



# What's New in Polaris and Leap

6.4

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## Polaris Installation Notes

**Important:**

When the new Polaris release is installed on a workstation, the file path changes from 6.3 to 6.4 as in the following examples:

C:\ProgramData\Polaris\6.4

C:\Program Files\Polaris\6.4

C:\Program Files (x86)\Polaris\6.4

## Web Admin Updates

The tables below lists the most important new strings added in Polaris 6.4.

### PowerPAC Strings

Mnemonic String	Text
PACML_COMMUNITY_AALHDR	Ask-a-Librarian box link
PACML_COMMUNITY_AALMSG	Display an Ask-a-Librarian box link, where visitors can send reference questions to the library from your site
PACML_COMMUNITY_AALWINHDR	Create an Ask-a-Librarian box link

## Polaris API Changes

The table below is a list of changes to the Polaris API for v6.4.

Method Name	Purpose
PatronRegistrationCreate and PatronRegistrationUpdate	Incoming phone number formats are now validated against customer-defined rules in Polaris System Administration. The TxtPhoneNumber parameter now supports "Unspecified" for instances where no phone number is indicated. The parameter StreetThree has been added as optional. The parameters Phone1CarrierID, Phone2CarrierID, and Phone3CarrierID support a value of -2 if the patron's branch has "Notice: Export text message" enabled in System Administration.
PatronBasicDataGet	StreetThree has been added to the PatronAddresses return element.
SynchBibsByIDGet	Bibliographic records can now be queried using a single record ID, a comma-delimited list of IDs, or a range of IDs. A new query string parameter, includeItems, is supported when retrieving records. This parameter includes an 852 tag for each item record linked to the bibliographic record.

For more information, see the **Polaris API Reference for v6.4**.

## New and Modified Polaris Administrative Settings

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

Setting	Purpose	Level
<b>New Permissions</b>		
Cataloging: Cataloging records sets: Export	Allows users to export data from cataloging record sets	Staff, Library, Branch, User, Workgroup
Patron Services: Patron record sets: Export	Allows users to export data from patron record sets	Staff, Library, Branch, User, Workgroup
<b>New Profiles</b>		
Staff Client: Web App: Use Local Item Availability Display Order on Local Items View: Yes/No	Uses the item availability display order table, previously used only for PowerPAC, to order item records on the Bibliographic Record, Item View in Leap.  Default value: No.	System, Library, and Branch
Staff Client: Patron phone number format definition	Add and select phone number format for a defined list of countries	System
Staff Client: Patron phone number format validation: Phone Call	Enforce selected country phone number format for phone calls in Staff Client and Leap	System
Staff Client: Patron phone number format validation: Txt Message	Enforce selected country phone number format for text messages in Staff Client and Leap	System
Patron Services: Contribute to BNC	Enables extraction of report data to BNC.	System



Setting	Purpose	Level
Patron Services: FTP URI for BNC	FTP URI for exporting report data to BNC.	System
Patron Services: FTP user name for the BNC account	FTP user name for exporting report data to BNC.	System
Patron Services: FTP password for the BNC account	FTP password for exporting report data to BNC.	System
Patron Services: BNC FTP: Set mode to Active	Enables FTP of report data to BNC in Active mode, rather than Passive mode.	System
<b>New Parameters</b>		
Patron Services: Last use patron: Delete: Yes/No	Enables you to delete linked Last Borrower ID when older than X days	System, Library, and Branch
Patron Services: Last use patron: Number of days to keep	<p>Allows you to set the number of days to keep linked Last Borrower ID.</p> <ul style="list-style-type: none"> <li>• 0 means delete on the first night.</li> <li>• Greater than 0 indicates number of days to keep last borrower data.</li> <li>• Setting controls the deletion based on patron's registered branch.</li> </ul>	System, Library, and Branch
Notification: Notification Options: Notification Method: TXT Message	An Export checkbox for this new option is added to the Notification options dialog. A new Txt Message section is also added to provide the FTP Server URI, Username, and Password for where the notice file report will be exported.	System
<b>Modified Profiles</b>		
PAC: Patron Options:	Enforce selected country phone number	System

Setting	Purpose	Level
Contact Info tab: Enable phone validation	format for text messages in PowerPAC and MobilePAC	

## **Obsolete Highlight Column Removed from the Item Availability Display Order Table**

The obsolete Highlight column has been removed from the Item Availability Display Order policy table in the Polaris staff client.

## **Google+ References Removed from Polaris**

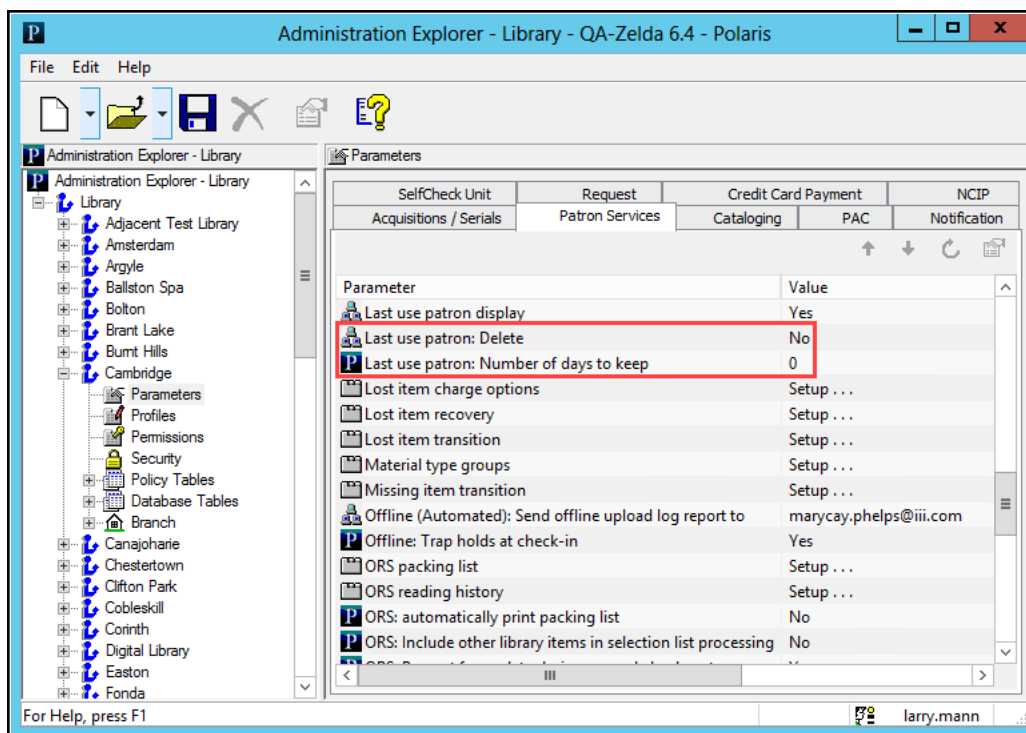
Because Google has discontinued their Google+ social community, the option to share information on Google+ has been removed from the Polaris Staff Client and the PowerPAC. All references to Google+ have been removed from the Staff Client, the PowerPAC, and documentation.

## Delete Last Borrower Information

You can now set how many days last borrower information is kept on the item record. Two new Patron Services parameters have been added at the System, Library, and Branch levels in system administration.

Each of these parameters is described below:

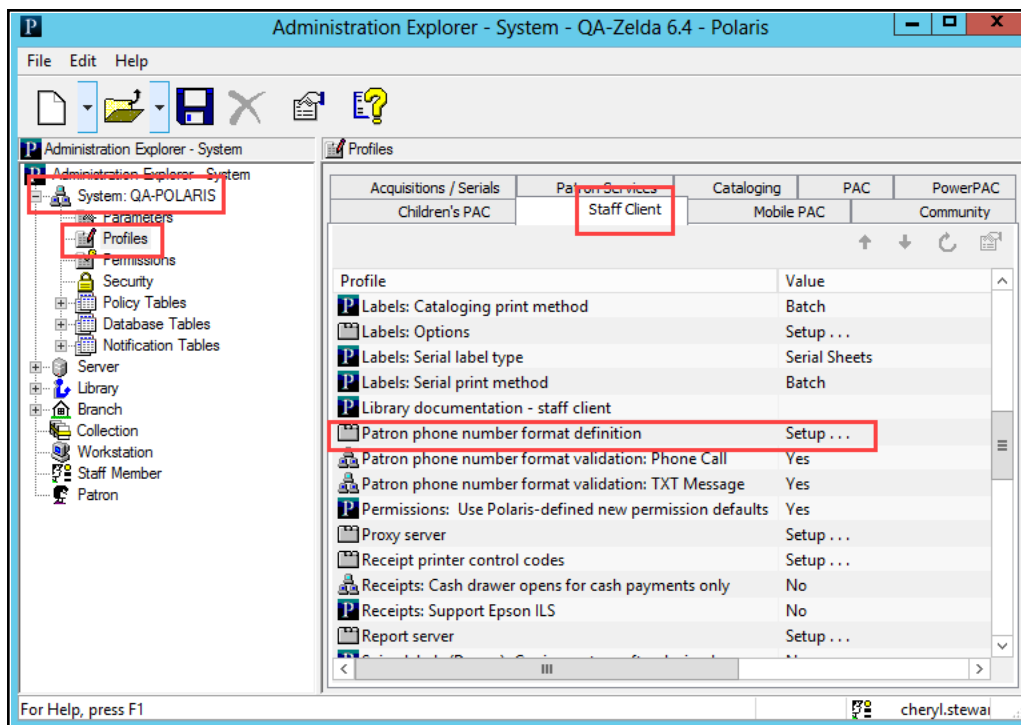
- **Last use patron: Delete:** Determines if the last borrower information is deleted.
- **Last use patron: Number of days to keep:** Sets the number of days the last borrower information is kept.



## Phone Formats Based on Default Country

You can now set up and enable custom phone number formats based on your default country in the Staff Client, Leap, PowerPAC, and MobilePAC. The System Administration Permission, **Profiles: Modify**, is required.

A new Staff Client profile, **Patron phone number format definition**, has been added to enable the setup of phone number formats for your default country.



Select the profile to open the new **Phone Number Formats** dialog in which you can select your default country, enter a phone number format with 9 representing a single

digit, and select a type. Select **Add** to add the format to **Current formats** list.

Phone Number Formats for QA-Zelda 6.4

Country: France

Format: 999 999 9999

☒ Phone call ☐ TXT message ☐ Both

Formats may include parentheses and should be entered with the 9 representing a single digit.

All formats will be stored with the space separator, however the decimal and hyphen are also valid, and will be considered duplicates.

Current formats

To delete a format, click on the row in the table, then select Remove.

Format	Phone Type
9999999999	Phone call
9999999999	TXT message
99 99 99 99 99	Phone call
99 99 99 99 99	TXT message

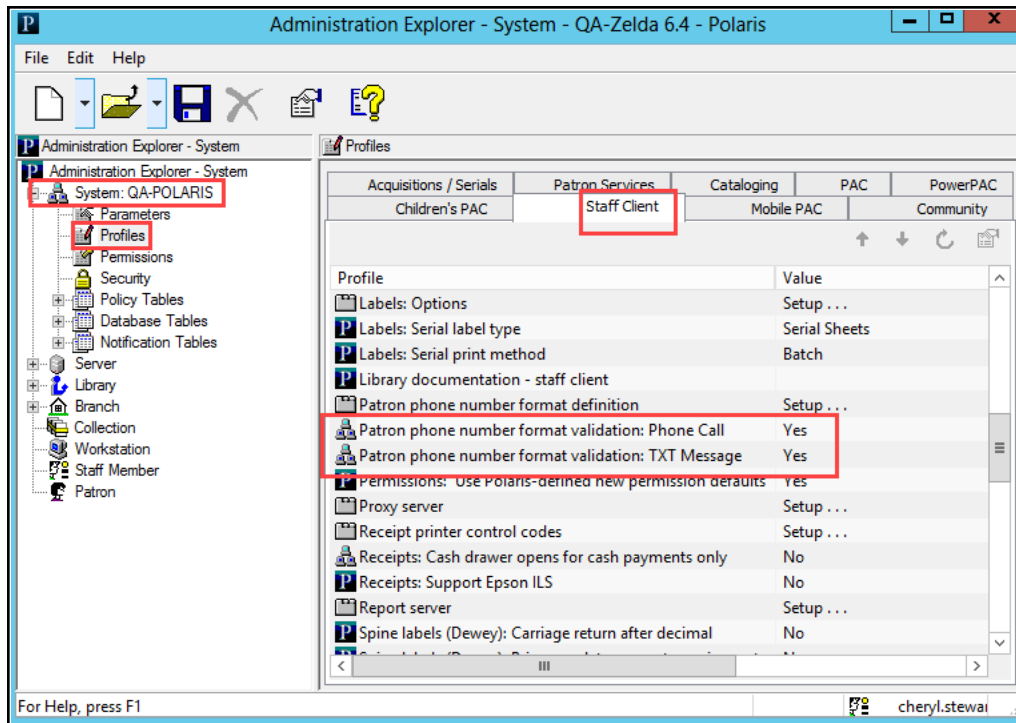
Add Remove

OK Cancel Help

**Note:**

If you have enforced phone number formatting and you want to enable phone number formats from another country, you can add them to your default country phone number formats.

