polaris

ExpressCheck Guide

7.1

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Contents

About This Guide

This guide contains information about setting up and running Polaris® ExpressCheck™ workstations for self-check circulation. It is intended for Polaris administrators and others responsible for setting up, customizing, and maintaining Polaris.

Polaris ExpressCheck Administration Topics

> **Important**:
> For information about developments that might have occurred after this information was published, go to support.iii.com.

This guide covers the following topics:

- **About Polaris ExpressCheck**: Overview of Polaris ExpressCheck features and functions.
- **Client Installation and Administration Setup**: Installing Polaris ExpressCheck software; registering the station and user in Polaris Administration; setting the permission to close the application; starting and closing Polaris ExpressCheck.
- **Configuring Polaris ExpressCheck**: Setting printer and RFID options; setting security and scanner options; setting circulation parameters and blocks; setting circulation by material type; setting ITG EM and AV Locker options; setting up ITG DiscXpress II circulation; credit card payment processing; customizing messages and help; customizing graphics.
- **Using Polaris ExpressCheck Offline**: Setting up an offline session; uploading offline transactions to the Polaris staff client.
- **Appendix: Workstation Setup (SeePoint™ Units Only):** Unpacking and setting up the See Point workstation; connecting the printer; safety considerations; signage; powering up and shutting down the workstation; adjusting the touch screen; configuring USB and serial barcode scanners.

Related Resources

Polaris Administration Guide
General information about using the Polaris Administration interface; setting up organizations, servers, collections, workstations, and staff members; setting permissions, parameters, and profiles; working with tables; setting search tool characteristics, barcode formats, and transaction logging.

Polaris Patron Services Administration Guide
Contains information about setting up patron services and circulation functions, and granting permissions to your front desk staff and supervisors.

Polaris Basics Guide
Contains basic Polaris information, including procedures to start Polaris tasks, and find, create, and display records. This guide also discusses how to use Polaris documentation, including online Help.

Polaris Online Help
Polaris online Help is accessible from the Help menu on the Polaris Shortcut Bar or any Polaris workform, or by pressing F1 with a Polaris window active.

About Polaris ExpressCheck

The Polaris ExpressCheck client application runs on compact, affordable self-check stations where patrons can easily check out and renew items and view their accounts using a touch screen. Unlike self-check stations that rely on SIP communication protocol, Polaris ExpressCheck communicates directly with the Polaris application and database. This means that transactions are fast, and you can use Polaris Administration settings to customize Polaris ExpressCheck.

Polaris ExpressCheck may be purchased with SeePoint™ workstations that include a barcode scanner, but you can also use an optional RFID antenna. The RFID version sets a Bibliotheca RFID tag security bit when an item is checked out. Polaris ExpressCheck also supports the RFID reader and tags from EnvisionWare™.

Polaris ExpressCheck software can also be installed and run on NCR hardware. Polaris ExpressCheck supports Bibliotheca's RFID, electromagnetic (EM) and audio/visual security options, and Bibliotheca's SmartDispenser200. You select these options during Polaris ExpressCheck client software installation.

You can also purchase multiple language versions of Polaris ExpressCheck, so patrons can choose the display language once the patron barcode is scanned.

> **Important**:
> Polaris ExpressCheck is available by specific contract to your library. Contact your Polaris Library Systems Site Manager to obtain your license for Polaris ExpressCheck.

Using Polaris ExpressCheck

Polaris Customer Support staff guide you in installing Polaris ExpressCheck client software and configuring the workstations to suit your needs.

Once ExpressCheck is installed, you can register each Polaris ExpressCheck workstation in Polaris Administration. See Client Installation and Administration Setup. Polaris Administration settings also control the features you offer to patrons and when circulation transactions should be blocked. See Setting Account and Circulation Options. If your library has instituted e-commerce and your Polaris ExpressCheck workstation is equipped with a credit card reader, you can accept payments for fines

and fees. See Setting Up Credit Card Payments. If necessary, Polaris ExpressCheck can be used in offline mode and the transaction information can be uploaded to the Polaris database after the session. See Using Polaris ExpressCheck Offline.

Polaris ExpressCheck is simple to use. Patrons who have used a bank card or scanned their own groceries are familiar with the process. In addition, simple directions are displayed on the screen, and you can select Help to watch a video clip. You can customize many screen graphics and colors, the on-screen messages, and the Help clip.

To use Polaris ExpressCheck

1. The patron scans the library card on the lighted area of the barcode reader or the RFID antenna tray in front of the workstation.

   > **Tip**:
   > You can also allow patrons to enter a user name or barcode with an on-screen keyboard, instead of scanning the library card. See Set Polaris ExpressCheck workflow options.

2. If you require a patron password for check-out, the system displays a keyboard on the touch screen and the patron enters a password.

3. If the patron has any held items and/or an account balance, the reminder dashboard appears, displaying the number of items held and/or the current account balance.
   If the patron does not have any held items or an account balance, the reminder

dashboard will not appear.

4. The patron scans each item to be checked out on the barcode scanner, or places up to three items on the RFID antenna tray. The screen displays a list of the items scanned. The system displays a message if an item cannot be checked out.

5. If you allow access to patron accounts from Polaris ExpressCheck, the patron can check the account balance and fines, renew items, and view, cancel, suspend, and reactivate requests. If you accept credit card payments, the patron can pay fines and fees. The patron always needs to enter a password to view account information.

6. The patron presses Print Receipt on the screen at any time during check-out. The printed receipt lists the items the patron has checked out in the session so far. EReceipts are also available.

7. The patron presses Exit on the screen. All patron information is cleared from the display, and the station is ready for the next patron.

Related Information

- **Scanning tips** - For best scanning results on barcode scanners, the patron card and each item to be checked out should be placed on the tabletop under the barcode scanner beam, not held mid-air between the tabletop and scanner. For best results with RFID items, 3-5 items should be placed on the RFID antenna tray, staggered slightly (not in a neatly aligned stack).
- **Override passwords** - If you have defined a staff override password to be used to assist patrons logging on at PAC, this password will also work to log on a patron at Polaris ExpressCheck.
- **RFID security bit** - If you use RFID, the checkout screen displays a padlock icon that indicates the state of the RFID security bit. A locked padlock means that security is still enabled for the item. This may occur when the patron attempts to check out an item, but due to position or reading errors, the security for the item is not turned off. In this case, the workstation displays a message asking the patron to reposition the item on the tray. The patron presses OK to try a second time. If the security bit fails to turn off a second time, a message asks the patron to seek assistance. (An unlocked padlock on the check-out screen indicates that security has been successfully turned off for a checked-out item.)

    > **Note**:
    > If there is a problem with the patron record or a specific item, the patron may be directed to see library staff. Staff cannot override specific blocks directly from the Polaris ExpressCheck station during the transaction, but may be able to override the blocks at the staff circulation workstation.

- **ITG features** - If you use ITG's EM security, the desensitizer moves on the track inside the unit when the appropriate materials are successfully checked out. If you use ITG's AV locker, the locker opens to deliver the material when the appropriate materials are successfully checked out. For a description of the ITG DiscXpress II media dispenser, see "ITG DiscXpress II™ Circulation" on page 46.

Client Installation and Administration Setup

Add the ExpressCheck workstation to your Windows network. Follow Microsoft's instructions for adding a workstation to a domain, then install prerequisite software on the workstation as you would for any other Polaris client. See "Installing Client Prerequisite Software" in *the Polaris Installation Guide*. Next, install Polaris client software and register the workstation in Polaris Administration as you would any computer running a Polaris client application.

This unit covers the following procedures:

- Install Polaris ExpressCheck client software
- Register the workstation in Polaris
- Assign permission to close Polaris ExpressCheck
- Start or close the Polaris ExpressCheck application

Install Polaris ExpressCheck client software

If the workstation does not include an integrated keyboard, connect one for installation purposes. You can remove it after the installation. For SeePoint units, see Connect a keyboard, mouse, and CD drive. Then follow these steps to install Polaris ExpressCheck client software.

