polaris

What's New in Polaris and Leap

7.4

innovative
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Legal Notices

Contents

Polaris Installation Notes

Important:
When the new Polaris release is installed on a workstation, the file path changes from 7.3 to 7.4 as in the following examples:

C:\ProgramData\Polaris\7.4
C:\Program Files\Polaris\7.4
C:\Program Files (x86)\Polaris\7.4

New or Modified Polaris Administrative Settings

The system administration settings below have been added or modified to support the new features in Polaris 7.4.

Setting	Purpose	Level
New Parameters		
Patron Services > Patron registration: First name required parameter	Determines whether the first name is required to save a patron record. The default setting is Yes. For details, see Saving Patron Records with a Single Patron Name.	System, Library, Branch
Patron Services > Renewal: Calculate based on due date	Determines how due dates for renewals are calculated. When set to No, the system calculates the due date by adding the loan period to today's date. When set to Yes, the system calculates the due date by adding the loan period to the due date. The default setting is No. For details, see Configuring How Polaris Calculates Due Dates for Renewals.	System
Leap > Web App: Enable device camera scanning	Determines whether you can use the camera on a device to scan patron and item QR codes in Leap. The default setting is No. For details, see Enabling QR Code Scanning in Leap.	Workstation
Request > Web App: Enable combined picklist view	Specifies whether Leap displays all holds to action in one combined list (Holds to Action) or keeps them in three separate lists (Unclaimed, Holds to Transfer, Cancelled). The holds to action appear in Leap's Picklist workform. The default setting is No. For details, see Combine Picklist Holds Views.	System, Library, Branch

Setting	Purpose	Level
New Profiles		
PowerPAC > Aeon item requests enabled	Determines whether Aeon special collection item requests are enabled for the organization. The default setting is No. For details, see Enabling Aeon Special Collection Requests.	System, Library, Branch
PowerPAC > Aeon OpenURL prefix	Specifies the Aeon URL prefix. Polaris uses this prefix to construct URLs used to submit special collection item requests to Aeon. For details, see Enabling Aeon Special Collection Requests.	System, Library, Branch
Staff Client > Web App: Display patron age in patron info	Specifies whether Leap displays a Patron's age in the Patron Record > information pop-up window. The default setting is No. For details, see Show Patron Age in Leap.	System, Library, Branch
Staff Client > Web App: Suppress Field: Language	Determines whether the Language field appears on the Details view of the Item Record workform in Leap. The default setting is Yes. For details, see New Language Field on the Item Record Workform in Leap.	System
Staff Client > Web App: Suppress Field: Username	Specifies whether Leap hides the Patron's username in the Patron Registration > Profile section. The default setting is Yes. For details, see Show Patron's Username in Leap.	System
New Database Table		
Tax Rates	Stores the tax rate and description of the tax rate for fees. For details, see Charge Goods and Services Taxes.	System

Setting	Purpose	Level
New Policy Table		
Aeon Special Collection Locations	Specifies the shelf locations that are designated as Aeon special collection locations. If an item that is owned by the organization is assigned a shelf location that is an Aeon special collection location, patrons must place a request to view the item in a reading room. For details, see Enabling Aeon Special Collection Requests.	System, Library, Branch
Modified Parameters		
SelfCheck Unit > Polaris SelfCheck: Blocking Conditions	This parameter was renamed. (In previous versions, it was called ExpressCheck: Blocking Conditions.) Starting in version 7.4, it applies to both ExpressCheck and PAPI transactions. Specifies the conditions related to patron records and item records that block circulation at the self-check unit and through PAPI. For details, see Polaris API Now Offers Item Checkout.	System, Library, Branch
Modified Profiles		
PowerPAC > PowerPAC Analytics	Polaris now supports integration with Google Analytics 4. For details, see Integration with Google Analytics 4.	System, Library, Branch
Mobile PAC > Mobile PAC Analytics	Polaris now supports integration with Google Analytics 4. For details, see Integration with Google Analytics 4.	System, Library, Branch
Modified Policy Tables		
Fee Descriptions	A new Tax Rate Supported column specifies whether the fee description	System

Setting	Purpose	Level
	supports a tax rate. The default setting is No. For details, see Charge Goods and Services Taxes.	
Fee Descriptions	A new Default Amount column specifies the default amount for a fee description. The default setting is $0.00. For details, see Add Default Fee Descriptions.	System

Polaris API Changes

The following methods have been added:

Method Name	Purpose
ItemCheckoutPost	The ItemCheckout endpoint allows you to check out an item as a patron. This endpoint automatically tries to renew an item if the specified patron currently has the item checked out. This is consistent with how renewals work in ExpressCheck, Leap, and Polaris staff client.

For more information, see the topic for the method in the PAPI documentation.

Making Bulk Changes to Patron Records

You can now update multiple patron records at once in Leap if you have the **Access patron record bulk change: Allow** permission enabled in Polaris Administration (staff client). For more information about patron record permissions, search for "Circulation and Patron Services Workflow Permissions" in the Polaris staff client help.

This section covers the following topics:

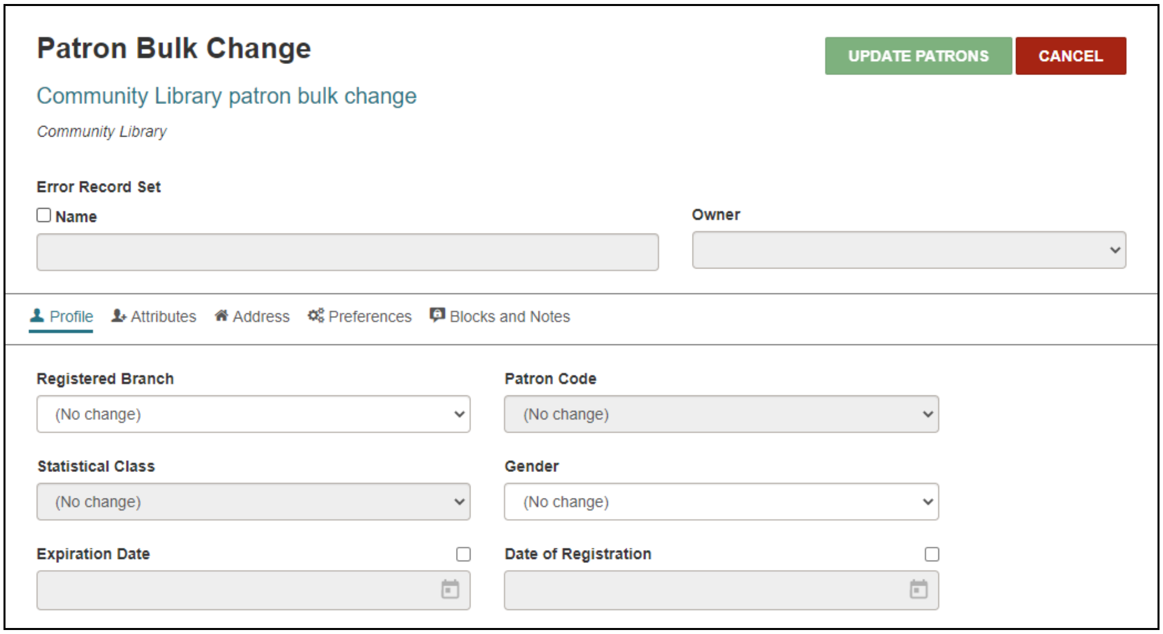
- Patron Record Bulk Change Workflow
- Select Patron Record Fields to Update
- View and Manage Patron Bulk Change Jobs

Patron Record Bulk Change Workflow

To make bulk changes to patron records

1. Create or find the patron record set that contains the records you want to update.
2. Open the record set in the Record Set workform.
3. Select **ACTIONS** > **Bulk Change**.

   The Patron Bulk Change workform appears. The tabs on the Patron Bulk Change workform align with the sections of the Patron Registration workform.



4. If you want to create an error record set, complete the steps below. If Leap cannot update a patron record during the bulk change process because of an error, it places the record in the error record set. You can review the error record set after the bulk change process is complete.

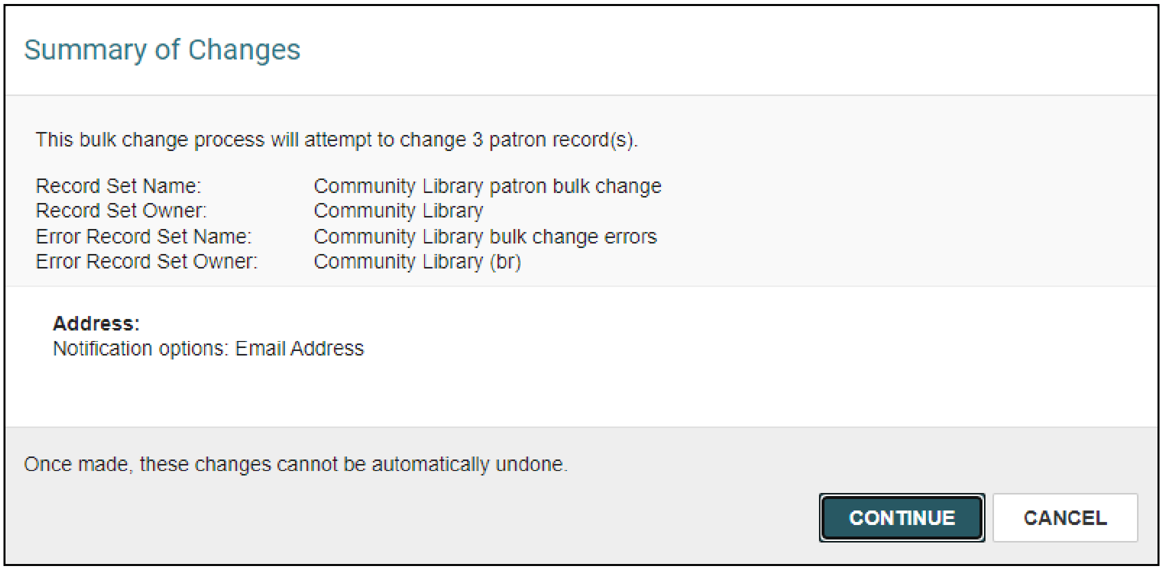
   > **Note:**
   > To create an error record set, you must have either the **Patron record sets: Create** or the **Use 'own' patron record sets: Allow** permission.

   a. Select the **Error Record Set** checkbox.
   b. In the **Name** box, type a name for the error record set.
   c. In the **Owner** list, select an organization or select your name.

      > **Note:**
      > The Owner list contains the organizations for which you have the **Patron record sets: Create** permission. If you have the **Use 'own' patron record sets: Allow** permission, your own name appears in the list.

5. Select patron record fields to update.
6. Select **UPDATE PATRONS**.

A Summary of Changes dialog appears.



7. Review the summary of changes.
8. Select **CONTINUE**.

   Leap schedules the patron record bulk change to be processed and displays a confirmation message. The Polaris Jobs service handles processing the bulk change.

You can view and manage pending and completed patron bulk change jobs on the Background Processing page. For information, see [View and Manage Patron Bulk Change Jobs].

If you chose to create an error record set, you can view it to review errors. Use the Find Tool to search for the error record set name you specified in step 4.

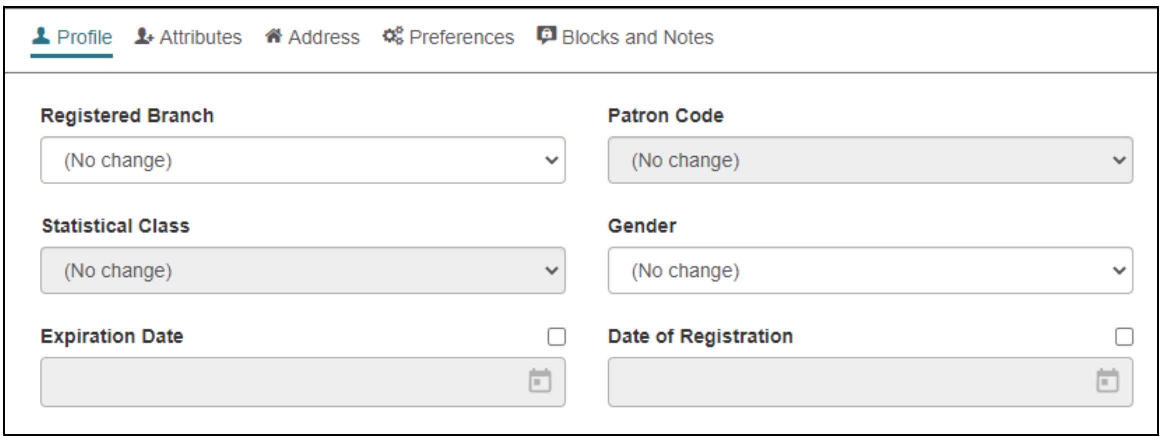
Select Patron Record Fields to Update

> **Note:**
> When you make bulk changes to free-text fields, Leap treats the text as a single unit. The entire text string can be deleted, replaced, or added, but you cannot delete, replace, or add parts of a text string.

To make bulk changes to patron record information, select one or more of the tabs on the Patron Bulk Change workform:

- Profile
- Attributes
- Address
- Preferences
- Blocks and Notes

Update Profile Fields



Make bulk changes to one or more of the following profile fields:

- **Registered Branch**
- **Patron Code**

> **Note:**
> Leap enables the **Patron Code** field when you select a registered branch.

- **Statistical Class**

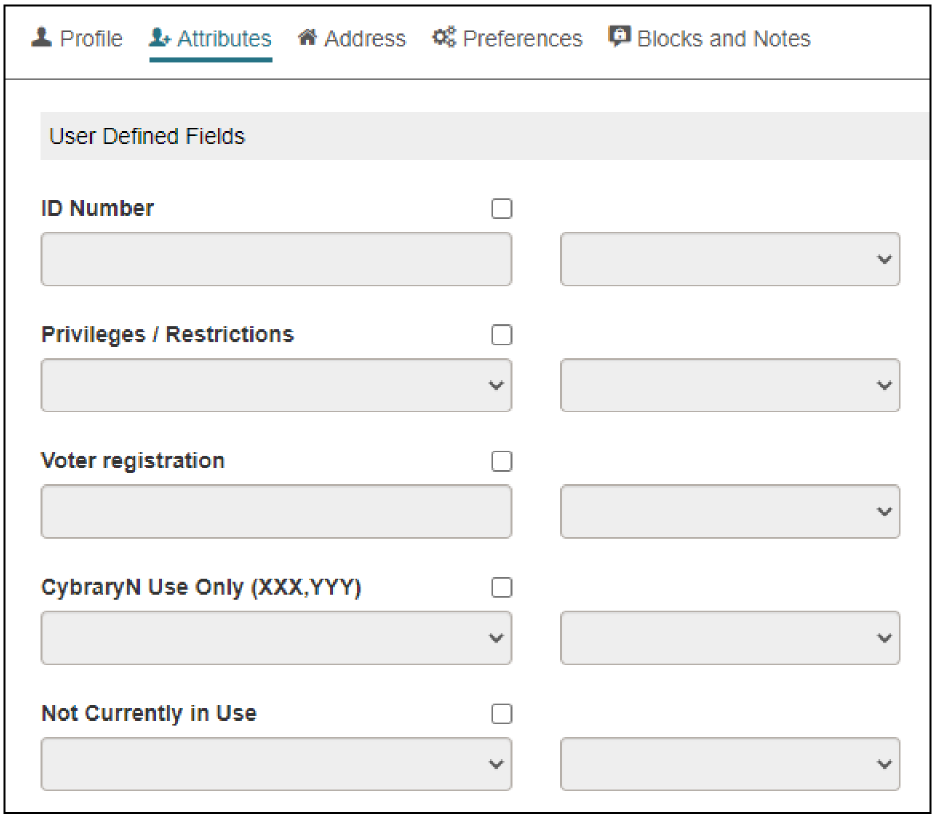
> **Note:**
> Leap enables the **Statistical Class** field when you select a registered branch.

- **Gender**

- **Expiration Date**
- **Date of Registration**

Update Attributes

The Attributes tab lists your library's user-defined fields (UDFs) for patron records.



To make bulk changes to one or more UDFs

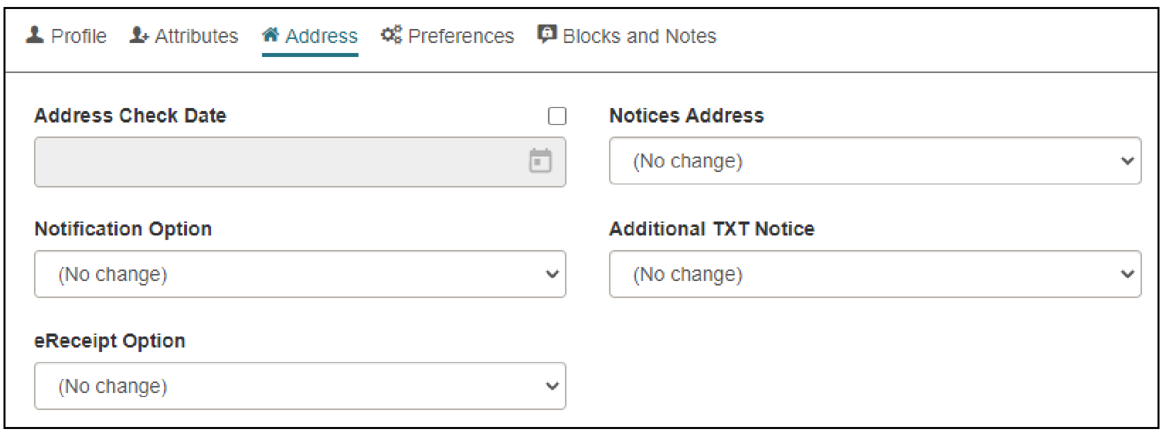
1. Select the checkbox beside the UDF you want to change.
2. In the box below the UDF name, enter text or select an option from the list.
3. In the list to the right of the UDF name, select one of the following options:
    - **Add When Empty** - Adds the value you specified to all records in the record set that do not have a value set for the UDF.
    - **Find and Delete** - Finds the records in the record set with the UDF value you specified and clears the data from the UDF field. Records in the record set that have a different value for this UDF retain their UDF value.

- **Find and Replace** - Finds the records in the record set with the UDF value you specified and replaces the value with the text you enter in the **Change to** box.

> **Note:**
> The **Find and Replace** option is only available for free-text UDFs.

- **Overwrite All** - Adds the value you specified to all records in the record set. If records already have a value set for the UDF, Leap overwrites the existing value with your new one.
- **Clear Field** - Clears data from the UDF field for all records in the record set.

