polaris

What's New in Polaris and Leap

6.6

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Contents

Polaris Installation Notes

Important:
When the new Polaris release is installed on a workstation, the file path changes from 6.5 to 6.6 as in the following examples:
C:\ProgramData\Polaris\6.6
C:\Program Files\Polaris\6.6
C:\Program Files (x86)\Polaris\6.6

New and Modified Polaris Administrative Settings

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

Setting	Purpose	Level
New Profiles		
PowerPAC: Cookie acceptance: Enable	Determines whether PowerPAC displays a message that informs patrons that the site uses cookies and prompts them to agree to the use of cookies.	System
PowerPAC: Cookie acceptance: External workstation retention period	Determines how frequently the cookie policy message appears for external patrons.	System
New Parameters		
Patron Services: Duplication detection options: Name on Identification (First and Last)	Library administration staff now have the option to enable the Name on Identification (First and Last) patron services administration parameter for Staff Client and Leap, PAC, Offline, or any combination of the three. When enabled, this new parameter adds Name on Identification to the duplicate detection criteria for patron records.	System, Library and Branch
Modified Permissions		
Access reports and notices	In previous versions, this permission determined whether users could access the Polaris Reports window in the staff client. As of version 6.6, the permission also determines whether users can access the Print Notices feature in Leap.	System, Library, Branch, and User
Modified Profiles		

Setting	Purpose	Level
Staff Client: Report Server Setup: Override default Report Server authentication	In previous versions, this profile specified optional credentials used to authenticate a user to the report server for access to reports in the staff client. As of version 6.6, the setting also specifies the credentials required for a user to generate and print notices in Leap.	System, Library, Branch, and User
PowerPAC: Patron inactivity timeout	In previous versions, this setting specified the period of time that could elapse before PowerPAC automatically signed an inactive patron out. As of version 6.6, the setting also determines how frequently PowerPAC displays the cookie policy message for in-house patrons.	System, Library, and Branch

Polaris API Changes

The table below is a list of changes to the Polaris API for v6.6.

Method Name	Purpose
PatronRegistrationCreate	Method has been updated so that if "PSPARMDUPDETLEGALPAC" (Patron > Name on ID > PAC) is configured in Polaris System Administration Parameters, then Polaris compares Name on ID for duplicate detection. If there is a possible duplicate in the database, the following error appears: "Duplicate patron name on identification is specified."
BibKeywordSearch	Documentation has been updated to be more complete and accurate.

For more information, see the **Polaris API Reference for v6.6**.

Duplicate Detection for Name on Identification

If a patron has a preferred name that is different from the name on their identification, you can include both the preferred name and name on ID in the patron record. Library administration staff have the option to enable the **Name on Identification (First and Last)** patron services administration parameter for Staff Client and Leap, PAC, Offline, or any combination of the three.
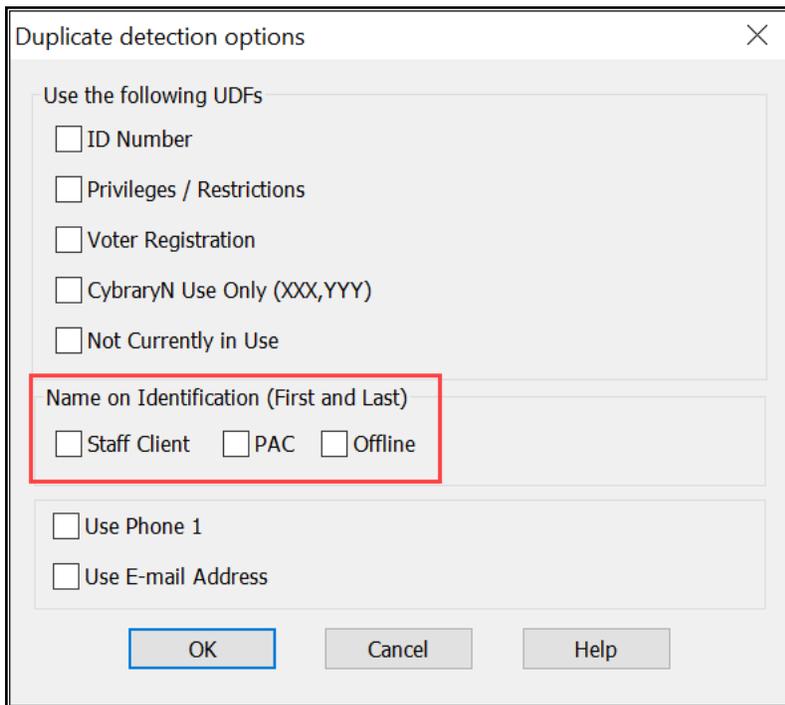
When enabled, this new parameter adds Name on Identification to the duplicate detection criteria for patron records. When detecting possible duplicate patrons, the system continues to check for duplicates using barcode, patron name (first and last), and birth date.

