polaris

What's New in Polaris and Leap 6.2

6.2

© 2019

innovative

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Contents

Polaris Installation Notes **1**

New and Modified Polaris Administration Settings **2**

WebAdmin Updates **4**

MARC Updates Implemented in Polaris 6.2 ..... **7**

RBdigital eContent Integration **8**

Sharing cloudLibrary eContent with cloudLink **9**

Integrating Polaris PowerPAC and EBSCO Discovery Service (EDS) **10**

Enabling EDS Searching in Polaris PowerPAC 10

Configuring Remote Database Usage Settings for EDS 11

Configuring Quick Search Buttons 14

Using EDS in Polaris PowerPAC 15

Improvements to INN-Reach Integration **16**

Stop RTF Processing Setting Applies to INN-Reach Requests 16

Automatic Population of the Barcode Field on the Brief Item Entry Dialog Box 16

Ad Hoc Bulk Change Item Records **18**

Configuring the Charge Alert Threshold **19**

Support for the OverDrive Magazine Format **20**

Checking Out Items with Alternate IDs **21**

Canceling Multiple Requests in Leap **23**

Transferring Hold Requests in Leap **24**

Specifying the Default Template for Item Creation in Leap **26**

Specifying the Default Item Template in the Administration Explorer 26

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Specifying the Default Item Template in the Leap User Default Settings .. 27
Deleting Multiple Records from a Record Set 28
Display Improvements in Polaris PowerPAC 29
Improvements to Reduce Horizontal Scrolling 29
Book Cover Images Appear on Patron Account Pages 29
Improved URL Format for the PowerPAC Full Display Page 30
Pasting the Patron Password on the Login Page 31

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Polaris Installation Notes

Important:
When the new Polaris release is installed on a workstation, the file path changes from 6.1 to 6.2 as in the following examples:
C:\ProgramData\Polaris\6.2
C:\Program Files\Polaris\6.2
C:\Program Files (x86)\Polaris\6.2

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New and Modified Polaris Administration Settings

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

Setting	Purpose	Level
New Parameters		
Patron Account: Charge Alert Threshold	Defines the charge alert threshold value. The system displays a warning message if a staff member adds a charge to a patron account that exceeds the charge alert threshold. The default threshold value is $999.00.	System, Library, Branch
New Profiles		
Web App: Item Create Workform default item template	Specifies the default item template selected for the Leap user. When the user creates a new item record, the default template is used.	Workstation, Staff
New Search Server Properties Option		
Search Server Properties	Allows you to define Polaris search server properties. On the Provider tab, a new EDS provider option allows you to integrate EDS with Polaris PowerPAC.	n/a
Modified Parameters		
Hold options: Stop RTF processing	Specifies whether RTF processing is enabled or disabled. This setting now applies to ILL requests submitted via INN-Reach.	System, Library, Branch
Modified Profiles		
Patron registration user defined fields	Allows you to configure up to five user-defined fields (UDFs) in patron records. A new "Use as alternate ID for checkout" setting lets you configure free text UDFs for use as alternate IDs to check out patron items.	System, Library, Branch
Remote Databases: Usage Settings	Allows you to configure usage settings for remote databases. Two new settings appear in this profile when the server Search Provider for the remote database is set to "EDS" on the Provider tab of the Search Server Properties dialog box. Your library can use these settings to specify the initial load size and time limit that apply when merging EDS and PowerPAC search results.	System, Library, Branch

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Setting	Purpose	Level
Quick search button configuration	Allows you to configure quick search buttons to appear in Polaris PowerPAC. Two new buttons (My Library and My Library plus Articles) can now be configured to appear.	System, Library, Branch

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WebAdmin Updates

The table below lists the most important new strings added in Polaris 6.2.

String Mnemonic	Default Text	Purpose
PACML_BAR_SIMPLE_BTN_MYLIBRARY	My Library	Quick search button label for EDS integration.
PACML_BAR_SIMPLE_BTN_MYLIBART	My Library + Articles	Quick search button label for EDS integration.
PACML_EDS_READARTICLEBUTTON	Read the Article	Label for a button that links to an article provided by EDS.
PACML_EDS_LOGINTOREADBUTTON	Log in for access	Label for a button that appears when EDS access to a resource requires the patron to log on.
PACML_EDS_LOGINTOGAINACCESS	Log in to gain access to this result.	Results text that appears when EDS requires the patron to log on to access the resource.
PACML_EDS_RELEVANTRESULT	This highly relevant result was discovered due to the authoritative indexing provided by {0}, and details cannot be displayed to unauthorized users.	Results text that appears when EDS requires the patron to log on to view even basic metadata for the resource.
PACML_LOGINARTICLESEARCH	Please log into your account to search for articles	Message to patrons advising that they should log on prior to searching for articles, as many resources from EDS require patron authentication.
SWC_RECSET_PATRON_DELS_MSG	The patron record will be permanently deleted. Do you want to continue?	Message warning that the patron records selected on the Patron Record Set

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String Mnemonic	Default Text	Purpose
		workform will be permanently deleted.
SWC_RECSET_PATRON_DELS_OBJECTLOCKED	Record is in use by another user and cannot be deleted.	Message that appears when there is an existing object lock on the patron record selected for deletion on the Patron Record Set workform.
SWC_RECSET_PATRON_DELS_BULK_MSG	{0} patron records will be permanently deleted. Do you want to continue?	Message specifying the number of patron records that are selected on the Patron Record Set workform that will be deleted.
SWC_RECSET_PATRON_DELS_RECSET_DIRTY	You have made changes to this patron record set. Please save before deleting the records.	Message indicating that you cannot delete records from a patron record set if there are unsaved changes to the record set.
SWC_CHARGETHRESHOLD_EXCEEDED	Charge amount exceeds the configured threshold. Do you want to charge [Amount] to the patron account?	Message that appears when a staff member attempts to add a fine that exceeds the threshold value configured in the Polaris Administration Explorer.
SWC_RECSET_AUTH_DELS_MSG	{0} authority records will be marked for deletion or will be permanently deleted. Do you want to continue?	Message specifying the number of authority records that are selected on the Authority Record Set workform that will be deleted.
SWC_RECSET_AUTH_DELS_SINGLE_MSG	The authority record will be permanently deleted. Do you want to continue?	Message warning that the authority records selected on the Authority Record Set workform will be permanently deleted.