Two new system-level staff client profiles have been added to enforce the phone number formats for your default country in both the Staff Client and Leap. Their default values are **Yes**. When enabled, valid phone numbers for new patrons or updated phone numbers for current patrons must follow the designated number format(s).



The **Contact Info** section of the **Patron Access Options** PAC Profile has been updated with the new **Enable phone validation** section. When enabled, phone numbers for new patrons or updated phone numbers for current patrons entered via PowerPac and MobilePAC must follow designated phone number format(s) for the default country.



Patron Access Options [ QA-Zelda 6.4 (sys) ]

Self-registration Defaults Log In Contact Info Preferences Ask us

☐ Patron can request address change

☐ Patron can change notification method

☐ Confirmation e-mail to patron

E-mail address

☐ Change allowed

☐ Patron can submit change request

☒ Patron can change without verification

Phone number

☒ Change allowed

☐ Patron can submit change request

☒ Patron can change without verification

☒ Enable phone validation (system level)

☒ Phone call

☐ TXT message

☐ Both

Enable for patron codes:

- ☒ CPH Outreach
- ☒ CPH Resident
- ☒ CPH Retired
- ☒ CPH Staff / Board
- ☒ Delinquent Borrower
- ☒ ILL Agency
- ☒ Juvenile
- ☒ Juvenile with Restrictions
- ☒ New Borrower
- ☒ Outreach
- ☒ Regular
- ☒ Retired
- ☒ Saratoga Outreach
- ☒ Saratoga Resident
- ☒ Saratoga Staff / Board
- ☒ Schenectady resident
- ☒ Self Registered
- ☒ Staff / Board
- ☒ Temporary
- ☒ Test 1
- ☒ Test 2

Patron can opt out of these reminder notices

☒ Almost overdue/Auto-renew ☒ Patron record expiration ☒ Inactive patron

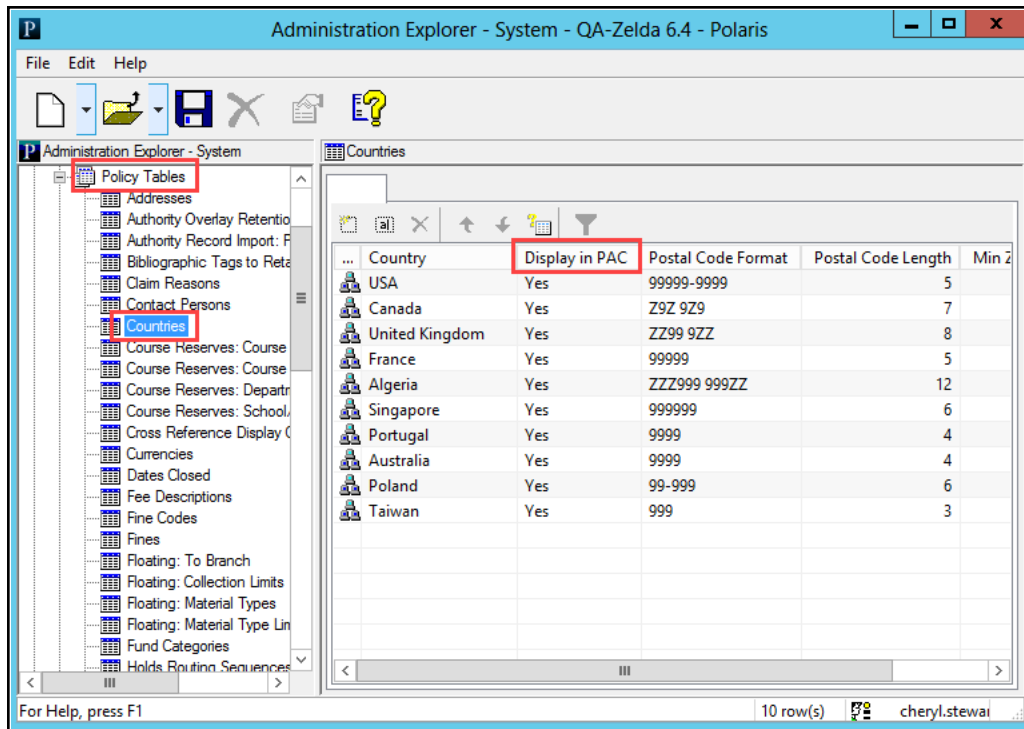
E-mail to:

Add Delete

Name	Branch
phelps	Schenectady Branch - Central

Save Cancel Apply Help

A new **Display in PAC** column has been added to the Countries Policy table to determine the default list of available countries in PowerPAC self-registration. The default value is **Yes** for existing countries and for new countries added to the table. Staff with the appropriate permission can modify this value in the Countries Policy table.



## New Third Address Line and Euro Currency Format

A new third address line has been added to form entries and other displays in the staff client, Leap, PowerPAC, and MobilePac. The third address line is optional and not required to add or save an address.

When your default currency is set to Euros, you will now see it reflected throughout the entire Polaris product suite.

The screenshot shows the 'System - 1 - QA-Zelda 6.4- Polaris - Polaris' window. The 'General' tab is active, displaying the following fields:

- Name:** QA-Zelda 6.4
- Abbreviation:** QA-POLARIS
- Display Name:** QA-Zelda 6.4
- General**
  - Addresses**
    - System:** 21 Sheridan Street; PO Box 238; Attn: Thomas D. Train; Argyle; NY; USA; 12809
    - Email:**
    - WWW:**
  - Contact Representatives**
    - Primary:** Carol Clingan; cclingan@mvls.info; 518-355-2010; 518-355-3674
    - Alternate:** Julia Martin; jmartin@sals.edu; 518-695-6641; 518-695-6441
  - Phone Numbers**
    - Primary:** 518-584-7300
    - Alternate:**
    - Fax:** 518-587-5589
- Default Country:** USA
- Default Currency:** US Dollar (dropdown menu is open showing options: US Dollar, Canadian Dollar, British Pound, Euro)
- Default Language:** English - United Sts
- Error Reporting Email:**

At the bottom left, it says 'For Help, press F1'.

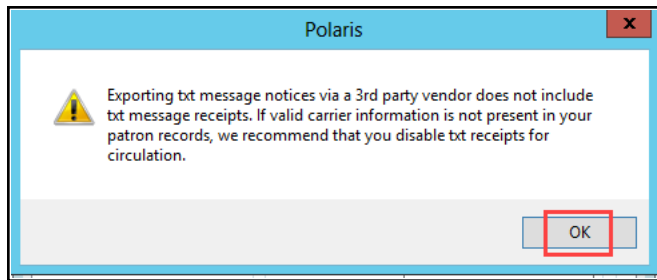
## Export Txt Messages to i-tiva

You can now export text messages for patrons without carrier information to the i-tiva SMS service. The text messages are exported to a notice file report that is sent to i-tiva for processing, and i-tiva then sends back a success notice after each text message goes out. The incoming success notice updates notification information in the patron record.

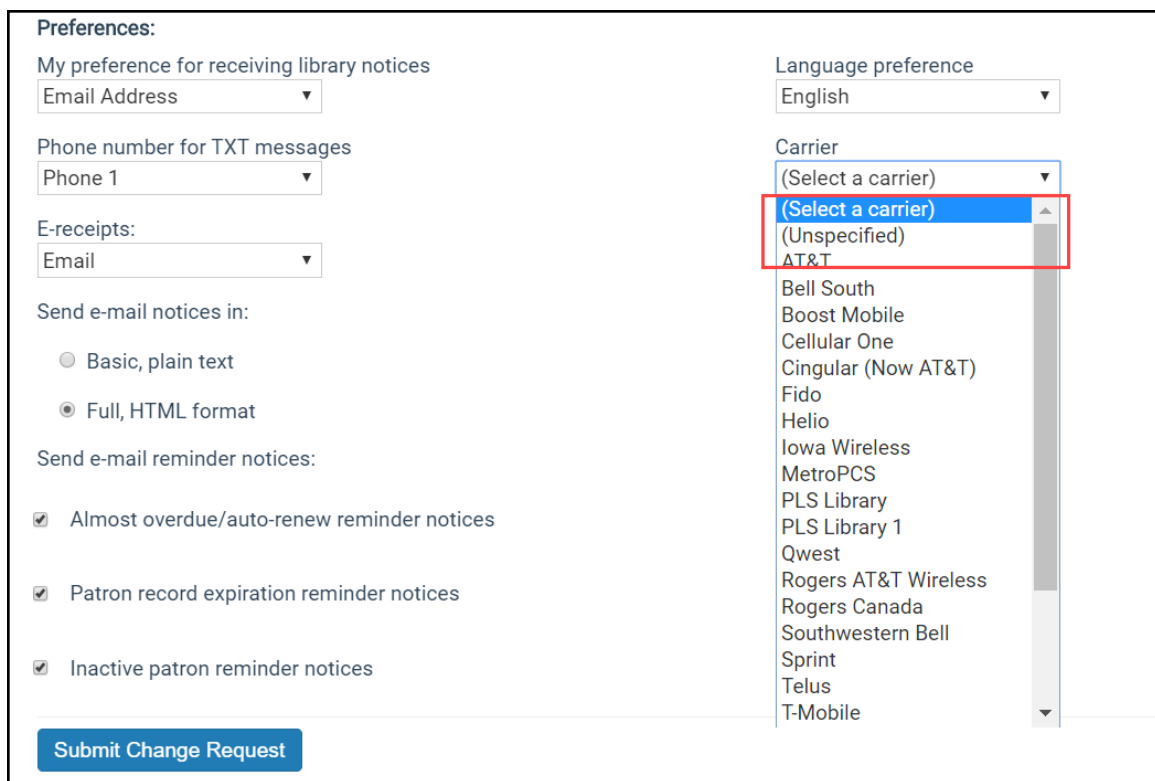
An **Export** checkbox for this new option is added to the Notification options dialog. A new **Text Message** section is also added to provide the FTP Server URI, Username, and Password for where the notice file report will be exported.

The screenshot shows the 'Notification options' dialog box with the 'General' tab selected. The 'Notification method' section on the left includes checkboxes for 'Print', 'Export', 'Available in PAC', 'E-mail', 'Available in PAC', 'Phone', 'Export', 'Available in PAC', 'TXT Message', and 'Export'. The 'Export' checkbox under 'TXT Message' is checked and highlighted with a red box. Below this, the 'Text Message' section is also highlighted with a red box, containing fields for 'FTP Server URI', 'Logon name', and 'Password'. The 'E-mail notice' section on the right includes fields for 'From', 'Reply-to', and 'E-mail address to use', along with a checkbox for 'Send report for e-mail notice processing'. The 'Phone' section includes fields for 'FTP Server URI', 'Logon name', and 'Password'. At the bottom, there is a checkbox for 'Save a local copy' and buttons for 'Save', 'Cancel', 'Apply', and 'Help'.

When you select the Export option, a warning note about disabling text receipts is displayed. Select **OK** to close the message.



A new carrier, **Unspecified**, is added to the carrier list in Leap, the Staff Client, and PowerPac. Carrier information is required for patrons with a Notification preference of Txt Message. When you select the new Export Txt Message option, Unspecified is the default carrier when the patron has selected a txt message phone number but has not selected a carrier.

A screenshot of a "Preferences" form. The form is divided into two columns. The left column contains settings for "My preference for receiving library notices" (Email Address), "Phone number for TXT messages" (Phone 1), "E-receipts:" (Email), "Send e-mail notices in:" (radio buttons for "Basic, plain text" and "Full, HTML format", with "Full, HTML format" selected), and "Send e-mail reminder notices:" (checkboxes for "Almost overdue/auto-renew reminder notices", "Patron record expiration reminder notices", and "Inactive patron reminder notices", all of which are checked). The right column contains "Language preference" (English) and "Carrier" (a dropdown menu). The dropdown menu is open, showing a list of carriers: "(Select a carrier)", "(Unspecified)", "AT&T", "Bell South", "Boost Mobile", "Cellular One", "Cingular (Now AT&T)", "Fido", "Helio", "Iowa Wireless", "MetroPCS", "PLS Library", "PLS Library 1", "Qwest", "Rogers AT&T Wireless", "Rogers Canada", "Southwestern Bell", "Sprint", "Telus", and "T-Mobile". The "(Unspecified)" option is highlighted with a blue background and a red border. At the bottom left of the form is a blue button labeled "Submit Change Request".