If the barcode, patron name and birth date, or Name on Identification match, the patron records are also flagged as duplicates.

If the application finds a suspected duplicate patron record, the following happens:

- **Staff Client/Leap**: A dialog box appears listing the possible duplicates. You can choose to continue creating the patron record, or cancel and change one of the fields used in duplicate detection. After you create a duplicate, you can merge the

duplicate records. See "Merge Patron Records" in the Leap online help.

- **PAC** (**PowerPAC**, **MPAC**, and **PAPI**): The record creation fails with a library-configurable error.
- **Offline**: Duplicates are listed in a report when patron records are uploaded. Library staff can use the report to cancel the record upload or merge the duplicates.

Serials Check In

Leap now offers the ability to check in serials, check in parts of standing orders, and predict the next group of serial issues or parts.
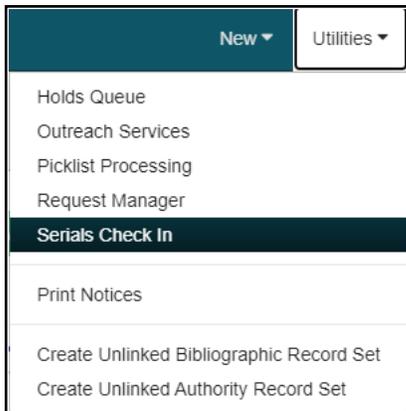
For the permissions needed to check in serials and standing order parts, search the Polaris online help for "Serials Workflow Permissions."

You can check in any issue or part that has a status other than Received, such as:

- Expected
- Pending Claim
- Claimed
- Not Available
- Never Published

To check in issues or parts

1. Go to **Utilities** > **Serials Check In**.

   The serials Find Tool opens.
2. In the Find Tool, type the title of a serial.
3. Select a result, and select **Open**. The Serials Check In workform opens.
4. From the Serials Check In workform, you can do any of the following:
   a. Check In Serials or Parts
   b. Undo a Check In
   c. Predict the Next Group of Serials
   d. Delete Future Issues or Parts

Check In Serials or Parts

To check in serials or parts

1. In the Serials Check In workform, select an issue or part that has a status other than Received.

2. Select **Check in**.

3. Depending on the settings in the staff client, you might see one or a number of the following prompts:

   - **Scan Barcode**: If the Serial Holdings Publication Pattern in the staff client is set to **Prompt for Barcode**, the Create Item for Issue/Part dialog box appears with the **Barcode** field empty. Scan or type the barcode and select **Continue**.

   - **Modify Price**: If the Serial Holdings Publication Pattern in the staff client is set to **Prompt for Barcode**, and the Unit Price is zero, then the Create Item for Issue/Part dialog box appears with the **Barcode** field empty. Scan or type the barcode and select **Continue**.

   - **Template error**: If the Serial Holdings Publication Pattern in the staff client is set to **Generate items at check-in**, but there is not a template associated with serials for your branch, you'll see the Item Template error. When you select **OK** in the error, the check in is canceled and no item record is generated.

   - **Print route slip**: If the option is available, the Print Route Slip dialog box appears. Select **Yes** to see the Print dialog box. Select **Cancel** to continue the check in without printing the route slip.

4. For subscription parts, proceed to the next step.
   For serials, a message displays saying the check in is complete. Proceed to the last step.

5. For subscription parts, the Create Part Bibliographic Record dialog box opens. Enter text in the required fields and select **Continue**.

6. The Create Part Bibliographic Record dialog box opens. Enter text in the required fields and select **Continue**.

7. When the check in is complete, the issue or part status changes to Received. Overnight processes update changes to the compressed holdings in PAC.
   If you made an error, you can undo the check in.

Undo a Check In

To undo a check in

1. In the Serials Check In workform, select an issue or part that has a status of Received.

2. Select **Undo Check In**.

The Status of the selected item returns to the non-received status it had before it was checked in.