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String Mnemonic	Default Text	Purpose
SWC_RECSET_AUTH_DELS_RECSET_DIRTY	You have made changes to this authority record set. Please save before deleting the records	Message indicating that you cannot delete records from an authority record set if there are unsaved changes to the record set.
SWC_RECSET_ITEM_DELS_RECSET_DIRTY	You have made changes to this item record set. Please save before deleting the records	Message indicating that you cannot delete records from an item record set if there are unsaved changes to the record set.
SWC_RECSET_BIB_DELS_RECSET_DIRTY	You have made changes to this bibliographic record set. Please save before deleting the records	Message indicating that you cannot delete records from a bibliographic record set if there are unsaved changes to the record set.
SWC_RECSET_BIB_DELS_MSG	{0} bibliographic records will be marked for deletion or will be permanently deleted. Do you want to continue?	Message specifying the number of bibliographic records that are selected for deletion from the record set.
SWC_HLDIND_TRANSFER_BULK_MSG	These requests will be transferred to {0}. It is not possible to undo this action. Do you want to transfer the requests?	Message indicating that it is not possible to undo a hold request transfer once the transfer is completed.
SWC_WRKFM_REACTIVATE_FAIL_MSG	Request was not reactivated	Message indicating that the selected request was not reactivated.
SWC_WRKFM_REACTIVATE_SUCCESS_MSG	Request reactivated successfully	Message indicating that the selected request was reactivated.

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MARC Updates Implemented in Polaris 6.2

The updates specified in the following MARC notices were implemented in Polaris 6.2:

- MARC 21 Update No. 25 - December 18, 2017
- MARC 21 Update No. 26 - April 27, 2018
- MARC 21 Technical Notice - May 25, 2018
- MARC 21 Technical Notice - June 15, 2018
- MARC 21 Technical Notice - July 27, 2018
- MARC 21 Technical Notice - August 31, 2018
- MARC 21 Technical Notice - September 21, 2018
- MARC 21 Technical Notice - October 12, 2018

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RBdigital eContent Integration

This development was described in *What's New in Polaris and Leap 6.1*, but the integration was in beta release during Polaris 6.1 general availability. It is now available to all Polaris customers.

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Sharing cloudLibrary eContent with cloudLink

This development was described in *What's New in Polaris and Leap 6.1*, but the integration was in beta release during Polaris 6.1 general availability. It is now available to all Polaris customers.

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Integrating Polaris PowerPAC and EBSCO Discovery Service (EDS)

Library administrators can integrate the EBSCO Discovery Service (EDS) database with Polaris to provide a unified search results set in Polaris PowerPAC. EDS integration allows patrons to search and access EBSCO's extensive collection of content by initiating a search in Polaris PowerPAC.

Before enabling this feature, your library must subscribe to EDS. You can purchase a subscription to EDS from Innovative Interfaces or by contacting EBSCO directly. Contact your Innovative Interfaces representative for more information.

The following sections provide more information about enabling, configuring, and using EDS:

- Enabling EDS Searching in Polaris PowerPAC
- Configuring Remote Database Usage Settings for EDS
- Configuring Quick Search Buttons
- Using EDS in Polaris PowerPAC

Enabling EDS Searching in Polaris PowerPAC

> **Note:** To complete this workflow, you must know the unique profile name associated with your library's EDS subscription.

To enable EDS searching in Polaris PowerPAC:

1. Register a remote resource server for EDS. See the section "Registering Remote Resource Services" in the Polaris user documentation for detailed instructions.
2. Define a search server connection for the EDS server record. When defining the EDS search server connection, be sure to do the following:
    a. On the **Provider** tab of the **Search Server Properties** dialog box, select the **EDS** search provider.

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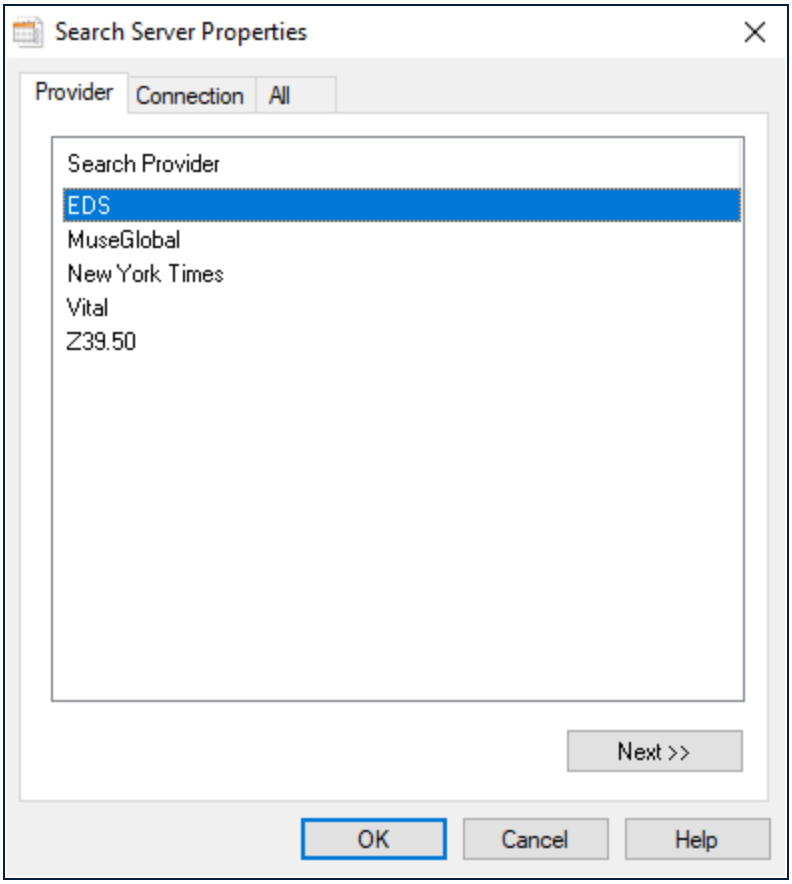

b. On the **All** tab of the **Search Server Properties** dialog box, enter your library's unique EDS profile name in the **Profile** field.
c. Select **OK** to save the server connection.