## What's New in Polaris and Leap

**Notification Settings**

Notices Address: Home

eReceipt Option: Email Address

Notification Option: Email Address

Additional TXT Notice: ☐

Text Messaging Phone: Phone 1

Wireless Carrier:

- (None)
- (Unspecified)
- AT&T
- Bell South
- Boost Mobile
- Cellular One
- Cingular (Now AT&T)
- Fido
- Helio

Preferences

**Patron Registration - 357715 - Addresses - Polaris**

File Edit View Links Tools Help

Barcode: A12291954

Registered at: Community Library (COB)

Last name: Izquierda

Patron code: Retired

First name: Laura

Middle name:

Title: Suffix:

Expiration:

Term: 0 Date: 11/15/2022

☐ Instructor

Addresses, Phone Numbers

Type	Street One	Street Two	City	State	Postal Code	County	Country
Home	101 E. Main Street		SYRACUSE	NY	13210	ONONDAGA	USA

Address Check

Term: 0 Date: 8/28/2020

Add... Edit... Remove Mailing Label

Notices address: Home

Notification option: Email Address

Additional TXT notice: ☐

eReceipt option: Email Address

Email address: rhonda.rucker@iii.com

Alt Email address: cheryl.stewart@iii.com

Phone 1: 315-512-5555

Phone 2:

Phone 3:

FAX number:

Wireless Carrier:

- (None)
- (Unspecified)
- AT&T
- Bell South
- Boost Mobile
- Cellular One
- Cingular (Now AT&T)
- Fido
- Helio
- Iowa Wireless
- MetroPCS
- PLS Library
- PLS Library 1

For Help, press F1

## **BNC Reporting Now Includes New Data and Transmission Method**

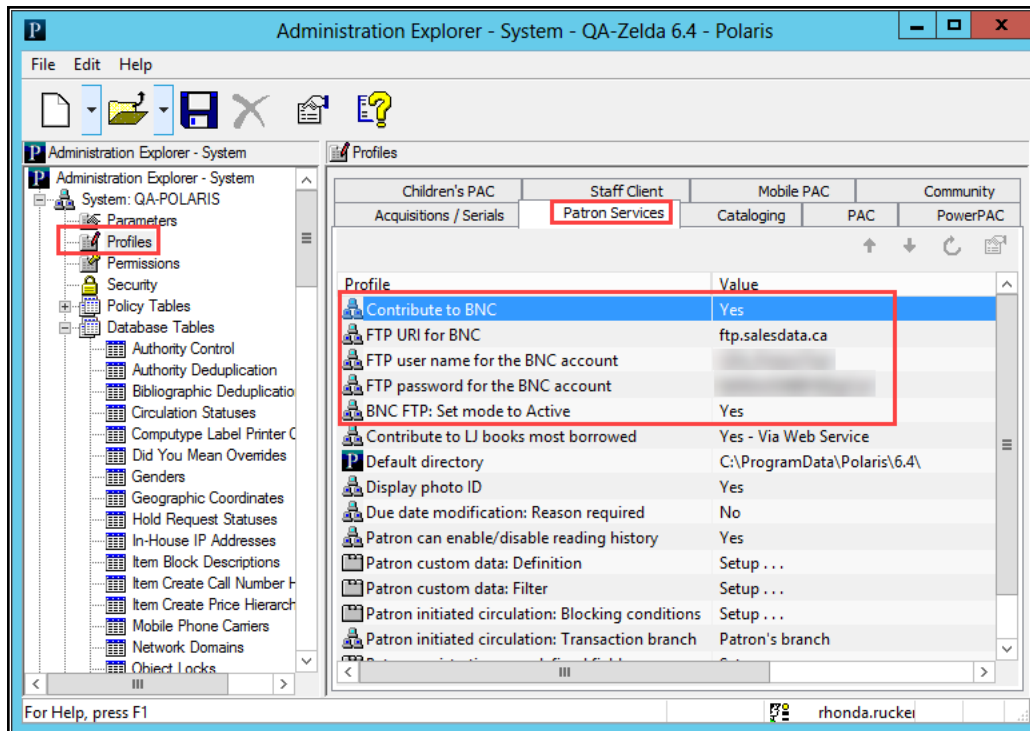
Three new data elements have been added for libraries that participate in BookNet Canada's (BNC) Sales Data Analysis (SDA) program. Each participating library can now configure automatic data extraction and schedule automatic FTP transmission of weekly data files. The two data files contain library information and circulation information. To the circulation information, the following new data elements have been added:

- Copies
- Copies out
- Copies on order

Customers using the existing integration will no longer need to schedule and generate the reports to email to BNC. Once configured, this will be done for them automatically. After the data files are sent, customers are encouraged to delete the files from the server to keep server space free.

Customers can configure the BNC extraction and FTP transmission using the following new settings, found in Administration Explorer > Profiles > Patron Services:

1. Contribute to BNC [Yes/No]
  - Default is no
2. FTP URI for BNC
  - Default is null
  - Max length 255
3. FTP username for the BNC account
  - Default is null
  - Max length 255
4. FTP password for the BNC account
  - Default is null
  - Max length 255
5. FTP: Active [Yes]



Once you enable and setup the BNC profiles, confirm the BNC LibrarySDA Structured Query Language (SQL) job is enabled and scheduled. See [Polaris SQL Jobs Reference](#) for more information.



## Delete All Instances of a Tag Using Bibliographic Record Bulk Change

You can now delete all instances of a tag, not just the first or last, using the Bibliographic Record Bulk Change.

A new option, **Delete an existing tag (all instances)**, has been added to the Operation menu on the Data Fields tab of the Bibliographic Record Bulk Change dialog box.

This option deletes all instances of the indicated tag during the bulk change operation.

The screenshot shows the 'Bibliographic Record Bulk Change' dialog box with the 'Data Fields' tab selected. The 'Operation' dropdown menu is set to 'Delete an existing tag (all instances)'. Below this, the 'Delete Tag' section is visible, containing checkboxes for 'Tag number' (checked), 'Indicator fields' (checked), and 'Subfield' (unchecked). The 'Tag number' is set to 100. The 'Indicator fields' section shows 'One' and 'Two' with a plus sign between them. The 'Subfield' section has a text box and a 'Diacritics' button. There are 'Add' and 'Remove' buttons for the subfield list. An 'Add Change To Queue' button is located below the 'Delete Tag' section. At the bottom, there is a 'Bulk change queue for data fields' section with a list box and 'Remove', 'Up', and 'Down' buttons. The dialog box has 'OK', 'Cancel', and 'Help' buttons at the bottom.

## **EContent Integration Consumption of OverDrive Language Metadata**

The OverDrive eContent integration now consumes language metadata as part of its nightly processes. The ISO-639-1 languages sent by Overdrive are mapped to their MARC equivalents. The bibliographic records are then created with the correct three-letter language indicator.

If an ISO value doesn't have an equivalent in MARC, the language in the bibliographic record defaults to "eng" for English.

If OverDrive sends more than one language, the MARC value 'mul' for multi is used in the bibliographic record.

## **Record Set ID Option Added to Find Tool**

Record Set ID is now an option in the Bibliographic and Item Find Tools in Leap and the Staff Client. The following new features allow library staff to work utilize Record Set content in new ways:

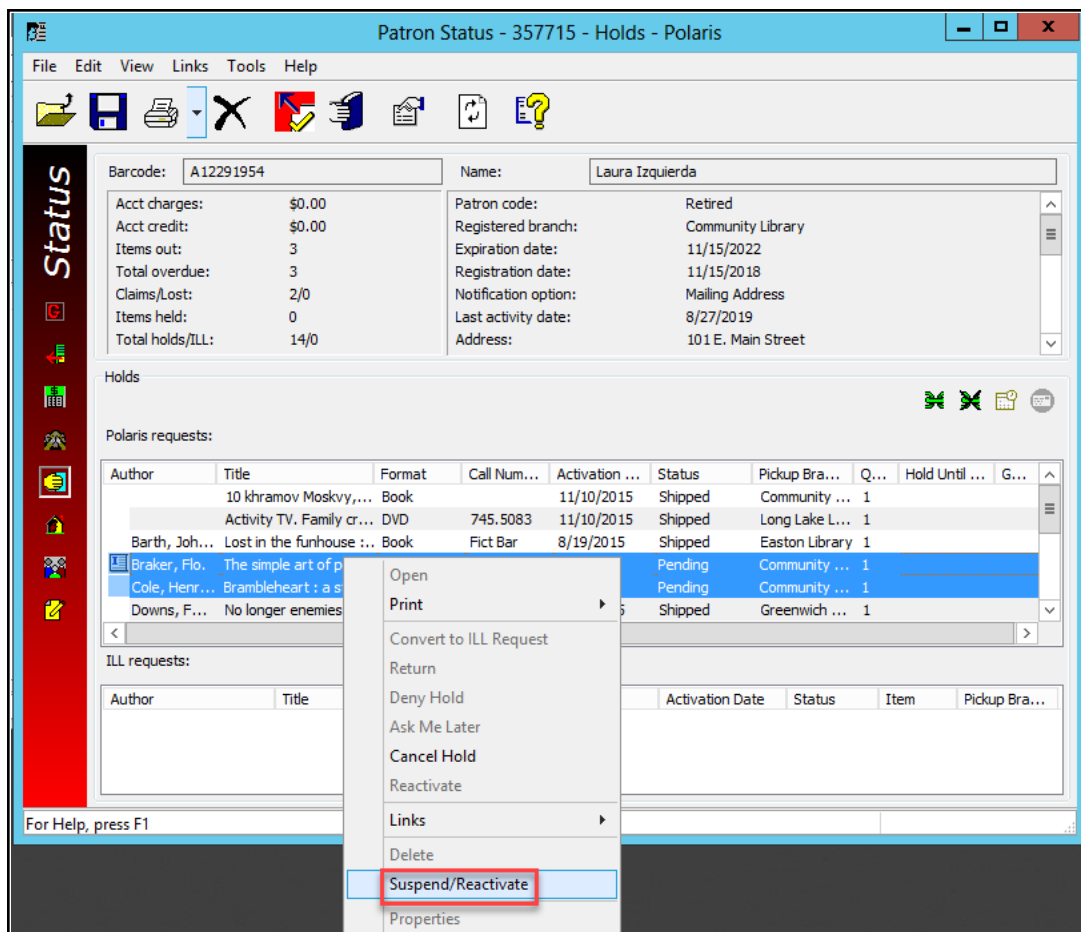
- You can search by record set ID to recall all the bibliographic records or item records in a particular record set.
- When placing multiple hold requests, you can search by record set ID to place a hold on every item in a record set.

## Suspend/Reactivate Holds in Bulk from Patron Account

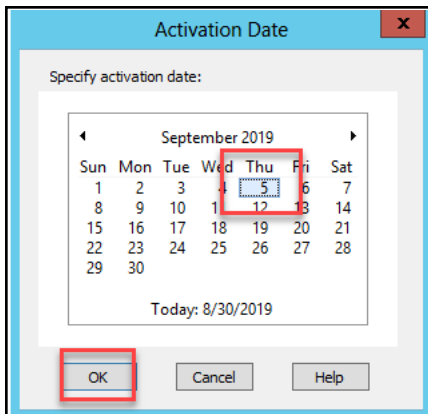
You can now update the activation date for multiple requests at one time from the patron record in Polaris. This option is enabled when all selected holds are in a status of Active, Inactive, or Pending/Located.