Predict the Next Group of Issues or Parts

To predict the next group of issues or parts

1. In the Serials Check In workform, go to the **Actions** menu and select **Predict Issues/Parts**.

2. If there is more than one publication pattern, then the Publication Pattern Dialog box opens. Select the publication pattern you want to use to predict future issues.

3. Select **Continue**. A number of issue or part records are added according to the publication pattern you selected. You can edit the publication pattern and the number predicted in the staff client. Search Polaris online help for "Create Publication Pattern - Pattern Options Window" for more information.

Delete Future Issues or Parts

To delete future issues or parts

1. In the Serials Check In workform, select an issue or part.

2. Select **Delete**.

> **Note:**
> You might see one or a number of dialog boxes. Examples include the following:
> - If you delete a part or issue that has a defined retention period in the serial holdings record, the Issue/Part is Retained dialog box appears.
> - If you delete a part or issue that is linked to another record, such as a route list or bibliographic record, additional dialog boxes appear.

Generating and Printing Notices in Leap

You can now generate and print the following types of notices in Leap:

- Overdue and billing notices
- Hold notices
- Fine notices
- Combined notices
- Patron billing statements

> **Note:**
>
> To generate or print notices in Leap:
>
> - Your user account must have the **Access reports and notices: Allow** permission. For more information, see "Granting Permissions" in the Polaris Administration help.
> - The **Override default Report Server authentication** setting must be enabled and properly configured on the Report Server Setup window in Polaris Administration. For more information, see "Specify a Server for Reporting Services" in the Polaris Administration help.

Generating and Printing Overdue, Billing, Hold, Fine, or Combined Notices

To generate and print overdue, billing, hold, fine, or combined notices

1. Select **Utilities** > **Print Notices**.

   The Notices workform appears.

Note:

Mailers in various formats for combined notices are listed individually on the Notices workform. Overdue notices, billing notices, and patron billing statements are in the **Overdues** folder.

2. Do one of the following:

- To print fine notices, select **Fines**.
- To print hold notices, select **Holds**.
- To print overdue notices or billing notices, select **Overdues**.
- To print combined notices, select one of the combined notice formats:
  - Combined Notice Full Page Mail
  - Combined Notice Half Page Mail
  - Combined Notice Z Fold Mailer

  If you selected **Fines**, **Holds**, or **Overdues**, the appropriate notices appear.

  If you selected a combined notice format, the Report Wizard appears. Skip to step 4.

3. Select a notice format:

- Full Page Mailer - 8.5 x 11 inches
- Half Page Mailer - 9 x 5.5 inches, suitable for commonly available half-page mailer stock
- Post Card - 6 x 4 inches
- Z Fold Mailer - 8.5 x 11 inches, folds so addresses are exposed in window envelope
- Z Fold Mailer Oversized - 8.5 x 14 inches, folds so addresses are exposed in window envelope

> **Note:**
> The following notice formats are designed to be inserted in a standard #10 window envelope: Full Page Mailer, Z Fold Mailer, and Z Fold Mailer Oversized.

The Report Wizard appears.

4. On the **Parameters** tab, select the organization(s) for which you want to generate

notices.

5. Select **Sorting Options**.

The **Sorting Options** tab appears.

Report Wizard - Billing Z Fold Mailer   ✕

Parameters   Sorting Options

Sorting options:
☐ CybraryN Use Only (XXX,YYY)
☐ ID Number
☐ Library return address
☐ Not Currently in Use
☐ Patron address city
☐ Patron address zip
☐ Privileges / Restrictions
☐ Voter Registration

➡
⬅

Selected:
☐ Reporting branch name
☐ Patron last name

CANCEL   SUBMIT REPORT

6. (Optional) Select one or more options from the **Sorting options** list, and select the right arrow button.

The sorting options are moved to the **Selected** list, indicating that they will be used for sorting notices.

The **Selected** list must contain at least one sorting option. If you select more than one sorting option, the option at the top of the **Selected** list is the primary sort criterion, the second option in the list is the secondary sort criterion, and so on.

> **Note:**
> **Reporting branch name** appears in the **Selected** list by default. If your library or system does not do central notice processing, you might want to use this default setting and select additional sorting fields, as needed. If you do central processing, you might want to remove **Reporting branch name** from the **Selected** list and instead select a more useful primary sort for mailing (for example, **Patron address zip**).