3. Add the EDS server as a remote search target on the **Remote databases: Categorization of target databases** dialog box. See the section "Remote Databases: Categorization of Target Databases Dialog Box" in the Polaris user documentation for detailed instructions.

Configuring Remote Database Usage Settings for EDS

The **Remote Databases: Usage Settings** profile in Polaris Administration contains two settings that only appear when the server Search Provider for the remote database is set to "EDS" on the Provider tab of the Search Server Properties dialog box. Your library can use these settings to specify the initial load size and time limit that apply when merging EDS and PowerPAC search results.

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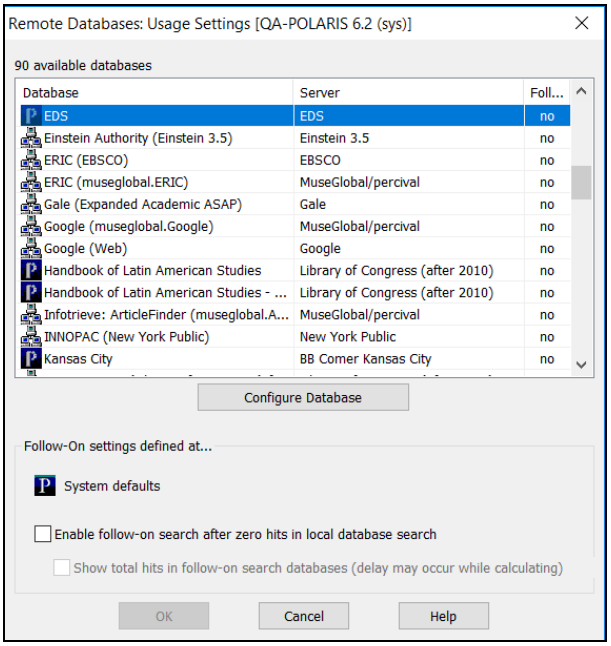
Note: As with other remote databases you configure as search targets, the EDS database configuration makes use of the authentication settings found on the Authentication tab of the Configure: EDS dialog box. You may want to enable the "No login required" settings on the Restrictions sub-tab so that patrons are not prevented from searching EDS resources because they are not logged on to Polaris PowerPAC.

To configure the initial load size and time limit for merging EDS and PowerPAC search results:

1. In the Administration Explorer, select **Profiles** | **PowerPAC** | **Remote databases: Usage settings** | **Setup**.

   The **Remote Databases: Usage Settings** dialog box appears.



2. Select **EDS** from the list of available databases.
3. Select **Configure Database**.

   The **Configure: EDS** dialog box appears.

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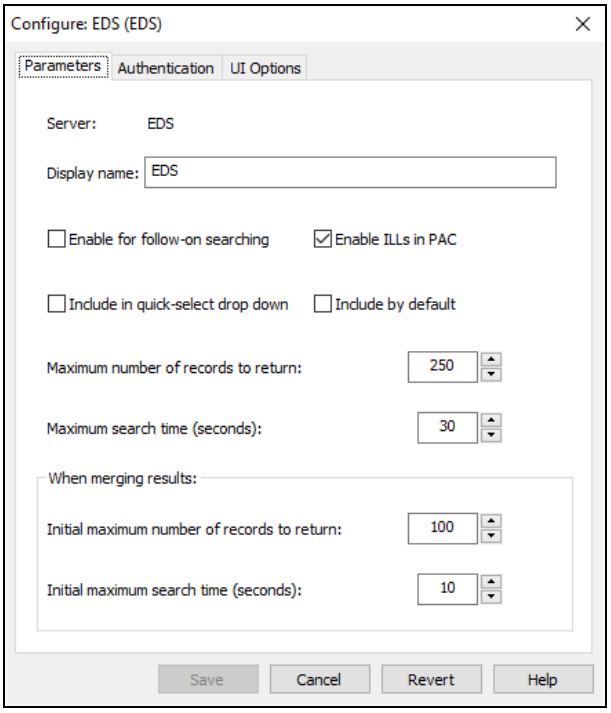

4. In the **Display name** box, enter the name that you want to be displayed for this server in the Polaris user interface.

   > **Note:** The **Display name** you specify appears in the list of facets in Polaris PowerPAC and also appears on the **Remote databases: Categorization of target databases** dialog box.

5. In the **Initial maximum number of records to return** box, enter a number or use the arrow buttons to select a number between 1 and 99,999. This setting specifies the maximum number of records that the system returns when a patron performs an initial search of the EDS database in the PowerPAC. (The default value for this setting is 100.)

   > **Note:** EBSCO may impose a limit on the initial maximum number of records returned that is lower than the limit you specify here.

6. In the **Initial maximum search time (seconds)** box, enter a number or use the arrow buttons to select a number between 1 and 300. This setting specifies the maximum number of seconds for which the system attempts to perform an EDS search before timing out. (The default value for this setting is 10 seconds.)
7. Select **Save** to save your usage settings.