Update Address Fields



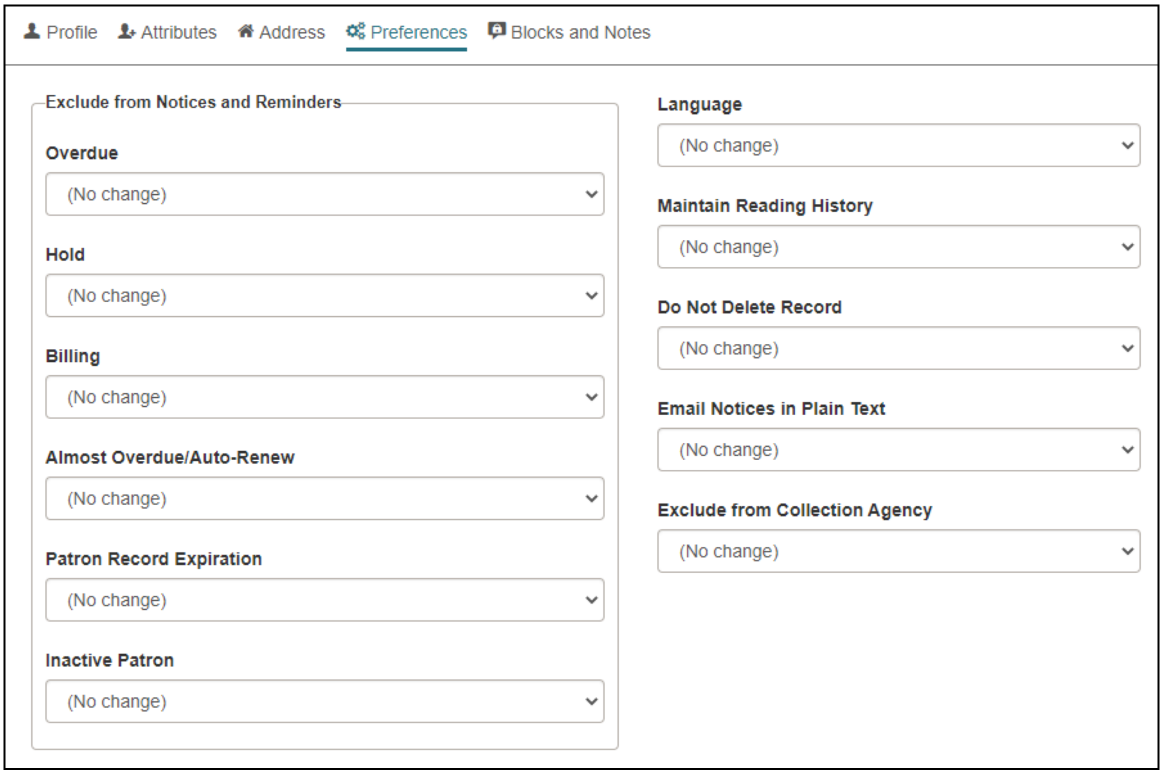
Make bulk changes to one or more of the following address or notification fields:

- **Address Check Date**
- **Notices Address**
- **Notification Option**
- **Additional TXT Notice**
- **eReceipt Option**

> **Note:**
> Bulk changes to notification fields could result in errors. For example, if you set the **Notification Option** to **Email Address**, Leap logs an error if the record set contains a patron record with no email address. If you chose to

create an error record set, you can review errors after the bulk change process is complete.

Update Preferences

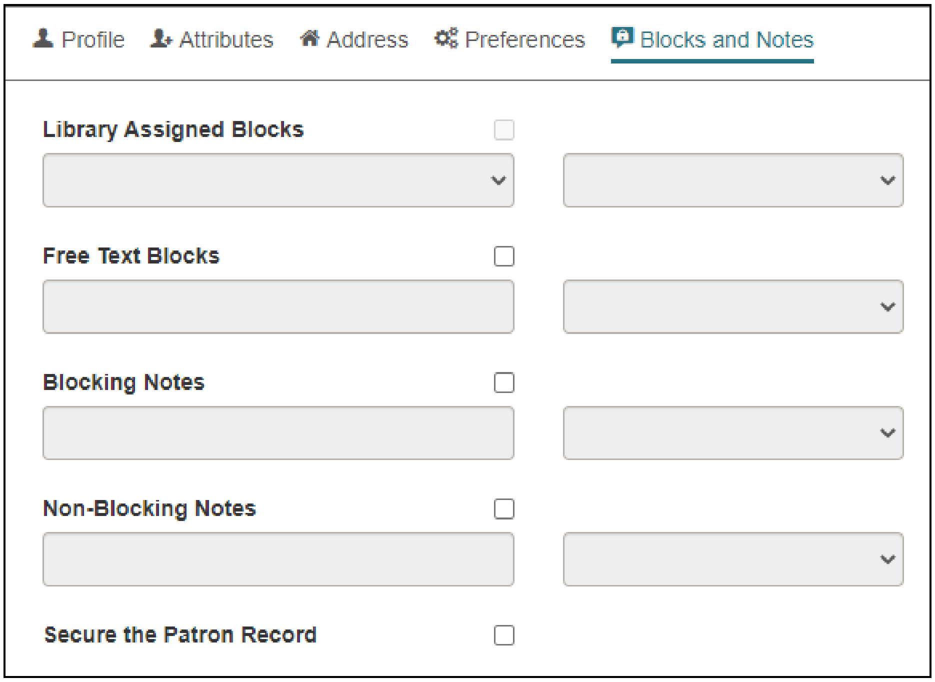


Make bulk changes to one or more of the following preference fields:

- **Exclude from Notices and Reminders** fields:
  - **Overdue**
  - **Hold**
  - **Billing**
  - **Almost Overdue/Auto-Renew**
  - **Patron Record Expiration**
  - **Inactive Patron**
- **Language**
- **Maintain Reading History**
- **Do Not Delete Record**

- **Email Notices in Plain Text**
- **Exclude from Collection Agency**

Update Blocks and Notes



Make bulk changes to one or more block or note fields:

- **Library Assigned Blocks**

> **Note:**
> Leap enables the **Library Assigned Blocks** field when you select a registered branch on the **Profile** tab.

1. Select the checkbox beside the **Library Assigned Blocks** label.
2. In the box below the **Library Assigned Blocks** label, select an option from the list.
3. In the list to the right of the **Library Assigned Blocks** label, select one of the following options:

- **Add** - Adds the block you selected to all records in the record set.
- **Delete** - Removes the block you selected from all records in the record set.

- **Free Text Blocks**
  1. Select the checkbox beside the **Free Text Blocks** label.
  2. In the box below the **Free Text Blocks** label, enter text.
  3. In the list to the right of the **Free Text Blocks** label, select one of the following options:
     - **Add** - Adds the free-text block you specified to all records in the record set.
     - **Delete** - Removes the free-text block you specified from all records in the record set.
     - **Find and Replace** - Finds the records in the record set with the free-text block you specified and replaces the existing text with the text you enter in the **Change to** box.
- **Blocking Notes**
  1. Select the checkbox beside the **Blocking Notes** label.
  2. In the box below the **Blocking Notes** label, enter text.
  3. In the list to the right of the **Blocking Notes** label, select one of the following options:
     - **Append** - In all records in the record set, appends existing blocking note text with the text you specified.
     - **Prepend** - In all records in the record set, prepends existing blocking note text with the text you specified.
     - **Clear** - Clears existing blocking note text from all records in the record set.
- **Non-Blocking Notes**
  1. Select the checkbox beside the **Non-Blocking Notes** label.
  2. In the box below the **Non-Blocking Notes** label, enter text.

3. In the list to the right of the **Non-Blocking Notes** label, select one of the following options:
    - **Append** - In all records in the record set, appends existing non-blocking note text with the text you specified.
    - **Prepend** - In all records in the record set, prepends existing non-blocking note text with the text you specified.
    - **Clear** - Clears existing non-blocking note text from all records in the record set.

- **Secure the Patron Record** - Secures all records in the record set. For more information, search the Polaris staff client help for "Secure a patron record."

  > **Note:**
  > If Leap cannot secure a patron record (for example, because the patron has requests, items out, or claims), this is noted in the patron bulk change report. See View and Manage Patron Bulk Change Jobs.

View and Manage Patron Bulk Change Jobs

The Patron Bulk Change view of the Background Processing page displays information about pending and completed patron bulk change jobs. You can access the Patron Bulk Change view if you have the **Access patron record bulk change: Allow** permission enabled in Polaris Administration (staff client). For more information about patron record permissions, search for "Circulation and Patron Services Workflow Permissions" in the Polaris staff client help.

On the Patron Bulk Change view, you can:

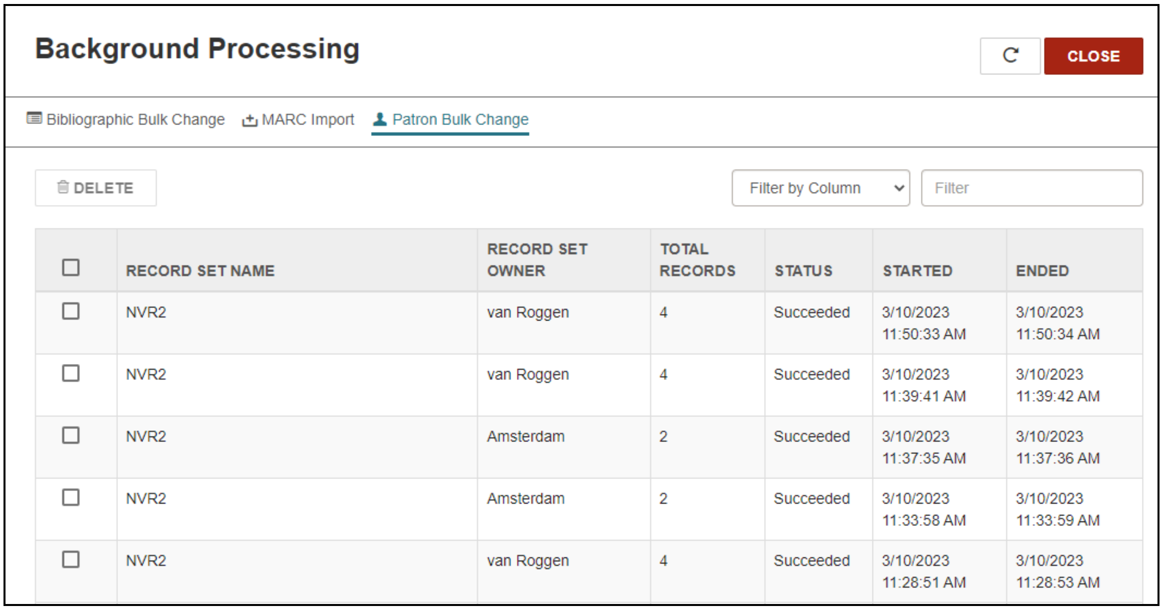
- View, save, or print a patron bulk change report.
- Delete a patron bulk change job from the list.

To access the Patron Bulk Change view

1. Select **Utilities** > **Background Processing**.

   The **Background Processing** page appears.

2. Select **Patron Bulk Change**.



	RECORD SET NAME	RECORD SET OWNER	TOTAL RECORDS	STATUS	STARTED	ENDED
☐	NVR2	van Roggen	4	Succeeded	3/10/2023 11:50:33 AM	3/10/2023 11:50:34 AM
☐	NVR2	van Roggen	4	Succeeded	3/10/2023 11:39:41 AM	3/10/2023 11:39:42 AM
☐	NVR2	Amsterdam	2	Succeeded	3/10/2023 11:37:35 AM	3/10/2023 11:37:36 AM
☐	NVR2	Amsterdam	2	Succeeded	3/10/2023 11:33:58 AM	3/10/2023 11:33:59 AM
☐	NVR2	van Roggen	4	Succeeded	3/10/2023 11:28:51 AM	3/10/2023 11:28:53 AM

View, Save, or Print a Patron Bulk Change Report

You can view, save, or print a report that provides details about a patron bulk change job.

To view, save, or print a patron bulk change report

1. On the **Patron Bulk Change** view of the Background Processing page, find the bulk change job you want to view. To find a job, you can:
   - Select any column heading to re-sort the list.
   - Type in the **Filter** box to filter the list.
   - Use the controls at the bottom of the list to show more bulk change jobs.
2. Select the bulk change job.

   Your browser launches a new browser tab that displays the contents of the bulk change report.
3. Use your browser's **Print** or **Save page as** options to print or save the report.

Delete a Patron Bulk Change Job

Patron bulk change jobs appear on the Patron Bulk Change view of the Background Processing page until they are manually deleted. You can delete a bulk change job when you no longer need the bulk change report or other information about the bulk change job.

> **Note**:
> When a bulk change job is running, you cannot cancel or delete it. If you delete a pending job, Leap does not process the bulk changes.

To delete a patron bulk change job

1. On the **Patron Bulk Change** view of the Background Processing page, find the bulk change job you want to delete. To find a job, you can:
    - Select any column heading to re-sort the list.
    - Type in the **Filter** box to filter the list.
    - Use the controls at the bottom of the list to show more bulk change jobs.
2. Select the checkbox to the left of the record set name for the bulk change job you want to delete.
3. Select **DELETE**.

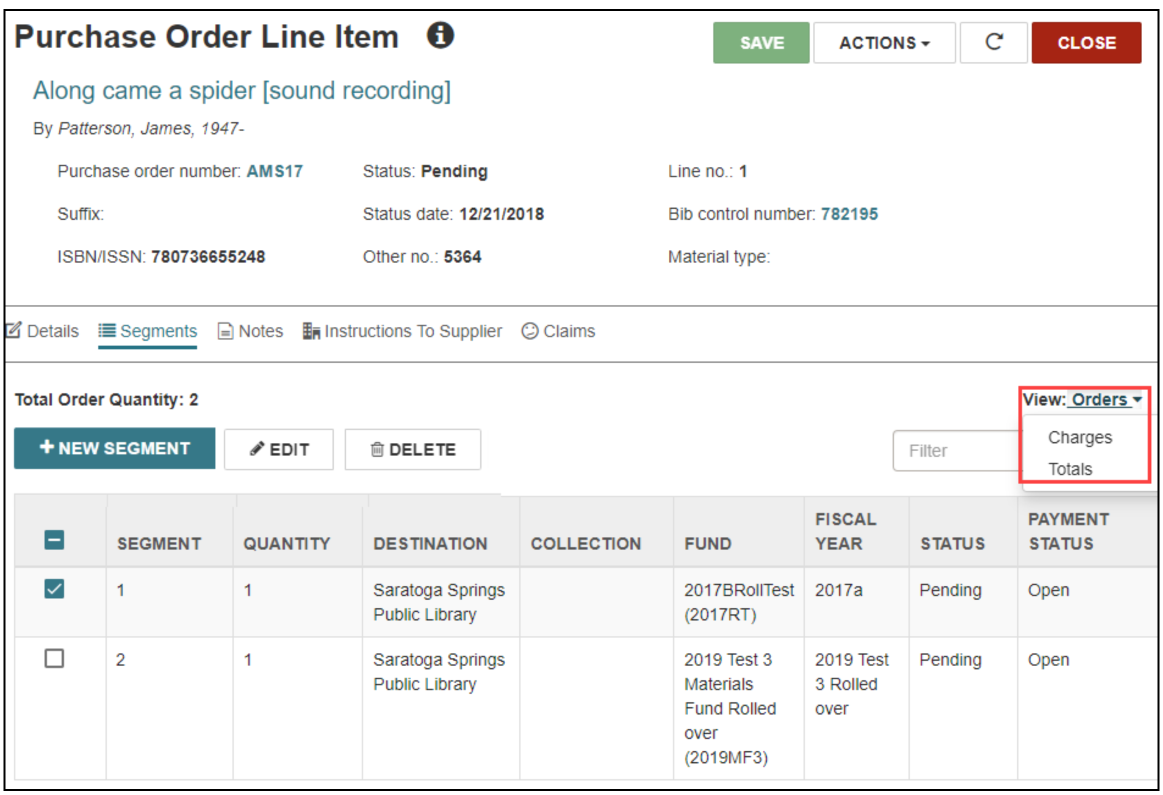
    Leap prompts you to confirm that you want to delete the bulk change job.
4. On the confirmation dialog, select **YES**.

    Leap deletes the bulk change job and displays a success message.

Receiving Purchase Order Line Item Segments

A segment is a part of a purchase order line item that designates the quantity of an item ordered. A purchase order line item must have at least one segment. You can use the **Segments** view of the Purchase Order Line Item workform to create, view, edit, and delete segments. Now you can also receive segments and copy a segment to an invoice.

1. Use the Find Tool to find the purchase order line item record you want to edit, and open it in the Purchase Order Line Item workform.
2. Go to the **Segments** view, from here you can see the segments listed in a table. The table lists segments in the following views:
    - **Orders** - Select a segment to edit or delete it.
    - **Charges** - Select segment to edit the segment's charges.
    - **Totals** - View the totals for the line item and segments.



To filter and sort each view of the table

1. Use the **Filter** field to limit the number of rows of segments that you see in the table.
2. Select the arrow in the header line of each column to sort rows in ascending or descending order.