Update the activation date for multiple requests in the Polaris Staff Client:

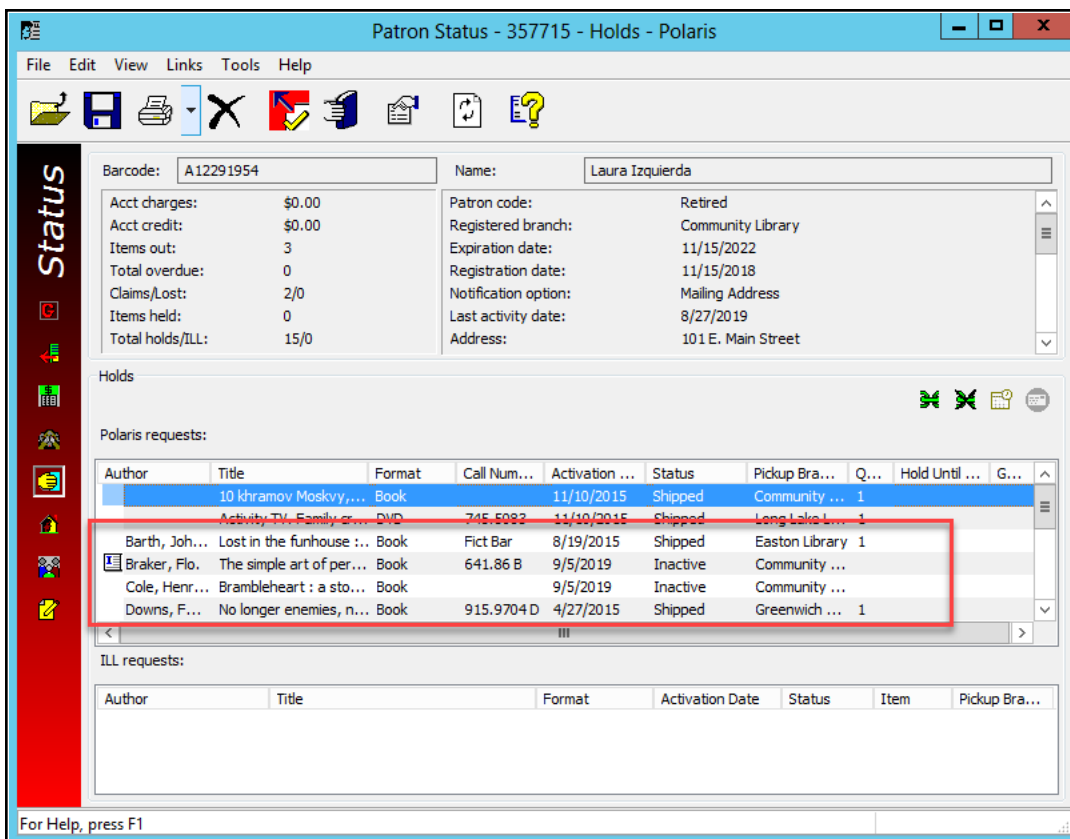
1. Right-click one or more holds from the Patron Holds View, and select **Suspend/Reactivate**.



2. Select an activation date from the **Activation Date** dialog box, and select **OK**. Only the current and future dates are enabled.



The activation dates for the selected holds are updated. Holds that are now inactive will display that status. Holds that may now be pending/located will display that status.



**Note:**

Limit checks are performed when a hold is placed, not when the activation

date is updated. There is no message when a hold is re-activated, but the limits are still respected during the RTF processing, which will leave a request active (or not supplied based on SA) until the patron is under their limits.

## Update the activation date for multiple requests in Leap:

1. In the Patron Holds view, select one or more holds, and select **Suspend/Reactivate**.

**LAURA IZQUIERDA** ⓘ

A12291954  
COMMUNITY LIBRARY

REGISTRATION ACTIONS REFRESH RESULTS CLOSE

Check Out (0) Out (3) / Overdue (0) Account (\$0.00) Claims (2) / Lost (0) **Holds (15) / Held (0)** ILL (0) / Held (0) Reading History More ▾

New Hold Cancel Reactivate Delete **Suspend/Reactivate** Fill Now More ▾ Filter Holds

	AUTHOR ▾	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS	PICKUP BRANCH	QUEUE	HOLD UNTIL	GROUP
		10 khramov Moskv, khranilishchikh chudotvornye ikony : putevoditel'.	Book		11/10/2015	Shipped	Fort Hunter Free Library	1		
		Activity TV. Family crafts and gifts [videorecording]	DVD	745.5083	11/10/2015	Shipped	Long Lake Library	1		
	Barth, John, 1930-	Lost in the funhouse : fiction for print, tape, live voice.	Book	Fict Bar	8/19/2015	Shipped	Easton Library	1		
<input checked="" type="checkbox"/>	Braker, Flo.	The simple art of perfect baking	Book	641.86 B	8/21/2019	Pending	Community Library	1		
<input checked="" type="checkbox"/>	Cole, Henry, 1955- author, illustrator.	Brambleheart : a story about finding treasure and the unexpected magic of friendship	Book		8/21/2019	Pending	Community Library	1		

2. Select an activation date in the **Activation Date** box, and select **UPDATE ACTIVATION DATE**. Only the current date and forward are enabled.

New Hold Cancel Reactivate Delete Suspend/Reactivate Fill Now More ▾ Filter Holds

Aug 2019

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

UPDATE ACTIVATION DATE CANCEL

	AUTHOR ▾	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS	PICKUP BRANCH	QUEUE	HOLD UNTIL	GROUP
--	----------	-------	--------	-------------	-----------------	--------	---------------	-------	------------	-------

The activation date for the selected holds is updated, and the Patron Holds view is refreshed. Holds that are now inactive will display that status. Holds that may now

be pending/located will display that status.

								Library					
<input type="checkbox"/>	Barth, John, 1930-	Lost in the funhouse : fiction for print, tape, live voice.	Book	Fict Bar	8/19/2015	Shipped	Easton Library	1					
<input type="checkbox"/>	Braker, Flo.	The simple art of perfect baking	Book	641.86 B	8/28/2019	Inactive	Community Library						
<input type="checkbox"/>	Cole, Henry, 1955- author, illustrator.	Brambleheart : a story about finding treasure and the unexpected magic of friendship	Book		8/28/2019	Inactive	Community Library						
<input type="checkbox"/>	Downs, Frederick.	No longer enemies, not yet friends : an American soldier returns to Vietnam	Book	915.9704 D	4/27/2015	Shipped	Greenwich Free Library	1					

**Note:**

Limit checks are performed when a hold is placed, not when the activation date is updated. There is no message when a hold is re-activated, but the limits are still respected during the RTF processing, which will leave a request active (or not supplied based on SA) until the patron is under their limits.

## Delay Hold Requests X Days Past First Available Date

When a consortium library purchases an item, that library can now use the Staff client or Leap to set the number of days the new item is available only to its patrons. During the specified number of days, patrons from other libraries can still find the new item and place a hold. After the specified number of days, holds on the new item placed by patrons from other libraries can be filled.

Library staff from other libraries can now use SimplyReports to view reports on holds placed on the new item by its patrons. The assigned library and other libraries can use the hold reports to help with purchasing decisions.

To delay holds and view hold reports:

[Delayed Holds Setting in Staff Client](#)

[Delayed Holds Setting in Leap](#)

[Using New Filters in SimplyReports](#)

---

### Delayed Holds Setting in Staff Client

To designate the number of days an item is available only to the assigned library's patrons:

1. Open a New Item workform or New Item Template workform, and go to the **Cataloging view**.
2. Select the **Holdable** check box in the Circulation parameters > Request section. The **Limit to:** options are enabled.
3. Select **Patrons from this library and branches**. The **days past first available** option is enabled.



4. Select **days past first available** and enter the number of days to reserve the new item for the assigned library's patrons. The default is 30.

The screenshot shows the 'New Item Template 1 - Cataloging - Polaris' window. The 'Request' section on the right has the following settings:

- ☒ Loanable outside system
- ☐ Do not mail to patron
- ☒ Holdable
- Limit to: ☐ Pickup at
- ☒ Patrons from this library and branches
- ☒ 30 days past first available
- ☐ Patrons from this branch only
- ☐ Preferred borrowers

## Delayed Holds Setting in Leap

To designate the number of days an item is available only to the assigned library's patrons:

1. Open an item record and go to the **Controls** view.
2. Under the **Holds Limited To:** section, select **Patrons from this library and branches**. The **days past first available** option is enabled.
3. Select **days past first available** and enter the number of days to reserve the new item for the assigned library's patrons. The default is 30.

The screenshot shows the 'Hold Limited To:' section with the following settings:

- ☒ Patrons from this library and branches
- ☒ 30 days past first available
- ☐ Patrons from this branch only
- ☐ Preferred borrowers

---

## Using New Filters in SimplyReports

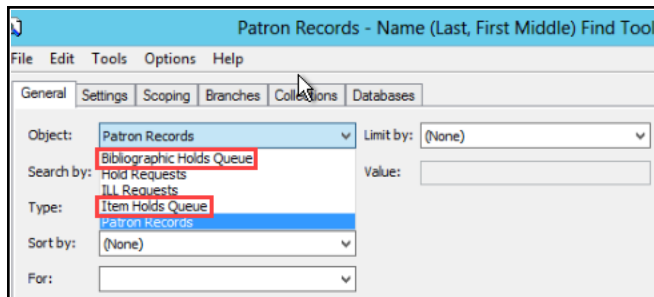
Library staff can now use SimplyReports to view reports on holds placed where the only available item will be delayed from satisfying the hold.

To filter by the new **Patrons from this library and branches** check box and the **days past first available** option settings:

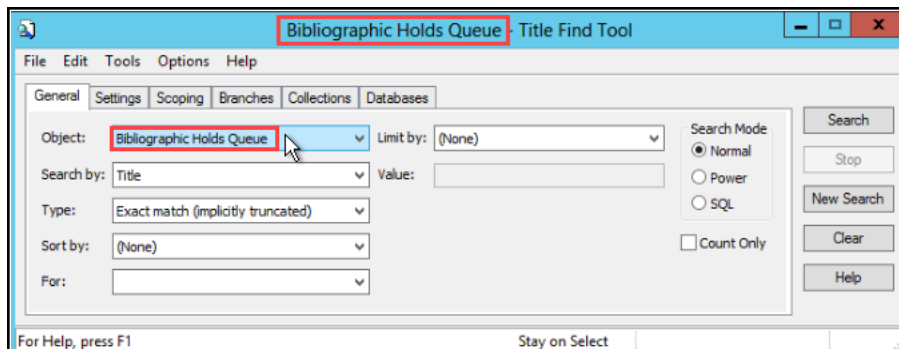
- In the Item List and Count reports use the following new options:
  - In **Report output columns**, you can select **Item delayed holds enabled**, and **Item number of days delayed**.
  - In the Item circulation filters, you can select **Days past first available** and use the drop down list to define:
    - Equal to entered value
    - Greater than or equal to entered value
    - Less than or equal to entered value
  - In the Item check box filters, you can select **Days past first available not checked** and **Days past first available checked**.
- Hold List and Count reports use the following new options:
  - In **Report output columns**, you can select **Hold request is delayed**, **Item delayed holds enabled**, **Item number of days delayed**.
  - In **Hold general filters**, you can select the **Is delayed** check box.

## Patron Status Find Tool Object and Window Title Updated

In the Patron Status Find tool, the Bibliographic and Item Objects have been renamed to Bibliographic Holds Queue and Item Holds Queue to reduce confusion.



When you select Bibliographic Holds Queue or Item Holds Queue in the Object menu, the title of the find tool window changes accordingly.



## **Prevent Staff from Placing Holds on EContent**

Staff can no longer place holds on integrated eContent using the Staff Client or Leap. If a staff member tries to place a hold on integrated eContent, they will receive a message stating holds are not permitted on eContent. Patrons and staff can still place holds on eContent using the PAC.

## **P.V. SUPA Added as an RFID Vendor**

Polaris now supports P.V. SUPA as a radio frequency identification (RFID) vendor. P.V. SUPA is available as an option during Polaris installation. Once P.V. SUPA is installed, you can use it to do the following:

- Check in an item or a number of items using Bulk Check In, In House, Inventory, and Offline with Staff Client.
- Check out an item or a number of items using In House, Inventory, and Offline with Staff Client.
- In the Staff Client only, use RFID with the Find Tool.
- In Leap only, use RFID with the OmniSearch.
- Manage missing parts.
- Check out items from the ExpressCheck.

## Action Button Anchor

The Action Button is now anchored on the Authority, Bibliographic, and Item record set workforms just as it is on the Patron record workform. It is anchored so that it remains visible when scrolling through a long list.

**Authority Record Set** ⓘ
 

SAVE

ACTIONS ▾

REFRESH

CLOSE

Name

Owner  
 ▾

Record Set ID

Note

Record Status

Record Count

FIND TOOL

ACTIONS ▾

<input type="checkbox"/>	HEADING	CONTROL NUMBER	BIB COUNT	SEE ALSO COUNT	NAME	SUBJECT	SERIES	STATUS
<input type="checkbox"/>	Oregon -- History -- 1859 -- Fiction.	1162377	1	0	N	Y	N	Final
<input type="checkbox"/>	Oregon Territory -- History.	1160767	1	0	N	Y	N	Final
<input type="checkbox"/>	Oregon Territory -- History -- Fiction.	1159837	1	0	N	Y	N	Final
<input type="checkbox"/>	Oregon National Historic Trail -- Fiction.	1148114	13	0	N	Y	N	Final
<input type="checkbox"/>	Oregon -- Social life and customs -- Juvenile literature.	1144645	1	0	N	Y	N	Final
<input type="checkbox"/>	Oregon -- Fiction.	1143861	16	0	N	Y	N	Final
<input type="checkbox"/>	Oregon National Historic Trail.	1142996	7	0	N	Y	N	Final
<input type="checkbox"/>	Oregon--Fiction	689146	194	0	N	Y	N	Final

## Additional Column Options in Patron Find Tool in Leap

You can now add Patron Code, Patron phone numbers, and user defined fields (UDF) to the columns that display in the Patron Find Tool results list.