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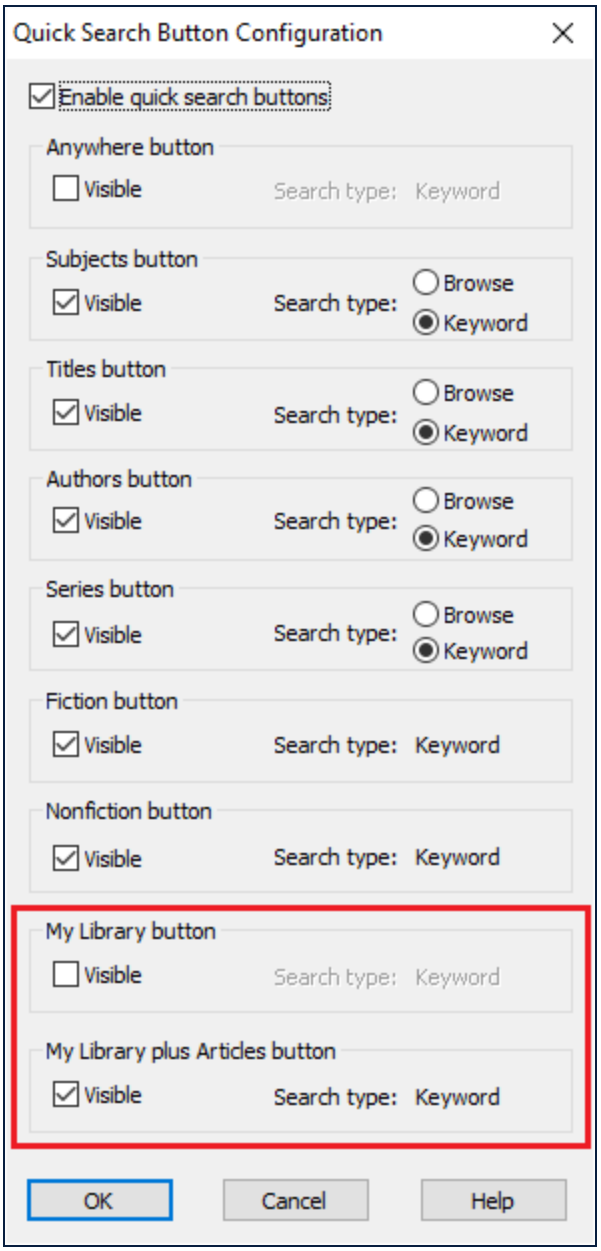
Configuring Quick Search Buttons

Two new quick search button settings are now available on the Quick Search Button Configuration dialog window in the Administration Explorer.

> **Note:** To access this dialog box, select **Profiles | PowerPAC | Quick search button configuration** in the Administration Explorer.



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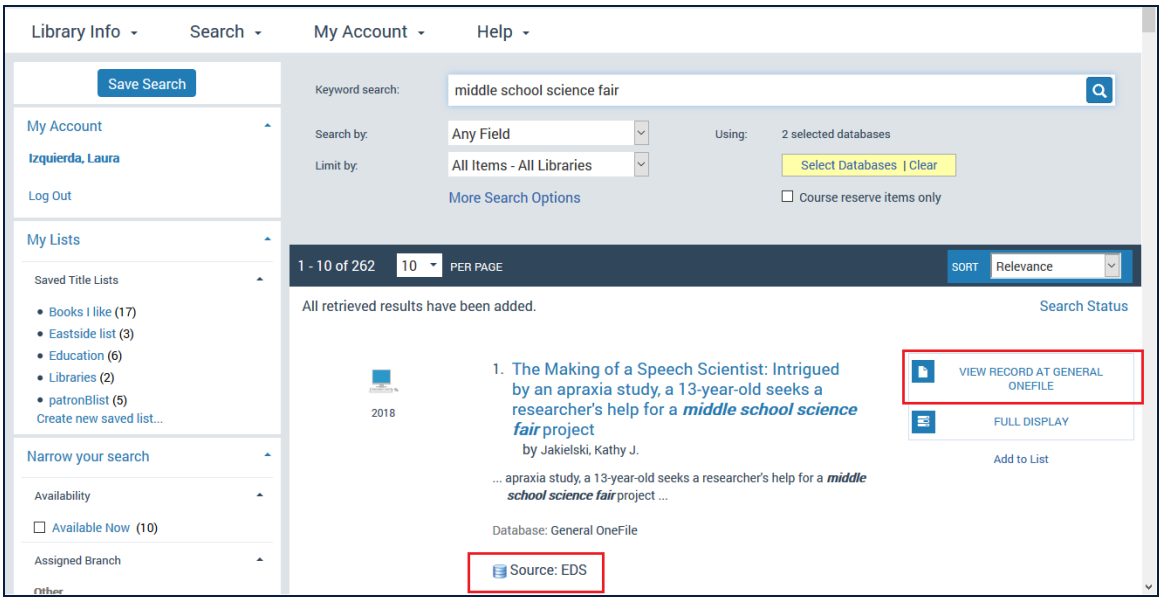
Enabling the My Library button allows PowerPAC users to execute a keyword search that searches only the Polaris system.

Enabling the My Library plus Articles button allows PowerPAC users to execute a keyword search that searches the Polaris system plus EDS resources.

Using EDS in Polaris PowerPAC

When EDS is enabled, patrons can access EDS resources via keyword search when the EDS database is selected.



Note: Patrons must be signed in to access some EDS resources. If a search returns EDS resources and the patron is not signed in, the PowerPAC user interface prompts the patron to sign in to view search results or access resources.

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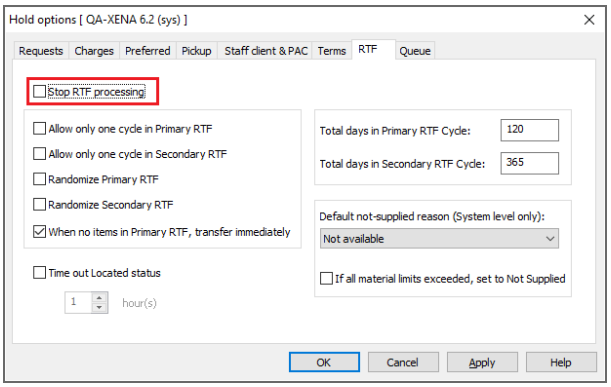
Improvements to INN-Reach Integration

Stop RTF Processing Setting Applies to INN-Reach Requests

The **Stop RTF processing** administrative setting, found on the **Hold options** dialog box, now applies to INN-Reach requests.



When RTF processing is stopped, ILL requests submitted via INN-Reach are not processed.

Automatic Population of the Barcode Field on the Brief Item Entry Dialog Box

When you receive an INN-Reach request, the system now automatically populates the Barcode field on the Brief Item Entry dialog box with the item barcode from the INN-Reach API message.