1. If you have not already done so, add the workstation to the network following Microsoft's instructions.
   The domain user account needs the same network access privileges as a Polaris staff client workstation.
2. Add the new domain user account to the Local Administration group for the Polaris ExpressCheck workstation.
3. Set screen resolution and color for the Polaris ExpressCheck workstation:
   a. Log on to the Polaris ExpressCheck workstation using the domain user account you set up for the workstation.
   b. Select **Start**, **Control Panel**, **Display**, and select the **Settings** tab on the Display Properties dialog box.

     c. Set **Screen resolution** to 1024 x 768.

     d. Set Color quality to High (24 bit), and select **OK**.

4. Open Windows Explorer and navigate to the location of the Polaris installation software on the network.

5. Double-click **Polaris Client installer.exe**.
The Polaris Client Installer window opens.
Polaris prerequisite software on the workstation is automatically installed, if necessary. Then the Polaris Clients — InstallShield Wizard opens.
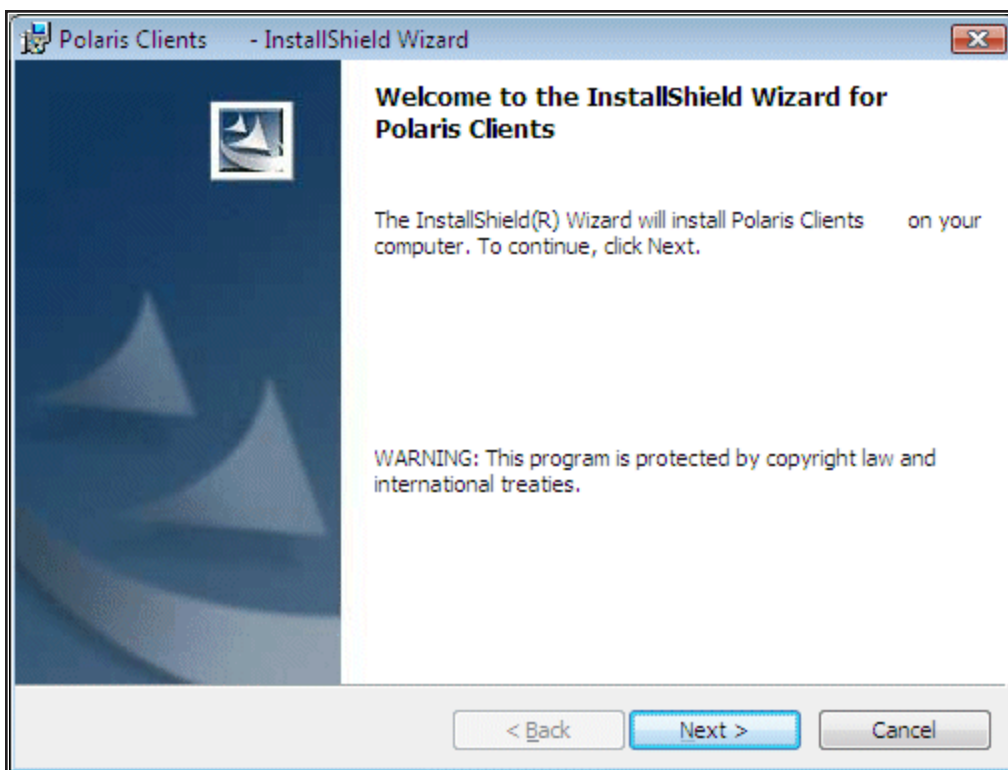
6. Select **Next** to continue.
The License Agreement dialog box appears.
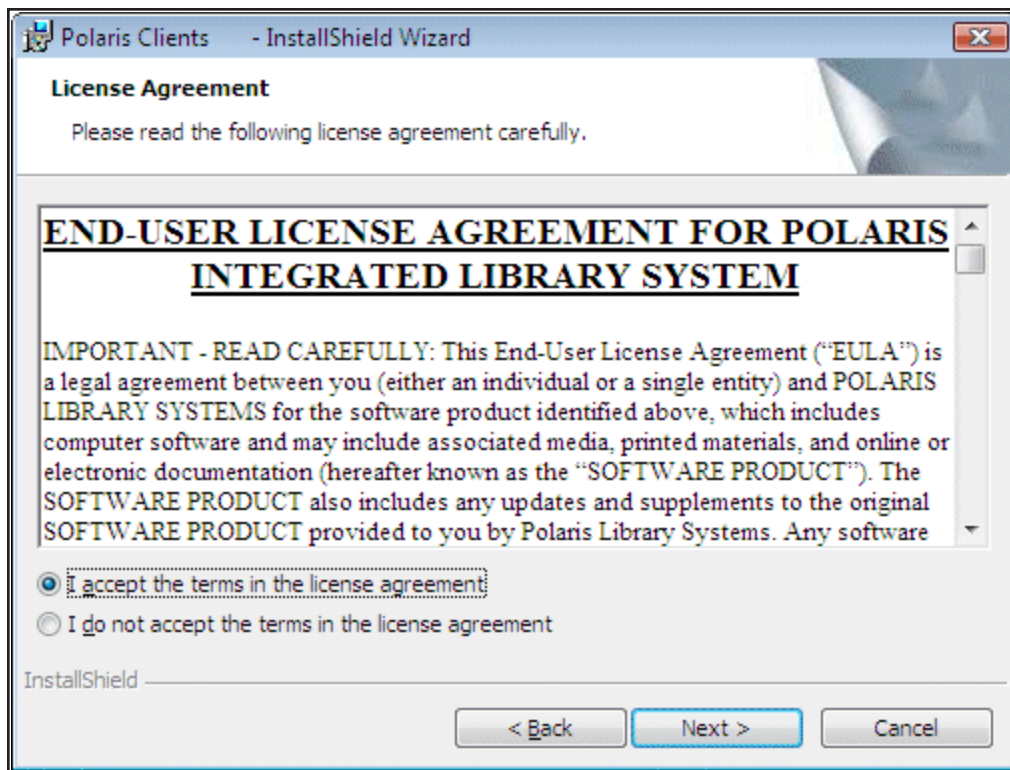
7. Select **I accept the terms in the license agreement**, and select **Next**. The Customer Information dialog box appears.