7. Select **Submit Report**.

   Leap generates notices and displays them in a preview window. This might take a few moments. A **Post Notice** message also appears.

8. Review the notices in the preview window.

   > **Note:**
   > If you see problems or decide not to print the notices, close the preview window.

9. To print notices, select the printer icon on the preview window. You can also print the notices after posting them to the database (see the next step for more information).

   > **Tip:**
   > You can print a limited range of pages to test the notices. Note that by design, title and author information is limited to 100 characters on all notices.

10. On the **Post Notice** message, do one of the following:

    - Select **Yes** to post notices to the database.

      > **Important:**
      > When you select **Yes**, notices are posted (recorded) in the

> database as issued, and the appropriate queue is cleared for the notice type and organization.

- Select **No** to proceed without posting notices to the database.

Generating and Printing Patron Billing Statements for Organizations

To generate and print patron billing statements for one or more organizations

1. Select **Utilities** > **Print Notices**.

   The Notices workform appears.

2. Select **Overdues**.

   The available overdue notices, billing notices, and patron billing statements appear.

3. Select **Patron Billing Statement by Organizations**.

   The Report Wizard appears.

4. Select the organization(s) for which you want to print billing statements.

5. Billing statements are generated for patrons with outstanding charges that fall between a minimum amount and a maximum amount that you specify.

   - In the **Minimum amount** box, enter the minimum outstanding charges amount.

   - In the **Maximum amount** box, enter the maximum outstanding charges amount.

6. Select **Submit Report**.

   Leap generates patron billing statements and displays them in a preview window. This might take a few moments.

7. Review the statements in the preview window.

> **Note:**
> If you see problems or decide not to print the statements, close the preview window.

8. Select the printer icon to print the patron billing statements.

Generating and Printing Patron Billing Statements for Specific Patrons

To generate and print patron billing statements for specific patrons

1. Select **Utilities** > **Print Notices**.

   The Notices workform appears.

Notices		⟳ **CLOSE**

QA-POLARIS > Notices   [Filter]
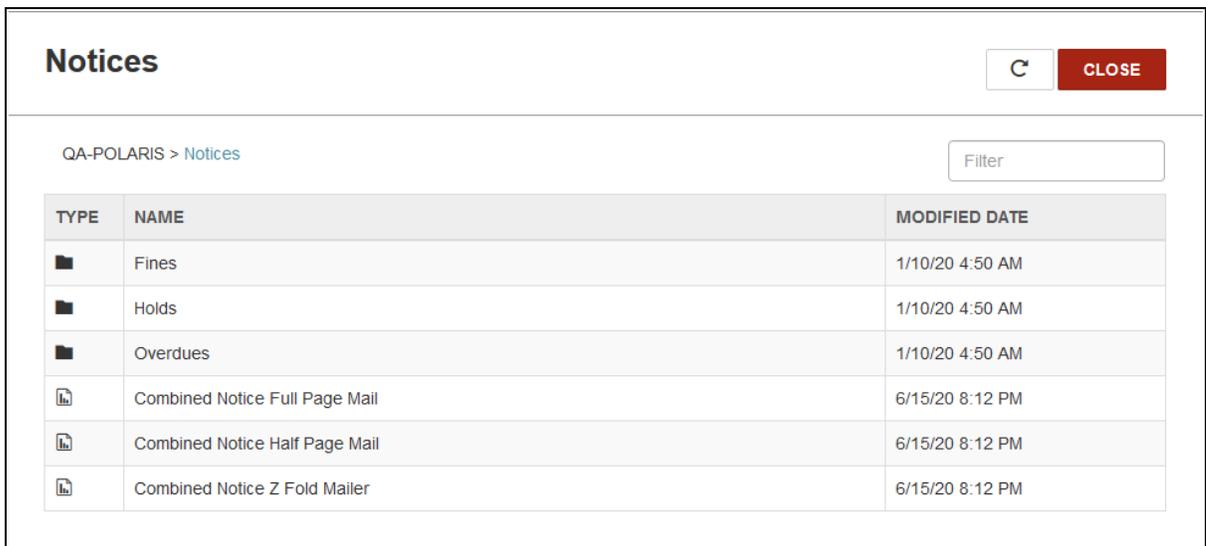
TYPE	NAME	MODIFIED DATE
📁	Fines	1/10/20 4:50 AM
📁	Holds	1/10/20 4:50 AM
📁	Overdues	1/10/20 4:50 AM
📄	Combined Notice Full Page Mail	6/15/20 8:12 PM
📄	Combined Notice Half Page Mail	6/15/20 8:12 PM
📄	Combined Notice Z Fold Mailer	6/15/20 8:12 PM

2. Select **Overdues**.

   The available overdue notices, billing notices, and patron billing statements appear.