In these views you can now do the following:

- Receive, Split Receive, or Undo Receipt
- Copy Segment to Invoice

Receive, Split Receive, or Undo Receipt

Use the **Segments** view of the Purchase Order Line Item workform to do the following with segments:

- Receive
- Split Receive
- Undo Receipt

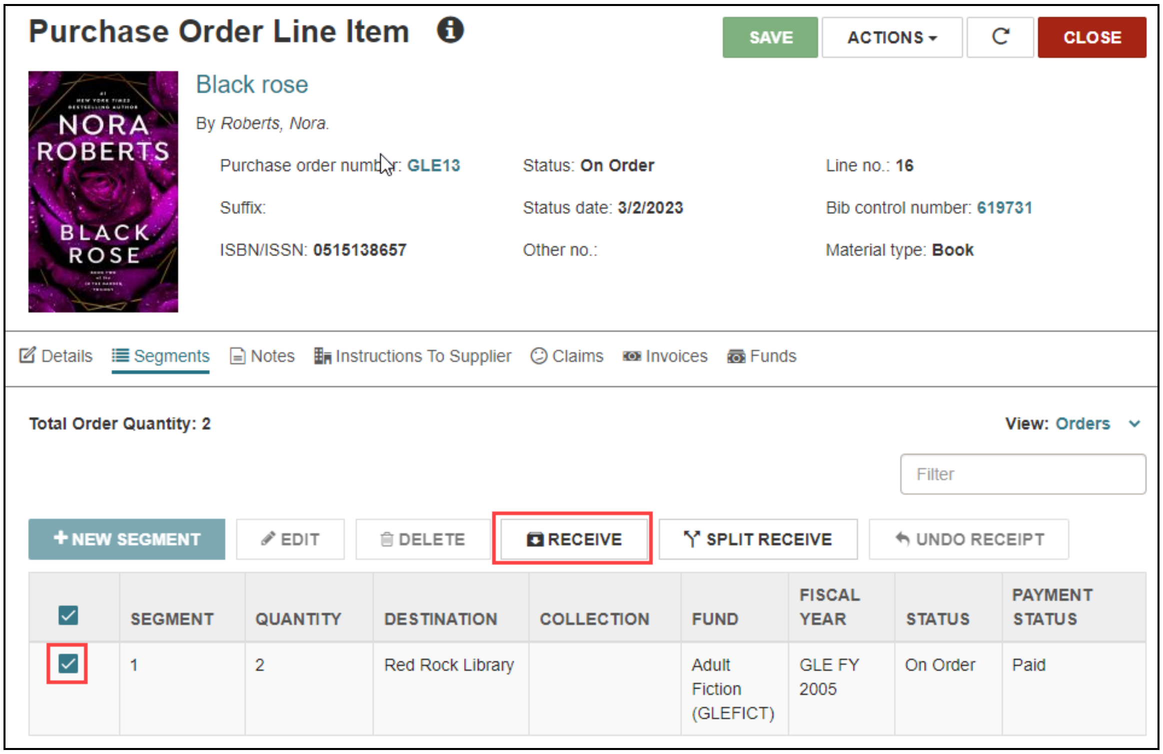
To receive a segment

1. Go to the **Purchase Order Line Item** workform and select the **Segments** view.

   The **Orders** view for the segments opens.
2. Select one or more table rows with the following statuses:
   - on order
   - backordered
   - exceptional condition
   - never published
   - out of print
   - return requested
   - returned

- pending claim
- claimed

3. Select **RECEIVE**.



The Receive Purchase Order Line Item(s) dialog opens.

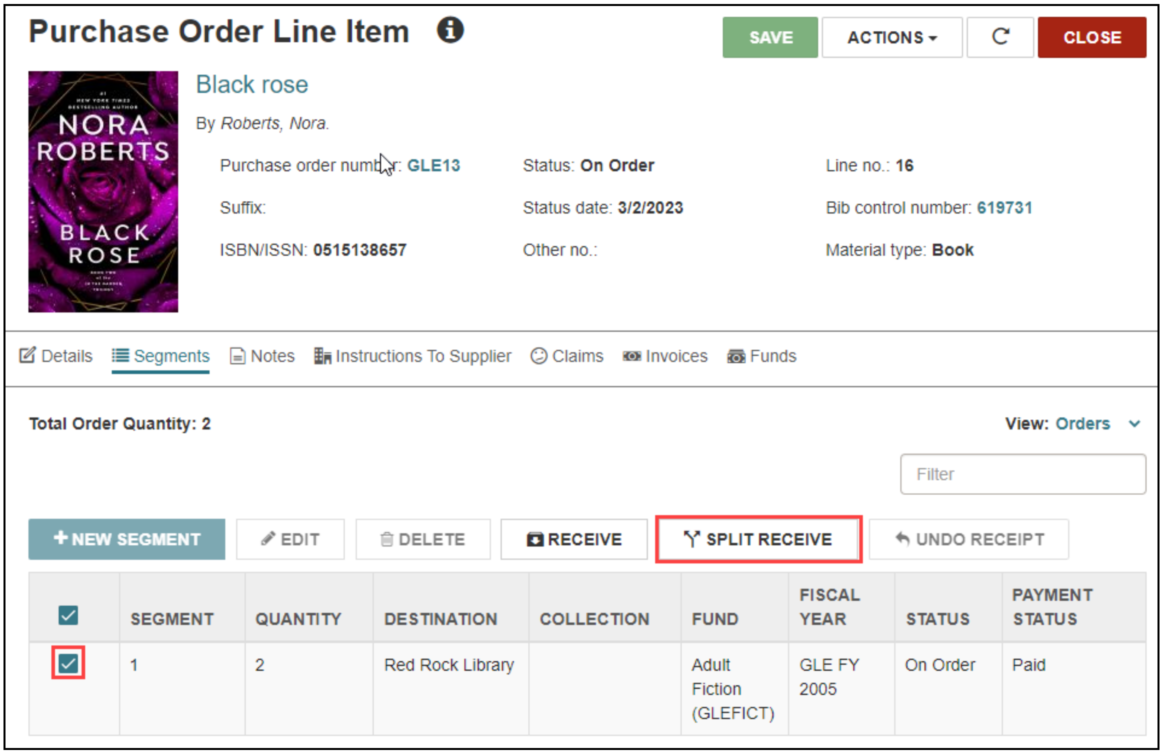
4. Select **CONTINUE**.

To split-receive a segment

1. Go to the **Purchase Order Line Item** workform and select the **Segments** view.

   The **Orders** view for the segments opens.

2. Select a table row with the following conditions:
   - Quantity is two or more.
   - Status is one of the Received statuses above.
   - Segment is not linked to an invoice line item.
3. Select **SPLIT RECEIVE**.



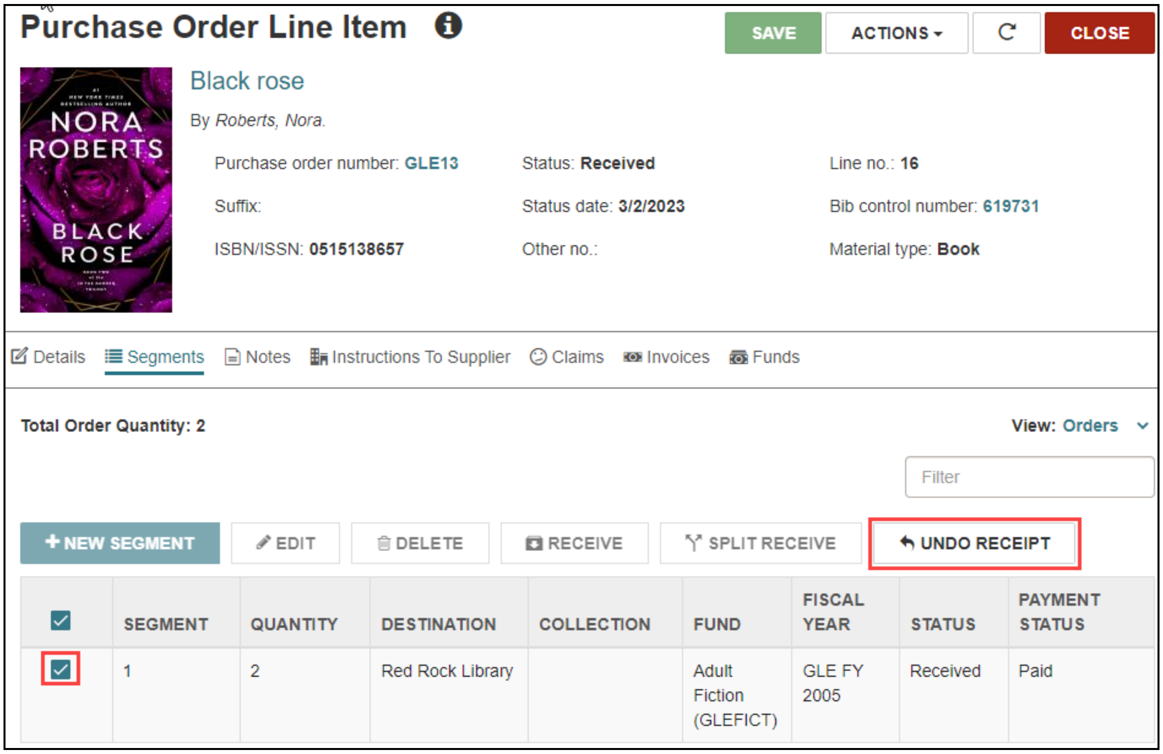
4. Enter the **Quantity Received**.
5. Select **OK**.

   The system receives the number of items you specified and creates another segment for the quantity that is not received yet. The new segment inherits the status of the original segment that you split-received.

To undo receipt of a segment

1. Go to the **Purchase Order Line Item** workform and select the **Segment** view.

   The **Orders** view for the segments opens.
2. Select a table row with a status of Received.
3. Select **UNDO RECEIPT**.



The Undo Purchase Order Item(s) Receipt dialog opens.

4. Select **CONTINUE**.

Copy Segment to Invoice

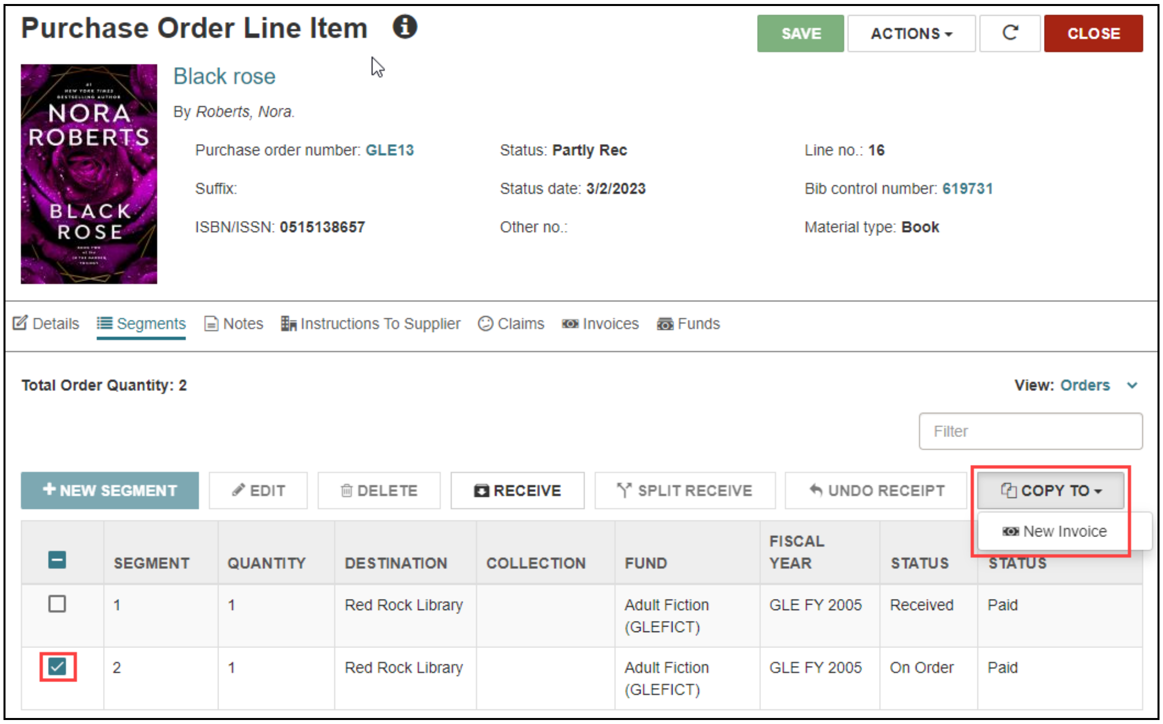
To copy a segment to an invoice

1. Go to the **Purchase Order Line Item** workform and select the **Segment** view.

   The **Orders** view for the segments opens.

2. Select a table row with a Status that is NOT: canceled, claimed, closed, pending, or pending claim.

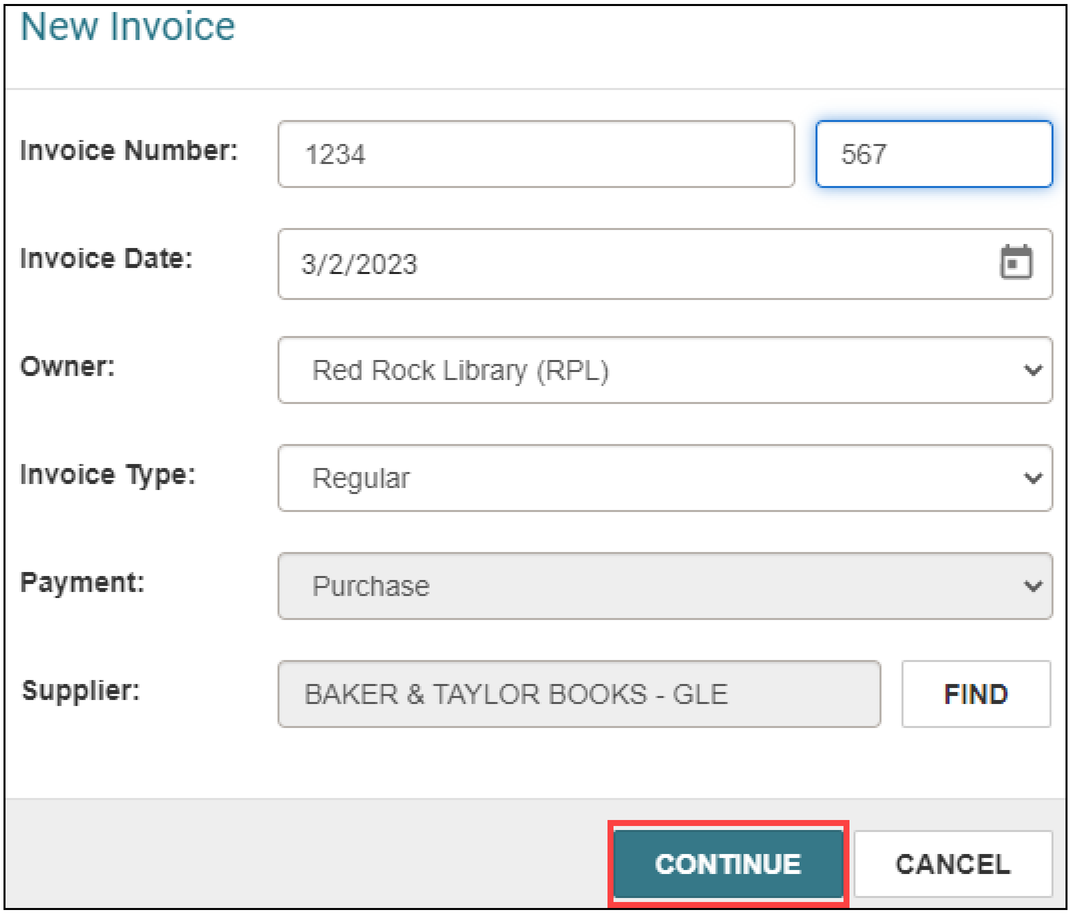
3. Select **COPY TO** > **New Invoice**.



The Copy to Invoice dialog opens.

4. Select **CONTINUE**.
5. Fill in an invoice number.

   Keep this number so you can search for the invoice after you create it.
6. Select **CONTINUE**.



The segment's Payment Status moves to Paid.

Expanded Support for Publication Patterns in Leap

Leap has enabled you to view, edit, close and reopen, and delete Publication Patterns for serials. Now Leap also enables you to add a publication pattern from a serial holdings record (SHR).

For the permissions required to manage SHRs, search the Polaris staff client help for "Serials Workflow Permissions."

To get to the Serial Holdings Record workform

1. Go to the Find Tool.
2. Search for the title of the serial holdings record and select the title in the search results.
3. Select **OPEN**.

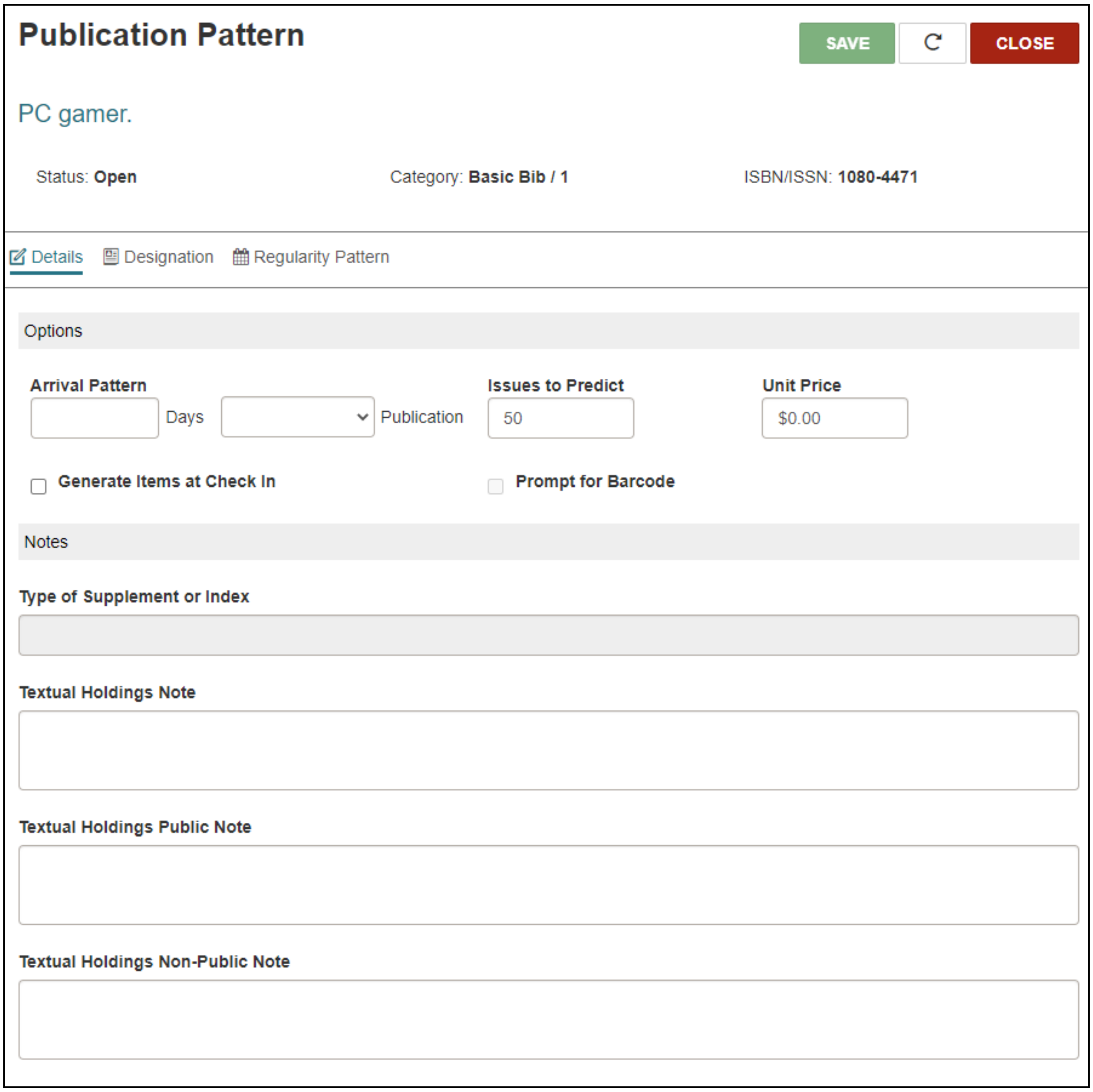
   The Serial Holdings Record workform appears.