8. Type the appropriate information in the User Name and Organization boxes.

9. Leave the default installation option Anyone who uses this computer selected, and select Next.
    The Custom Setup dialog box appears.
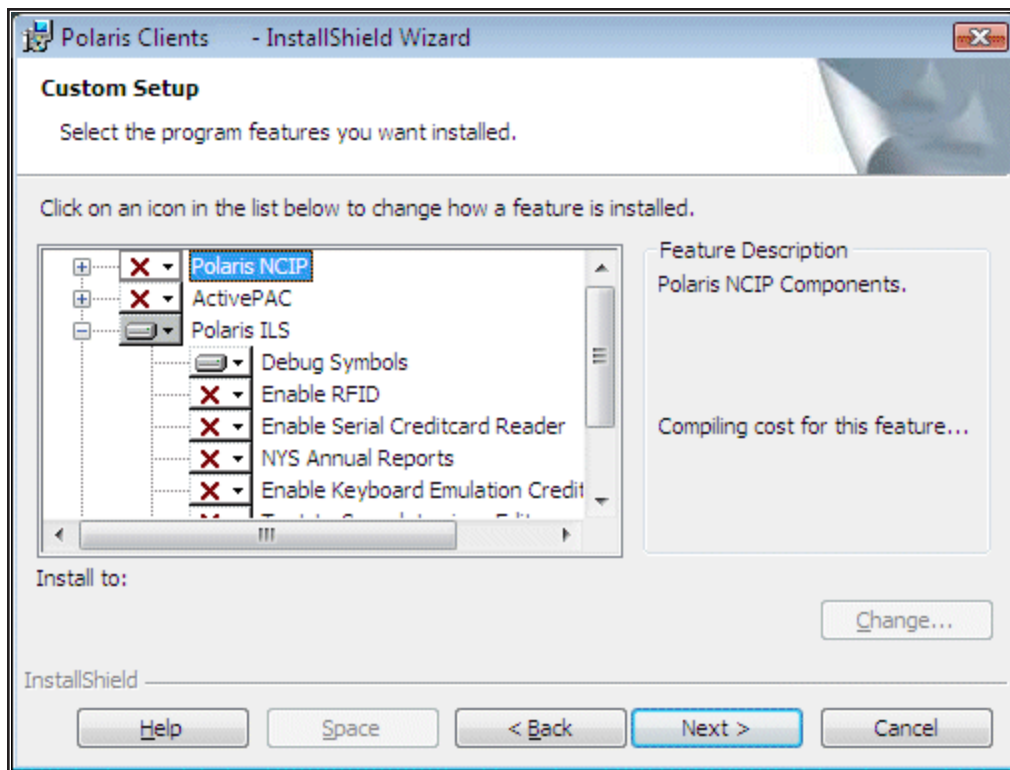
10. Select Polaris ILS, and select **This feature will not be available** from the drop-down menu.
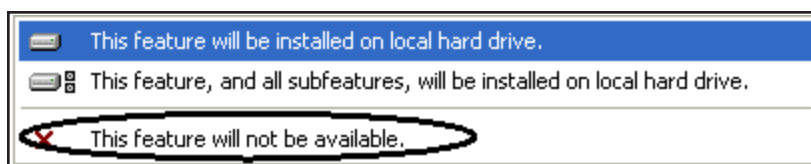
> **Note**:
> By default, only staff client (Polaris ILS) software is set to be installed. Because you are installing Polaris ExpressCheck, you must deselect Polaris ILS and select Polaris ExpressCheck. A red X indicates that a component will not be installed unless you deliberately select it for installation.

11. Select Polaris ExpressCheck, and select **This feature will be installed on local hard drive** from the drop-down menu.
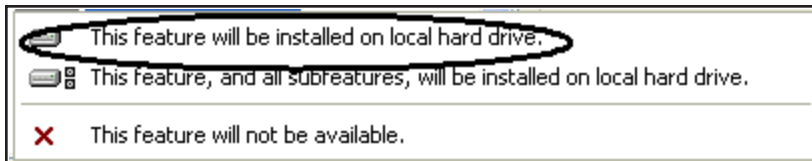
The Custom Setup dialog box should show only Polaris ExpressCheck selected for installation.
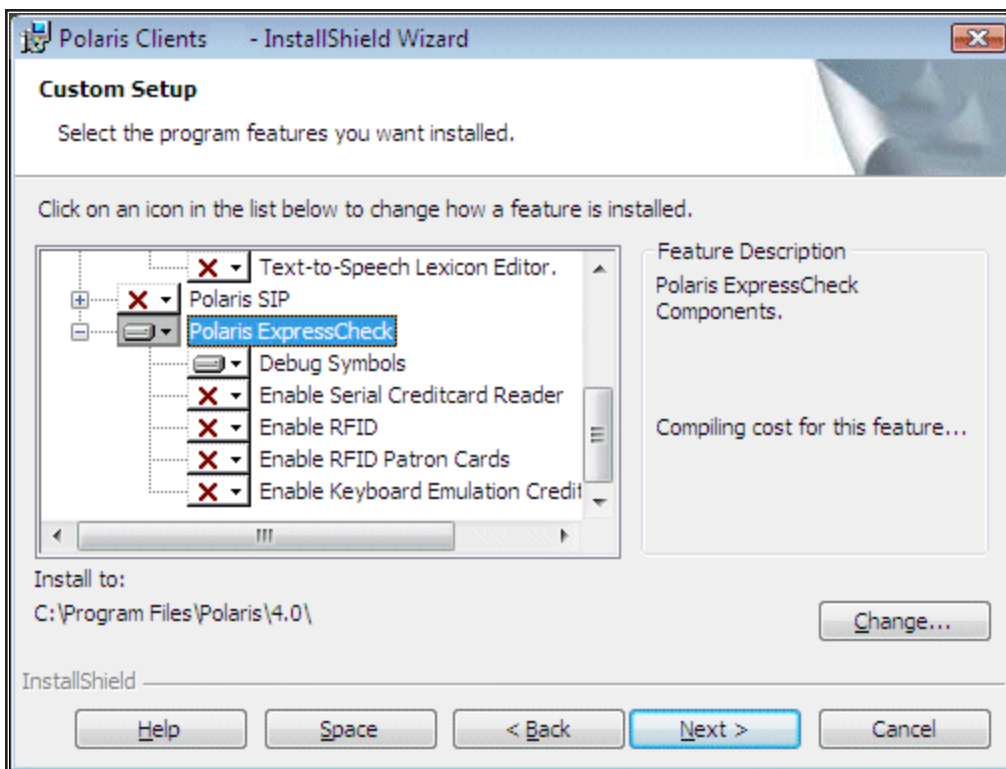
12. If this workstation will use a MagTek® Mini swipe serial credit card reader, and the workstation is running 32-bit Windows, select **Enable Serial Creditcard Reader** under **Polaris ExpressCheck**, and select **This feature and all subfeatures will be installed** from the drop-down menu.
    If this workstation will use a MagTek® Mini swipe serial credit card reader, and the workstation is running 64-bit Windows, select **Enable Keyboard Emulation**

Creditcard Reader under **Polaris ExpressCheck**, and select **This feature and all subfeatures will be installed** from the drop-down menu. The MagTek Mini Swipe driver is not compatible with 64-bit versions of Windows.

> **Important**:
> If you are installing ExpressCheck with credit card support on an NCR unit, select Enable Keyboard Emulation Creditcard Reader.

> **Note**:
> If you plan to accept credit card payments from Polaris ExpressCheck, a magnetic swipe credit card reader is required. If your credit card reader is not a MagTek serial reader, or you are using the MagTek reader on a 64-bit Windows workstation, do not select Enable Serial Creditcard Reader. Instead, select Enable Keyboard Emulation Creditcard Reader. You can use any magnetic swipe reader that supports keyboard emulation and returns the swipe data in ISO 7813 format followed by a CR. For more information about Polaris Administration settings for credit card processing, see Setting Up Credit Card Payments.
>
> Serial mode readers work only for Polaris ExpressCheck clients that are directly connected to the Polaris server. USB Keyboard Emulation readers work both for Polaris ExpressCheck clients that are directly connected, and for clients that connect to a Terminal Server.
>
> In serial mode, Polaris controls when the magnetic swipe reader will accept a card swipe. In USB keyboard emulation mode, the magnetic swipe reader is not controlled and accepts a card swipe at any time.

13. If this workstation will read item RFID tags, select **Enable RFID** under **Polaris ExpressCheck**, and select **This feature and all subfeatures will be installed** from the drop-down menu.

> **Important**:
> You should also select this option if you will use ITG's EM (electromagnetic) security.

14. If this workstation will read patron RFID cards, select **Enable RFID Patron Cards** under **Polaris ExpressCheck**, and select **This feature and all subfeatures will be installed** from the drop-down menu.

15. If this workstation will communicate with an ITG DiscXpress II™ media dispenser, select **Enable DiscXpress2** under **Polaris ExpressCheck**, and select **This feature and all subfeatures will be installed** from the drop-down menu.
    You can select this feature together with or independently from other ITG options. For more information about media dispenser processing, see ITG DiscXpress II™ Circulation.