**Find Tool - Patron**

**Column Settings**

☒ Birth Date  
☒ Library  
☐ Patron Code  
☐ Phone 1  
☐ Phone 2  
☐ Phone 3  
☐ ID Number  
☐ Privileges / Restrictions  
☐ Voter Registration  
☐ CybraryN Use Only (XXX,YYY)  
☐ Not Currently in Use

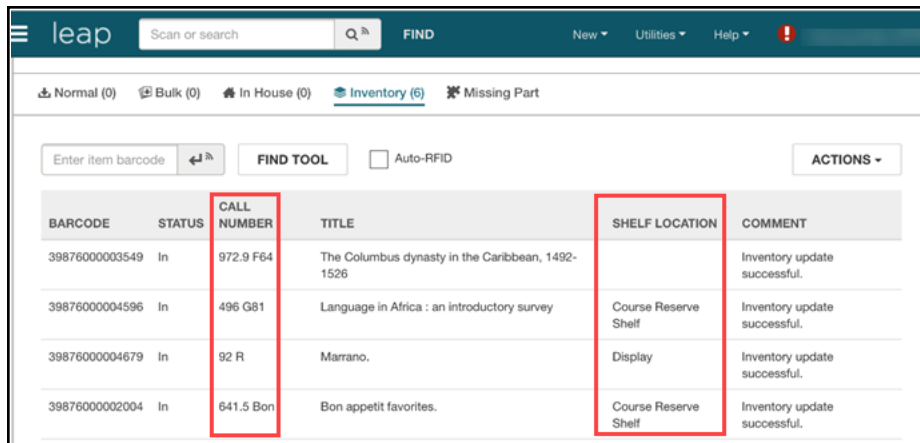
**Display Position** 1  
**Folded** False  
**Name** Secured  
**Pinned** False  
**Visible** True  
**Width** 2.493

**Display Position**  
The order of the column in the display.

**MOVE UP** **MOVE DOWN** **SAVE** **CANCEL**

## Call Number and Shelf Location Added to Leap Inventory View

Call Number and Shelf Location are now displayed for each item in the Inventory view from the Check In workform. When viewing inventory in Leap, library staff can now quickly check that a spine label matches the call number in the item record.



The screenshot shows the Leap web application interface. At the top, there is a navigation bar with the 'leap' logo, a search bar, and a 'FIND' button. Below the navigation bar, there are tabs for 'Normal (0)', 'Bulk (0)', 'In House (0)', 'Inventory (6)', and 'Missing Part'. The 'Inventory (6)' tab is selected. Below the tabs, there is a search bar with the text 'Enter item barcode' and a 'FIND TOOL' button. To the right of the search bar is a checkbox for 'Auto-RFID' and an 'ACTIONS' dropdown menu. The main content area displays a table with the following columns: 'BARCODE', 'STATUS', 'CALL NUMBER', 'TITLE', 'SHELF LOCATION', and 'COMMENT'. The 'CALL NUMBER' and 'SHELF LOCATION' columns are highlighted with red boxes. The table contains four rows of data, each representing an inventory item.

BARCODE	STATUS	CALL NUMBER	TITLE	SHELF LOCATION	COMMENT
39876000003549	In	972.9 F64	The Columbus dynasty in the Caribbean, 1492-1526		Inventory update successful.
39876000004596	In	496 G81	Language in Africa : an introductory survey	Course Reserve Shelf	Inventory update successful.
39876000004679	In	92 R	Marrano.	Display	Inventory update successful.
39876000002004	In	641.5 Bon	Bon appetit favorites.	Course Reserve Shelf	Inventory update successful.



## Check In Item from a Record Set in Leap

You can now check in an item from an Item Record Set in Leap.

1. Open a record set.
2. Select one or more items in the Item List.
3. Select **ACTIONS > Check In**.

**Item Record Set** SAVE ACTIONS REFRESH CLOSE

Name: Baseball Owner: larry.mann Record Set ID: 88250

Note: Record Status: Final Record Count: 3

Scan or enter barcode FIND TOOL

TITLE	ASSIGNED BRANCH	COLLECTION	MATERIAL TYPE	SHELF LOCATION	CALL NO.	VOL.	STATUS	BARCODE			
Mickey Mantle	Glenville Branch - Schenectady County Public Libra	Children's Nonfiction (JNF)	Book		J.B Mantle Gal		In	0000405916008			
<b>Murderers' row</b>	Saratoga Springs Public Library	Adult Nonfiction (ANF)	Book		796.357 F		In	0000200363869	12/2/1998	Final	59434
Why not us? : the 96-year journey of the Boston Red Sox fans from unparalleled suffering to the promised land of the 2004 World Series	Red Rock Library	Adult Nonfiction (ANF)	Book		796.357 Mon		In	0000504286931	12/26/2007	Final	1070180

3 of 3 record(s) retrieved

A confirmation message displays with the item status.

4. Click **OK**. A confirmation message displays that the item has been checked in.

This option is available when a single item in one of the following Circulation statuses is selected:

- Bindery
- Claim Missing Parts
- Claim Never Had
- Claim Returned
- Held
- In
- In-Process
- In-Repair
- In-Transit
- Lost

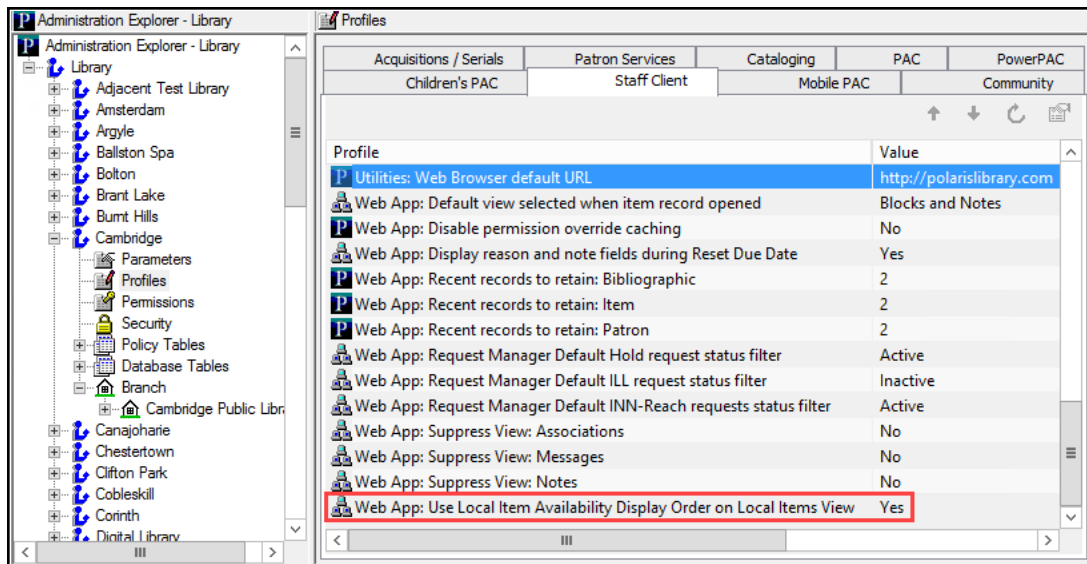
- Missing
- On Order
- Out
- Routed
- Transferred
- Unavailable

**Note:**

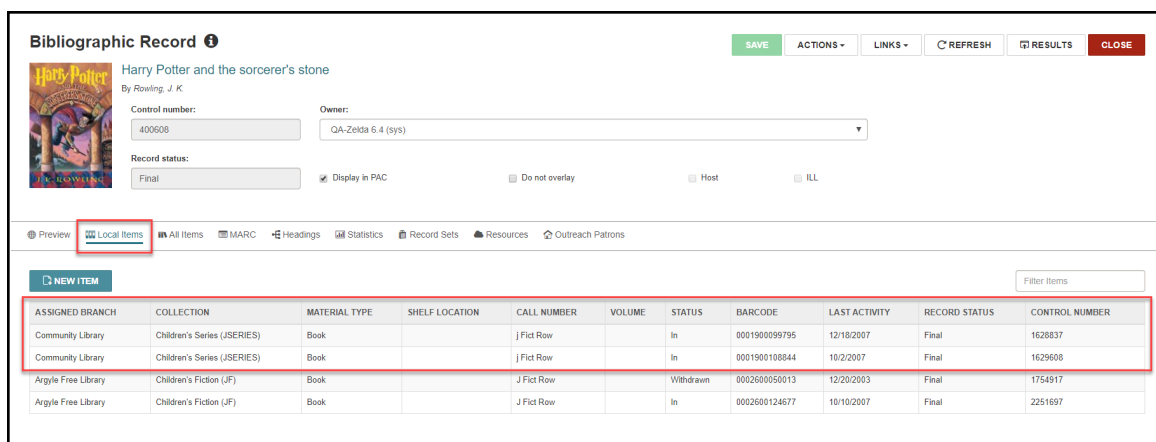
Check in is available when the record set is locked by another user.

## Display Local Items in New Local Items View in Leap

When the new **Web App: Use Local Item Availability Display Order on Local Items View** staff client profile is set to **Yes**, your local items are displayed in a new Local Items view in the order specified in the Item Availability Display Order table (previously only available in the PAC).



The new Local Items view has been added to the Bibliographic Record workflow.



The new **All Items** view is also added to the Bibliographic Record Workform when the new **Web App: Use Local Item Availability Display Order on Local Items View** staff client profile is set to **Yes**.

Bibliographic Record ⓘ

SAVE

ACTIONS ▾

LINKS ▾

REFRESH ↻

RESULTS

CLOSE

Harry Potter and the sorcerer's stone

By Rowling, J. K.

Control number:

400608

Owner:

QA-Zelda 6.4 (sys)

Record status:

Final

☒ Display in PAC
 ☐ Do not overlay
 ☐ Host
 ☐ ILL

Preview

Local Items

All Items

MARC

Headings

Statistics

Record Sets

Resources

Outreach Patrons

NEW ITEM

Filter Items

ASSIGNED BRANCH	COLLECTION	MATERIAL TYPE	SHELF LOCATION	CALL NUMBER	VOLUME	STATUS	BARCODE	LAST ACTIVITY	RECORD STATUS	CONTROL NUMBER
Amsterdam Free Library	Children's Fiction (JF)	Book		J Fict Row		In	0001200338943	8/27/2018	Final	1481168
Amsterdam Free Library		Book		YA fict Row		In	0004300378090	1/24/2018	Final	2052672
Amsterdam Free Library		Book		YA FICT ROW		Lent	0004300426931	4/4/2002	Final	2056876
Argyle Free Library	Children's Fiction (JF)	Book		J Fict Row		Withdrawn	0002600050013	12/20/2003	Final	1754917
Argyle Free Library	Children's Fiction (JF)	Book		J Fict Row		In	0002600124677	10/10/2007	Final	2251697
Ballston Spa Public Library	Children's Fiction (JF)	Book		J Fict Row		Out (2/7/2008)	0000800637944	1/10/2008	Final	2533976
Ballston Spa Public Library	Children's Fiction (JF)	Book		J Fict Row		Withdrawn			Final	2788765
Ballston Spa Public Library	Children's Fiction (JF)	Book		J Fict Row		Withdrawn			Final	1335533

When the new **Web App: Use Local Item Availability Display Order on Local Items View** staff client profile is set to **No**, only the original Items view is available on the Bibliographic record.

Bibliographic Record ⓘ

SAVE

ACTIONS ▾

LINKS ▾

REFRESH ↻

RESULTS

CLOSE

Harry Potter and the Order of the Phoenix

By Rowling

Control number:

625470

Owner:

QA-Zelda 6.4 (sys)

Record status:

Final

☒ Display in PAC
 ☐ Do not overlay
 ☐ Host
 ☐ ILL

Preview

Items

MARC

Headings

Statistics

Record Sets

Resources

Outreach Patrons

NEW ITEM

Filter Items

ASSIGNED BRANCH	COLLECTION	MATERIAL TYPE	SHELF LOCATION	CALL NUMBER	VOLUME	STATUS	BARCODE	LAST ACTIVITY	RECORD STATUS	CONTROL NUMBER
_Test Branch 1 (Library 8)	Adult Nonfiction (ANF)	Book				In	BulkCreate003397320		Final	3397320
Adjacent Test Branch One	Adult Nonfiction (ANF)	Book				In	BulkCreate003397359		Final	3397359

## Enable or Disable RFID Security on Demand in Leap

You can now enable or disable RFID security from an RFID workstation when you encounter RFID error messages. If you get an error message at check in, you can now enable RFID security on demand. If you get an error message at check out, you can now disable RFID security on demand.

### Enable RFID Security During Check In

When you get an error message during check in at an RFID workstation, you can now select the new **Enable RFID Security** option in the ACTIONS menu. This action is enabled when at least one row is selected from the Check In workform.


