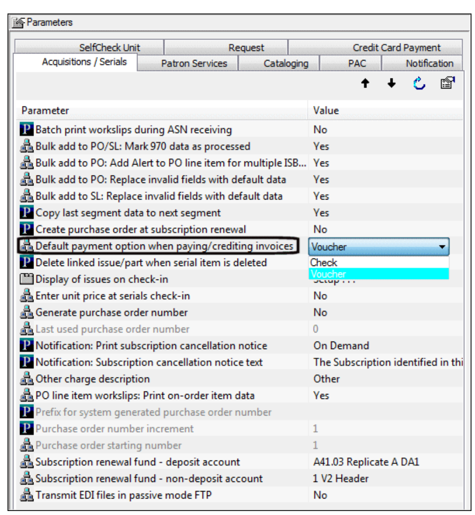
You can now set a default payment option, either **Check** or **Voucher**, to be selected automatically in the Check/Voucher dialog box when staff members prepay, pay, or credit an invoice.



Tip:
If you want to leave the default set to **Voucher**, you do not need to change the setting.

To change the default from **Voucher** to **Check**, use the new Acquisitions parameter **Default payment option when paying/crediting invoices** at the System, Library, or Branch level. If the parameter is set at the System level, and not at the Library or Branch level, the Check/Voucher dialog box always has the same default payment option selected. If the parameter is set at the Library or Branch level, the default is selected as follows:

- When paying or crediting an invoice, the default selection in the Check/Voucher dialog box is set according to the parameter for the invoice's **Paid by** branch (or the branch's parent library if the parameter is set at the Library level).
- When prepaying, the default selection in the Check/Voucher dialog box is set according to the parameter for the purchase order's **Ordered at** branch (or the branch's parent library if the parameter is set at the Library level).



Library Name and PO Number in PO Footer

I.Trac

The name of the library organization associated with the purchase order and the PO number now appear in the footer on every page of the printed purchase order.

BAKER & TAYLOR BOOKS

SAN: 1556150

Account Number: 22352

Att: Order Department 251 Mt Olive Church Road COMMERCE GA USA 30599 800-775-1100 800-775-7480

Purchase Order: 125464 Comm

Ship To: Community Library (Cobleskill)
PO Box 219
147 Barnerville Road
Cobleskill, NY 12043-0219

Bill To: Community Library (Cobleskill)
PO Box 219
147 Barnerville Road
Cobleskill, NY 12043-0219

Date Ordered:
Tax Exemption No.:
Total Amount: $334.55
Total Quantity Ordered: 43

Please supply the following item(s):

Qty	ISBN/ISSN	Title/Author	Line ID	Other No.	Material Type	Est. Disc Rate	Unit Price	Total Amount
1	9780670023684 (alk. paper)	The age of desire : a novel / Fields, Jennie.	191778		Book	30.0000%	$10.50	$7.35
1	9780679644385 (ebook)	The age of miracles : a novel / Walker, Karen Thompson.	191789		Book	30.0000%	$10.50	$7.35
1	9781616200770	All woman and springtime : a novel / Jones, Brandon W., 1972-	191779		Book	30.0000%	$10.50	$7.35
1	9780374298890 (alk. paper)	At last / St. Aubyn, Edward, 1960-	191773		Book	30.0000%	$10.50	$7.35
1	9781596436695	Bad Kitty for president / Bruel, Nick.	191771		Book	30.0000%	$10.50	$7.35
1	9780525952589	Believing the lie : an Inspector Lynley novel / George, Elizabeth, 1949-	191766		Book	30.0000%	$10.50	$7.35
1	9780399158452	The book of Jonas / Dau, Stephen.	191788		Book	30.0000%	$10.50	$7.35
1	9780143121077 (pbk.)	Caleb's crossing / Brooks, Geraldine.	191792		Book	30.0000%	$10.50	$7.35
1	9780385536073 (hbk.)	Calico Joe / Grisham, John.	191793		Book	30.0000%	$10.50	$7.35
1	0439426316 (pbk.) :	The case of the rainy day mystery / Preller, James.	191761		Book	30.0000%	$3.99	$2.79
1	9780451235428 (pbk.)	Damage / Lescroart, John T.	191768		Book	30.0000%	$10.50	$7.35
1	9780062121035 :	Dirt : a novel / Vann, David.	191791		Book	30.0000%	$25.99	$18.19
1	0689873794 (pbk.) :	Double Identity / Haddix, Margaret Peterson.	191762		Book	30.0000%	$5.99	$4.19
1	9780316056243	The drowned cities / Bacigalupi, Paolo.	191795		Book	30.0000%	$10.50	$7.35
1	9780062049575 :	Elegy for Eddie / Winspear, Jacqueline, 1955-	191786		Book	30.0000%	$25.99	$18.19
1	9780525478812 (hardcover : alk. paper)	The fault in our stars / Green, John, 1977-	191767		Book	30.0000%	$10.50	$7.35