To add a publication pattern

1. In the Serial Holdings Record workform > Details view > Publication Patterns section, select **+ NEW PATTERN**.

   The New Publication Pattern workform appears.
2. Select a template from the drop down list, or select **None** to start with a blank workform.

   The Publication Pattern workform appears.



3. Enter required information in **Details**.
    a. Select a category for this publication pattern. Select from **Basic Bibliographic Unit**, **Supplement**, and **Index**.

> **Tip:**
> You can have different publication patterns for different categories of the same serial title. For example, you can indicate a frequency of **Monthly** for the Basic Bibliographic Unit and **Annual** for the Supplement.

b. To establish the **Arrival pattern**, type the number of **Days** and select **Before** or **After** to indicate the number of days between the **Start Date** (in the **Designation** view) and the date the issue should arrive at the library. Leap uses this arrival pattern to calculate the expected arrival date of each issue.

c. Type the number of **Issues to Predict**.

d. (Optional) Type the **Unit Price** if you want the issues and the item records created from the issues to have a price.

e. (Optional) Select **Generate Items at Check In** if you want to prepare the issues of this serial holdings record for circulation as they are received.

f. (Optional) Select **Prompt for Barcode** if you want staff to apply barcodes and scan them at check-in.

g. (Optional) Enter **Publication Pattern Notes**

- **Type of Supplement or Index** — If you selected either Supplement or Index in the Category field, enter the type or description.
- **Textual Holdings Note** — Enter surplus information to describe the holdings.
- **Textual Holdings Public Note** — Enter surplus information to describe the holdings. This note appears in the public description of the holdings.
- **Textual Holdings Non-Public Note** — Enter surplus information to describe the holdings. This note appears in the staff-only description of the holdings.

4. Establish the **Designation**.

a. Select a **Frequency** of publication.

b. Select or type a **Start Date**.

c. (Optional) Select or type an **End Date**.

d. Build the **Starting Designation** using the Chronology and Enumeration Setup section. A publication pattern must have at least one level of chronology or enumeration.

> **Note**:
> You can also create these presets in the Polaris staff client.

> For more information, search the staff client help for "Pattern Options Window."

5. Edit or add a **Regularity Pattern**.

   Leap generates a Regularity Pattern when you enter required information on the Details or Designation views. Most of the time, you'll edit a generated regularity pattern.

   If the publication pattern frequency is a common one (daily or monthly), and there are no combined or omitted issues, you do not need to specify the regularity. If, for example, there are days when a daily serial is not published, you need to specify these exceptions. To predict issues for publications with a frequency of "Totally Irregular" or "Continuously Updated," you must enter a regularity pattern.

   To add a regularity pattern

   a. Select **Regularity Pattern**.
   b. Select **+ADD PATTERN**.

      The **Add Regularity Pattern** dialog opens.
   c. Select a **Publication Code**:
      - **Combined** (c) — for combined issues
      - **Omitted** (o) — for omitted issues
      - **Published** (p) — for additional issues
   d. Select a **Calendar Unit**.
   e. Enter a value in **From** and **To** that corresponds to the calendar unit. These values indicate the span of time that the issues are combined, omitted, or published. Refer to the following example:

      > **Example**:
      > A weekly serial is published on Monday of each week with combined issues for the last two weeks of August and December. The publication details are as follows for this publication:

```
pd mo
cw 0898mo/0899mo
cw 1298mo/1299mo
```

f. Select **OK**.

Leap adds the code for the new publication pattern to the end of the table.

To indicate a Calendar Change[1]

a. Select a **Calendar Unit**.

Select **None** to enter your own codes.

b. Enter your desired **Codes**.

6. Select **SAVE**.

Leap recalculates predicted issues and the regularity pattern. Refer to the following examples to help read the designation and regularity pattern codes:

Publication Example	Frequency	Chronology	Enumeration	Regularity /Exception	Pattern Results
Published annually	Annual	Year	Vol.		Vol. 1 2023 Vol. 2 2024

[1]A calendar change indicates the chronological point where the highest level of enumeration changes. For example, if you select Day of Month for the calendar change, and enter 0101, the calendar change will be on January 1.

Publication Example	Frequency	Chronology	Enumeration	Regularity /Exception	Pattern Results
Published monthly with two combined issues - July/August and Septem- ber/ October	Monthly	Year Month	Volume 1 Issue 1	cm07/08 cm09/10	Vol. 1 Issue 1 January 2012 (10 issues per year - July & Aug. in issue 7, Sept. & Oct. in issue 8)
Published semiweekly - Monday and Thursday (except on Fourth of July, Labor Day, Thanksgiving, Christmas, New Year's Day)	Semiweekly	Year Day of Month Month Day of week	Vol. 1 no.1 Monday Jan.2	od0101 od0704 od1225 ow0901mo ow1199th	Vol. 1 no. 1 Monday, January 6, 2012 (omits Jan.1, July 4, Dec. 25, 1st Mon. in Sept. & last Thurs. in Nov.)

Chronology and Enumeration Setup

Build the **Starting Designation** of a serial publication using the Chronology[1] Setup and Enumeration[2] Setup sections of the Publication Pattern workform's Designation view. You can specify up to four levels of chronology, six levels of enumeration, and two levels of alternative enumeration. A publication pattern must have at least one level of chronology or enumeration.

To add a level of chronology

1. Select **+ ADD CHRONOLOGY**.

   The Add Chronology Level dialog appears.

2. Select a **Caption**.
3. Select a **Format**.
4. (Optional) Select **Alternative Chronology**.
5. Select **OK**.

   Leap adds a row to the Chronology Setup table and a level to the Starting Designation.

To add a level of enumeration

1. Select**+ ADD ENUMERATION**.

   The Add Enumeration Level dialog appears.

2. Select a **Caption**.
3. Select a **Format**.
4. Enter a **Start Value**.

[1]The date(s) used by the publisher on a bibliographic unit that is issued serially. This date helps identify or indicate when it was published. The chronology can reflect the dates of coverage, publication, or printing.
[2]The designation reflecting the alphabetic, numeric, or date-based scheme used to identify the bibliographic item and it's parts. This scheme also shows the relationship of each unit to the item as a whole. The publisher creates this scheme, or the system assigns it when a staff member creates a holdings statment.

> **Note**:
> You don't have to enter Start Value if the Format is Free Text.
> Enter an Arabic number in Start Value. If the format is Number, Numeral, or Roman, Leap converts the Start Value for you.

5. Enter **Units**.
6. Select one of the following from **Continuity**:
    - Restarts
    - Continues
7. (Optional) Select **Alternative Enumeration**.
8. Select **OK**.

    Leap adds a row to the Enumeration Setup table and a level to the Starting Designation.

The next step in the Publication Pattern workform is creating a Regularity Pattern.

Copying a Serial Holdings Record (SHR)

You have the ability to delete the Serials Holding Record and return to Serials Check In from the menus in the Serials Holding Record header. Now Leap also enables you to Copy a Serial Holdings Record from the Actions menu. This is especially useful when you are creating multiple copies of a title for different locations.

> **Note**:
> To make a copy of an SHR, you must have the following permissions:
> **Serial Holdings Record: Create**.

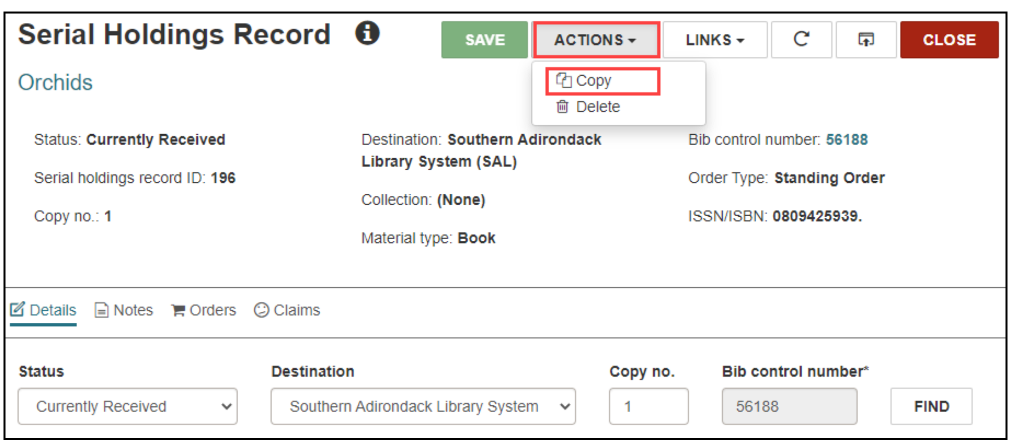
To open the Serial Holdings Record workform

1. Go to the Find Tool.
2. Search for the title of the serial holdings record and select the title in the search results.
3. Select **OPEN**.

   The Serial Holdings Record workform appears.

To create a copy of the current Serial Holdings Record

1. Open the Serial Holdings Record workform.
2. Select **Actions** > **Copy**.

   A new copy of the existing SHR opens with all fields copied except Copy no.
3. Enter a new **Copy no**.

4. Select **SAVE**.

   Leap saves the copied SHR as a separate record.

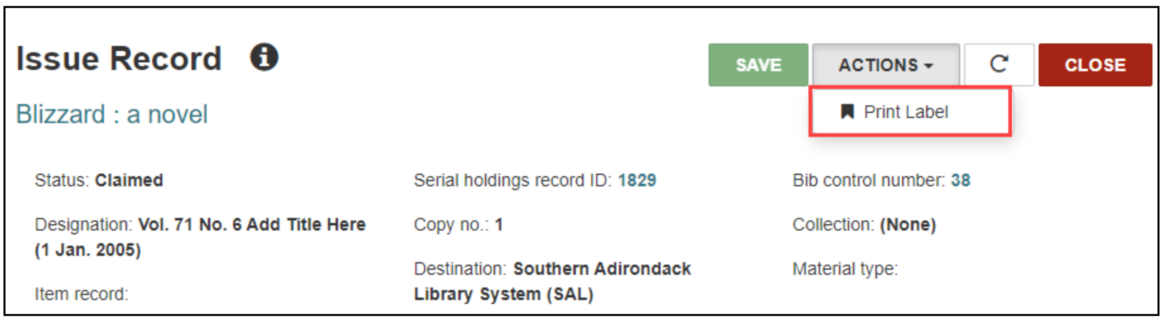
Printing Serial Labels

You can now print serial labels from any workstation in Leap.

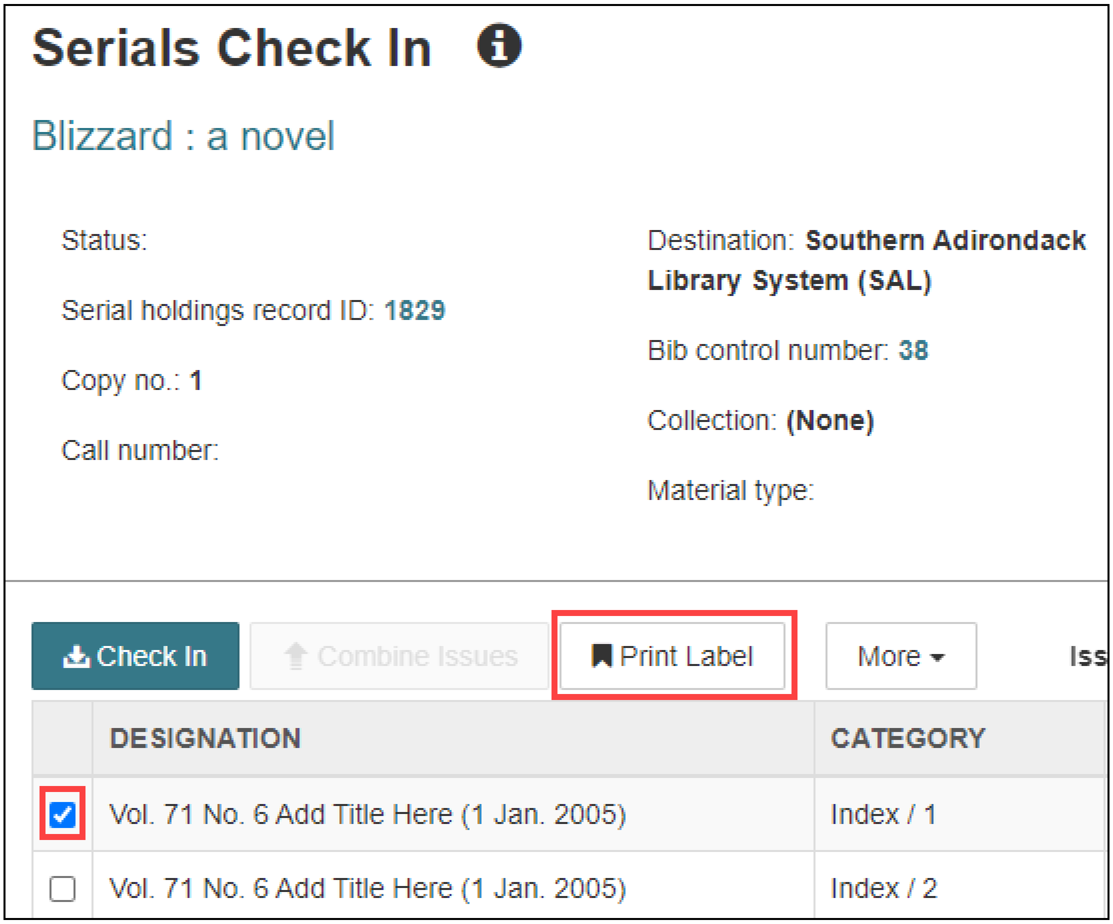
> **Note**:
> Before you print, you must configure settings in Polaris Administration (staff client) and in Leap. For more information, search the Leap documentation for "Setting Up to Print Labels."

To print serial labels

1. Do one of the following:
    - Use the Find Tool to find the serial item or standing order part that needs a printed label, open the record, and select **ACTIONS** > **Print Label**.

    - Go to **Utilities** > **Serials Check In** to find the Serials Check In workform, select one issue or part in the table, and select the **Print Label** button.



One of the following happens, depending on your user setup:

- **On Demand** - Leap opens Label Manager so you can view the label before printing it.
- **Batch** - Leap queues the label, but does not print it. You can repeat steps 1 and 2 to add more labels to the print queue.
- **Quick Print** - Leap prints the label at the designated printer.

2. For batch print jobs, select **Utilities** > **Label Manager** to open Label Manager.
3. (Optional) Select the label type from the list at the upper left.

   The preview changes to show the type of label you select.

4. Review the label layout. If necessary, you can make changes and enter carriage returns directly in the label page display. When finished, select **SAVE**.

> **Note**:
> When troubleshooting font sizes on PDF labels:
> - Check the page size in your printer driver.
> - Make sure your PDF reader view is set to "Default."

5. Do one of the following:
   - To clear all of your labels and start with a blank sheet, select **ACTIONS** > **Clear Labels**. Start again with step 1.
   - To send all labels to your designated printer, select **ACTIONS** > **Print Labels**.

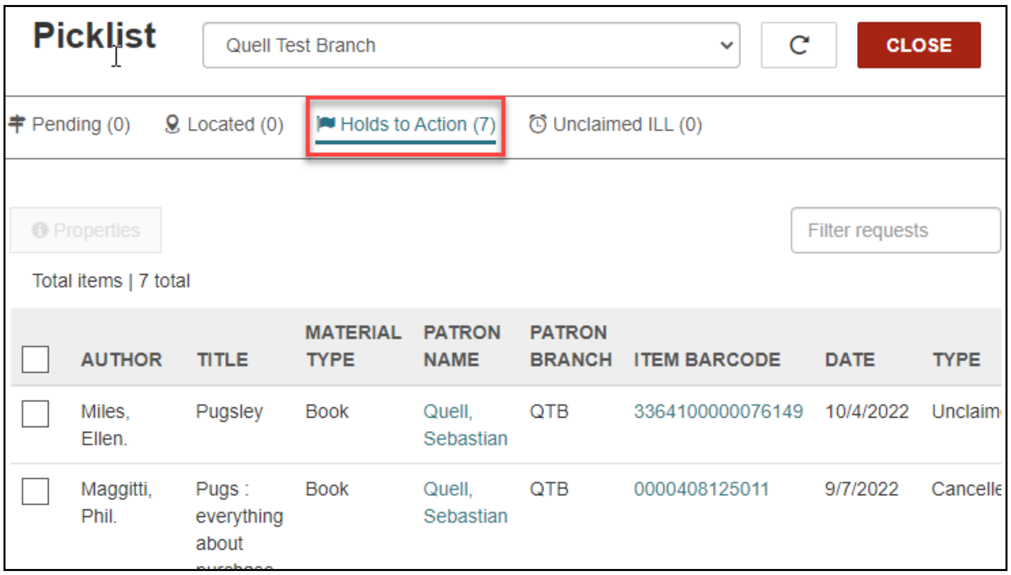
     Your browser's print preview opens.
6. Select **Print**.

   Your browser's Print dialog opens.
7. Check the settings, and select **Print**.

   Leap sends the queued labels to the printer.

Combining Picklist Holds Views

You can now choose to display holds in one combined list in Leap. Libraries might find it useful for staff to see holds in one combined list to easily identify the material they need to pull from the hold shelf without having to check multiple tabs. The combined holds view appears in Leap's Picklist workform.



To combine holds lists in the Picklist workform

1. In the Polaris System Administration (staff client), go to **Administration Explorer** > **System** > **Parameters**.
2. Select **Request**.
3. Select **Web App: Enable combined picklist view**, and select **Yes**.
4. Select **Save**.

   The three holds views (Unclaimed, Holds to Transfer, and Cancelled) in the Picklist Workform combine into one (Holds to Action).