3. Select **Patron Billing Statement by Patron Barcode**.

   The Report Wizard appears.

Report Wizard - Patron Billing Statement by Patron Barcode ✕

Parameters

Patron Barcodes:

CANCEL   SUBMIT REPORT

4. In the **Patron Barcodes** box, enter the patron barcode(s). You can type or scan patron barcodes.

> **Note:**
>
> - Separate multiple barcodes with commas.
> - You can enter a maximum of 255 characters in the **Patron Barcodes** field.
> - Leap does not validate the barcodes you enter in the Report Wizard. If you enter an incorrect barcode, a billing statement for that patron is not generated.

5. Select **Submit Report**.

Leap generates patron billing statements and displays them in a preview window. This might take a few moments.

6. Review the statements in the preview window.

> **Note:**
> If you see problems or decide not to print the statements, close the preview window.

7. Select the printer icon to print the patron billing statements.

View or Print Recently Generated Notices

When you generate notices in Leap, a copy of the notice file remains temporarily available. For each notice type, the most recently generated notice file remains available. Files are cleared after 24 hours. You can view or print recently generated notices.

> **Note:**
>
> To display recently generated notices, Leap uses the credentials specified in the **Override default Report Server authentication** setting. Leap uses credentials from the lowest organizational level defined (for example, system, library, branch, or staff user).
>
> If you want the **Recent** tab to display only recently generated notices for your branch, your library must configure unique credentials for your branch using this setting.
>
> For more information about the **Override default Report Server authentication** setting, see "Specify a Server for Reporting Services" in the Polaris Administration help. Contact your Site Manager if you have questions about how to configure this setting for your library's needs.

To view or print recently generated notices

1. Select **Utilities** > **Print Notices**.

   The Notices workform appears.

2. Select **Recent**.

   Leap displays the recently generated notice files.

   > **Note:**
   > Leap displays the most recently generated notice file for each notice type. For example, if you generated overdue notices twice during the past 24 hours, only the most recent copy of the notice file is available.

Notices

⟳   **CLOSE**

✉ Notices   ⏱ Recent

NAME	DATE
Billing Full Page Mailer_pdf	7/14/20 2:58 PM
Overdues Full Page Mailer_pdf	7/14/20 2:32 PM

3. Click on the notice file you want to view or print.

   The notice file opens in a preview window.

4. To print notices, select the printer icon.

Leap Default Quote Text Updated

The quotes displayed on the Leap home page have been updated to include more diverse sources.

Your library can customize default text using the Language Editor in the Web Admin Tool. The updated default language strings are as follows:

- SW_CI_RANDOM_QUOTE1 = "If there's a book that you want to read, but it hasn't been written yet, then you must write it."
- SW_CI_RANDOM_AUTH1 = "Toni Morrison"
- SW_CI_RANDOM_QUOTE2 = "A word after a word after a word is power."
- SW_CI_RANDOM_AUTH2 = "Margaret Atwood"
- SW_CI_RANDOM_QUOTE3 = "If you only read the books that everyone else is reading, you can only think what everyone else is thinking."
- SW_CI_RANDOM_AUTH3 = "Haruki Murikami"
- SW_CI_RANDOM_QUOTE4 = "To build up a library is to create a life. It's never just a random collection of books."
- SW_CI_RANDOM_AUTH4 = "Carlos María Domínguez"
- SW_CI_RANDOM_QUOTE5 = "When we read we are able to travel to many places, meet many people and understand the world."
- SW_CI_RANDOM_AUTH5 = "Nelson Mandela"
- SW_CI_RANDOM_QUOTE6 = "A book is a dream you can hold in your hand."
- SW_CI_RANDOM_AUTH6 = "Neil Gaiman"