16. If you want to install the Polaris ExpressCheck program files in a location other than the default folder, do the following:

> **Note**:
> To accept C:\Program Files\Polaris\[version] as the default application folder, you do not need to do this step.

a. Select **Change** to display the Change Current Destination Folder dialog box.
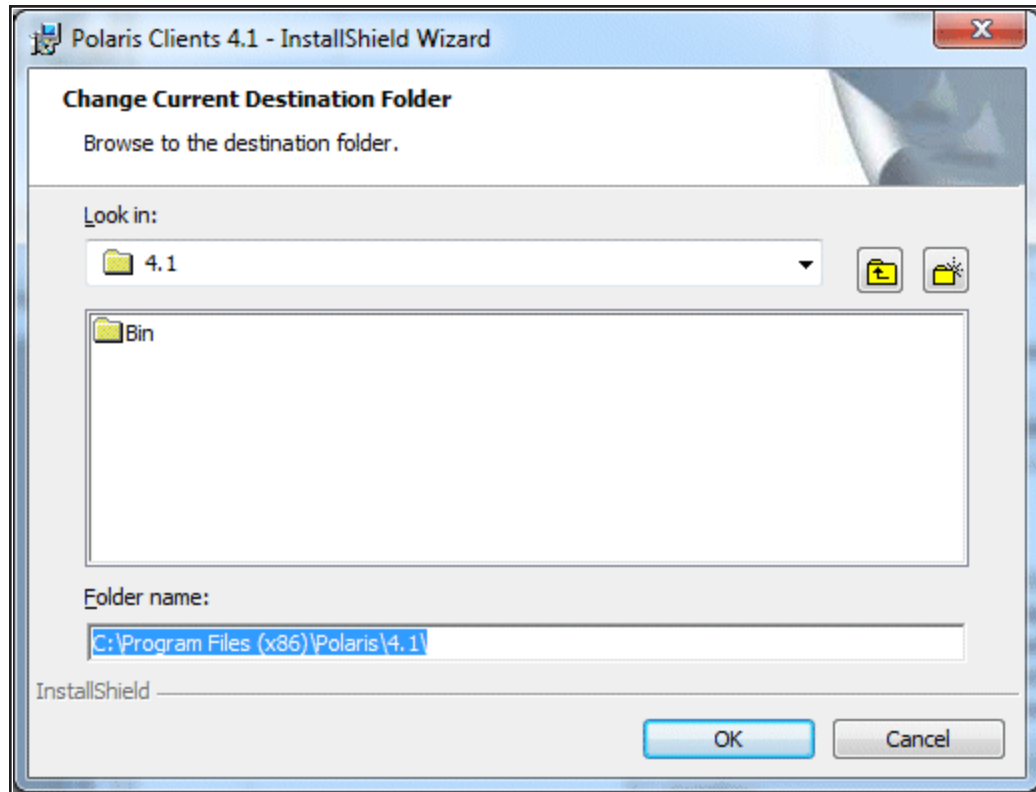
b. Select **OK** to return to the Custom Setup dialog box.

17. Select **Next** on the Custom Setup dialog box.
The Server Information dialog box appears.

18. Type the application server name in the **Application Server Name** box.

19. If you are running Polaris in an ASP environment, select the **Datalink Name** check box, and type the datalink name in the text box.

20. If the Polaris ExpressCheck workstation is running in a workgroup environment, or authenticates to a domain controller other than the primary domain controller, do these steps:

    a. Select **Enable Workgroup Mode**.

    b. Type the workgroup name or authenticating domain name in the **Authentic-ating Domain** box.

21. If the workstation uses a serial credit card reader, type the port number to which the reader is connected. This option is available only if you selected **Enable Serial Creditcard Reader** under **Polaris ExpressCheck** on the Custom Setup dialog box.

22. Select **Next**.
    If you selected an RFID option to install, the RFID Configuration dialog box

appears.
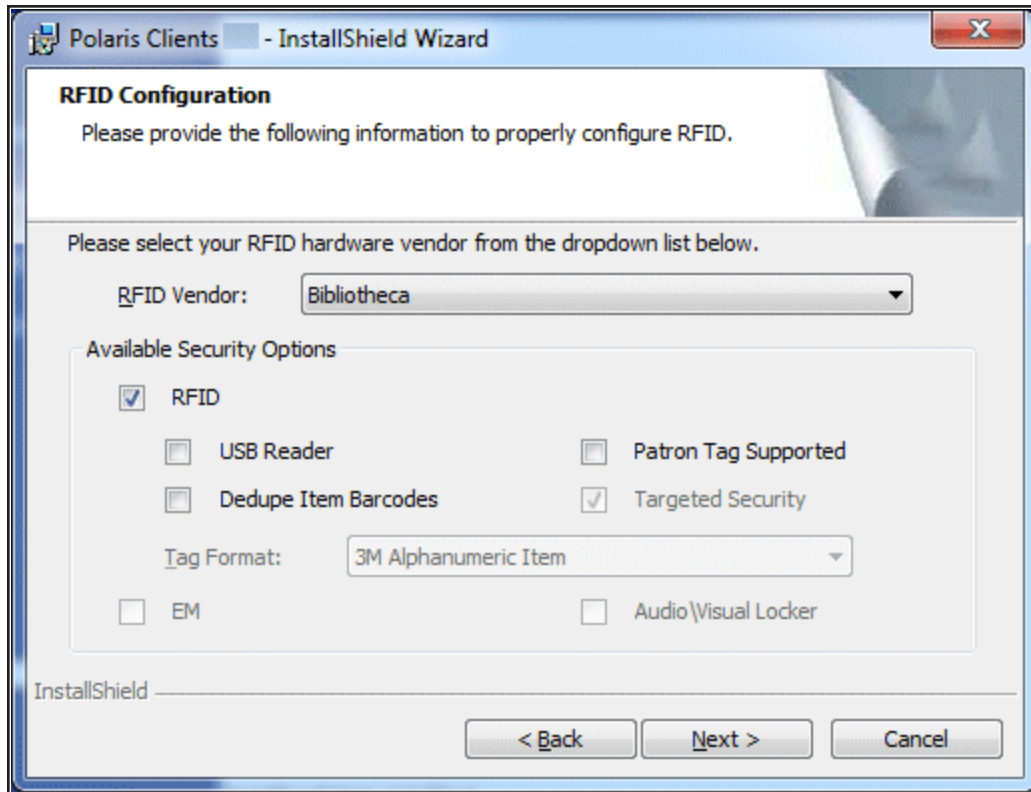
23. Select your RFID vendor in the **RFID vendor** box.

24. Do the following steps, depending on your vendor:

    Bibliotheca - Select from the following options, as appropriate for your Bibliotheca equipment setup:

    - **USB Reader** - Select this option if the workstation uses a USB RFID reader.

    - **Patron tag supported** - Select this option if your Bibliotheca installation supports patron RFID tags.

    - **Dedupe item barcodes** - Select this option if your library places RFID tags with duplicate item barcodes on all items in a set. When this option is selected, at check-out duplicate item barcodes are removed from the list of RFID tags currently on the antenna pad (reader) so that the set is checked out once.

Integrated Technology Group (ITG) - Select from the following options, as appropriate for your ITG equipment setup:

- **USB Reader** - Select this option if the workstation uses a USB RFID reader.
- **Dedupe item barcodes** - Select this option if your library places RFID tags with duplicate item barcodes on all items in a set. When this option is selected, at check-out duplicate item barcodes are removed from the list of RFID tags currently on the antenna pad (reader) so that the set is checked out once.
- **Patron tag supported** - Select this option if your ITG installation supports patron RFID tags.
- **Targeted security** - When this option is selected (the default setting), you can set RFID security to off for certain items in a stack of items. If the option is not selected, RFID security is set to off for the entire stack of items on the reader, regardless of whether they are all successfully checked out.

- **EM** - Select this option if your ITG installation supports electromagnetic (EM) security, where magnetic strips on materials are desensitized when they are successfully checked out.