Enhancements to Default Views in Leap

Leap 7.4 includes the following enhancements to default views:

- New Default View on the Background Processing Page
- New Options for Configuring Workform User Defaults

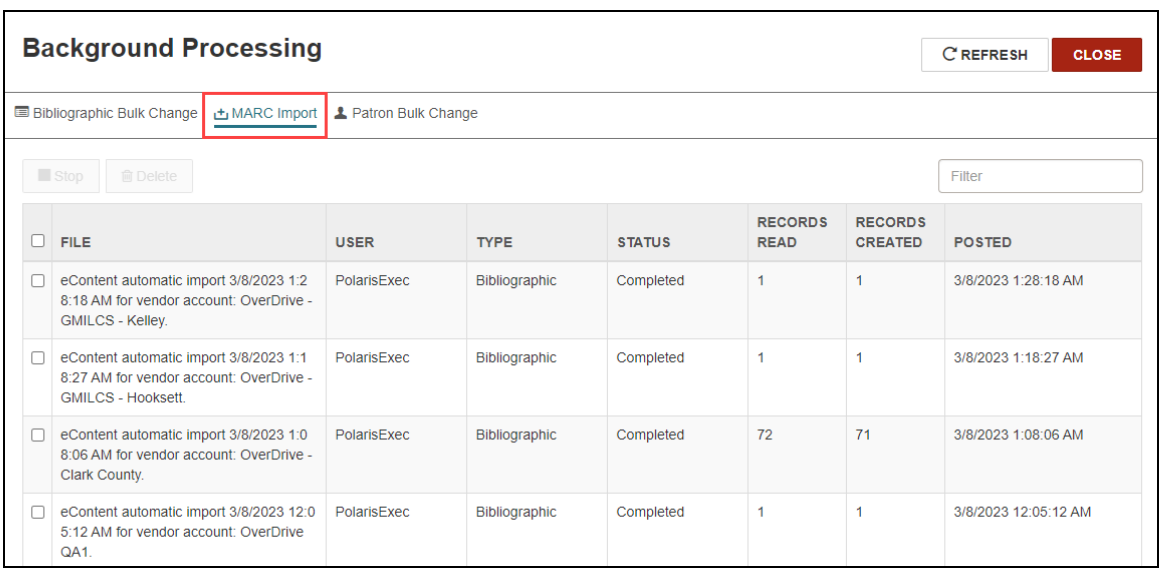
New Default View on the Background Processing Page

The Cataloging Processing page was renamed the Background Processing page. When you access the page, Leap now displays the **MARC Import** view by default.

> **Note:**
> You can use the Workform User Defaults settings to select a different default view. For more information, see New Options for Configuring Workform User Defaults.

To access the Background Processing page

- Select **Utilities** > **Background Processing**.



FILE	USER	TYPE	STATUS	RECORDS READ	RECORDS CREATED	POSTED
eContent automatic import 3/8/2023 1:28:18 AM for vendor account: OverDrive - GMILCS - Kelley.	PolarisExec	Bibliographic	Completed	1	1	3/8/2023 1:28:18 AM
eContent automatic import 3/8/2023 1:18:27 AM for vendor account: OverDrive - GMILCS - Hooksett.	PolarisExec	Bibliographic	Completed	1	1	3/8/2023 1:18:27 AM
eContent automatic import 3/8/2023 1:08:06 AM for vendor account: OverDrive - Clark County.	PolarisExec	Bibliographic	Completed	72	71	3/8/2023 1:08:06 AM
eContent automatic import 3/8/2023 12:05:12 AM for vendor account: OverDrive QA1.	PolarisExec	Bibliographic	Completed	1	1	3/8/2023 12:05:12 AM

New Options for Configuring Workform User Defaults

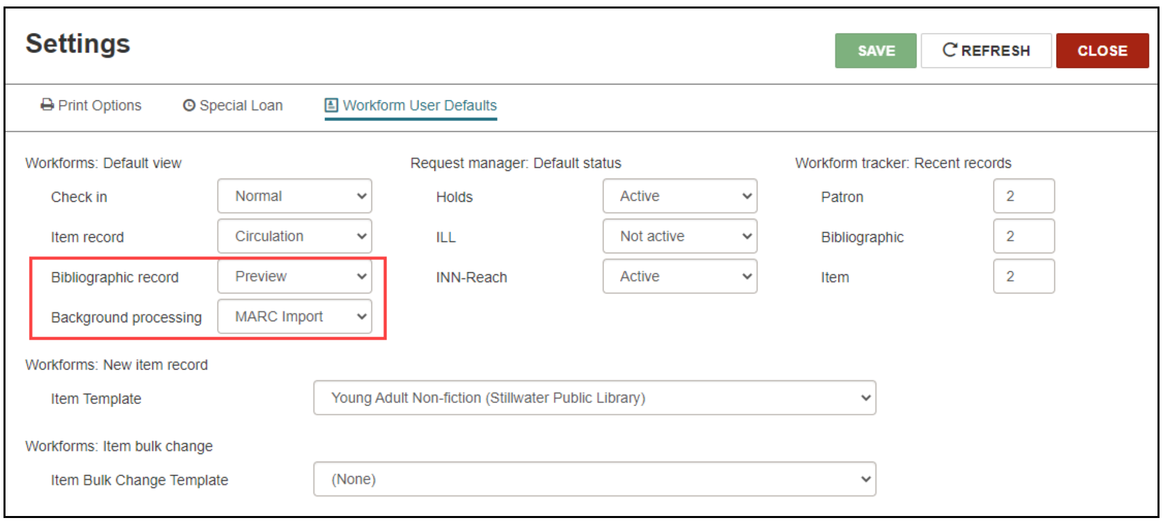
Two new options on the **Workform User Defaults** tab of the Settings page let you specify the default view for the Bibliographic Record workform and the Background Processing page.

To configure Workform User Defaults settings

1. Select your username, and select **Settings**.

   The Settings page opens.

2. Select the **Workform User Defaults** tab.
3. Select a default view for one or more workforms.



4. Select **SAVE**.

Bibliographic Statistics Now Include Circulation by Branch

Library staff can now view bibliographic circulation statistics divided by branch location using the Bibliographic Record workform in Leap.

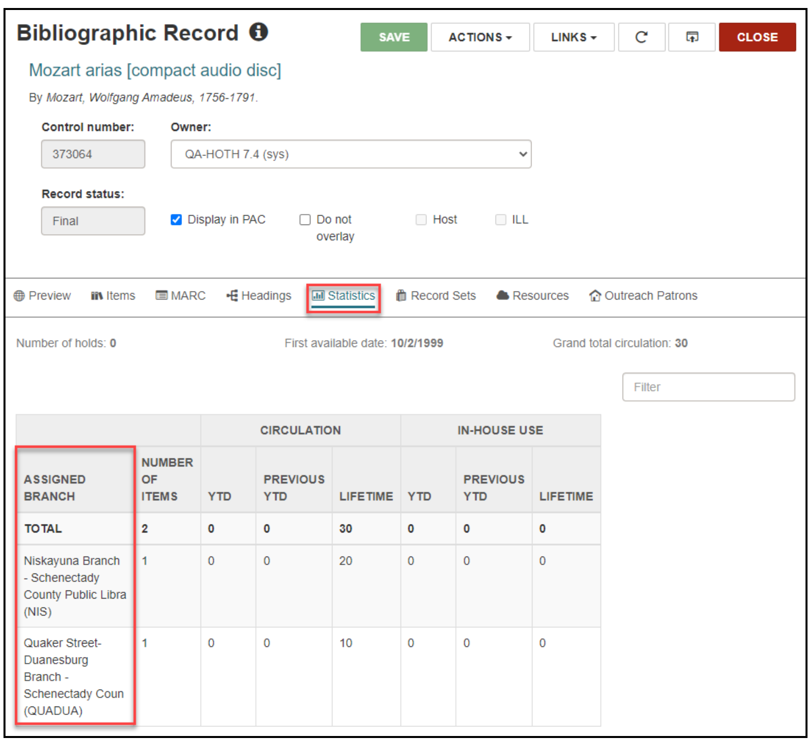
To view bibliographic statistics

1. Use the Find Tool to find and open a bibliographic record.

   The Bibliographic Record workform appears.

2. Select **Statistics**.

   The new Statistics view appears.



3. (Optional) Type a branch name in **Filter** to view only numbers associated with that branch.

Saving Patron Records with a Single Patron Name

Some patrons have a single name instead of a first name and a last name. The new **Patron registration: First name required** parameter determines whether you can save a patron record with a single name. You can set this parameter at the System, Library, or Branch level in Polaris Administration (staff client).

> **Note:**
> By default, Polaris requires both a first name and a last name to save a patron record. If you want to continue using this default behavior, you don't need to take any action.

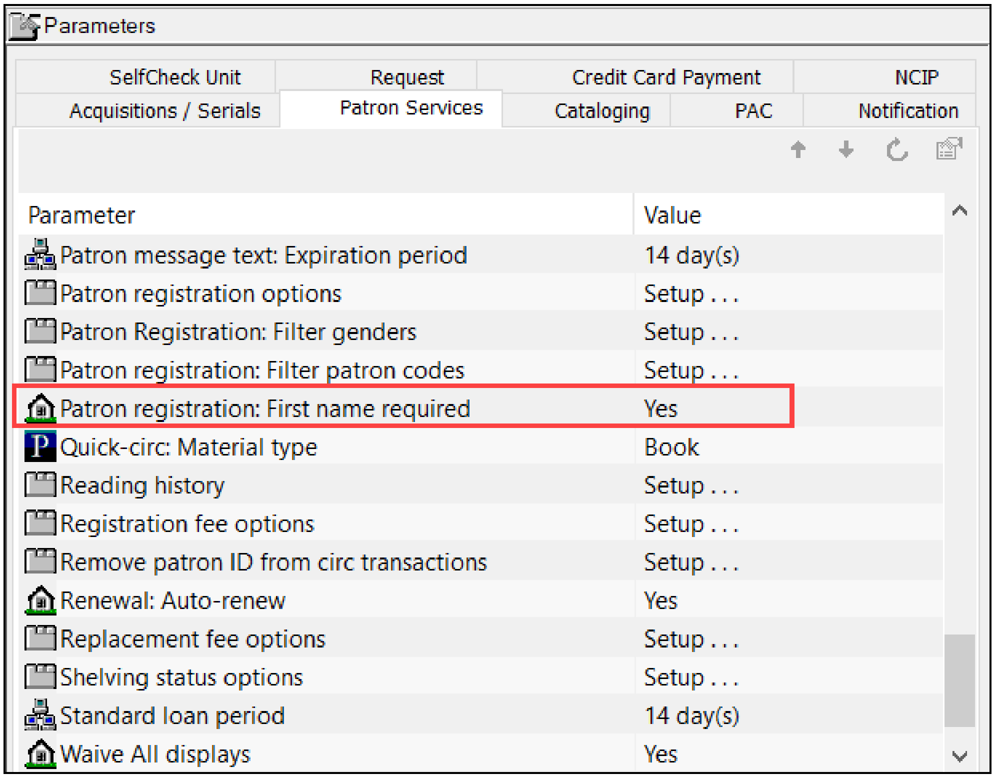
The sections below explain how to configure and use this feature:

- Configure Polaris to Allow Saving a Patron Record with a Single Name
- Save a Patron Record with a Single Name

Configure Polaris to Allow Saving a Patron Record with a Single Name

To configure Polaris to allow saving a patron record with a single name

1. In Polaris Administration (staff client), go to **Administration** > **Explorer**.
2. Select an organization level (**System**, **Library**, or **Branch**).
3. Select **Parameters** > **Patron Services**.
4. Double-click the **Patron registration: First name required** parameter, then set the **Value** option to **No**.



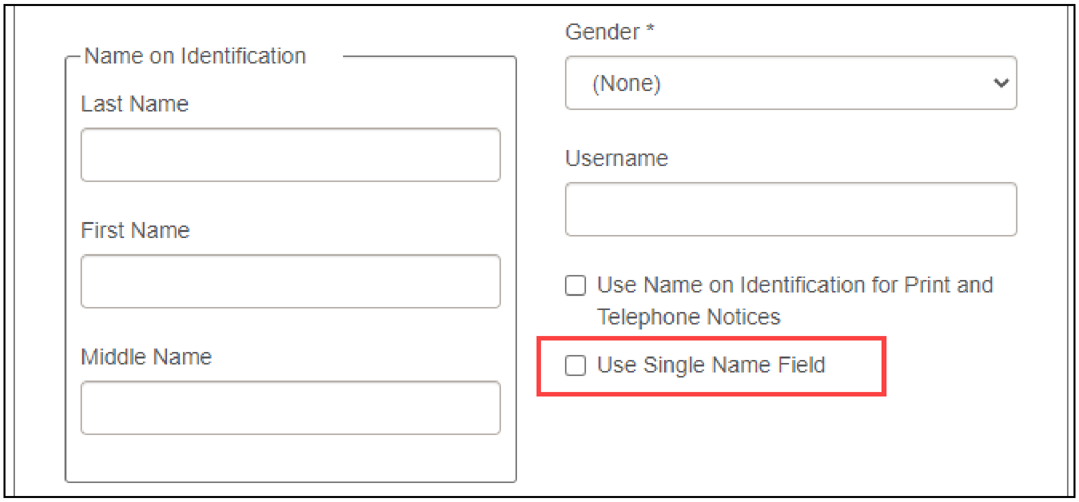
By default, the parameter is set to Yes.

5. Select **Save**.

Save a Patron Record with a Single Name

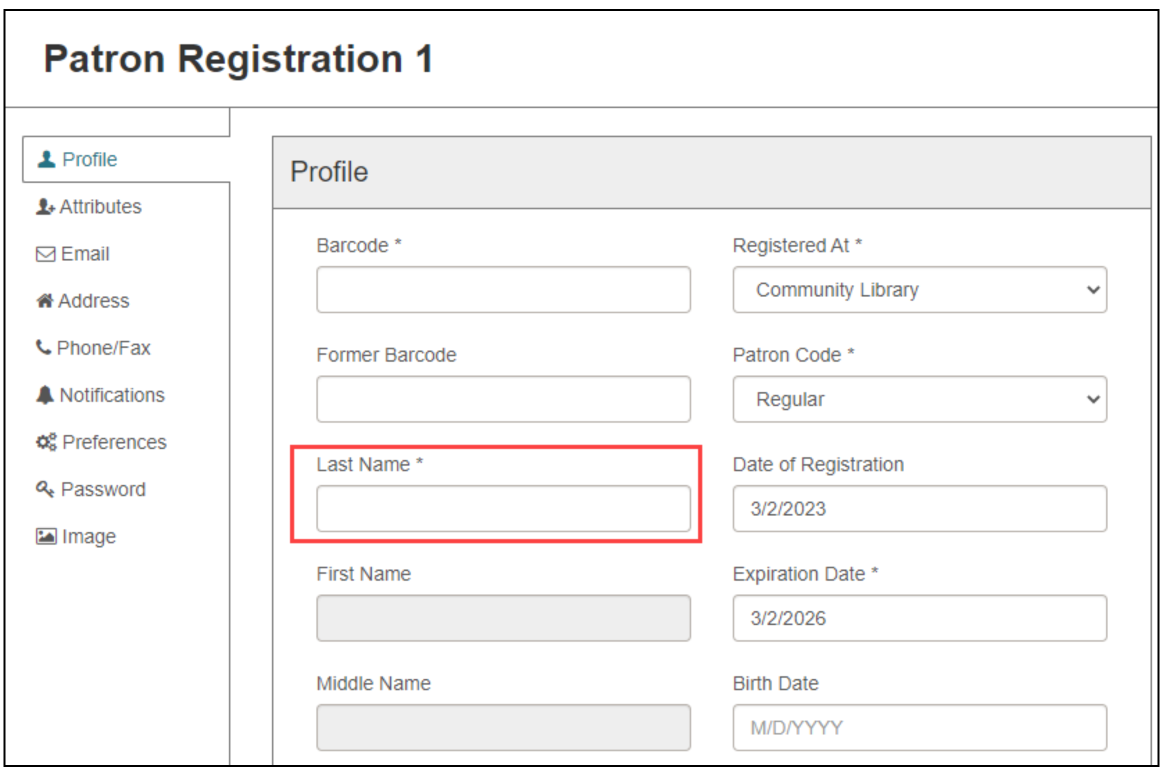
To save a patron record with a single name

1. On the Patron Registration workform, select the **Use Single Name Field** checkbox.



Leap disables the **First Name** and **Middle Name** fields.

2. Enter the name in the **Last Name** field.



3. Select **SAVE**.

Support for Azure AD Authentication with Polaris System Administration (Web-Based)

Polaris System Administration (web-based) now offers basic support for single sign-on (SSO) authentication with Azure Active Directory (Azure AD). Polaris System Administration (web-based) also requires OAuth 2.0 with OpenID Connect and PKCE.

Contact Innovative for help getting started with Polaris System Administration (web-based). For additional information about configuring OAuth and Azure AD, see the Polaris and OAuth 2.0 with OpenID Connect Integration Guide (7.4).

Support for Multi-Factor Authentication with Leap and Polaris System Administration (Web-Based)

Leap and Polaris System Administration (web-based) now support multi-factor authentication (MFA). You can configure MFA using the following tools:

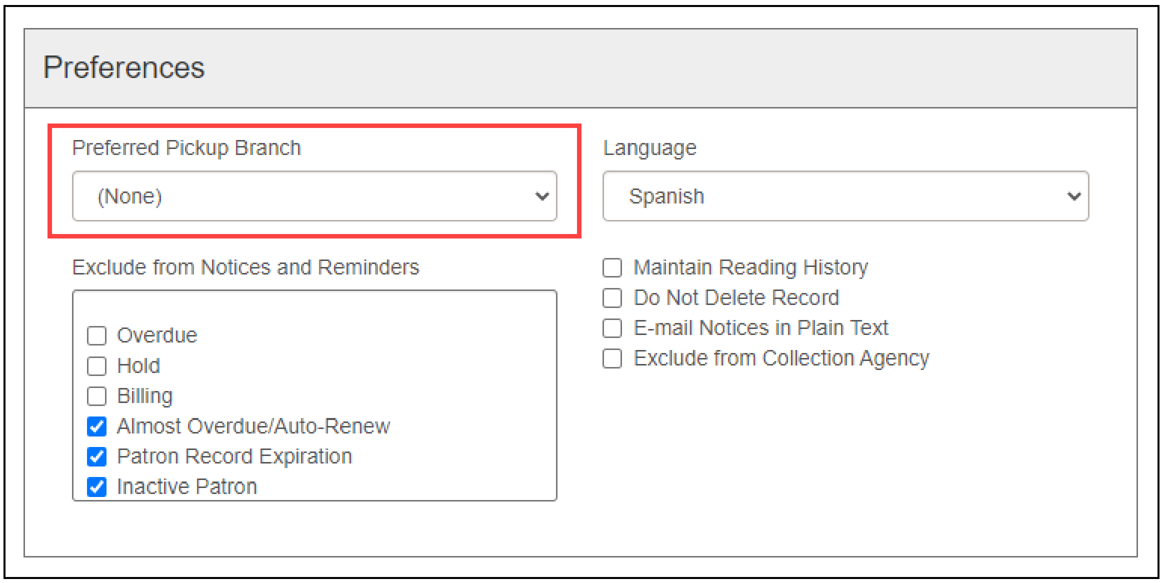
- Azure AD Multi-Factor Authentication
- A MFA verification application, such as Microsoft Authenticator

For information about configuring Azure AD, see the Polaris and OAuth 2.0 with OpenID Connect Integration Guide (7.4).