International Date and Time

The Polaris product suite has been updated to expand support for different locales and improve handling of different date formats. Polaris products continue to use the server's configuration to determine the date and time format to display. For instance, servers configured for Canada use the date and time format most common in Canada.
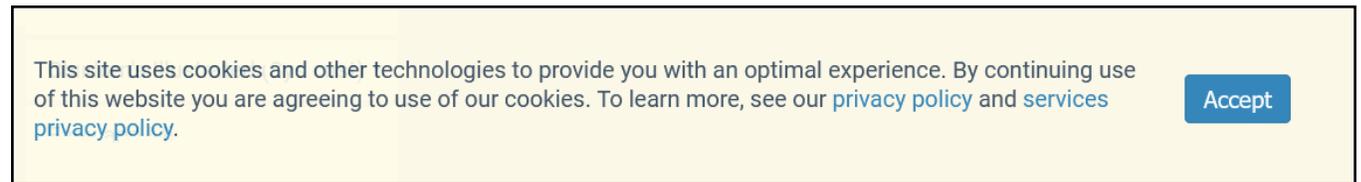
This update provides the following advantages:

- increases consistency in date and time display across Polaris products
- improves date validation in Leap
- adds a new date picker in PAC, Web Admin, and SimplyReports

Prompting PowerPAC Users to Accept Cookies

You can now configure PowerPAC to display a message that informs patrons that the site uses cookies and prompts them to agree to the use of cookies.

When you enable this feature, the following message appears at the bottom of each PowerPAC screen. The message formatting matches your PowerPAC theme.

This site uses cookies and other technologies to provide you with an optimal experience. By continuing use of this website you are agreeing to use of our cookies. To learn more, see our privacy policy and services privacy policy.

Accept

When a patron clicks **Accept**, the message disappears.

By default, the cookie policy message is not enabled.

To enable and manage the cookie policy message:

- Enabling the Cookie Policy Message
- Customizing the Cookie Policy Message Text
- Configuring How Frequently the Cookie Policy Message Appears

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Enabling the Cookie Policy Message

You can enable or disable the appearance of the cookie policy message at the system level.

To enable the cookie policy message

1. In the Administration Explorer, select **System** > **Profiles** > **PowerPAC**.

2. On the PowerPAC tab, set the **Cookie acceptance: Enable** profile to **Yes**.
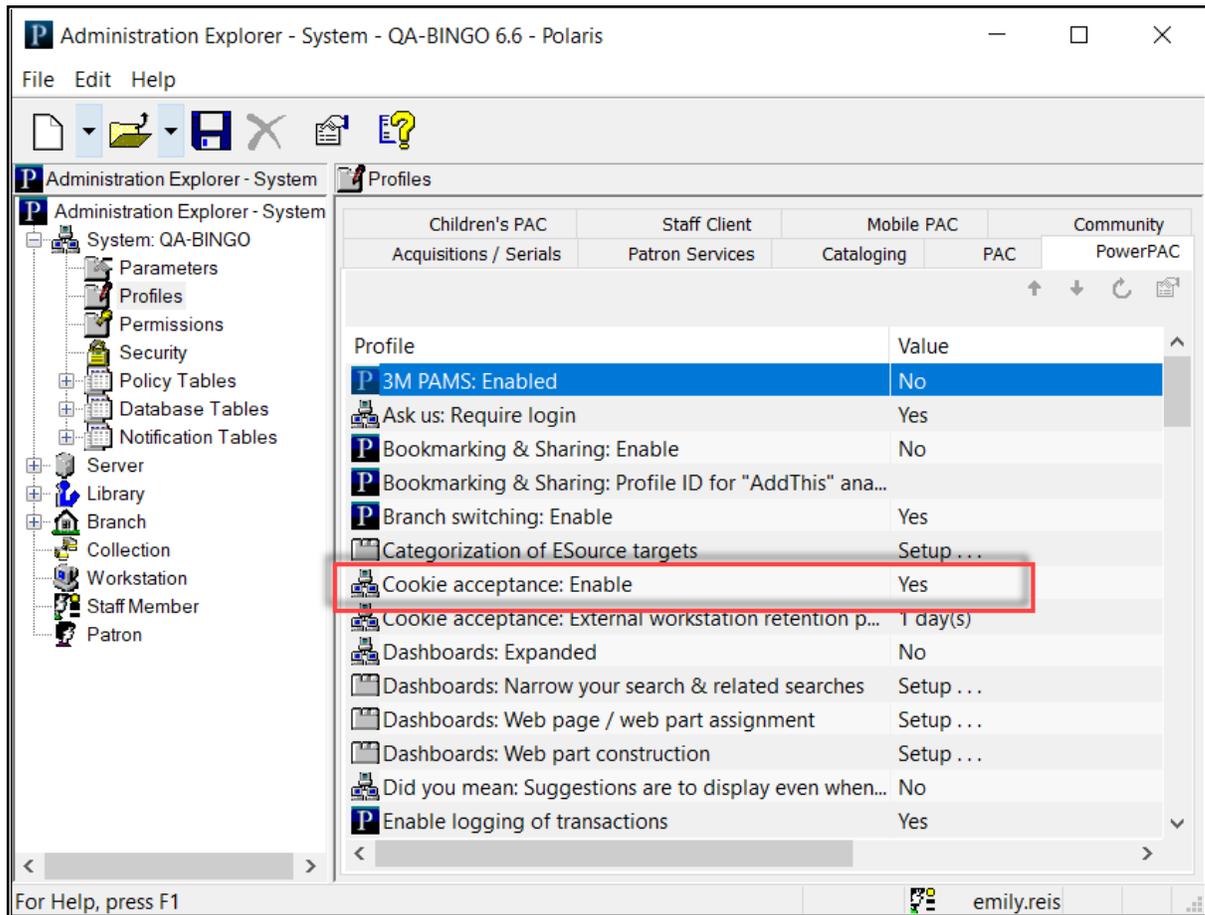
Customizing the Cookie Policy Message Text