- **Audio-Visual Locker** - Select this option if your ITG installation supports an AV locker that unlocks to deliver specified materials when they are successfully checked out.

EnvisionWare - Select from the following options, as appropriate for your EnvisionWare equipment setup:

- **USB Reader** - Select this option if the workstation uses a USB RFID reader.
- **Patron tag supported** - Select this option if your EnvisionWare installation supports patron RFID tags.
- **Dedupe item barcodes** - Select this option if your library places RFID tags with duplicate item barcodes on all items in a set. When this option is selected, at check-out duplicate item barcodes are removed from the list of RFID tags currently on the antenna pad (reader) so that the set is checked out

once. However, the security bit is turned off in all the EnvisionWare RFID tags on the antenna pad with that barcode.
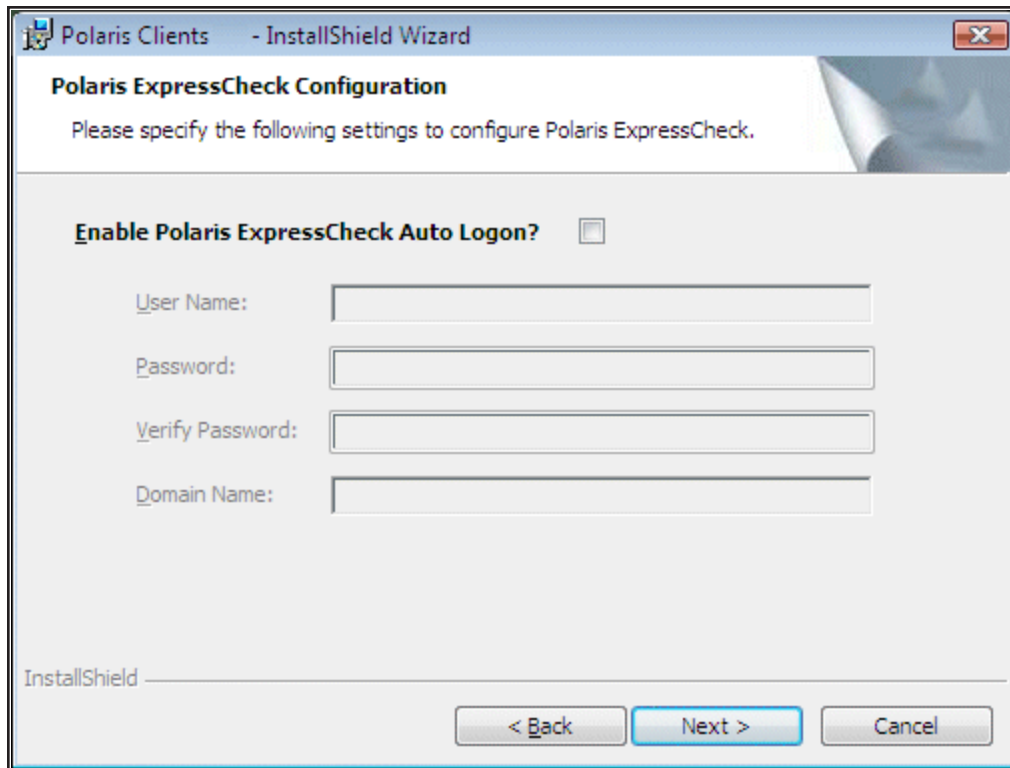
3M - Select from the following options, as appropriate for your 3M equipment setup:
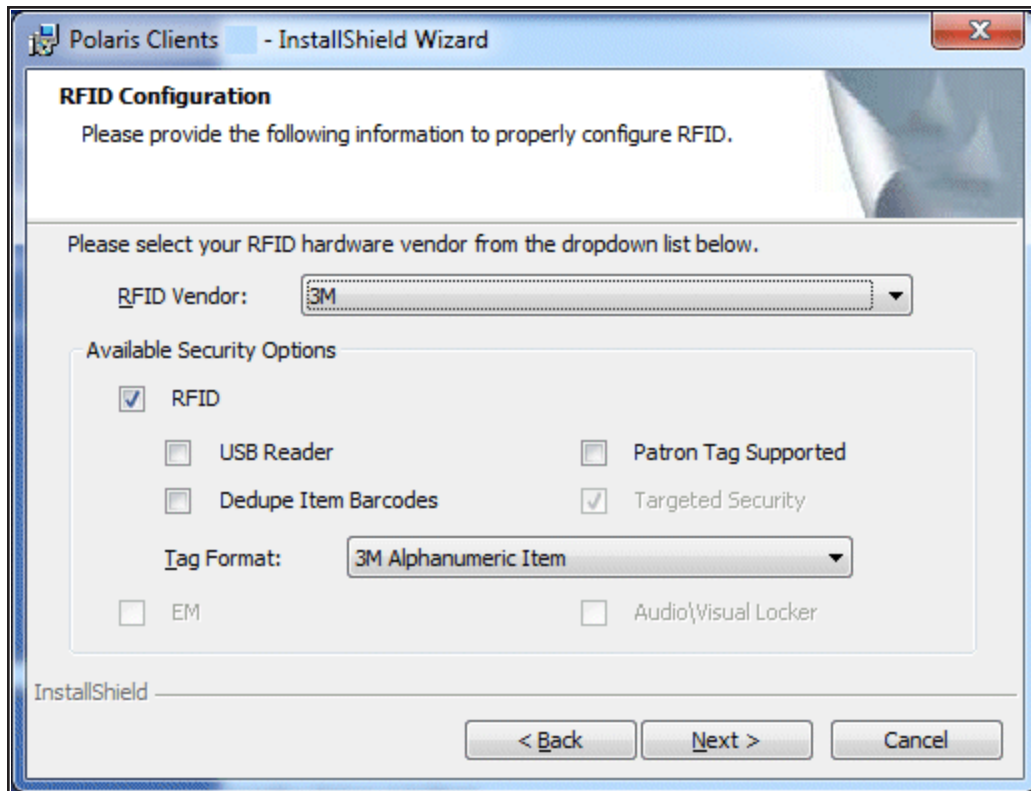
- **USB Reader** - Select this option if the workstation uses a USB RFID reader.

- **Patron tag supported** - Select this option if your 3M installation supports patron RFID tags.

- **Dedupe item barcodes** - Select this option if your library places RFID tags with duplicate item barcodes on all items in a set. When this option is selected, at check-out duplicate item barcodes are removed from the list of RFID tags currently on the antenna pad (reader) so that the set is checked out once.

- **Tag Format** - Select 3M Alphanumeric Item (default) or 3M Numeric Item, as appropriate for your 3M RFID item tag format.

25. Select **Next**.

The Polaris ExpressCheck Configuration dialog box appears.

26. If you want the Polaris ExpressCheck client software to start automatically when the Polaris ExpressCheck workstation is rebooted, follow these steps:

    a. Select **Enable Polaris ExpressCheck Auto Logon**. The log-on fields become available.

    b. Supply the appropriate information in the User Name, Password, Verify Password, and Domain Name boxes (see steps 1 and 2).