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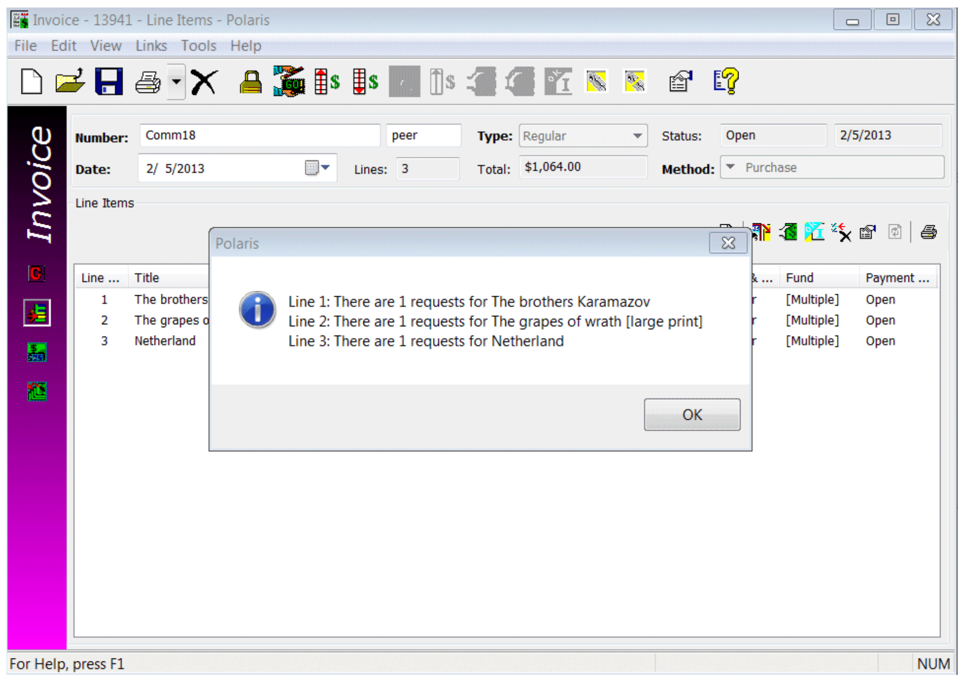
Report Printed: 2/26/2013 11:44 AM

Prompt for Holds When Receiving Multiple Invoice Lines

I.Trac

If the Polaris Administration Acquisitions/Serials profile **Receiving line items: Warn if linked hold requests** is set to **Yes**, a message box appears when you receive multiple line items from an invoice and any of the line items have hold requests associated with them. If more than one line item has a hold request linked to it, the message box displays all the active or pending hold requests.



