



What's New in Polaris and Leap

6.5

© 2020

Legal Notices

© Innovative Interfaces Incorporated and/or its affiliates. All rights reserved. All trademarks shown are the property of their respective owners.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

The software and related documentation are provided under an agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of the software, unless required by law for interoperability, is prohibited.

Contents

Preferred Name	4
Hold Options: Permit Cancellation of Holds that Have Status of Shipped	6
Outreach Services	7
State Not Required for International Addresses	8
MARC Updates Implemented in Polaris 6.5	9
Combine Phone and Text Notices into a Single File for Export to i-tiva	10
PowerPAC Themes Table	11
Polaris API Changes	12

Preferred Name

If a patron has a preferred name that's different from the patron's legal name, you can include both the preferred name and legal name in the patron record. You can search for either the patron's preferred name or legal name and designate the use of the legal name for print and phone notices. If you provide both preferred and legal names, Polaris uses the Name on Identification section for collection agency reporting.

The following image shows the Name on Identification section on Polaris.

The screenshot shows the 'New Patron Registration 3 - Addresses' window in Polaris. The 'Name on Identification' section is highlighted with a red border. It contains the following fields and options:

- Registered at:** Galway Public Library (GAL)
- Patron code:** Regular
- Expiration:** Term: 3 years, Date: 3/11/2023
- Name on Identification:**
 - Last name: []
 - First name: []
 - Middle name: []
 - Use for print / phone notices
- Addresses, Phone Numbers:** A table with columns: Type, Street One, Street Two, Street Three, City, State, Postal Code, County, Country.
- Address Check:** Term: 1 years, Date: 3/11/2021. Buttons: Add..., Edit..., Remove, Mailing Label.
- Notices address:** (None)
- Notification option:** Email Address
- Additional TXT notice
- eReceipt option:** (None)
- Phone 1:** 518- [] [] [] TXT
- Phone 2:** [] [] []
- Phone 3:** [] [] []
- FAX number:** [] [] []
- Email address:** [] [] [] []
- Alt Email address:** [] [] [] []

The following image shows the Name on Identification section on Leap.

The screenshot shows the 'Patron Registration 1' form in the Leap system. The form is divided into several sections. On the left is a sidebar with navigation icons for Profile, Attributes, Email, Address, Phone/Fax, Notifications, Preferences, Password, and Image. The main form area is titled 'Patron Registration 1' and contains the following fields:

- Barcode *
- Former Barcode
- Last Name *
- First Name *
- Middle Name
- Title
- Suffix
- Registered At *
- Patron Code *
- Date of Registration
- Expiration Date *
- Birth Date
- Statistical Class
- Gender

A red box highlights the 'Name on Identification' section, which includes:

- Name on Identification
- Last Name
- First Name
- Middle Name

Below these fields is a checkbox: Use Name on Identification for Print and Telephone Notices. To the right of the form are 'SAVE' and 'CANCEL' buttons.

Name on Identification fields are available to library staff and patrons who register themselves. The Name on Identification name fields are available on the following products:

- Polaris Staff Client
- Leap
- PowerPAC
- MobilePAC
- Polaris API
- SimplyReports

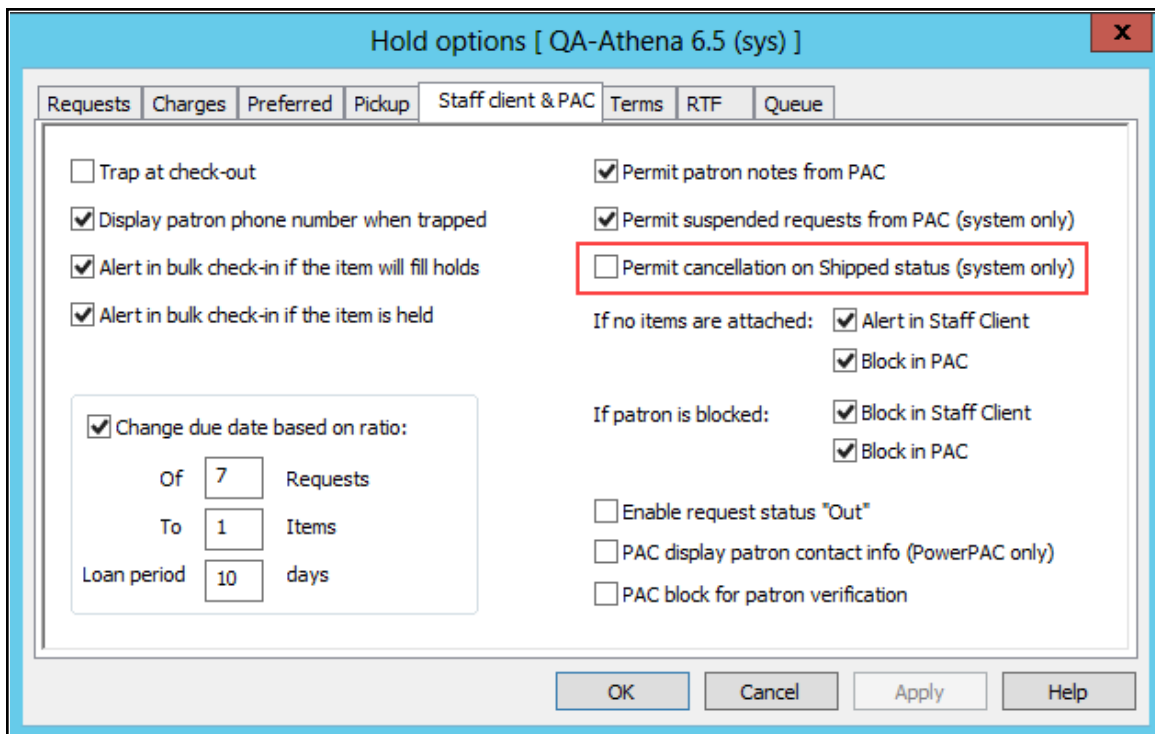
Hold Options: Permit Cancellation of Holds that Have Status of Shipped