27. Select **Next**. The Ready to Install the Program dialog box appears.
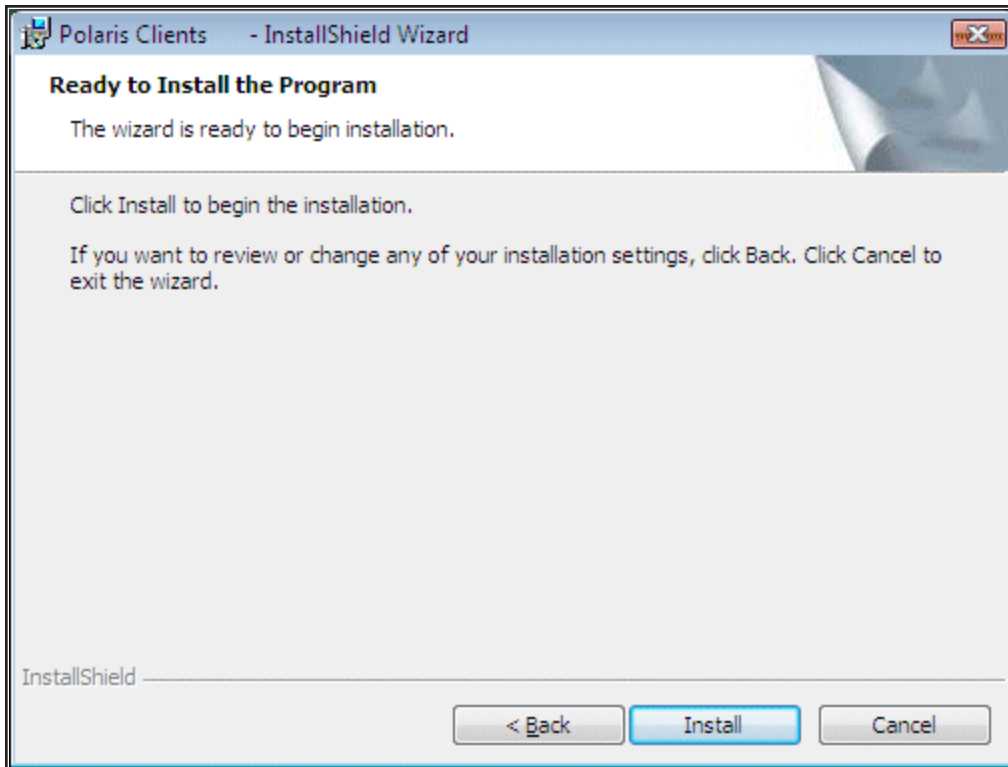
28. Select **Install**.
    The automatic installation process starts. Installation dialog boxes may appear for the USB reader or USB dongle device drivers, if applicable. Simply follow the prompts. The Installation Complete dialog box appears when the installation is finished.

29. Select **Finish** to close the InstallShield Wizard.

Related Information

- **Printer set-up** - Install the receipt printer driver on the Polaris ExpressCheck workstation. Then set printer options on the workstation. See Setting Receipt Printing and Display Options.

- **RFID set-up** - Set RFID options at the Polaris ExpressCheck workstation. See Set RFID, scanner, and security options.

Register the workstation in Polaris

You register the Polaris ExpressCheck workstation in Polaris Administration as you would a staff client computer. Follow these steps to register the workstation.

> **Important**:
> Be sure the Polaris ExpressCheck workstation is added to your Windows network before you do this procedure.
> Contact your Polaris Library Systems Site Manager to enable the Polaris ExpressCheck license if you have not already done so.

1. At a staff client workstation, select **Administration**, **Explorer**, **System** on the Polaris Shortcut Bar, or select **New** on the Shortcut Bar and select Workstation in the New dialog box.

   If you opened the Administration Explorer, select **File** > **New** > **Workstation** from the Administration Explorer menu bar.

   The Workstation workform opens.
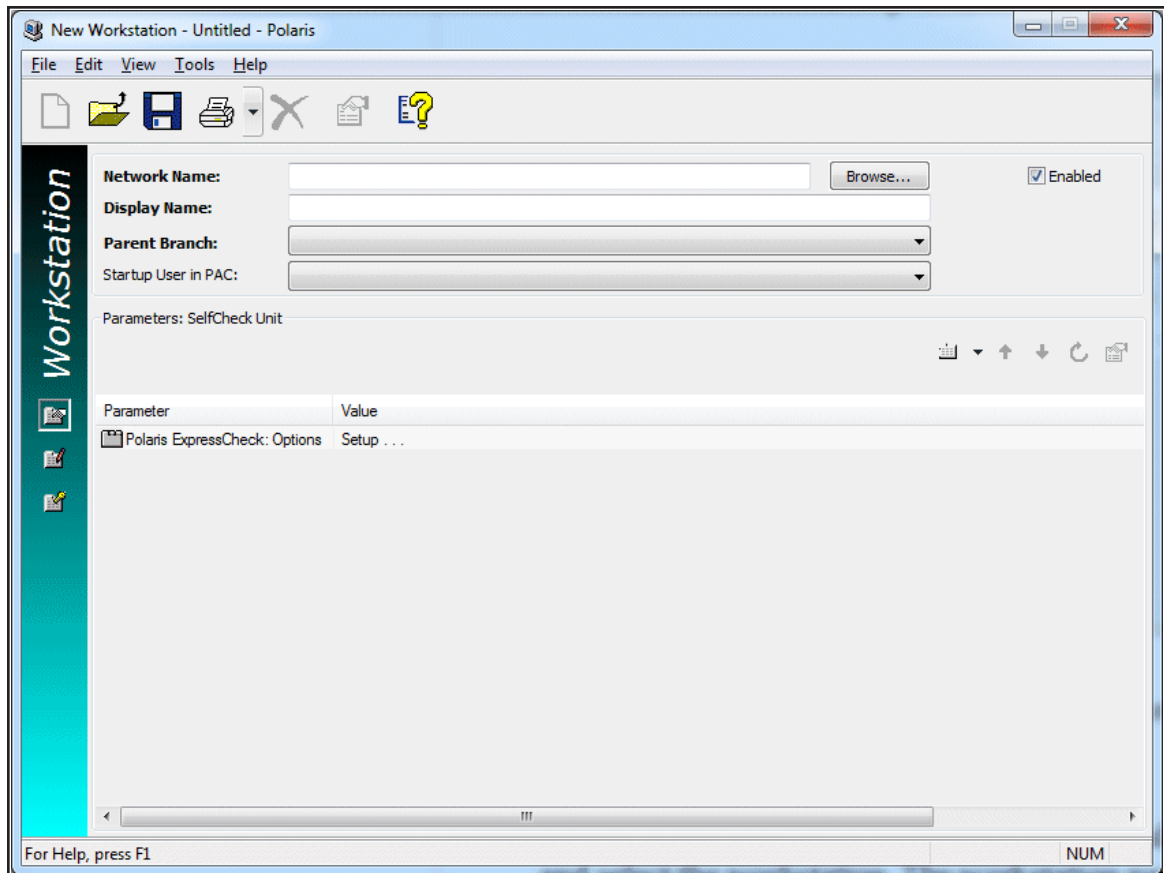
2. In the **Network Name** box, enter the network name of the workstation, using one of the following methods:

   - Type the workstation network name.
   - Select **Browse**, and use the Network Browser dialog box to locate and select the workstation. The workstation name appears in the Network Name box.

3. In the **Display Name** box, type the label used to identify the workstation.
   The display name is listed when setting permissions, for results on the Polaris Find Tool, and in the tree view of the Administration Explorer.

4. In the **Parent Branch** box, select the branch to which the workstation is assigned.

5. Select **File** > **Save** to save the workstation record.
   Record Saved appears in the status bar.

Related Information

- **Setting Polaris ExpressCheck parameters for the workstation** - See <u>Set Polaris ExpressCheck workflow options</u>.

- **Setting Polaris permissions for the workstation** - Set the same permissions for the Polaris ExpressCheck workstation that you would set for a staff client circulation workstation, typically those assigned to the Circulation Clerk group and staff client circulation workstations. See "Setting Circulation Permissions" in the *Polaris Patron Services Administration Guide*.

- **Default user** - For statistical reporting purposes, Polaris ExpressCheck transactions use the default user ID, Polaris Exec (ID=1).

Assign Permission to close Polaris ExpressCheck

The only permission for Polaris ExpressCheck itself is the permission to close the application. This prevents users from closing it accidentally. Follow these steps to assign the permission to close the application.

> **Note**:
> No staff override permissions apply to Polaris ExpressCheck transactions. When certain circulation blocks are encountered, a message advises the patron to contact a library staff member.