Setting or Viewing a Patron's Preferred Pickup Location in Leap

When you register a patron in Leap, you can now specify the patron's preferred pickup location. You can also view or edit a patron's preferred pickup location on the Patron Record workform.

A new Preferred Pickup Branch setting now appears on the Patron Registration page and the Patron Record workform.

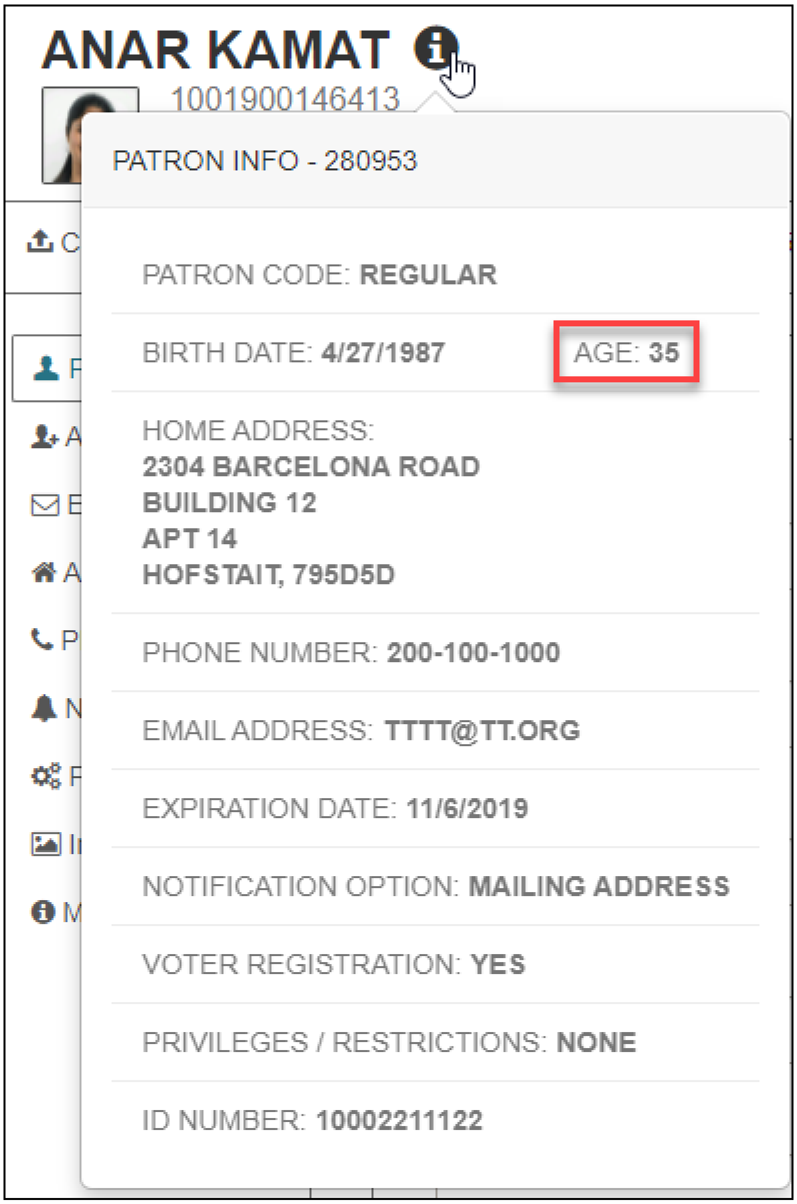


To view or set a patron's preferred pickup location

1. On the Patron Registration page or the Patron Record workform, select **Preferences** in the navigation bar.
2. In the **Preferred Pickup Branch** list, select a location or select (None).
3. Select **SAVE**.

Showing Patron Age in Leap

Libraries with age-restricted items might find it useful for staff to see a patron's age. You can enable the patron's age to show in Leap's Patron Record > Patron information.



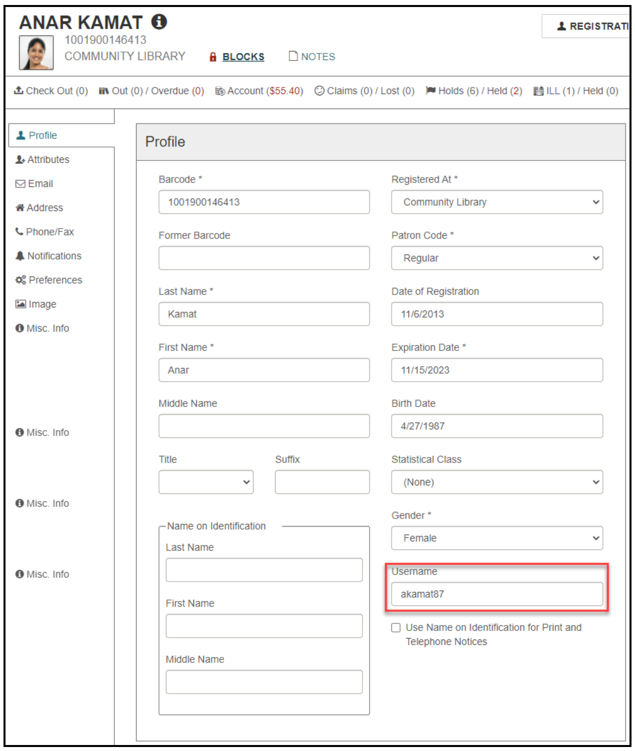
To show the patron's age in Leap

1. In the Polaris System Administration (staff client), go to **Administration Explorer** > **System** > **Profiles**.
2. Select **Staff Client**.
3. Select **Web App: Display patron age in patron info**, and select **Yes**.
4. Select **Save**.

   The patron's age appears in Patron Record > Patron information.

Showing Patron's Username in Leap

You can now choose to display a patron's username for library staff in Leap. Libraries might find it useful for staff to see a patron's username so staff can help patrons who have forgotten theirs. You can enable the Username field to show in Leap's Patron Registration > Profiles section.



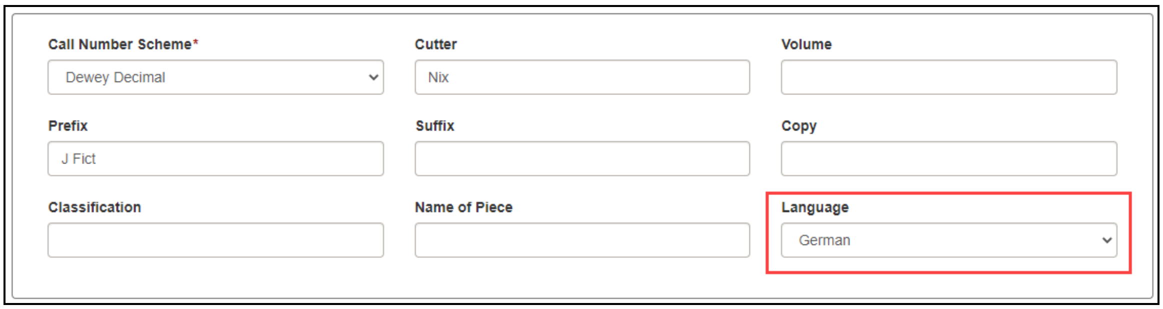
To show the patron's username in Leap:

1. In the Polaris System Administration (staff client), go to **Administration Explorer** > **System** > **Profiles**.
2. Select **Staff Client**.
3. Select **Web App: Suppress Field: Username** and select **No**.
4. Select **Save**.

   The Username field appears in Leap's Patron Registration > Profiles section.

New Language Field on the Item Record Workform in Leap

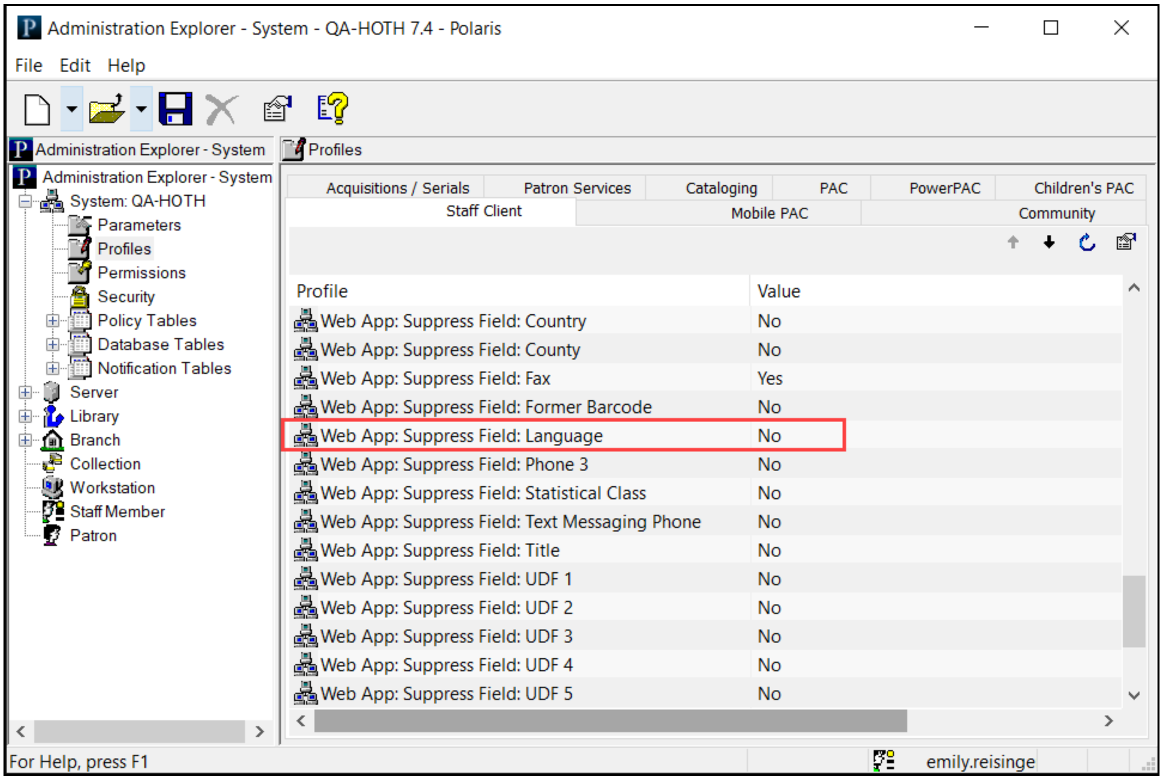
You can now choose to include a Language field on the Details view of the Item Record workform in Leap. This field functions as a note that your library can use for tracking purposes.



The appearance of the Language field is controlled at the system level in Polaris Administration (staff client). By default, the Language field does not appear on the Item Record workform.

To enable the Language field on the Item Record workform

1. In Polaris Administration (staff client), navigate to **Profiles** > **Staff Client**.



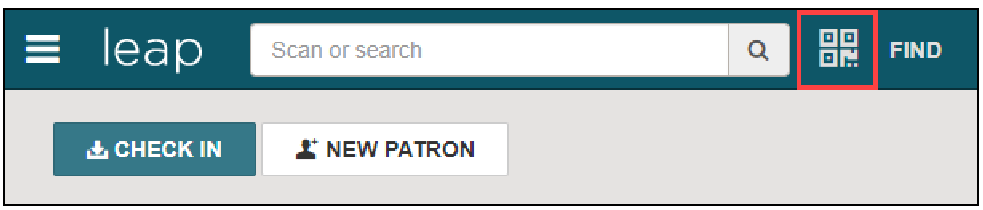
2. Set the **Web App: Suppress Field: Language** profile to **No**.

Enabling QR Code Scanning in Leap

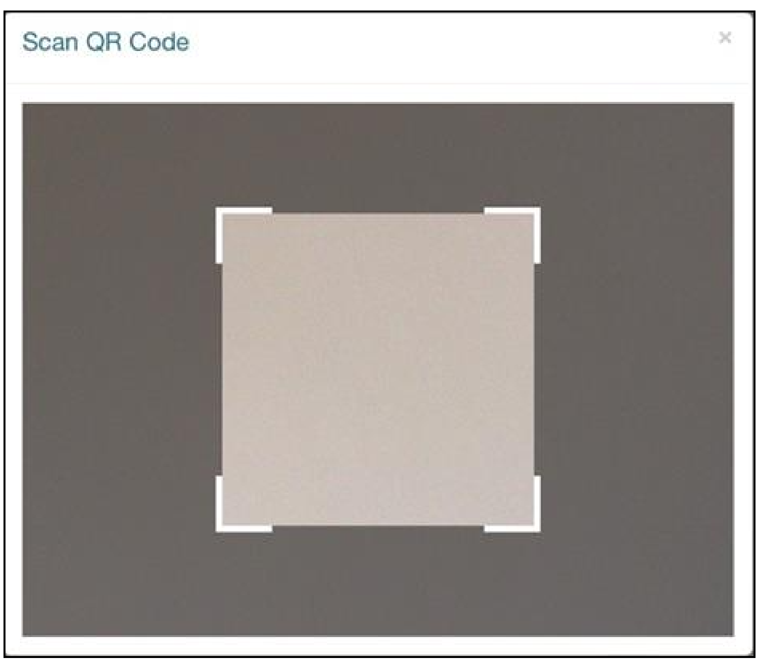
The new **Web App: Enable device camera scanning** parameter lets you scan QR codes with device cameras in Leap. You can set this parameter at the Workstation level in Polaris Administration (staff client).

When this parameter is enabled, a QR code icon appears in the following locations in Leap:

- Main search bar
- Check In workform
- Check Out view of the Patron Record workform
- Item Record Set workform



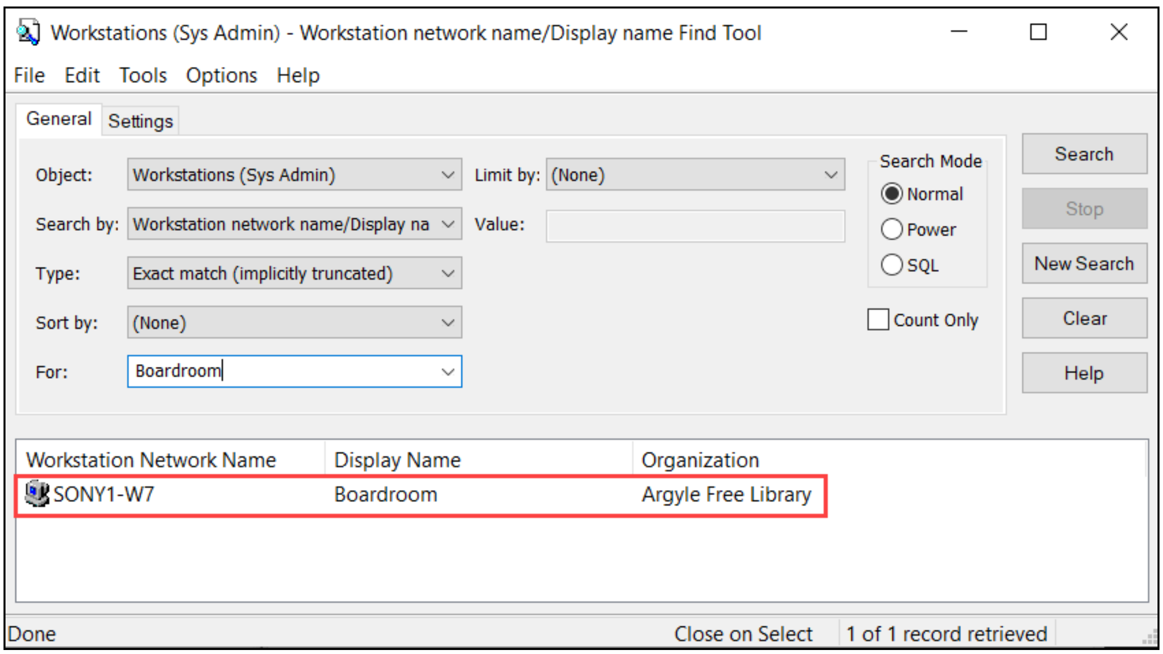
Selecting the QR code icon launches the Scan QR Code dialog. You can use the camera on your device to scan a patron's or item's QR code.



To enable QR code scanning in Leap

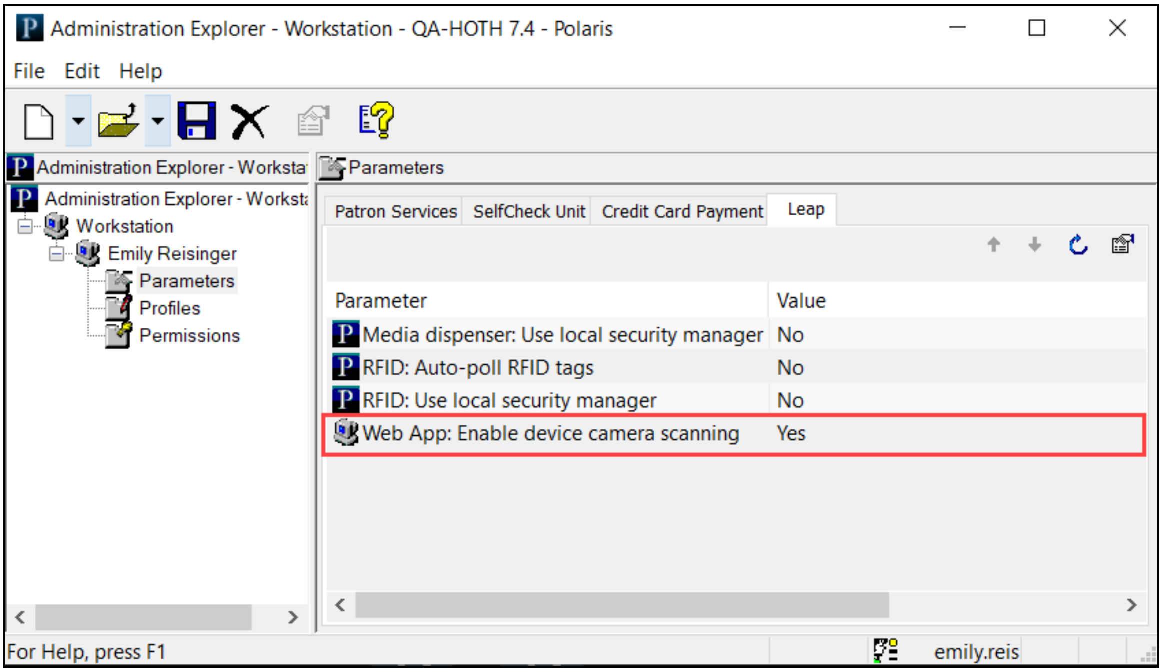
1. In Polaris Administration (staff client), go to **Administration** > **Explorer** > **Workstation**.
2. Select **Search**.