The screenshot shows the 'Check In' interface. At the top, there's a 'Check In' title and a 'CLOSE' button. Below the title, there are filters: 'Normal (0)', 'Bulk (1)', 'In House (0)', 'Inventory (0)', and 'Missing Part'. A search bar with 'Enter item barcode' and a 'FIND TOOL' button is present. There are also checkboxes for 'Auto-RFID' and 'Free Days' (set to 0), and a date field (12/11/2019). An 'ACTIONS' dropdown menu is open, showing options: 'Clear List', 'Manage Item Record', 'Replace Barcode', 'Manage Missing Parts', 'Print List', 'Load from File', and 'Enable RFID Security' (which is highlighted with a red box). Below the menu is a table with columns: BARCODE, DUE DATE, STATUS, COMMENT, FINE CHARGED, MATERIAL TYPE, CALL NUMBER, and ASSIGNED. The table contains one row with the following data: 0000100423409, 12/25/2019, Out -> In-Transit, To Johnsburg Library, Town of (JBG), \$0.00, Book, 289.8 W, and Johnsburg of (JBG).

### Disable RFID Security During Check Out

When you get an error message during check out at an RFID workstation, you can now select the new **Disable RFID Security** option in the ACTIONS menu. This action is enabled when at least one row is selected from the Check Out view.

## What's New in Polaris and Leap

LAURA IZQUIERDA

A12291954  
COMMUNITY LIBRARY

BLOCKS

NOTES

REGISTRATION

ACTIONS


REFRESH

COMPLETE

Check Out (1) Out (1) / Overdue (0) Account (\$22.00) Claims (7) / Lost (0) Holds (12) / Held (0) ILL (0) / Held (0) Reader Services


More


Enter item barcode




Find Tool

☐ Auto-RFID

 Disable RFID Security


 Reset Due Date

 Special Loan

<input checked="" type="checkbox"/>	BARCODE	CALL NUMBER	TITLE	DUE DATE	ACTION	MATERIAL TYPE
<input checked="" type="checkbox"/>	0000100423409	289.8 W	The four seasons of Shaker life : an intimate portrait of the community at Sabbathday Lake	12/25/2019	Check Out	Book

For RFID workstations rendered at iPad or other tablet resolutions, there is now an ACTIONS button that holds both the Reset Due Date and the Disable RFID Security menu options.

LAURA IZQUIERDA

A12291954  
COMMUNITY LIBRARY

BLOCKS

NOTES

REGISTRATION

ACTIONS


REFRESH

COMPLETE

Check Out (1) Out (1) / Overdue (0) Account (\$22.00) Claims (7) / Lost (0) Holds (12) / Held (0) ILL (0) / Held (0)

More


Enter item barcode





Find Tool

☐ Auto-RFID

ACTIONS

 Reset Due Date

 Disable RFID Security

 Special Loan

<input checked="" type="checkbox"/>	BARCODE	CALL NUMBER	TITLE	DUE DATE	ACTION	MATERIAL TYPE
<input checked="" type="checkbox"/>	0000100423409	289.8 W	The four seasons of Shaker life : an intimate portrait of the community at Sabbathday Lake	12/25/2019	Check Out	Book

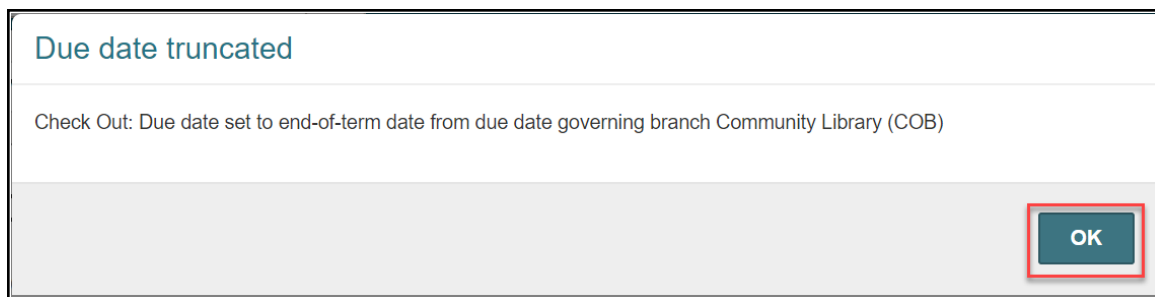
## End of Term Due Dates in Leap

Leap now checks system administration settings for due dates that should be truncated due to End-of-Term (EOT) due date settings.

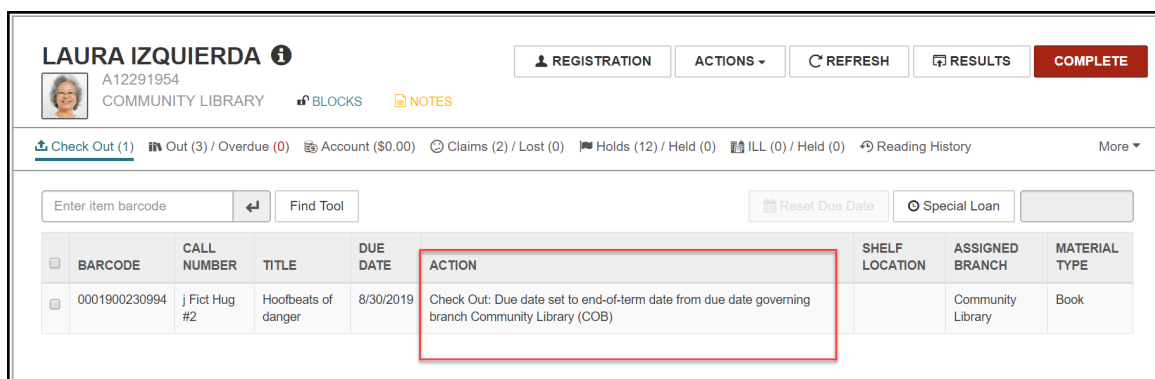
The following Polaris staff client system administration Patron Services parameters apply:

- Due date truncated: prompt (yes/no)
- End-of-term due date options
- Consortium circulation: Due date calculation (System Level)

This message appears if the due date is truncated for EOT. Select **OK** to complete the check out.



The check out **ACTION** column is populated with this message:



## Missing Part Check In and Manual Billing in Leap

You can now check in, manage, and bill missing parts in Leap. You can also now manually bill in Leap.

### Check in and Manage Items with Missing Parts

You can now check in multipart items, such as DVD or CD sets, that are returned with missing parts, whether the missing parts are discovered before or after the item is checked in. A staff member checking in multipart items is likely to discover the missing parts while the item still has a status of Out. But, if the library uses automated materials handling (AMH) units, a staff member may discover that parts are missing after the item has been checked in by the AMH and has a status of In.

The following permissions are required:

- Special item check-in: Access
- Special item check-in: Select missing
- Special item check-in: Select unavailable

To check in and manage missing parts from the new **Missing Part** view:

1. Open the **Check In** workflow.
2. Select the new **Missing Part** view.
3. Enter the item's barcode and press **Enter**.

The screenshot shows the 'Check In' workflow interface. At the top, there are tabs for 'Normal (1)', 'Bulk (0)', 'In House (0)', 'Inventory (0)', and 'Missing Part' (which is selected and highlighted with a red box). A 'CLOSE' button is in the top right. Below the tabs, there is a search bar containing the barcode '0000202968764' and a 'FIND TOOL' button (highlighted with a red box). To the right of the search bar is an 'ACTIONS -' dropdown. Below this is a table with the following columns: BARCODE, STATUS, TITLE, MATERIAL TYPE, and PATRON NAME.

**Note:**

The item being checked in must be in a status of IN or OUT, and it must have a current/last borrower associated with it.



- If the item satisfies the criteria, the new **Manage Missing Parts** dialog will open. Select one of two options:

- **Missing part: block & notify** - the item status is changed to Claim Missing Parts.
- **Make item unavailable** - the item is marked unavailable.

### Manage Missing Parts

Barcode: **0000202968764**
Material Type: **Book**

Status: **In**
Patron: **Laura Izquierda**

Title: **Chicken soup for the traveler's soul : stories of adventure, inspiration and insight to celebrate the spirit of travel**

☒ **Missing part: block & notify**  
Special item check-in note (will appear on the patron notice and on the item record)

☐ **Make item unavailable**

OK

CANCEL

If you have already checked an item in, prior to noticing the missing part, you can manage the missing part directly from the check in workform:

- On the Check In workform, select the item with the missing part.
- Under **ACTIONS**, select the new **Manage Missing Parts** action.

### Check In

CLOSE

Normal (1)
Bulk (0)
In House (0)
Inventory (0)
Missing Part

Free Days

BARCODE	DUE DATE	STATUS	COMMENT	TITLE	MATERIAL TYPE	SHELF LOCATION	CALL NUMBER	PATRON NAME	ASSI	BRAI
<input checked="" type="checkbox"/> 0000202968764		In -> In	Item was not Out	Chicken soup for the traveler's soul : stories of adventure, inspiration and insight to celebrate the spirit of travel	Book		910 Chi			

ACTIONS -

**Note:**

The item being checked in must be in a status of IN, and it must have a current/last borrower associated with it.

3. The new **Manage Missing Parts** dialog opens. Select one of two options:
- **Missing part: block & notify** - the item status is changed to Claim Missing Parts.
  - **Make item unavailable** - the item is marked unavailable.

**Manage Missing Parts**

Barcode: 0000202968764      Material Type: **Book**

Status: **In**      Patron: **Laura Izquierda**

Title: **Chicken soup for the traveler's soul : stories of adventure, inspiration and insight to celebrate the spirit of travel**

☒ **Missing part: block & notify**  
Special item check-in note (will appear on the patron notice and on the item record)

☐ **Make item unavailable**

**OK** **CANCEL**

**Note:**

Notices are sent according to the setting in the Notification options parameter for the check in branch, and the patron preference set in the patron's record.

---

## Check In and Charge for Missing Parts

You can now charge a patron for any parts missing from a returned item and optionally send them a bill for the missing part(s) during check in.

The following permissions are required:

- Special item check-in: Access
- Special item check-in: Select missing
- Special item check-in: Select unavailable

The new Action button, **Check in / Charge Missing Parts**, is added to the **Claims** view. This action is only enabled when a single claim with a status of **Claim Missing Parts** is selected.

The screenshot shows the Polaris user interface for a patron named LAURA IZQUIERDA. The top navigation bar includes buttons for REGISTRATION, ACTIONS, REFRESH, RESULTS, and CLOSE. Below this, a status bar shows various library metrics. The main content area displays a list of claims. A red box highlights the 'Check In / Charge Missing Parts' button in the top right of the claims list. Below the button, a table shows claim details:

BARCODE	TITLE	CLAIM DATE	DESCRIPTION	DUE DATE
0000202968764	Chicken soup for the traveler's soul : stories of adventure, inspiration and insight to celebrate the spirit of travel	10/21/2019	Claim Missing Parts	11/5/2019

Selecting the action opens a new **Check in and charge for missing item** dialog. You can enter the amount, add a note, and choose to send a bill.

The screenshot shows the 'Check in and charge for missing item' dialog box. It contains the following fields and buttons:

- Amount:** A text input field with a blue border and a red box around it, containing the value '\$0.00'.
- Fee Reason:** A dropdown menu with 'Missing Parts' selected.
- Item Barcode:** A text input field containing the value '0000202968764'.
- Notes (for internal use):** A large text area with a red box around it.
- Send a bill:** A checkbox with a red box around it.
- Buttons:** At the bottom right, there are two buttons: 'CHECK IN / CHARGE' (green) and 'CANCEL' (white).

If the item has already been billed, this message is displayed: **"The patron has already been billed for this item. To check-in the item, use normal check-in."**

## Manual Billing in Leap

You can now manually bill patrons for charges related to lost items, missing parts, or other fees in Leap. This can be done one charge at a time for unique messaging, or if the messages on the bill are similar, multiple charges can be billed at one time.

The following permissions are required:

- Patron Status: Access patron account
- Patron Status: Modify patron account
- Patron Status: Bill a charge manually

### Manual Billing When Adding a Charge

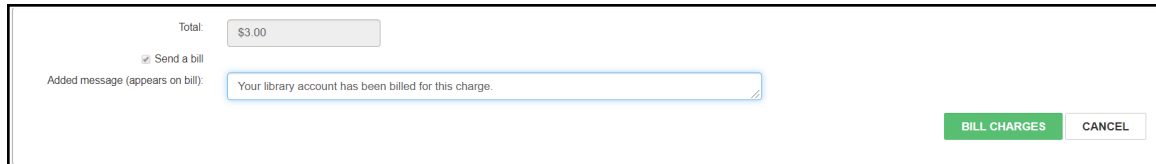
When you add a new charge, the **Send a bill** option has been added to the **Add Charge** dialog.