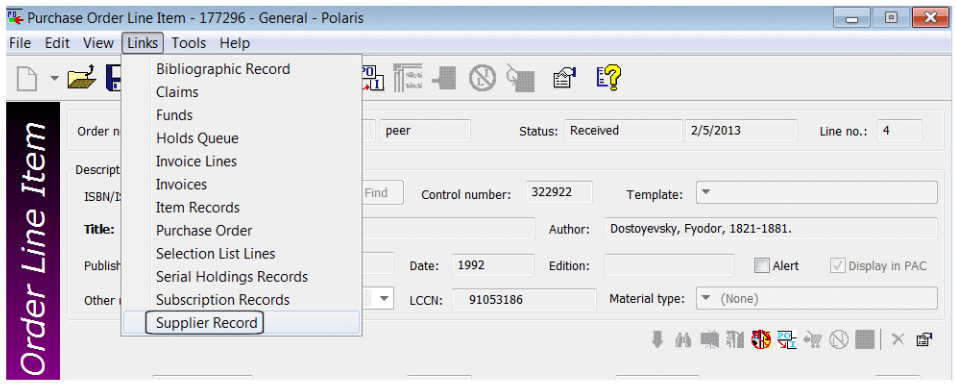
Added Links in Acquisitions

LTrac

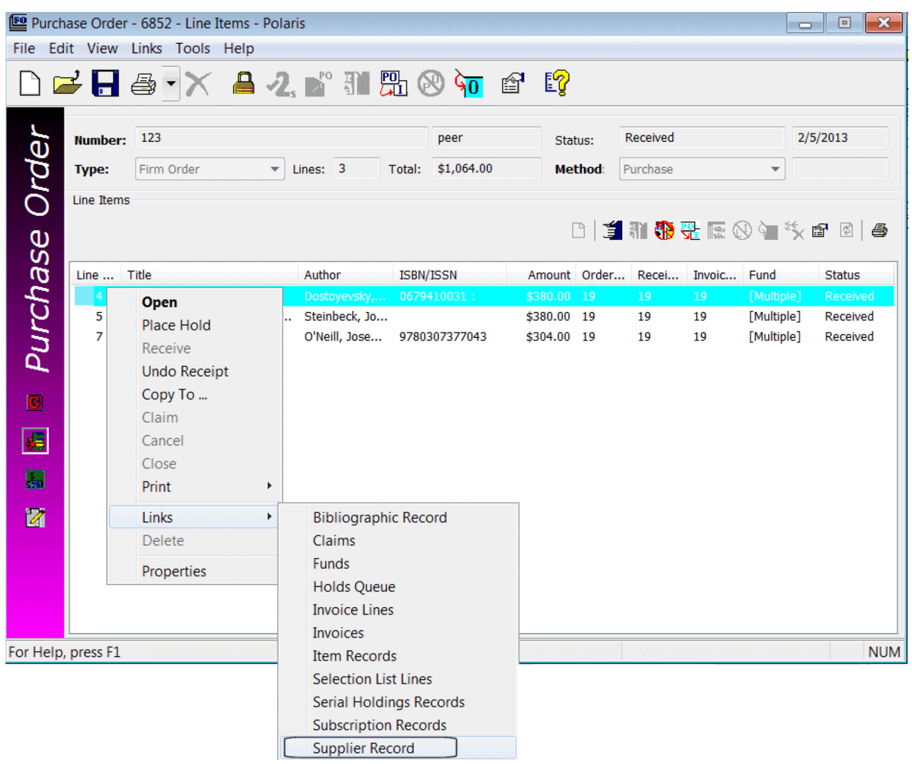
The following new linking options were implemented to facilitate Acquisitions processing and reduce keystrokes.

Link from a Line Item to a Supplier

- Select **Links, Supplier** on the Purchase Order Line Item or Invoice Line Item workform.

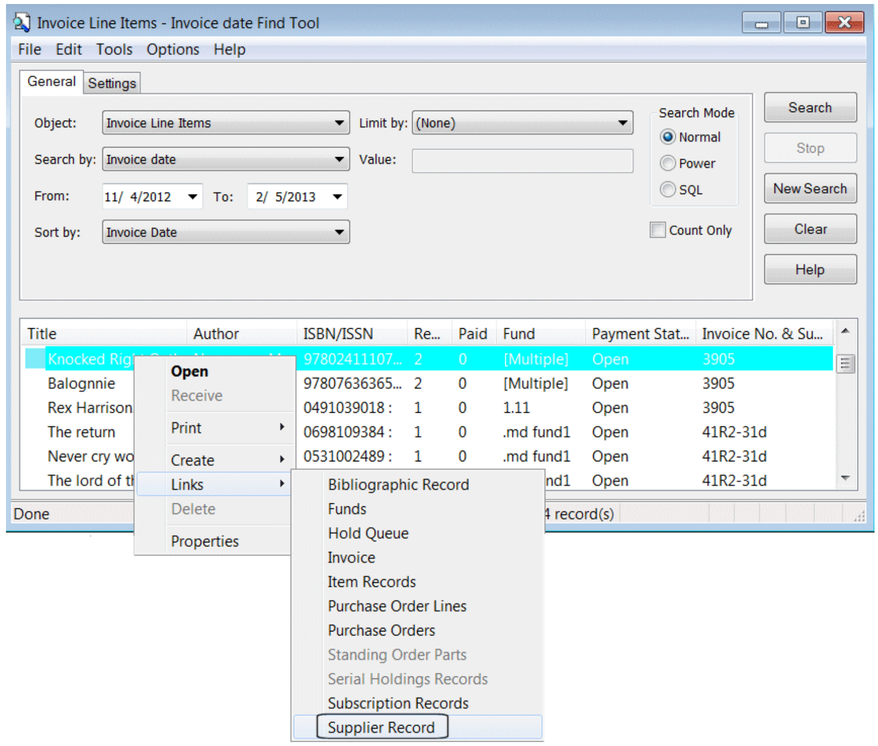


- Select a line item listed in the Line Items view (view 2) of a Purchase Order or Invoice workform, right-click, and select **Links, Supplier.**