   The Find Tool appears.
3. Search for a workstation.
4. In the search results, double-click the workstation for which you want to enable QR code scanning.

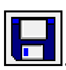


   The Administration Explorer displays the workstation in the tree list view.
5. In the Administration Explorer - Workstation tree list view, double-click the workstation name to expand the list.
6. Select **Parameters** > **Leap**.

   The Leap workstation parameters appear.



7. Double-click the **Web App: Enable device camera scanning** parameter, and set the **Value** option to **Yes**. By default, the parameter is set to **No**.

8. Select **Save** .

Polaris API Now Offers Item Checkout

Now you can use the Polaris API to check out items as a patron. This endpoint does the following:

- Checks for all the blocks — Patron, Item, and Renewal — before checking out or renewing an item.
- Blocks item check out based on existing System Administration settings, specifically the Self Check Material Types policy table and the updated Polaris Administration (staff client) > Administration Explorer > Parameters > SelfCheck Unit > Self Check: Blocking Conditions.
- Tries to automatically renew an item if the specified patron currently has the item checked out.

For more information, see the "ItemCheckoutPost" topic in the Polaris API Guide.

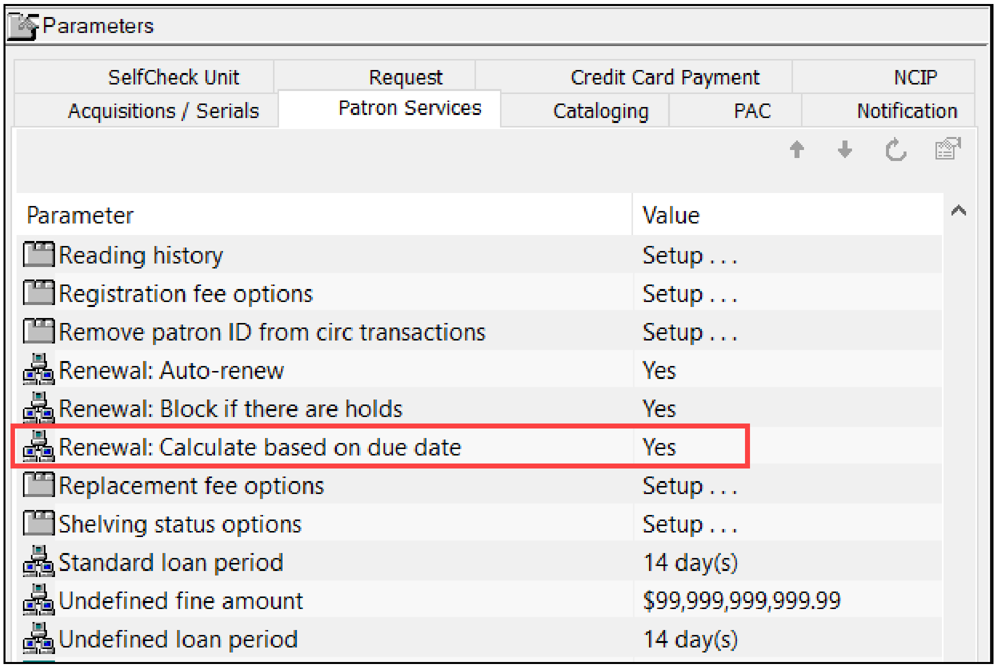
Configuring How Polaris Calculates Due Dates for Renewals

The new **Renewal: Calculate based on due date** parameter lets you configure how Polaris calculates due dates for renewals. You can set this parameter at the System level in Polaris Administration (staff client).

> **Notes:**
>
> - By default, Polaris calculates due dates for renewals by adding the loan period to today's date. If you want to continue using the default method for calculating due dates for renewals, you don't need to take any action.
> - This parameter does not apply to automatic renewals. Due dates for auto-renewals are always calculated by adding the loan period to the due date.

To set the Renewal: Calculate based on due date parameter

1. In Polaris Administration (staff client), go to **Administration** > **Explorer** > **System**.
2. Select **Parameters** > **Patron Services**.
3. Double-click the **Renewal: Calculate based on due date** parameter, then set the **Value** option.



To calculate the due date for renewals by adding the loan period to	Set the Value to
Today's date	No
The due date	Yes

By default, the parameter is set to No.

4. Select **Save** .

Adding Default Fee Descriptions

Fees are charges that are unrelated to overdue fines. Examples of fees include patron registration charges or the price of a pair of headphones. Using the Fee Descriptions policy table, you can:

- Enter fee descriptions so library staff can select them from a predefined list.
- Set a default amount for each fee description.

Entries in this policy table appear as selections on workform views and dialog boxes where you handle patron charges, such as the **Reason** list from which you can select a fee reason when adding a charge to a patron's account. Entries also appear in Leap.

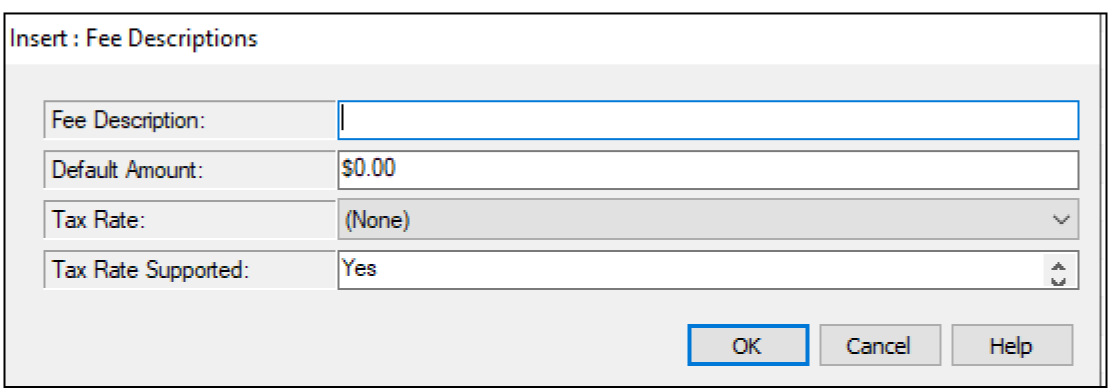
To add a fee description to the Fee Descriptions policy table

> **Note:**
> Check existing descriptions before you add a new one. You cannot delete duplicate descriptions.

1. In the Administration Explorer, open the **Policy Tables** folder for the organization, and select **Fee Descriptions**. The Fee Descriptions table is displayed in the details view.

> **Note:**
> In the Fee Descriptions table, ID numbers preceded by a minus sign are supplied by the system and used in system processes.

2. Select to display the Insert Fee Descriptions dialog box.



3. Enter text that describes the type of fee in the **Fee Description** box.
4. Enter a **Default Amount**.

   The default amount starts as $0.00.
5. (Optional) Select a **Tax Rate**.
6. If this fee description includes a tax rate, select **Yes**. Otherwise, select **No**.
7. Select **OK**.

   The Fee Descriptions policy table appears with the new fee description name. The status bar indicates that the modification is pending.
8. Select **File** > **Save** to save your changes.

   The status bar indicates that the record is saved.

Charging Goods and Services Taxes

You can now charge Goods and Services Taxes (GST) on items sold and on fees, but not on fines. To charge GST, you must do the following:

1. Create a tax rate in System Administration (staff client).
2. Assign a tax rate to fees in System Administration (staff client).
3. View tax rates in Leap.

> **Note**:
> If you set or change a tax rate in the staff client, we recommend that you perform an IISRESET and refresh your browser to see the most up-to-date tax rates in Leap. If you don't know how to perform an IISRESET, contact an Innovative support agent.

Create a Tax Rate

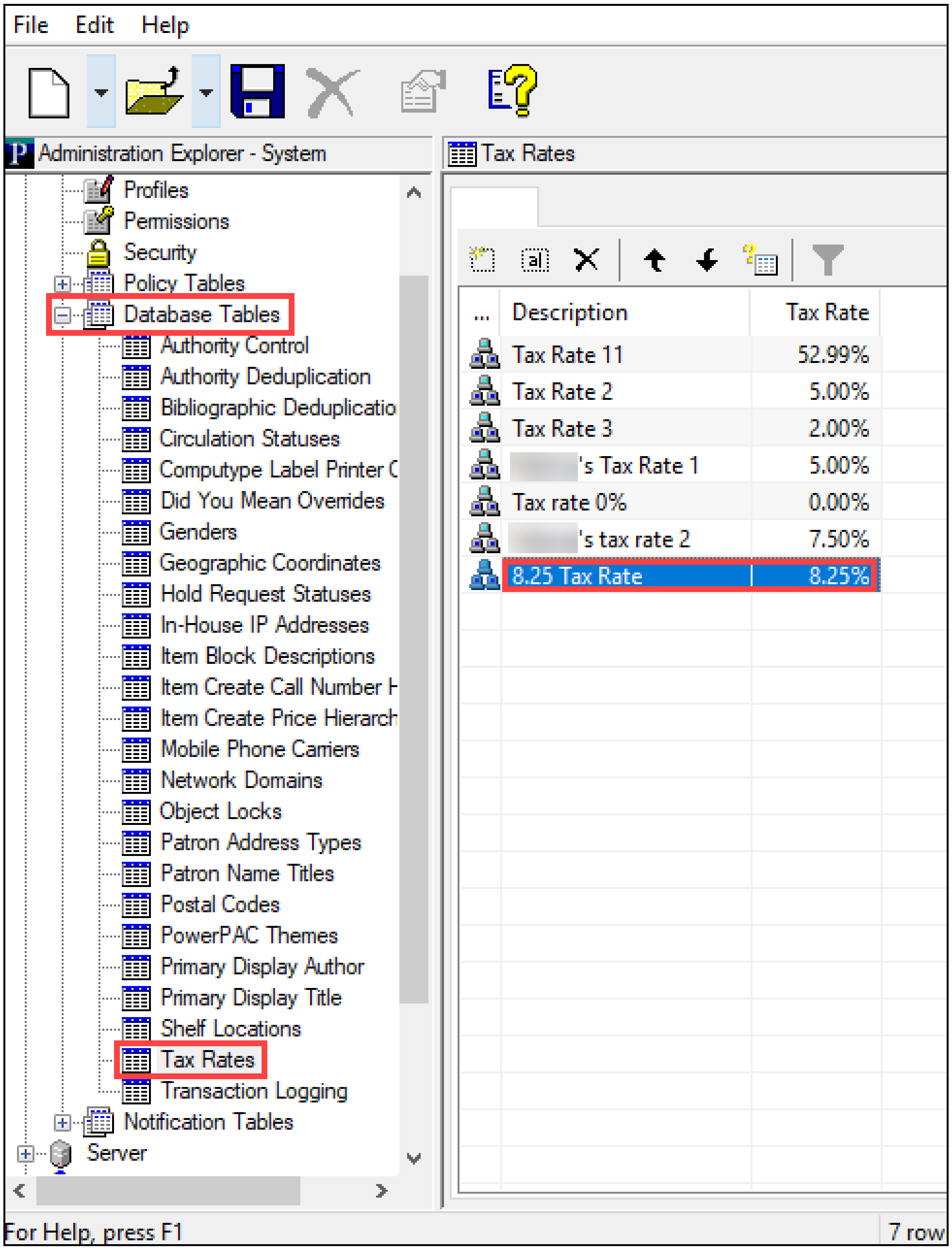
To perform the following steps, you and your workstation must have the permission: **Modify tax rates table: Allow**.

To create a tax rate

1. Open the staff client, and select **Administration** > **Explorer** > **System**.

   The System Administration Explorer appears.

2. Select **Database Tables** > **Tax Rates**.



3. Select Insert tax rate.

   The Insert: Tax Rates dialog appears.

4. Enter a **Description** and **Tax Rate** percentage.
5. Select **OK**.

The system adds the new tax rate to the bottom of the Tax Rate table.

Assign a Tax Rate

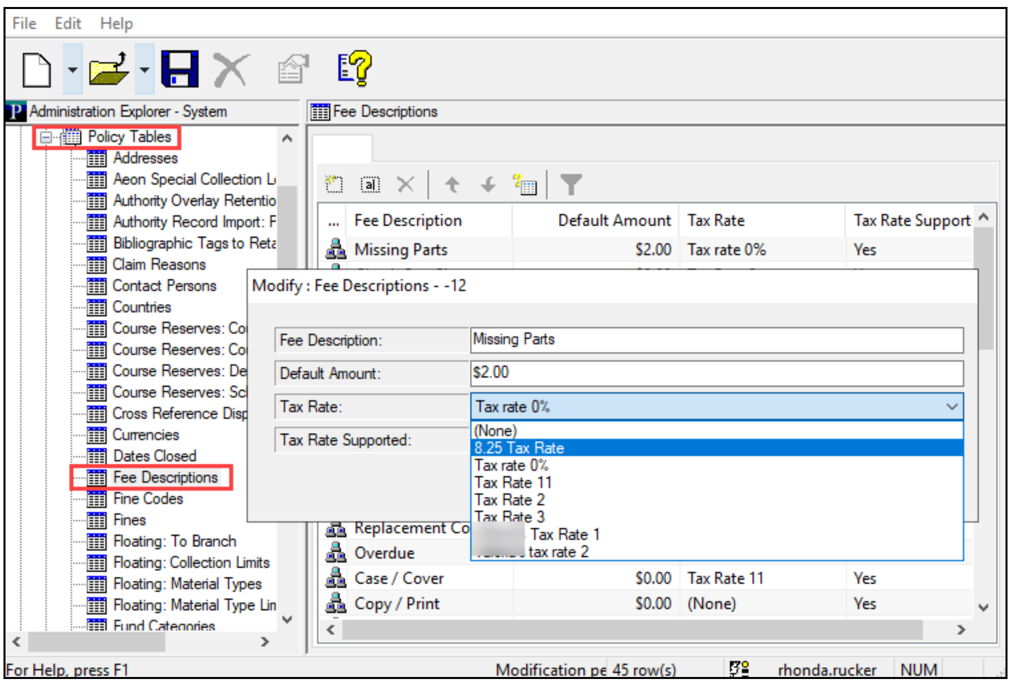
To assign a tax rate

1. Open the staff client, and select **Administration** > **Explorer** > **System**.

   The System Administration Explorer appears.

2. Select **Policy Tables** > **Fee Descriptions** > **Modify: Fee Descriptions**.

   The Modify: Fee Descriptions dialog appears.



3. Select a **Tax Rate**.
4. Select **OK**.

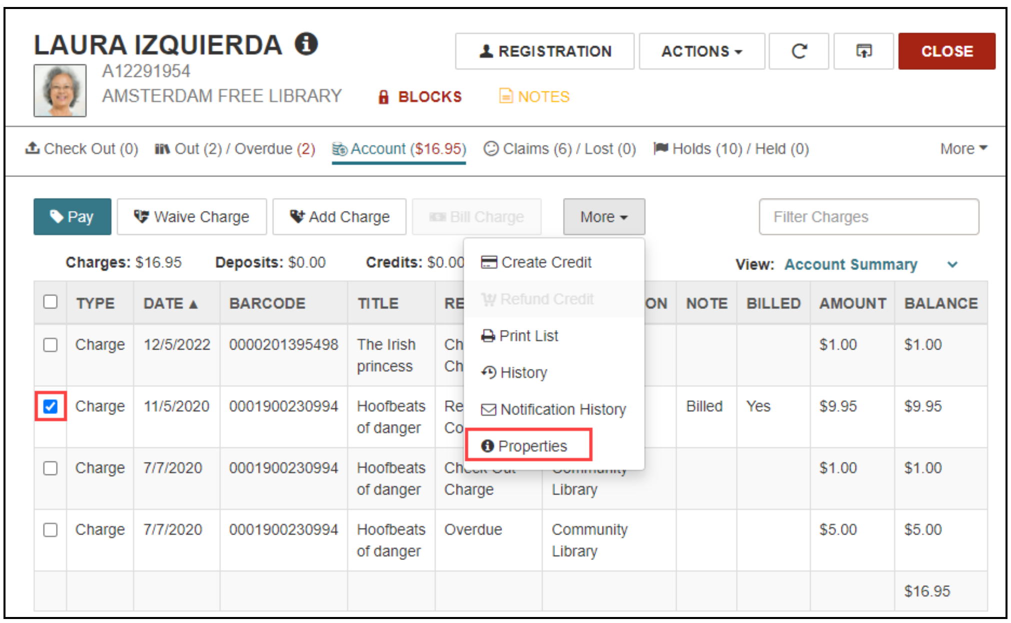
   Polaris assigns the new tax rate to the selected fee.

View Tax Rates on a Charge in Leap

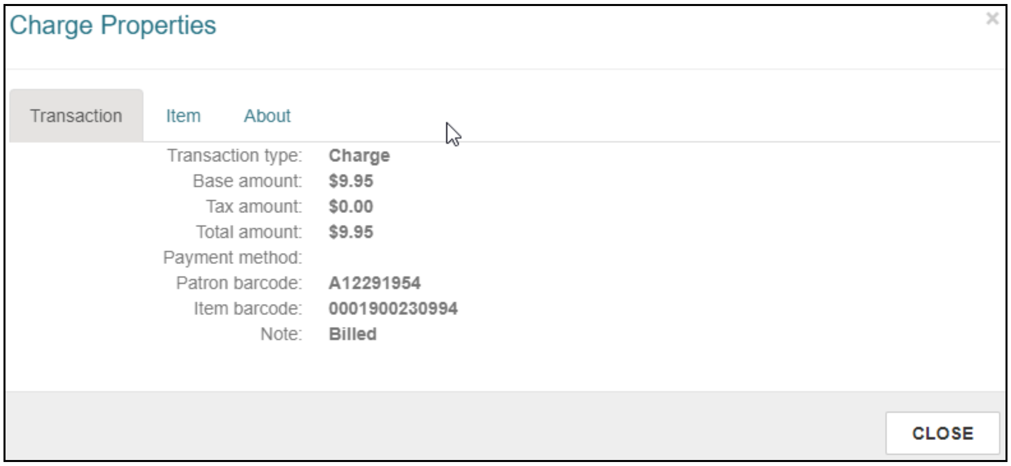
After you create and assign a tax rate in System Administration (staff client), you can view the tax rate and calculated total fees on a patron charge in Leap.