1. At a staff client workstation, select **Administration**, **Explorer**, **System** from the Polaris Shortcut Bar.

2. In the Administration Explorer tree view, select the **Security** folder for the system. The Security view is displayed in the details view.

3. Double-click **Circulation** in the Control Record list.
   The list of circulation permission objects appears.

4. Double-click **Close ExpressCheck**, and select **Allow**.

5. Select **Assign** under **Individuals with Permission**, and select the resource type (groups, staff members, Polaris ExpressCheck workstation).he Polaris Find Tool appears.

6. Use the Find Tool to search for and select one or more resources.The resources are displayed in the **Individuals With Permission** list.

7. Select **File**, **Save** to save your changes.

Related Information

- **Working with Polaris permissions** - See "Granting Permissions" in the *Polaris Administration Guide*.
- **Closing Polaris ExpressCheck** - See Start or close the Polaris ExpressCheck application.

Start or close the Polaris ExpressCheck application

Follow these steps to start and close the Polaris ExpressCheck application on the workstation.

> **Note**:
> Both you as a staff member and the Polaris ExpressCheck workstation need the permission Close ExpressCheck: Allow to close the application. See Assign permission to close Polaris ExpressCheck.

1. To start Polaris ExpressCheck, double-click the shortcut icon on the Windows desktop. The Welcome screen is displayed.

> **Note**:
> If the workstation is online but cannot be identified in Polaris, a message appears. You can choose to continue and use the default Polaris workstation ID (1) or exit ExpressCheck. Note that using the default workstation ID may affect settings such as loan periods, since they may differ for the two workstations. For information about registering the workstation in Polaris, see Register the workstation in Polaris.

2. To close Polaris ExpressCheck, select the logo image area at the upper left corner of the Polaris ExpressCheck window. A confirmation message appears.

3. Select **Yes** on the confirmation message.
The Polaris ExpressCheck Operator dialog box appears. The dialog box displays

identification fields and a keyboard image.

4. Select (touch) the appropriate keys on the keyboard image to enter your user name, password, and network domain.

5. Select **Done**.

    The Windows desktop appears.

Configuring Polaris ExpressCheck

You can customize Polaris ExpressCheck in many ways. You can set receipt printing, display options, and RFID/scanner options at each workstation. In addition, Polaris Administration settings control what features are available to patrons at Polaris ExpressCheck workstations, as well as the specific blocking conditions for check-outs and renewals. If you use ITG hardware with electromagnetic (EM) or AV Locker security, you also specify the material types to which these options apply. Polaris ExpressCheck also supports ITG DiscXpress II media dispenser circulation. You can further customize Polaris ExpressCheck with your own graphics, colors, help video clip, and messages.

This unit covers the following topics:

Setting Receipt Printing and Display Options

Setting Security and Scanner Options

Setting Account and Circulation Options

ITG DiscXpress II™ Circulation

Setting Up Credit Card Payments

Customizing the Interface

Editing Messages

Setting Receipt Printing and Display Options

You use the Setup screen in Polaris ExpressCheck to set receipt printing and certain display options for the workstation.

The specific information included on the check-out receipt is determined by the branch's Polaris Administration settings for check-out receipts. You set these fields with the Patron Services parameter Check-out: Receipt options. For details, see "Setting Up Circulation Receipts" in the Polaris *Patron Services Administration Guide*. The message that appears at the bottom of the receipt is the same message that appears on receipts generated from the staff client. For details, see "Set receipt printer message text" in the Polaris *Patron Services Guide*. If you change the message, you must reboot the ExpressCheck workstations to see the change.

> **Note**:
> Polaris ExpressCheck also supports eReceipts (email and text message receipts). See Set Polaris ExpressCheck workflow options.

Set receipt printing and display options

Follow these steps to set up receipt and display options.

> **Important**:
> You need a keyboard connected to the workstation to do this procedure. For connection instructions, see Connect a keyboard, mouse, and CD drive.

1. Double-click the Polaris ExpressCheck shortcut on the desktop to start Polaris ExpressCheck, if the application is not currently running.
   The Welcome screen appears.

2. Press **CTRL+ALT+S**.

The Setup screen appears.

3. Select the network name of the printer in the **Name** box.

4. Select your printer type in the **Type** box.

5. Under **Receipt Options**, select the **AutoCut** option if your printer supports this option.

   The standard receipt printer supports **AutoCut**.

6. To print a receipt when the workstation times out, if items have been checked out during the session, be sure **Print Receipt on timeout** is selected.

7. To display a **Print receipt** option on the check-out screen, be sure **Display Print Receipt Button** is selected.

> **Note**:
> When this button is displayed, patrons can print a receipt at any time. Pressing Exit automatically prints a receipt.

8. To display only items that have been successfully checked out, select **Display Success Only**.
   When this option is selected, and an item check-out or renewal fails for any reason, the item does not appear in the list of items checked out.
   When this option is not selected, and an item check-out or renewal fails for any reason, the item appears in the list of items checked out with a red X, indicating that the transaction was not successful.

9. Select **OK**.

   The Setup screen closes.

Related Information

- **Display wait screen** - If you want to display a Loading message for 1.5 seconds when a patron barcode is scanned, select the setup option **Display Wait Screen**. Set RFID, scanner, and security options.
- **Prompt for a printed receipt** - A "Print a Receipt?" prompt can help minimize paper receipts. See Set Polaris ExpressCheck workflow options for information about setting this option.
- **eReceipts** - You can enable eReceipts for Polaris ExpressCheck transactions for patrons who prefer to receive email or text message check-out and renewal receipts instead of printed receipts. See Set Polaris ExpressCheck workflow options.
- **Stop sound** - When an item "stop" message appears, for example when a patron attempts to check out an item that does not circulate, a stop sound .wav file is played. (On Windows Vista workstations, the file is the default Critical Stop sound.) You can turn it off by clearing the **Play Stop Sound** option on the Setup screen. If you want to play your own sound, you can edit the message\stop node in the EC_interface.xml file, located in C:\ProgramData\Polaris\[version]\Templates\Config. If your custom .wav file is not in the C:\Program Files\Polaris\[version]\Bin folder, you must enter the full path. For more information about editing the EC_interface.xml file, see Customizing the Interface.

- **Other setup options** - Options on the Setup screen also control RFID and offline circulation for the workstation. See the following topics:
    - Set RFID, scanner, and security options
    - Using Polaris ExpressCheck Offline

Setting Security and Scanner Options

You can use an RFID antenna, a barcode scanner, or both devices with the Polaris ExpressCheck workstation. You use the Setup screen in Polaris ExpressCheck to enable RFID circulation for the workstation and to set RFID options. Options on the Setup screen also affect the barcode scanner, and how the scanner and RFID reader work together if you use both devices. If your Polaris ExpressCheck workstation includes EM or AV Locker devices, certain Polaris Administration settings affect how these function (see "Setting Account and Circulation Options" on page 30).

Security Manager

The Polaris Security Manager is an executable that runs with the Polaris ExpressCheck, staff client, RFIDVerify and RFIDUtility applications when a security model has been selected. It supports the Polaris security interface and provides the underlying implementation for each supported third-party security model, including:

- 3M RFID
- Bibliotheca RFID
- EnvisionWare RFID
- ITG RFID
- ITG DiscXpress
- ITG AV Unlocker
- ITG EM

Polaris can easily perform security fixes, updates and upgrades may be typically made by updating the Security Manager. The Polaris client software communicates with the Security Manager using a common interface and the Security Manager handles the specific details of each RFID implementation. The Security Manager also allows Polaris to tightly integrate security (RFID, AV, EM) operations, allowing Polaris to communicate

directly with each security device. Unlike screen-scraping or non-integrated wedge software, Polaris controls when to read from security devices and when to write to security devices. There is no need to manage a second application for security operations.