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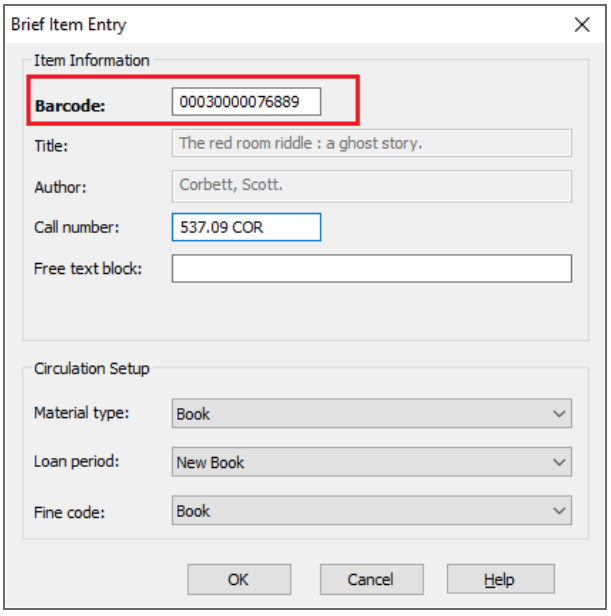

This reduces the likelihood of accidentally receiving the wrong ILL item to satisfy an INN-Reach request.

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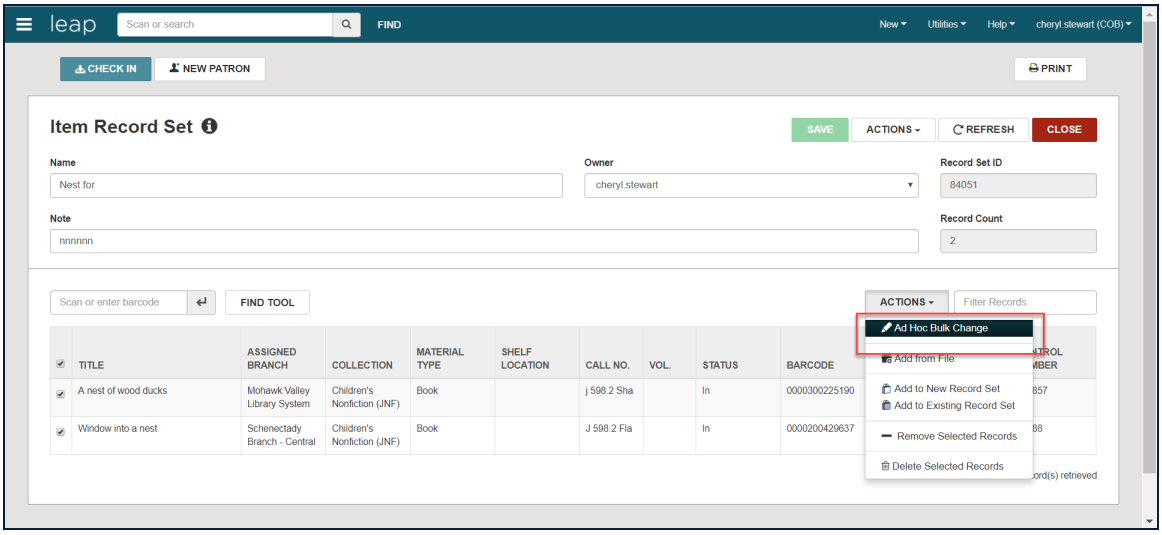
Ad Hoc Bulk Change Item Records

A new Ad Hoc Bulk Change option is available under **Actions** in the **Item Record Set** workform.

Changes can now be made to a selection of rows in an item record set rather than to the whole record set.



Note:
This option is enabled only when at least one item is selected in the item workform.

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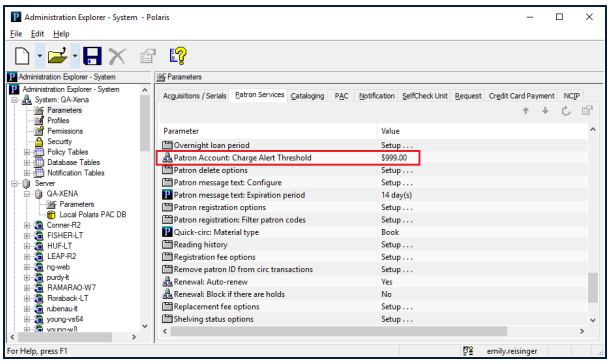
Configuring the Charge Alert Threshold

A new **Patron Account: Charge Alert Threshold** parameter is available in the Administration Explorer under **Parameters** | **Patron Services**. This parameter lets you define a charge alert threshold value at the System, Library, or Branch level.



The system displays a warning message if a staff member adds a charge to a patron account that exceeds the charge alert threshold. The charge alert threshold applies to charges added via the Polaris staff client and charges added in Leap. By default, the **Patron Account: Charge Alert Threshold** parameter is set to $999.00.

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Support for the OverDrive Magazine Format

In addition to supporting OverDrive e-books and audiobooks, Polaris now supports the new Magazine format for OverDrive e-content. When an OverDrive magazine is imported, Polaris creates a bibliographic record with a Type of Material code of Emagazine (Leader position 07 value of "s", 008 tag position 21 value of "p", and 008 tag position 23 value of "o").