To view tax rates on a patron charge in Leap

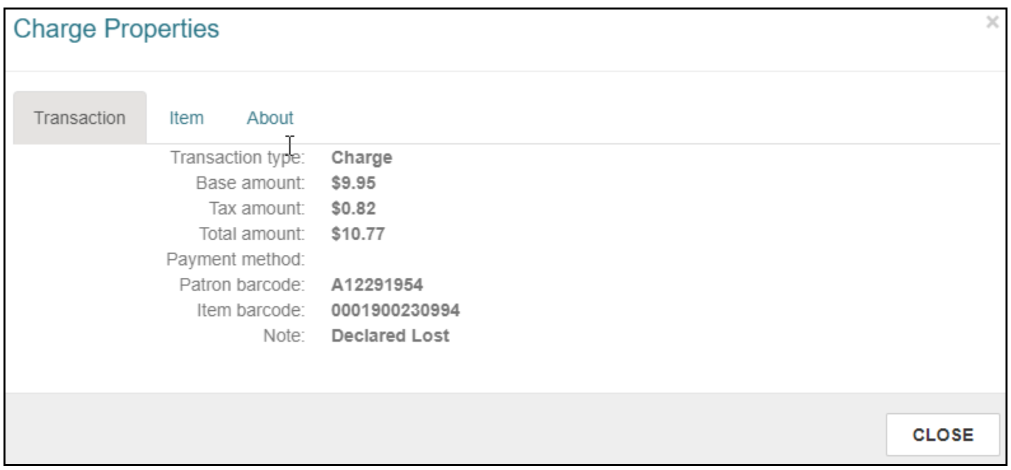
1. In Leap, use the Find Tool to search for a Patron Record.
2. Open the Patron Record and select **Account View**.
3. Select a charge from the table and select **Properties**.



Before in Leap the tax rate was 0%.



After in **Leap** the tax rate is 8.2%.



Enabling Aeon Special Collection Requests

You can now integrate Polaris with Aeon for handling special collection requests. If an item is part of a special collection, patrons can access the item by placing a request in PowerPAC and viewing the item in a library reading room. When a patron initiates a special collection request, PowerPAC launches a new browser window where the patron can enter their Aeon credentials to complete the request.

To configure Polaris to enable Aeon special collection requests, do the following:

1. Designate special collection locations.
2. Set the Aeon OpenURL prefix.
3. Enable Aeon special collection requests.

For more information about Aeon special collection item requests, see https://www.atlas-sys.com/aeon.

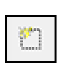
Designate Special Collection Locations

The Aeon Special Collection Locations policy table specifies shelf locations that are designated as Aeon special collection locations. If an item's shelf location is an Aeon special collection location, the item can only be accessed by request and viewed in a reading room. You can specify special collection locations at the System, Library, or Branch level.

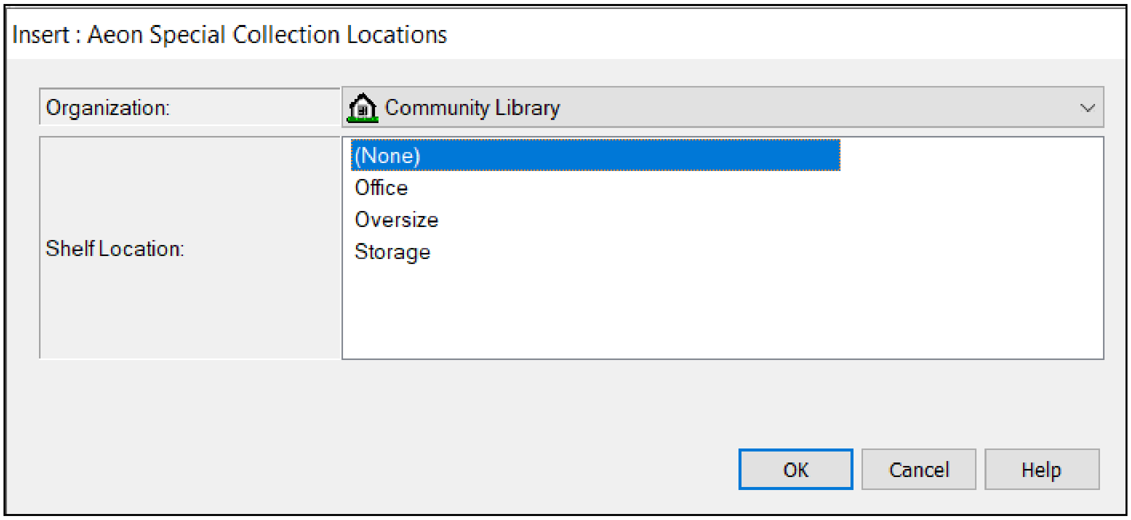
To designate items that belong to a special collection

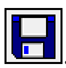
1. In Polaris Administration (staff client), go to **Administration** > **Explorer**.
2. Select an organization level (**System**, **Library**, or **Branch**).
3. Select **Policy Tables** > **Aeon Special Collection Locations**.

   The Aeon Special Collection Locations policy table appears.

4. Select **Insert** .

   The Insert: Aeon Special Collection Locations dialog appears.



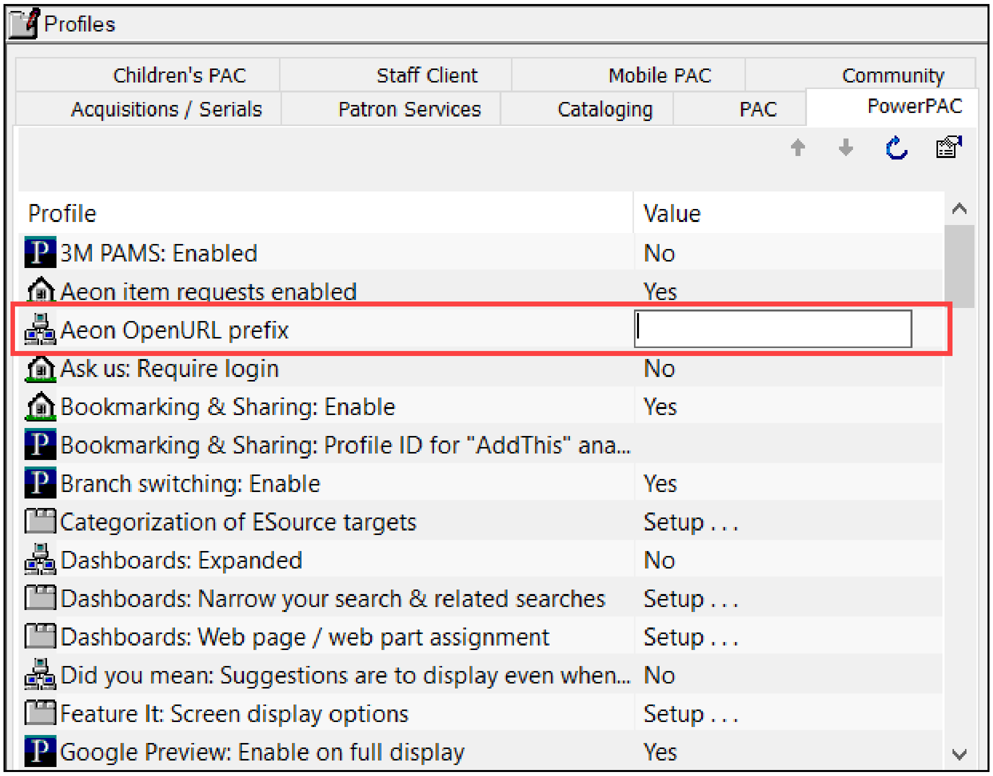
5. Select the shelf locations you want to designate as special collection locations.
6. Select **OK**.
7. Select **Save** .

Set the Aeon OpenURL Prefix

Polaris uses the Aeon OpenURL prefix to construct URLs used to submit special collection item requests to Aeon. Before editing the **Aeon OpenURL prefix** profile, contact Innovative to determine your library's Aeon OpenURL prefix.

To set the Aeon OpenURL prefix

1. In Polaris Administration (staff client), go to **Administration** > **Explorer**.
2. Select an organization level (**System**, **Library**, or **Branch**).
3. Select **Profiles** > **PowerPAC**.
4. Double-click the **Aeon OpenURL prefix** profile, then enter the Aeon OpenURL prefix in the **Value** field.

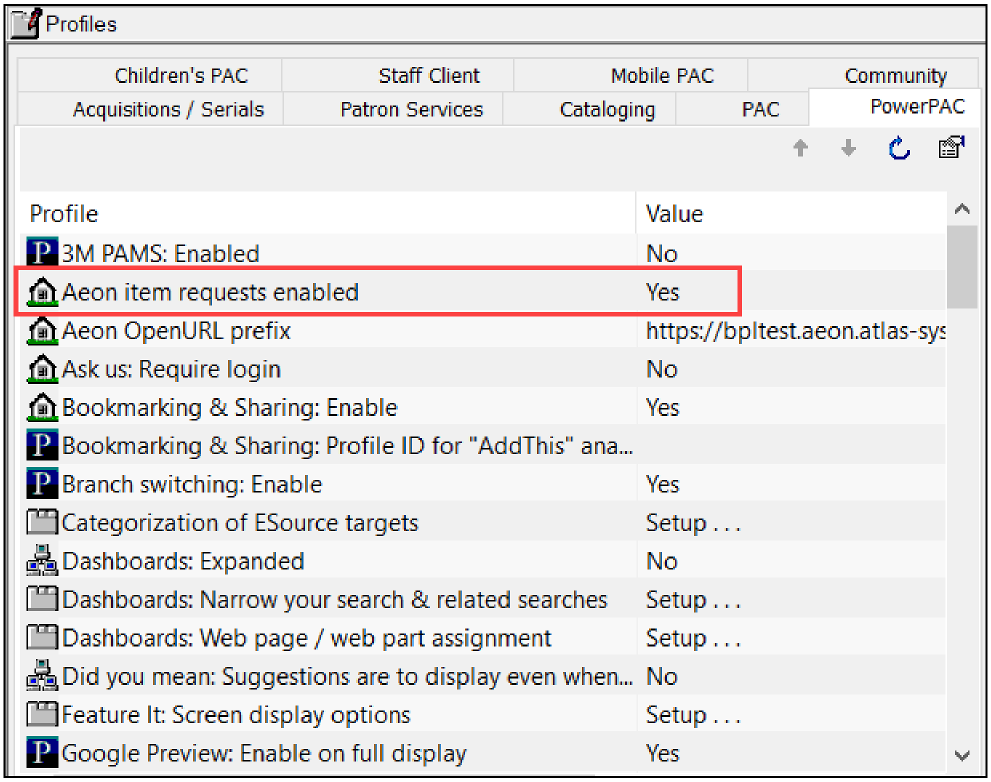


5. Select **Save** .

Enable Aeon Special Collection Requests

To enable Aeon special collection requests

1. In Polaris Administration (staff client), go to **Administration** > **Explorer**.
2. Select an organization level (**System**, **Library**, or **Branch**).
3. Select **Profiles** > **PowerPAC**.
4. Double-click the **Aeon item requests enabled** profile, then set the **Value** option to **Yes**.



5. Select **Save** .

Integration with Google Analytics 4

Polaris now supports integration with Google Analytics 4. Google Analytics 4 replaces the previous version of Google Analytics (Universal Analytics). Google will end support for Universal Analytics on July 1, 2023.

To continue using Google Analytics to track PowerPAC or Mobile PAC usage, you must do the following before July 1, 2023:

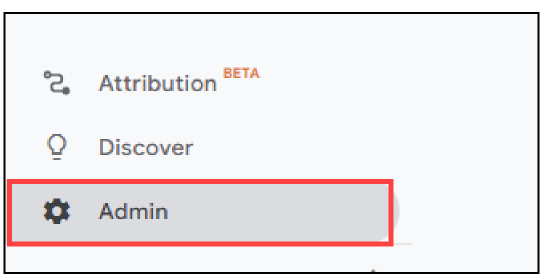
- Upgrade to Polaris 7.4.
- Use your existing Google Analytics account to create a Google Analytics 4 measurement ID.
- Enter the measurement ID in Polaris Administration (staff client).

Important:
If you do not complete these steps by July 1, 2023, Google Analytics will no longer provide you with usage statistics.

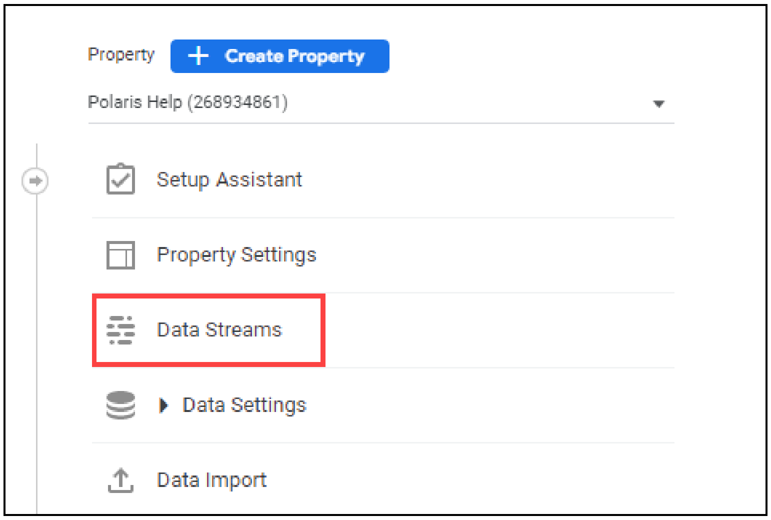
Create a Google Analytics 4 Measurement ID

To create a Google Analytics 4 measurement ID

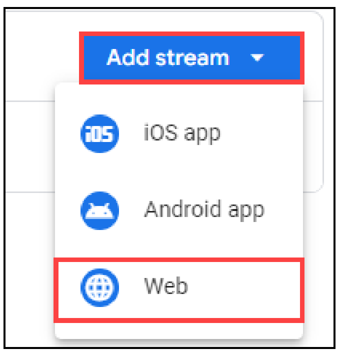
1. Navigate to https://analytics.google.com/.
2. Sign in.
3. In the bottom-left corner, select **Admin**.



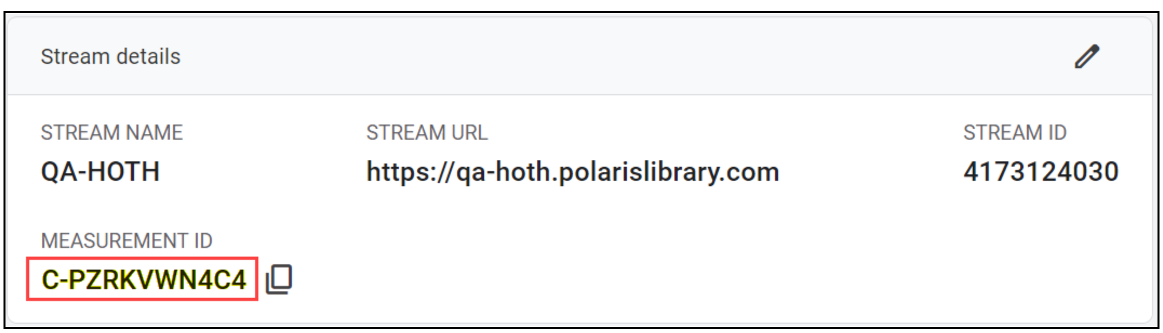
4. Select **Data Streams**.



5. Create a new data stream by selecting **Add stream** > **Web**.



6. Copy the measurement ID of the new data stream. You will use this value to [enter the measurement ID in Polaris Administration (staff client)].



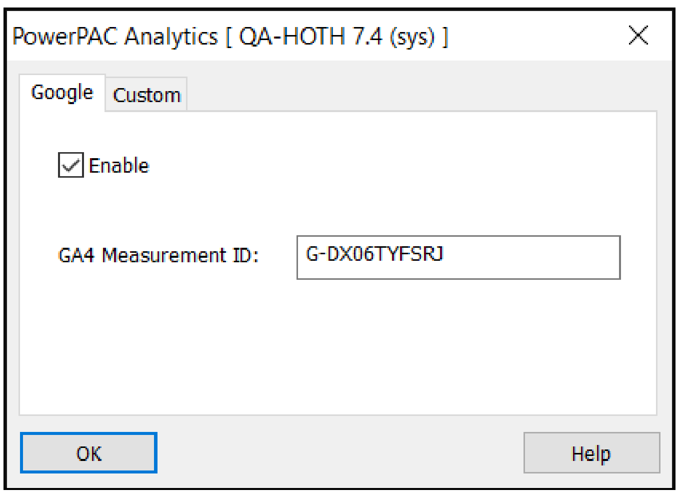
Enter the Measurement ID in Polaris Administration (Staff Client)

You can configure Google Analytics at the system, library, or branch level.

To enter the measurement ID in Polaris Administration (staff client)

1. In Polaris Administration (staff client), do one of the following:
    - To configure Google Analytics for PowerPAC, select **Profiles** > **PowerPAC** > **PowerPAC Analytics**.
    - To configure Google Analytics for Mobile PAC, select **Profiles** > **Mobile PAC** > **Mobile PAC Analytics**.

   The PowerPAC Analytics or Mobile PAC Analytics dialog appears.



2. On the **Google** tab, verify that **Enabled** is selected.
3. Paste your Google Analytics 4 measurement ID into the **GA4 Measurement ID** box.
4. Select **OK**.

MARC Technical Updates in Polaris 7.4

The updates specified in the following links were implemented in Polaris 7.4.

- MARC Update Number 32 (June 2021)
  - Bibliographic format updates
  - Authority format updates
- MARC Technical Notice (February 5, 2021)
- MARC Technical Notice (February 26, 2021)
- MARC Technical Notice (March 15, 2021)
- MARC Technical Notice (April 15, 2021)
- MARC Technical Notice (April 26, 2021)
- MARC Technical Notice (May 10, 2021)
- MARC Technical Notice (June 14, 2021)
- MARC Technical Notice (July 30, 2021)
- MARC Technical Notice (September 23, 2021)
- MARC Technical Notice (October 21, 2021)
- MARC Technical Notice (November 26, 2021)
- MARC Technical Notice (December 7, 2021)
- MARC Technical Notice (December 9, 2021)
- MARC Technical Notice (December 9, 2021 - Revised)