### Manual Billing from Patron Account View

The new **Bill Charge** action has been added to the Patron Account view to manually bill a single existing charge or multiple existing charges on a patron account. This action is enabled only when one or more unbilled charges are selected.

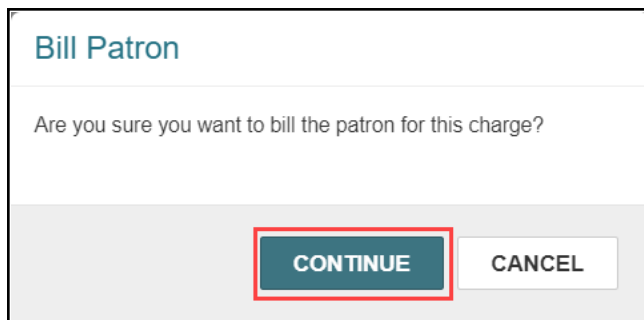
TYPE	DATE	BARCODE	TITLE	REASON	ORGANIZATION	NOTE	BILLED	AMOUNT	BALANCE
Charge	10/22/2019	0001900003425	Dawn Land : a novel	Check Out Charge	Community Library		Pending	\$1.00	\$1.00
Charge	10/22/2019	0000203555255	Unforgettable places to see before you die	Missing Parts	Community Library	Bill for item's missing part.	Pending	\$10.00	\$10.00
Charge	10/22/2019	0000202968764	Chicken soup for the traveler's soul : stories of adventure, inspiration and insight to celebrate the spirit of travel	Missing Parts	Community Library			\$10.00	\$10.00
									\$21.00

When multiple charges are selected, selecting the **Bill Charge** action opens a new inline dialog with a section that includes only the Grand total, Send a bill, and the Added message fields.



This screenshot shows an inline dialog box for billing a patron. At the top, it displays 'Total: \$3.00'. Below this is a checked checkbox labeled 'Send a bill'. Underneath the checkbox is a text input field with the placeholder text 'Your library account has been billed for this charge.' To the right of the input field are two buttons: a green 'BILL CHARGES' button and a white 'CANCEL' button.

A confirmation message is displayed before a bill is sent.



This screenshot shows a confirmation dialog box titled 'Bill Patron'. The main text asks, 'Are you sure you want to bill the patron for this charge?'. At the bottom of the dialog, there are two buttons: a dark teal 'CONTINUE' button, which is highlighted with a red rectangular border, and a white 'CANCEL' button.

## New and Updated Permissions to Export Record Sets from Leap

To increase control over the library's private information and that of its patrons, two new **Export** permissions have been added for Patron and Cataloging record sets in Leap. To allow export, the ownership of the record set must be set at the system, library, or branch level.

**Note:**

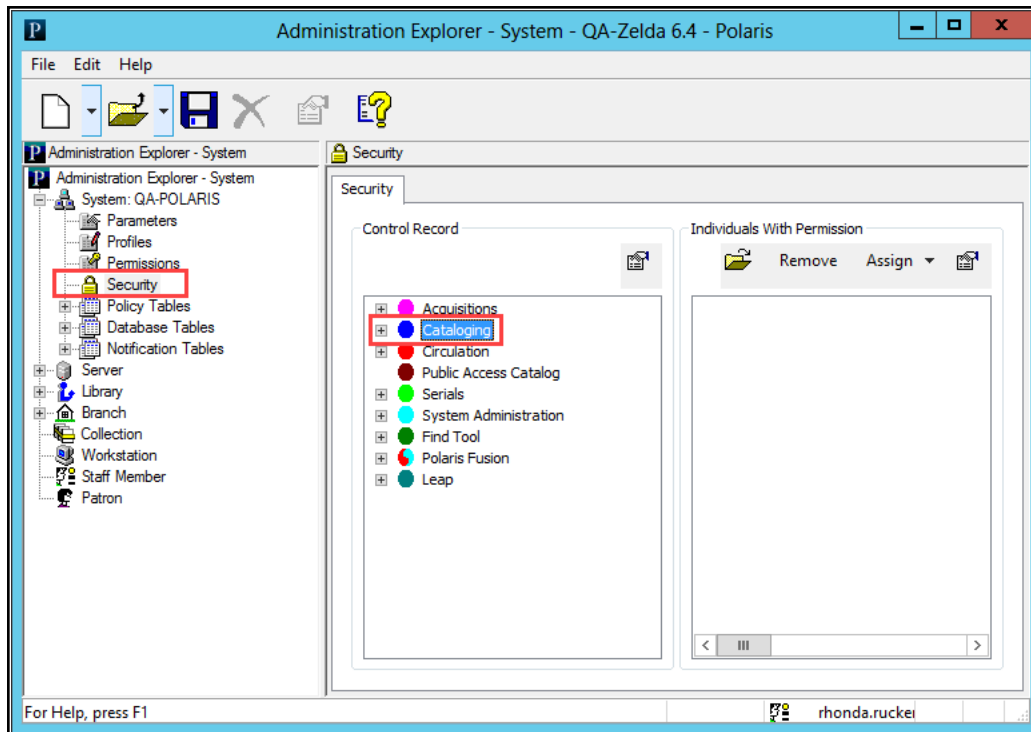
For data privacy and protection, these two new **Export** permissions are not granted by default during an upgrade. After the upgrade, you will need to request these permissions from your System Administrator, even if you could previously export record sets from Leap.

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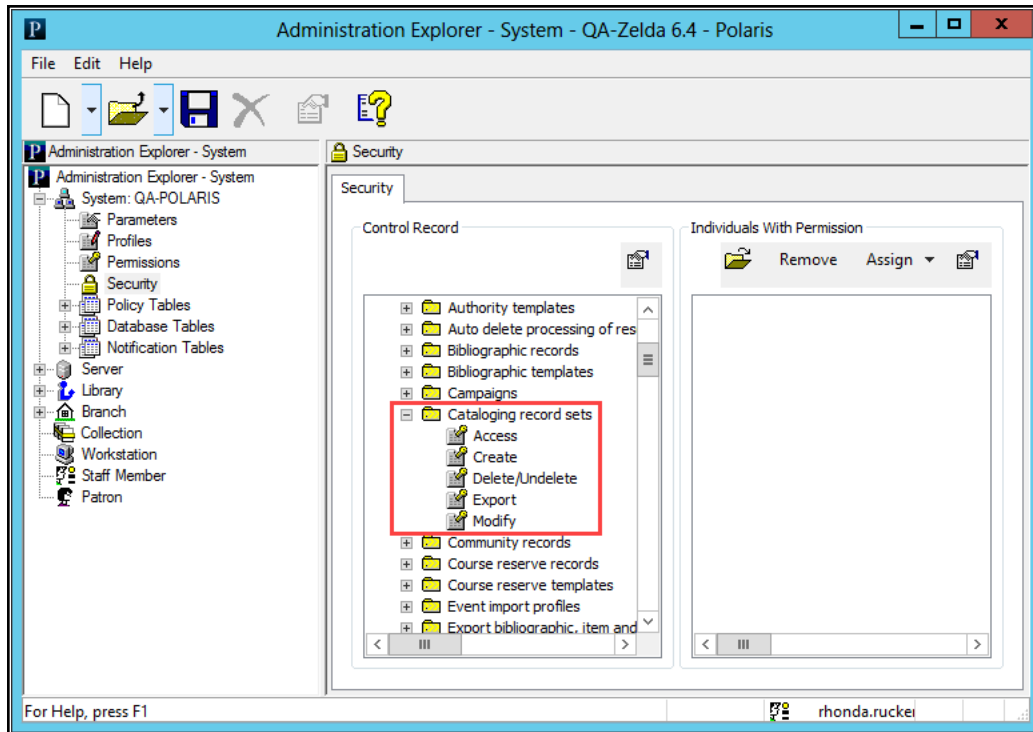
### Permission to Export a Cataloging Record Set

To grant **Cataloging Record Sets: Export** permission:

1. Go to the **Administration** menu and choose **Explorer > System**.
2. Select **System > Security** and expand **Cataloging**.



3. Select **Cataloging record sets > Export**.



4. Assign the Export permission to a Permission Group, Workstation, or Staff Member.

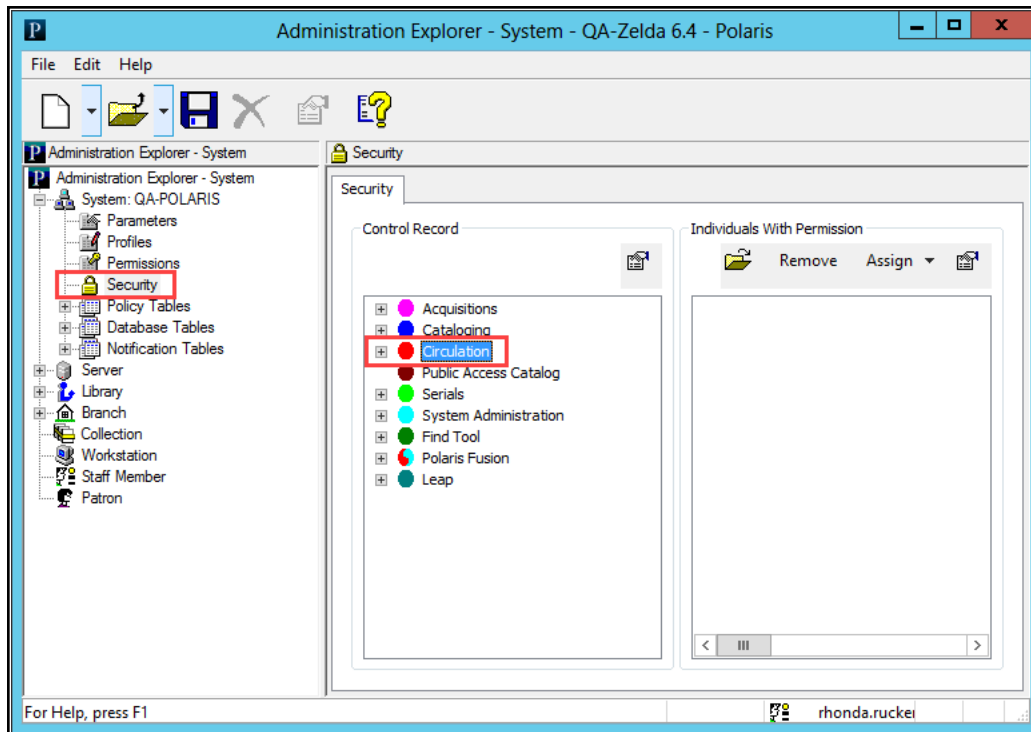
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## Permission to Export a Patron Record Set

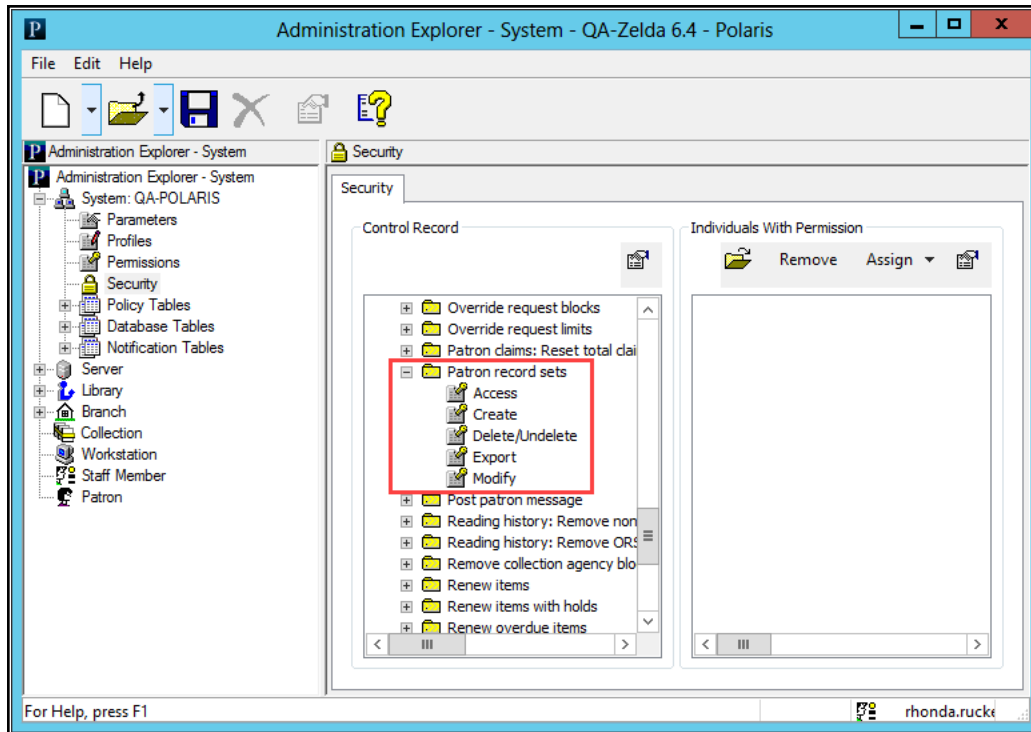
To grant **Patron Record Sets: Export** permission through the Polaris Staff Client:



1. Go to the **Administration** menu and choose **Explorer > System**.
2. Select **System > Security** and expand **Circulation** for Patron record sets.