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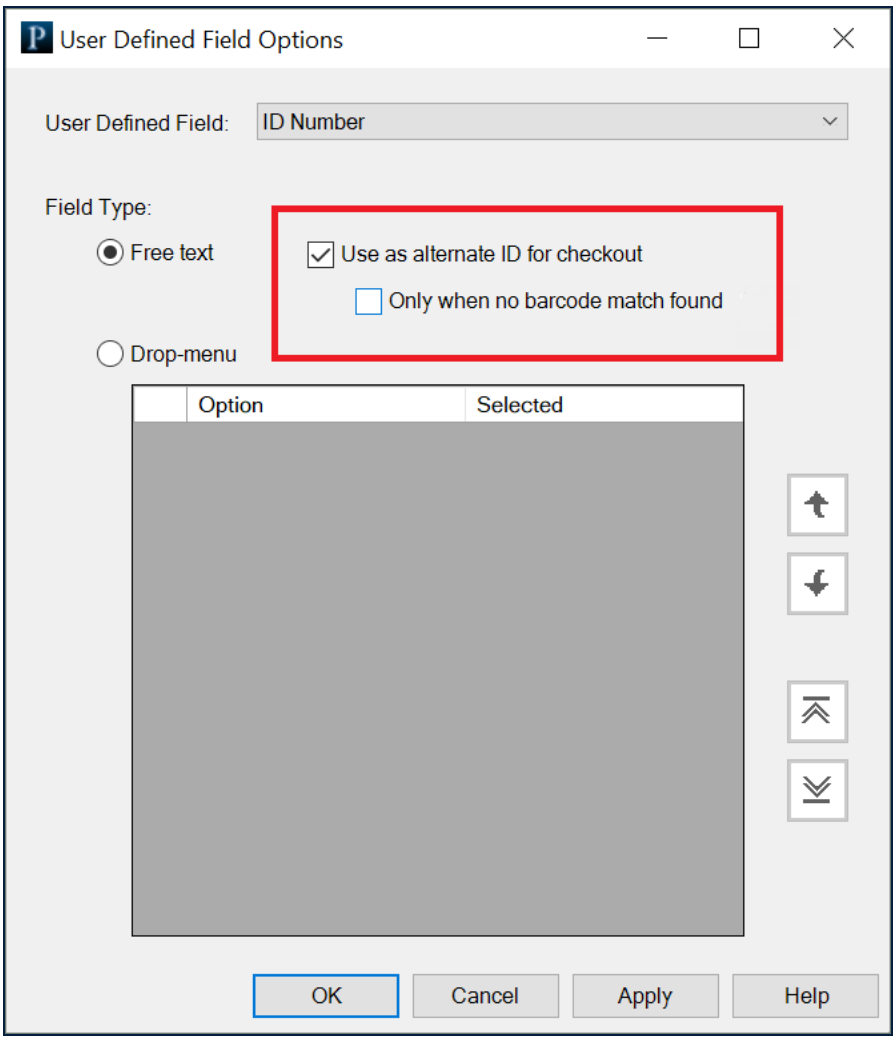
Checking Out Items with Alternate IDs

Free text UDF fields can now be configured as alternate IDs for checking out patron items in the Polaris staff client or in Leap.

Two new options are now available on the User-Defined Field Options dialog box under Patron Services in Administration Explorer.



Select the **Use as alternate ID for checkout** check box to indicate that the free text field can be used as an alternate ID for patron item check outs.

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Select the **Only when no barcode match found** check box if you want the patron search to happen only when no matching barcode is found. This check box is only enabled when the **Use as alternate ID for checkout** check box is checked.

If your library system has enabled this feature, you can check out items by entering an alternate ID in the **Patron barcode** box on the Check Out workform or by entering an alternate ID in the quick search box in Leap.

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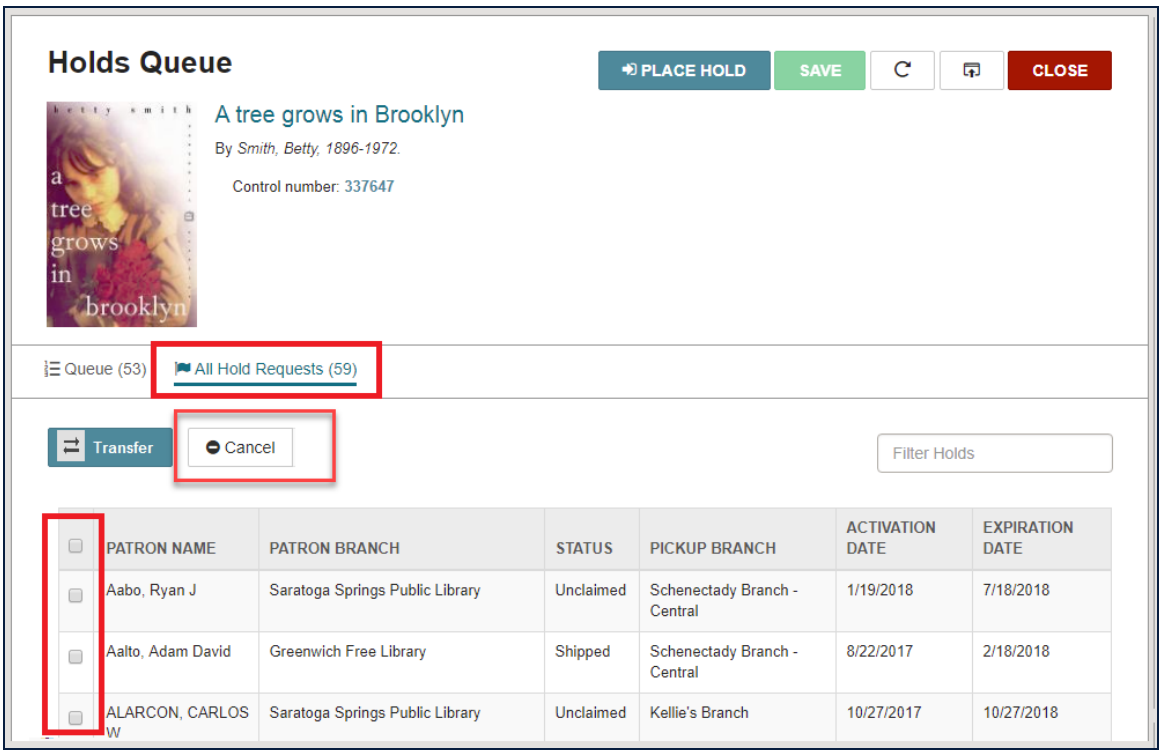
Canceling Multiple Requests in Leap

You can now quickly cancel multiple requests on a particular title without having to open each request.

The **Cancel** action has been added to the **Holds Queue / All Hold Requests** view action bar, to the right of **Transfer**.



To cancel multiple hold requests placed on the same title:

1. Open the Holds Queue workform.
2. Click the **All Hold Requests** tab to view all the hold requests.
3. Select the hold requests to cancel.
4. Select **Cancel**.

> **Note:**
> The Cancel button is active only when all the selected hold requests have a status of: Inactive, Active, Pending, Located, or Not Supplied.