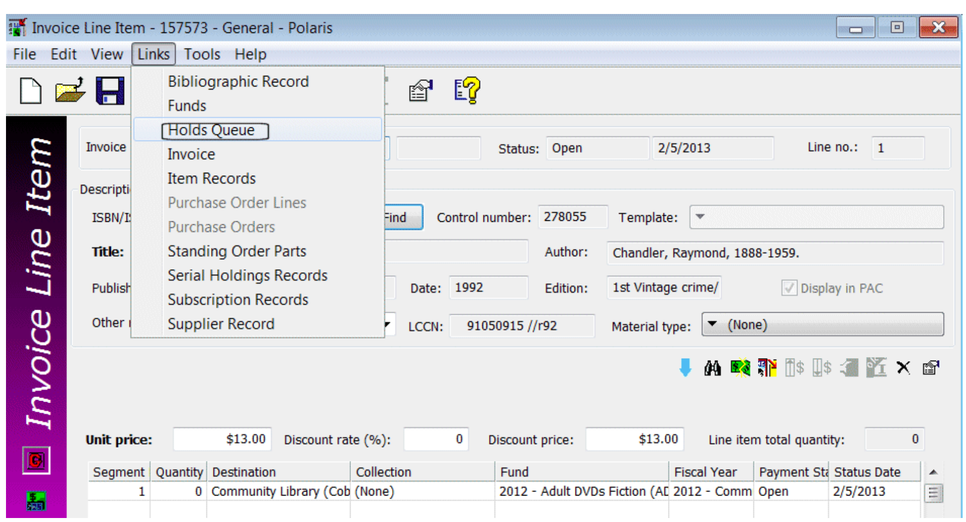
[

- Select a purchase order or invoice line item listed in the Find Tool results, right-click, and select **Links, Supplier**.



Link from an Invoice Line Item to the Holds Queue

If hold requests are linked to an invoice line item's bibliographic record, you can go to the Holds Queue workform by selecting the **Holds Queue** option on the **Links** menu on the Invoice Line Item workform. You can also link to the Holds Queue by selecting an invoice line item listed in the Invoice workform (view2) or in the Find Tool results list, right-clicking and selecting **Links, Holds Queue**.



EDI and Internet Explorer 10 Compatibility

This update rectifies a compatibility issue between the EDIAgent and servers running Microsoft Internet Explorer (IE) 10 that prevented the EDIAgent from deleting files on the supplier's FTP site and generating EDI invoices and purchase order acknowledgments. If your library has sent orders via EDI since the server has been updated with IE10, files are not being deleted from vendors' FTP sites. However, once you install this update, the EDIAgent will work on servers with IE10, as well as IE9 and IE8.

As before, the EDIAgent will run from its normal location in the SQLJobs folder, and the EDIAgent log will continue to report FTP connection information. To enable more efficient troubleshooting, a new EDIFTP subfolder, located under the SQLJobs folder, will contain files with additional information about FTP transmissions.

When the EDIAgent runs, one file for each EDI-enabled Polaris supplier record will be created (or overwritten if already created for the supplier) and saved in the EDIFTP folder. If the EDIAgent log reports a connection failure, a Polaris representative or authorized library staff member will use the supplier ID to find the file in the EDIFTP subfolder.

Sample FTP Messages and Logs

Successful FTP - no files to pull from supplier's site

- **FTP message**:

```
Accessing FTP Server ftp.polarislibrary.com for Supplier ID: 297
InternetConnect - File Transfer on FTP Server ftp.polarislibrary.com successful.
Accessing FTP Server ftp1.ingrambook.com for Supplier ID: 643
InternetConnect - File Transfer on FTP Server ftp1.ingrambook.com successful.
Accessing FTP Server ftp.brodart.com for Supplier ID: 655
InternetConnect - File Transfer on FTP Server ftp.brodart.com successful.
exiting EDIAgent
There were no errors in the EDIAgent process, invoice creation starting [SQLSTATE 01000]
Apr 17 2013  9:24AM No Edi Agent Invoices were created. [SQLSTATE 01000]
Apr 17 2013  9:24AM Edi Agent completed with no errors. [SQLSTATE 01000]
```

- **EDIAgent Log:**

  Starting EDIFTP - 4/17/2013 9:24:56 AM

  Number of files retrieved: 0

  Finishing EDIFTP - 4/17/2013 9:24:57 AM

Unsuccessful FTP - bad password

- **FTP message**:

```
Accessing FTP Server ftp1.ingrambook.com for Supplier ID: 643
InternetConnect - File Transfer on FTP Server ftp1.ingrambook.com failed Error: 12014.
```

- **EDIAgent Log**:

    Starting EDIFTP - 4/17/2013 9:30:21 AM

    This EDI Agent FTP experienced the following error.

    Exception Message: The remote server returned an error: (530) Not logged in.

    Response Status: 530 Not logged in.

    If error code = 530, check username and password.

    Number of files retrieved: 0

    Finishing EDIFTP - 4/17/2013 9:30:22 AM

For more information on the EDIAgent SQL Job and the EDIAgent log, see Polaris online Help.