A new system administration setting has been added to the Hold options > Staff client and PAC tab, called "Permit cancellation on Shipped status (system only)." This setting controls whether patrons and staff can cancel hold requests that have the status of Shipped in the PAC, MPAC, PAPI, staff client, MyLibrary, ExpressCheck, and Leap. This can reduce the time spent managing unclaimed holds.

This is a system-level setting. It is visible at the branch level, but it can only be changed at the system level.

This option is disabled by default.

The following image shows the option to permit cancellation of holds that have the status Shipped.



Requests that are canceled while in a shipped status are either routed to the appropriate branch, or trapped to fill another patron hold upon check-in. Also, a row is added to the item record history to indicate the request was canceled.

Outreach Services

The Outreach Services Manager is now accessible in Leap.

The Outreach Services Manager header in Leap automatically updates the display as the criteria are changed. If you manually add patrons or items and then make changes to the search options or refresh, you will see a warning that the patrons or items will be lost.

You can do the following:

- Identify patrons by the following criteria:
 - Branch name
 - Status
 - Delivery Routes
 - Delivery Modes
 - Date of Next Delivery
- Print a pick list.
- View picklists for multiple patrons.
- Update the last service date for multiple patrons.
- View combined picklists for multiple patrons.
- Add selected patrons to a new or existing patron record set.
- Add selected items to a new or existing item record set.
- Check out items from a patron's picklist.
- Temporarily add items to a combined pick list to streamline bulk actions.
- Temporarily remove items from a combined pick list to streamline bulk actions.
- Place bulk holds for outreach patrons.
- Bulk check out items for outreach patrons.
- Add existing held items to a combined pick list and check out all items at once.
- Print individual receipts for multiple patrons when performing a bulk checkout.
- Print a packing list to collect reviews of items when performing a bulk checkout.

State Not Required for International Addresses

A new setting in the Polaris staff client and Leap allow addresses to be entered, edited, and displayed without a state.

A new column, StateRequired, has been added to the Countries table in the database. If StateRequired is set to No in the database, the following is true:

- Library staff and patrons can add and edit patron, organization, and supplier addresses without a state.
- Library staff can print mailing labels with no extra line for the state in the address.
- Reports, notices, and receipts properly display addresses with no state.

A new System Administration profile allows library staff to suppress the display of the state column in the Find Tool results and workform table views for patron addresses.

- Display State in address: patron

This profile setting applies to both the staff client and Leap.

MARC Updates Implemented in Polaris 6.5

The updates specified in the [MARC Format Documentation for Updates 27-29](#) and the [MARC Technical Notices for February 8, 2019 - December 12, 2019](#) were implemented in Polaris 6.5.

Combine Phone and Text Notices into a Single File for Export to i-tiva

You can now combine phone and text notices into a single file to export to i-tiva.

Notification options

General | Overdue & Bill | Hold Request & Cancellation | Fine | Reminder | Serial

Notification method

- Print
 - Export
 - Available in PAC
- E-mail
 - Available in PAC
- Phone
 - Export
 - Available in PAC
- TXT Message
 - Export
 - Include with phone
 - Available in PAC

[Languages...](#)

E-mail notice

From: "QA-POLARIS" <kristen.link@iii.com>
Reply-to: "QA-POLARIS" <kristen.link@iii.com>
E-mail address to use: Use both E-mail and Alt t
 Send report for e-mail notice processing

Export

Print

FTP Server URI: ftp://ftp.polarislibrary.com
Logon name: phelps@ftpsecure.polarislibr
Password:

Phone

FTP Server URI: ftp://ftp.polarislibrary.com
Logon name: Polarisexec@ftpsecure.pola
Password:

Txt Message

FTP Server URI: ftp://ftp.polarislibrary.com
Logon name: Polarisexec@ftpsecure.pola
Password:

Save a local copy

Save Cancel Apply Help

PowerPAC Themes Table

A new database table called PowerPAC Themes is now available in System Administration to customize PowerPAC. It can be used to add new custom themes, modify the descriptions of existing themes, and delete custom themes.

Polaris API Changes

The table below is a list of changes to the Polaris API for v6.5.

Method Name	Purpose
PatronBasicDataGet and PatronRegistrationCreate	Supports the use of a patron's legal name. The legal name fields LegalNameFirst, LegalNameMiddle, LegalNameLast, and UseLegalNameOnNotices have been added to PatronBasicDataGet and PatronRegistrationCreate. PatronBasicDataGet also includes the new field LegalFullName.
PatronBasicDataGet, PatronRegistrationCreate, and PatronRegistrationUpdate	The state address field can now be undefined, if a country does not require a state definition. This requires "StateRequired" to be set to no in the System Administration "Countries" table.
HoldRequestCancel	Shipped holds can now be canceled with the status of "1 inactive", "2 active", and "4 pending". If enabled by the library, hold requests with a status of "5 shipped" can also be canceled.