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Transferring Hold Requests in Leap

You can now transfer single or multiple hold requests from one bibliographic or item record to another bibliographic or item record.

When you transfer hold requests, the updated requests maintain the original pickup branch, activation date, expiration date, notes, patron information, and history.

The request history is updated with a history action row of **Request transferred to a new bibliographic record** or **Request transferred to a new item record**. The request also goes through the Request to Fill (RTF) process (if active).

In addition, a **6058 Hold request transferred** transaction is logged with the following subtypes:

- 6 PatronID
- 36 BibliographicRecordID
- 38 ItemRecordID
- 123 Patrons Assigned Branch ID
- 130 Pickup Location
- 233 HoldRequestID
- 235 Subsystem Type
- 274 Borrow by mail request

To transfer multiple hold requests: open the **Holds Queue** workform and search for the holds that you want to transfer. Select **All Hold Requests**, select the holds, and then select **Transfer**.

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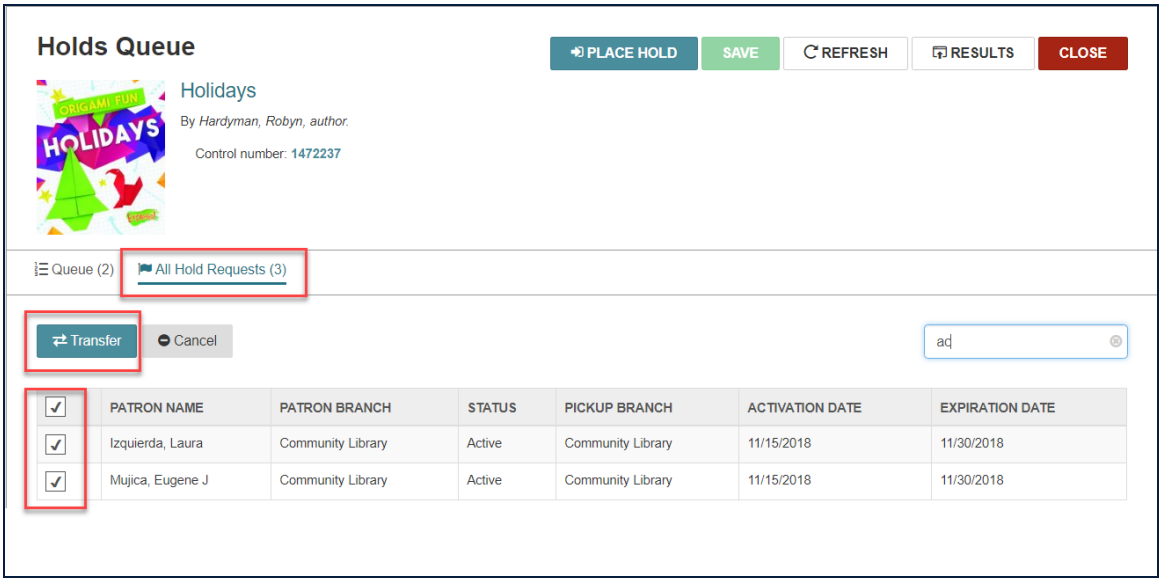
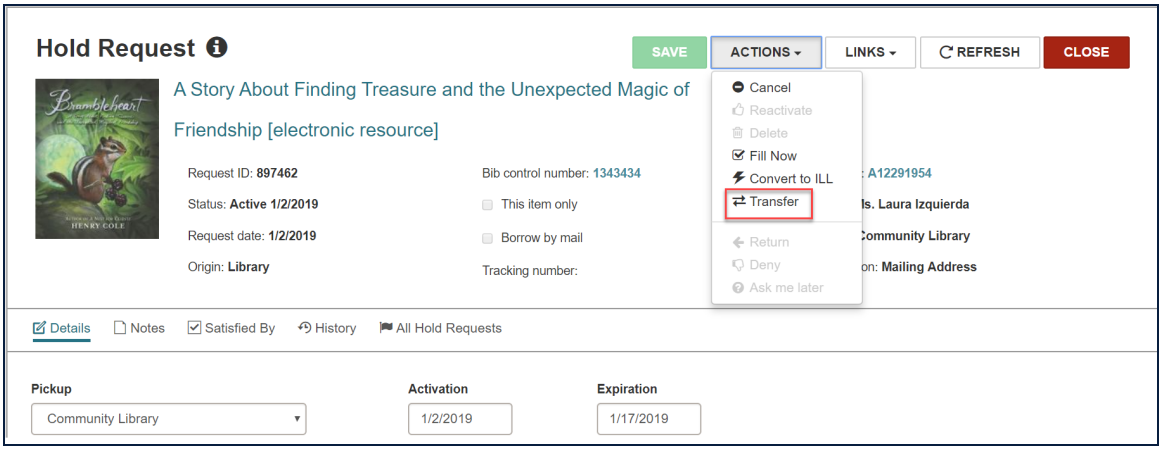


To transfer a single hold request: open the **Hold Request** workform and select **Transfer**.



Note:

- You must have the permission **Hold request: Modify** to transfer hold requests.
- You can transfer holds that have a status of **Active** or **Inactive**.

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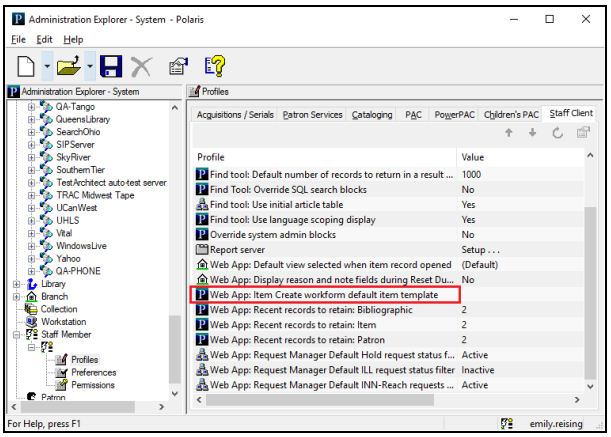
Specifying the Default Template for Item Creation in Leap

You can now specify the default item template that is used for item creation in Leap. You can configure the default item template either via the Administration Explorer or by editing user default settings in Leap.