Two new strings in the Polaris Web Admin Tool allow you to customize the cookie policy message:

- PACML_PRIVACY_POLICY - Cookie policy message text
- PACPROF_COOKIE_ACCEPT_BUTTON - Accept button label

By default, the cookie policy message includes links to Innovative's privacy policy and services privacy policy. You can edit the message to include links to your library's policies.

Configuring How Frequently the Cookie Policy Message Appears

When a patron clicks **Accept**, the cookie policy message disappears and does not reappear for a configurable period of time. You can configure different "cookie acceptance" periods for different types of users:

- In-house patrons (patrons accessing PowerPAC at public workstations in the library)
- External patrons (patrons accessing PowerPAC from home)

For In-house Patrons

For in-house patrons, PowerPAC uses the existing **PowerPAC: Patron inactivity timeout** profile setting to determine when to display the cookie policy message.

When an in-house patron clicks **Accept**, the cookie policy message disappears and does not reappear until one of the following conditions causes it to reappear:

If the patron is	And	The following occurs
Signed in	Signs out of Power-PAC	The cookie policy message appears.
Signed in	Leaves the workstation without signing out	The cookie policy message appears when the **Patron inactivity timeout** period elapses. If this profile is not enabled in Polaris Administration, the cookie policy message appears when the session timeout period elapses.
Not signed in	Leaves the workstation	The cookie policy message appears when the session timeout period elapses.

Notes:

- For more information about the **Patron inactivity timeout** profile setting, see "Set inactivity timeout for in-house workstations" in the Polaris ILS help.

- PowerPAC's default session timeout period is 20 minutes. Contact Innovative Support to change the timeout period.

For External Patrons

For external patrons, PowerPAC uses the new system-level **PowerPAC: Cookie acceptance: External workstation retention period** profile setting to determine when to display the cookie policy message.

To configure how frequently the cookie policy message appears for external patrons