3. Select **Patron record sets > Export**.



4. Assign the Export permission to a Permission Group, Workstation, or Staff Member.

## Outreach Services (ORS) Added to Leap

Outreach allows a staff member to select titles that interest patrons who are unable to get to the library based on each patron's preferences, and arrange for the materials to be delivered to the patrons. You can now use Leap to designate a patron for outreach services, as you would in the Staff Client. Using Leap, you can create a profile of the patron's reading and media interests, delivery preferences, service dates, and other information. Based on the patron's interest profile, Leap generates a selection list of titles. From the Selection list, you can select available items for a pick list, pull the items on the list, and place holds.

If the outreach services patron has designated an individual to pick up the items, you can contact the designated individual to pick up the items, and the items circulate in the normal way. Alternatively, you can pull the items on the pick list and pack them for delivery. You can set aside the packed items for delivery drivers. If the delivery method is by mail, you can use the Staff Client to print mailing labels or export patron address information to another application.

The service dates on each ORS patron's profile help you manage outreach services for multiple patrons. For more information, see [Arranging Delivery of the Pick List Items](#).

Follow the procedures below to enable and manage Outreach Services in Leap:

- [Enabling Outreach Services for a Patron](#)
- [Adding to a Pick List](#)
- [Working with a Pick List](#)
- [Arranging Delivery of the Pick List Items](#)
- [Rating Returned Pick List Items](#)

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### Enabling Outreach Services for a Patron

1. Search for a patron using the Find Tool.
2. Open a Patron Record from the search results.
3. Go to the **Reader Services** view.
4. Select the **Outreach Enabled** check box and click **Save**. The Update Last Service Date, Preferences, and Selection List buttons are enabled.

**LAURA IZQUIERDA** A12291054  
COMMUNITY LIBRARY

REGISTRATION ACTIONS REFRESH RESULTS CLOSE

Check Out (0) Out (0) / Overdue (0) Account (\$22.00) Claims (7) / Lost (0) Holds (12) / Held (0) ILL (0) / Held (0) **Reader Services** Reading History Associations Notices Messages Blocks Notes Record Sets

Update Last Service Date Preferences Selection List Outreach Enabled Save

**Outreach Services**

Status: Active Reactivate: 9/18/2013 Last Service: Next Service: 9/18/2013

Number of items to send: 0 Patron Selection Only: ☐ Allow previous items to be resent: ☐ Months to Wait: 120

Note:

**Delivery Options**

Mode: (None) Schedule: (None) 9/18/2013 Pickup Person:

Route: (None) Every 1 day(s) Note:

Stop: (None)

Use the Outreach Services section of the **Reader Services** view to do the following:

- **Set Outreach Status:** Activate and deactivate the outreach services for this patron.
  - **Set Dates:** If the patron's Outreach Services Status is inactive, set a reactivate date. Set Last Service and Next Service dates.
  - **Number of items to Send:** Enter the maximum number of items the patron can receive each service.
  - **Patron Selection Only:** Select if the patron only wants to receive items from the Pick List items. If the check box is cleared, library staff can also choose items.
  - **Allow previous items to be resent:** Select if the patron can receive the same items again.
  - **Months to Wait:** Enter the number of months to wait before sending items sent before.
5. Click **Preferences** and select at least one preference for the patron.
  6. Click the **Selection List** button to go to the Selection List workform.

7. Click **Build List** to generate a selection list for the patron based on the preferences.

**ORS Selection List**

Patron Name: Test, Ed Edward  
Barcode: test0130191  
Address: 1110 Gallupville Road  
GREENSBORO NC 27405

Phone:  
Expiration Date: 1/13/2021  
Number of items to send: 0  
Last Service Date:

Delivery Mode:  
Delivery Route:  
Delivery Stop:  
Delivery Schedule:

☒ Selection List ☐ Pick List

Amsterdam Free Library **Build List** Preferences Find Tool Place Hold

	TITLE	AUTHOR	FORMAT	PUB DATE
<input checked="" type="checkbox"/>	The sky is full of stars	Branley, Franklyn M. (Franklyn Mansfield), 1915-2002	Book	1981
<input type="checkbox"/>	The stars by clock & fist	Neely, Henry M. (Henry Milton), 1877-1963	Book	1972
<input type="checkbox"/>	Stars and galaxies.	Apfel, Necla H.	Book	1982
<input type="checkbox"/>	How was the universe born?	Asimov, Isaac, 1920-1992	Book	1988

+ Add To Pick List - Remove From Pick List Place Hold

23 record(s) found!

	BRANCH	COLLECTION	MATERIAL TYPE	CALL NUMBER	STATUS	BARCODE	SHELF LOCATION
<input checked="" type="checkbox"/>	Amsterdam Free Library		Book	J 523.8 B82s	In	0004300103746	

8. You can use the Find Tool to search for and add other items to the selection list.
9. You can select a row in the selection list and click the **Place Hold** button to place a hold from the patron's **Holds** view. Once the hold request is created, you return to the Selection List workform. Your held item is marked with a flag.

### Create a Pick List from a Selection List

To create a pick list from a selection list:

1. To add items, select a row in the top portion of the selection list. Available items appear in the lower portion of the selection list.
2. Select an available item from the lower portion of the selection list and click **+Add To Pick List**. Your pick list title is marked with a check.
3. To remove items, select a checked row in the top portion of the selection list.
4. Select your pick-list item from the lower portion of the selection list and click **- Remove From Pick List**. The check beside the title is removed.

### Adding to a Pick List

#### Add to a Pick List from Holds

To add items on hold for this patron to their pick list:

1. Go to the **Pick List** View in the ORS Selection List workflow.
2. Click the **ACTIONS** menu and select **Add Held Items**.

#### **Add to a Pick List Using Barcodes**

If you have already pulled items for a pick list, you can add them to the pick list using the items' barcodes:

1. Go to the **Pick List** View in the ORS Selection List workflow.
2. Place your cursor in the **Scan or enter barcode** field and scan or type an item's barcode.
3. Click or press the enter button to add the item to the pick list.

#### **Add to a Pick List Using RFID**

If you have already pulled items for a pick list, you can add them to the pick list using the items' RFID tags:

1. Go to the **Pick List** View in the ORS Selection List workflow.
2. Place an RFID-tagged item on the antenna tray.
3. Click or press the enter button to add the item to the pick list.

#### **Add to a Pick List Using Find Tool**

1. Go to the **Pick List** view in the ORS Selection List workflow.
2. Click the **FIND TOOL** button. The Find Tool opens.
3. Enter a keyword or search string and click the **Search** (magnifying glass) button. A list of results appears.
4. Click a line to select the item. To select multiple items, hold the Control key and select the items.
5. Click **OPEN** to add all selected items to the pick list.

---

### **Working with a Pick List**

Once you create a pick list, you can filter and select items within the list.

By selecting items and using the **ACTIONS** menu, you can do the following with the items on the list:

- Place Hold
- Remove items

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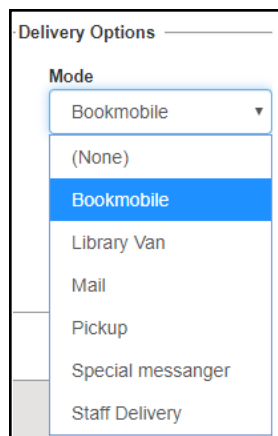
## Arranging Delivery of the Pick List Items

Library staff can arrange delivery of the pick list items. Use any of the following delivery methods:

- **Pick up:** Contact the individual designated to pick up items for the patron.
- **Delivery:** Arrange for library delivery drivers to deliver the items.
- **Mail:** Use the Staff Client to print mailing labels or export patron address information to another application.

### Select and Schedule a Delivery

1. Open an ORS-enabled patron record and go to the **Reader Services** view.
2. Use the Delivery Options section of the **Reader Services** view to do the following:
  - **Set Delivery Mode:** Select the delivery method for this patron's items.



The screenshot shows a web interface titled "Delivery Options". Below the title is a section labeled "Mode" with a dropdown menu. The dropdown menu is open, showing a list of options: "Bookmobile", "(None)", "Bookmobile", "Library Van", "Mail", "Pickup", "Special messenger", and "Staff Delivery". The "Bookmobile" option is highlighted in blue, indicating it is the selected delivery mode.

- **Set Route and Stop:** Select a route. The Stop drop-down list offers options based on the route.
- **Schedule:** Select either an exact date or the frequency of deliveries. If you select Exact Date, enter the date to deliver in the next field. If you select Daily, you can enter the number of days between deliveries in the **Every \_ day(s)** field. All other schedule options operate according to the **Last Service** and

**Next Service** dates in the Outreach Services section.



- **Pickup Person:** Enter the name of the individual authorized to pick up and return items for this patron.

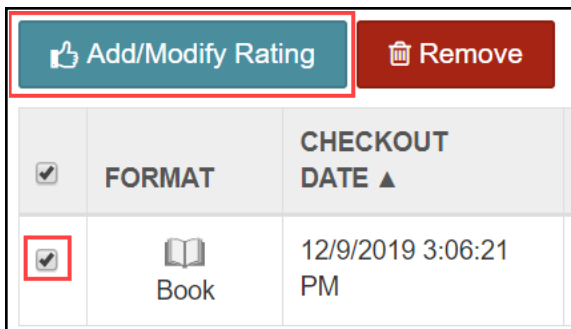
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## Rating Returned Pick List Items

When an outreach patron returns pick list items, library staff can enter a rating for each item.

### Enter a Rating

1. Go to the patron's Profile and select the **Reading History** view.
2. Select an item in the patron's reading history, and click **Add / Modify Rating**.



<input checked="" type="checkbox"/>	FORMAT	CHECKOUT DATE ▲
<input checked="" type="checkbox"/>	Book	12/9/2019 3:06:21 PM

3. Select a rating from the drop-down list and enter a note.
4. Click **UPDATE RATING**. The rating and note appear in the Reading History table.



**Note:**

If the patron has checked out and rated the same title more than once, each rating appears until the bibliographic records are purged.

## Patron Registration and Patron Status Read-Only Mode in Leap

The Patron Registration and Patron Status workforms in Leap now display in read-only mode when a selected record is locked by another user.

### Patron Registration Workform Read-Only Mode

The Patron Registration workform displays in read-only mode when the selected record is locked. A red key displays next to the patron name.

The Add to Record Set functions remain enabled. All Registration actions, except for Copy, are disabled.

**LAURA IZQUIERDA** 🔑 A12291954 COMMUNITY LIBRARY BLOCKS NOTES

REGISTRATION ACTIONS - REFRESH RESULTS CLOSE

Check Out (0) Out (0) / Overdue (0) Account (\$22.00) Claims (7) / Lost (0) Holds (12) / Held (0) ILL (0) / Held (0) Reader Services Reading History Associations Notices More ▾

**Profile**

Barcode \* A12291954 Registered At \* Community Library ▾

Former Barcode 131335456456 Patron Code \* Retired ▾

Last Name \* Izquierda Date of Registration 11/15/2018

First Name \* Laura Expiration Date \* 11/15/2022

Middle Name Birth Date

SAVE RENEW RESET PASSWORD COPY MERGE DELETE SECURE

### Patron Status Workform Read-Only Mode

The Patron Status Workform now displays in read-only mode when the selected record is locked. A red key displays next to the patron name.

## What's New in Polaris and Leap

The screenshot shows the Polaris user interface for a patron named MR ELI GORDON CONNER. The interface includes a header with the patron's name, a search icon, and buttons for REGISTRATION, ACTIONS, REFRESH, RESULTS, and CLOSE. Below the header, there is a navigation bar with links to Check Out (0), Out (0) / Overdue (0), Account (\$0.00), Claims (0) / Lost (0), Holds (21) / Held (3), ILL (6) / Held (2), Reading History, Associations, Notices, Messages, and Blocks. A search bar with the text "Enter item barcode" and a "Find Tool" button is present. Below the search bar, there is a table with columns: BARCODE, CALL NUMBER, TITLE, DUE DATE, ACTION, SHELF LOCATION, ASSIGNED BRANCH, and MATERIAL TYPE. The table is currently empty.

The Patron Registration link is still available and is read-only if there is also a lock for that workflow.

The Add to Record Set actions remain enabled.

## **MobilePAC Updated for ADA Compliance**

MobilePAC is updated to ADA compliance level AA.