Specifying the Default Item Template in the Administration Explorer

A new **Web App: Item Create Workform default item template** profile is available in the Administration Explorer under **Profiles** | **Staff Client**. This profile specifies the default item template that is used when the Leap user creates a new item record. The profile is available at both the Workstation and the Staff level.



By default, no item template is selected. To specify a default item template, select a template from the drop-down list.

When the user creates a new item record in Leap, the default item template is automatically selected in the Item Template list.

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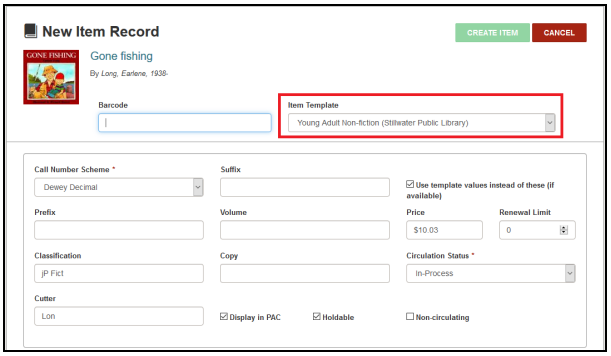
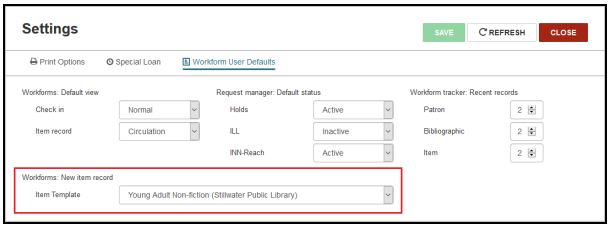


Specifying the Default Item Template in the Leap User Default Settings

A new **Workforms: New item record** setting is now available on the Workform User Details tab of the Settings page.



By default, no item template is selected. To specify a default item template, select a template from the Item Template list.

> **Note:** If you select a default item template, your choice applies even if you sign out of Leap and sign in again.

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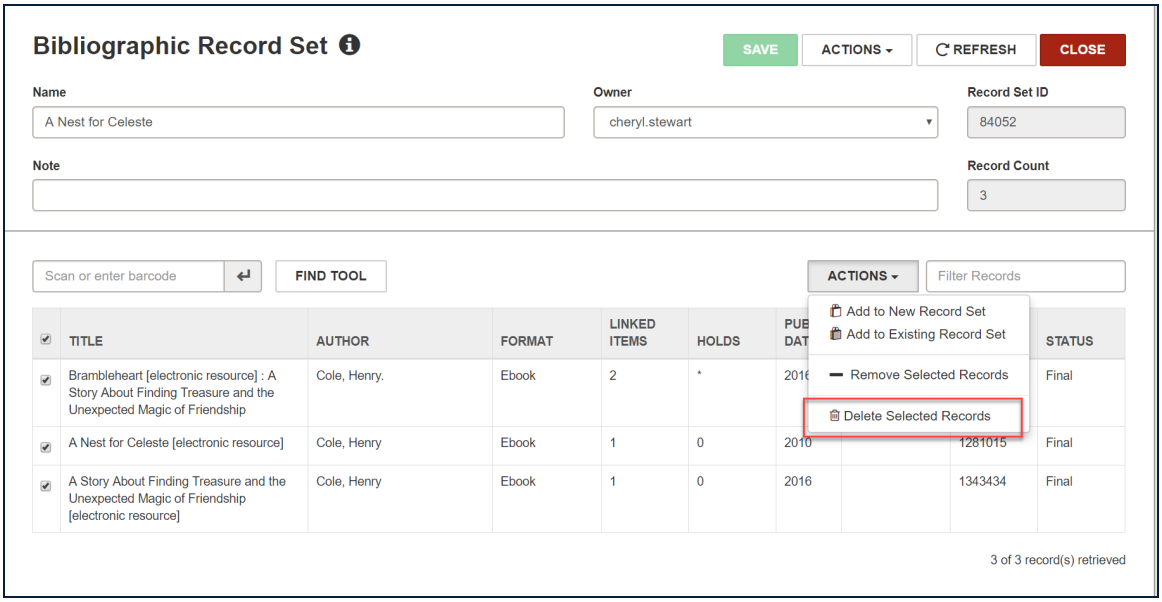
Deleting Multiple Records from a Record Set

You can now delete multiple records from a record set.

A **Delete Selected Records** option now appears under the **Actions** button on the **Record Set** workform.



This option is available for the following record set types:

- Patron
- Authority
- Bib
- Item

> **Note:**
> This option is enabled only when at least one record is selected in the Record Set workform.

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Display Improvements in Polaris PowerPAC

Improvements to Reduce Horizontal Scrolling

The PowerPAC user interface has been improved to reduce the need for horizontal scrolling. This change makes it easier for users to navigate Polaris PowerPAC using mobile devices.

Book Cover Images Appear on Patron Account Pages

Book cover images now appear on the following patron account pages in Polaris PowerPAC:

- Items Out
- Fines & Fees
- Requests
- Claimed and Lost
- Reading History

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Improved URL Format for the PowerPAC Full Display Page

The URL format for the full display page has been updated to include the control number associated with the title.

This improvement makes it possible for users to bookmark the URL for a title's full display page and return to it later. It also makes it possible for users to copy and paste a full display page URL and successfully load the page in a new browser window.

The new format of the full display page URL is:

/search/title.aspx?pos=4&cn=3729873 (for local database titles)

/search/title.aspx?pos=4&cn=987987&db=231 (for remote databases)

> **Note:** While links to some remote databases (including Z39.50 targets) will work as described above, links to other remote databases (including Vital or EDS databases) will return an empty search page. This is because the control numbers associated with Vital and EDS titles are unique to the context of the current search.

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Pasting the Patron Password on the Login Page

Patrons logging in to their account via the PAC can now paste text into the **Password** field. This makes it easier for patrons to paste long or complex passwords from a password manager.

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