1. In the Administration Explorer, select **System** > **Profiles** > **PowerPAC**.

2. On the PowerPAC tab, double-click the value beside the **Cookie acceptance: External workstation retention period** profile.
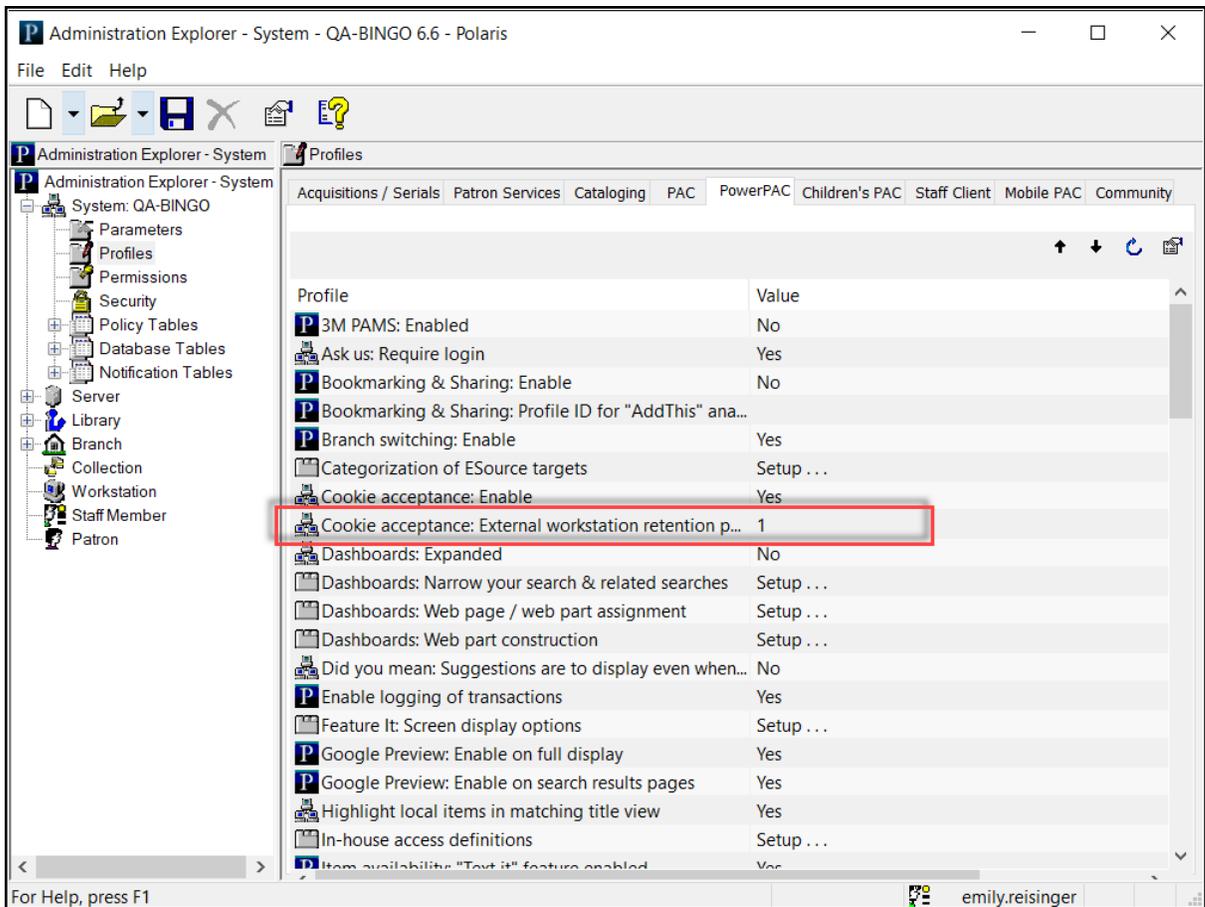
3. Enter a value in days.

When an external patron accepts the cookie policy, the message disappears and does not reappear until the specified **External workstation retention period** elapses. By default, this profile is set to 365 days.

> **Note:**
> The cookie policy message reappears before the **External workstation retention period** elapses if the patron clears their browser cache and cookies.

New Variable in Postal Codes

Polaris postal code validation now supports a single character to represent a number or a letter in postal codes. In the countries table, you can use "A" in the postal code format field to represent an alphanumeric character. For detailed information on configuring postal codes, search "Add a Postal Code Format" in the Staff Client help.

My Lists Now under My Account in PowerPAC

In PowerPAC, the **My Lists** option in the navigation menu in both the header and footer has moved from **Search** to **My Account**.

My Account ▾
My Record
Items Out
Requests
Fines & Fees
Saved Searches
My Lists
Log In / Register

MARC Technical Updates in Polaris 6.6

The updates specified in the following links were implemented in Polaris 6.6.

- [MARC Technical Notice January 17, 2020](#)
- [MARC Technical Notice February 21, 2020](#)
- [MARC Technical Notice March 13, 2020](#)

Changes to Supported Web Browsers

Firefox

As of version 6.6, Polaris products include beta-level support for Firefox.

Internet Explorer

Polaris products no longer support Internet Explorer. We recommend that you use the Edge browser instead.

Web Admin Tool Updates

The tables below lists the most important new strings added in Polaris 6.6.

PowerPAC Strings

Mnemonic String	Text
PACML_PRIVACY_POLICY	This site uses cookies and other technologies to provide you with an optimal experience. By continuing use of this website you are agreeing to use of our cookies. To learn more, see our [privacy policy](#) and [services privacy policy](#).
PACPROF_COOKIE_ACCEPT_BUTTON	Accept