The Polaris Security Manager is automatically installed if you select RFID, EM, DiscXpress or AV Locker while installing Polaris ExpressCheck, or if you select RFID or DiscXpress while installing the Polaris staff client.

Settings in the Security Manager are vendor-specific, not Polaris client-specific, so any changes you make in the Security Manager affect all the client workstations that use the vendor's security features.

The Security Manager is set with the equipment manufacturer's default values and the security options you selected for your vendor when you installed the client software (see "Install Polaris ExpressCheck client software" on page 7). If you need to change these settings, open SecurityManager.exe, located by default on the client workstation at

C:\Program Files\Polaris\[version]\Bin

This puts the Security Manager icon in the desktop tray. Select the icon to open the Security Manager.

In addition to RFID security settings for your vendor, you can change ITG settings for EM and the AV Locker:

- **EM Wait (milliseconds)** - Sets the amount of time Polaris ExpressCheck pauses while the EM device travels along the rails inside the unit.
- **AV Locker** - When this option is enabled and an item is scanned, the material type is checked in the SelfCheck Material Types policy table. If the Unlocker option is set to Yes for the material type (see Set Polaris ExpressCheck circulation by material type), an instruction screen explains how to unlock the media locker.
    - **Max Attempts** - Specifies the number of intervals the software waits for the user. If the user exceeds the maximum number of attempts, the item is not checked out.
    - **Wait (seconds)** - Specifies how long the locker remains unlocked.

        Important:
        Port 8075 must be open on the ExpressCheck workstation if any security features (RFID, EM, AV Locker) are used. This port

is used for communication between the Polaris ExpressCheck and the Security Manager applications.

You can save a log file for RFID security debugging purposes. On the Log tabbed page, select Save log to file. The log file is saved in the following location:

C:\ProgramData\Polaris\[version]\Logs\SECURITYMANAGER

Non-Standard Barcodes

Your barcode scanner and Polaris ExpressCheck may not handle certain non-standard proprietary barcodes properly. Polaris provides a custom conversion script, follett_barcode.vbs, to convert Follett barcodes. By default, the script is placed in C:\Program Files\Polaris\[version]\Bin when you install the Polaris ExpressCheck client software on the ExpressCheck workstation. You can create custom scripts to convert other non-standard barcodes. Contact your Polaris Site Manager for assistance. The custom script should be placed in the \Polaris\[version]\Bin folder. On the Setup screen, you provide the path and filename of the conversion script. This function does not apply to RFID labels.

Set RFID, scanner and security options

You need a keyboard connected to the workstation to do this procedure. For connection instructions, see Connect a keyboard, mouse, and CD drive. Then follow these steps to set up RFID, scanner, and security options in Polaris ExpressCheck.

> **Important**:
> Polaris ExpressCheck workstations using RFID must have RFID enabled when the Polaris ExpressCheck application is installed. See Install Polaris ExpressCheck client software.
> To change the RFID, scanner, and security settings as discussed in this procedure, and have the changes persist after the workstation is rebooted, you must have administration rights to the local machine portion of the registry.

1. Double-click the Polaris ExpressCheck shortcut on the desktop to start Polaris ExpressCheck, if the application is not currently running.
   The Welcome screen appears.
2. Press **CTRL+ALT+S**.
   The Setup screen appears.

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Note:
If you selected any security options (RFID, EM, AV Locker) during installation, Use Security Manager is checked and the Security Manager Port is set to 8075. If this workstation is using security options, do not change these settings. See Security Manager.

3. If you use a barcode scanner, set these options:

- Select the type of scanner in the Type box (under Symbol Barcode Scanner), and set the baud rate and port if necessary.

   The default type is Serial (9600 baud, COM 2 port).

   Important:
   If the Polaris ExpressCheck unit has a Symbol USB scanner, and you have upgraded Polaris ExpressCheck software from a

version of Polaris earlier than 3.1 build 413, or Polaris 3.2 build 357, be sure to set this option to USB.

- If you use certain non-standard barcodes, and have a custom conversion script to handle them, type the path and filename of the script in the Script box. See Non-Standard Barcodes. This option does not apply to RFID labels.

4. If you use an RFID antenna, set these options:

- If you use RFID patron cards, select the **Support RFID patron cards** check box.

- (Optional) To help patrons who are accustomed to using a barcode scanner, select the **Display RFID Instruction Screen** check box.
  This option displays a message once per session, immediately before the checkout screen, that instructs patrons to place their materials on the Polaris ExpressCheck RFID antenna tray.

> **Note**:
> The default message is Please place up to 3 books on the ExpressCheck tray or scan a magazine barcode. You can edit the message in the Polaris Language Editor (string ID EC_TEXT_CHECKOUT_INSTRUCTION_RFID). See Editing Messages. If you are using an RFID attenuator kit that allows only one item on the antenna tray, you should change the message.

- (Optional) To allow only one item at a time on the RFID antenna tray, clear the **Allow Multiple RFID Items on Tray** check box.
  When this option is not selected, a message is displayed when a patron places more than one item on the RFID antenna tray. If you find that the RFID antenna is "missing" items in a stack of items, you may want to clear this option.

> **Note**:
> The default message is Multiple items were detected on the ExpressCheck tray. Items must be read one at a time. Please place a single item on ExpressCheck tray. When you are ready, select **OK**. You can edit the message in the Polaris Language

Editor (string ID EC_TEXT_CHECKOUT_RFID_
BLOCKMULTIPLEITEMS). See Editing Messages.

5. If you use both an RFID antenna and a barcode scanner, set these options:

- (Optional) Select the **Display Barcode Scanner Warning** check box to display a message when a patron scans an item with the barcode scanner. It reminds the patron that the library is using RFID and security may not be turned off if they use the scanner, and gives them the option to continue scanning or stop. The message appears only once per session.

  > **Note**:
  > The default message is This unit uses RFID to read item labels. Using the barcode scanner may not turn off security. Are you sure you want to continue using the barcode scanner? You can edit the message in the Polaris Language Editor (string ID EC_TEXT_CHECKOUT_RFID_SCANNERWARNING). See Editing Messages.

- (Optional) If you want to limit item check-out to the RFID antenna (and pre-vent checkout from the barcode scanner), clear the **Allow Barcode Scans for Item Checkouts** check box.
  When this option is not selected, a message is displayed when a patron scans an item with the barcode scanner.

  > **Note**:
  > The default message is Barcode scanning of items is not allowed during checkout. This unit uses RFID to read item labels. Please reposition item on ExpressCheck tray. When you are ready, select **OK**. You can edit the message in the Polaris Language Editor (string ID EC_TEXT_CHECKOUT_RFID_ITEMBARCODESCAN). See Editing Messages.

  > **Note**:
  > When you use a serial barcode scanner for patron barcodes but require RFID item check-out for security purposes, this option controls when the scanner laser is turned off and on. If

> this option is not selected, the scanner laser turns off automatically once the patron barcode is scanned, and does not turn on again until the Welcome screen is displayed. Patrons must use the RFID antenna tray for item check-out.

6. (Optional) If you want to display a **Loading** message for 1.5 seconds when a patron barcode is scanned, select **Display Wait Screen**.

   If the barcode is scanned during a network slowdown, the message is displayed during this period as well. For example, if there is a 10-second network delay, the message is displayed for 11.5 seconds. When the patron account data has been loaded, the message disappears and normal processing continues.

7. Select **OK**.

Setting Account and Circulation Options

Polaris Administration settings control whether a patron password is required to use the Polaris ExpressCheck station, options related to patron accounts, and the specific blocking conditions for check-outs and renewals. You can set most options at the system, library, or branch level. The options that control whether Polaris ExpressCheck is enabled, whether patrons can access their accounts and/or renew expiring registrations, whether an on-screen keypad is available, and whether a separate receipt is printed for each item are also available at the workstation level, and can be set specifically for each Polaris ExpressCheck workstation. Certain general self-check unit settings that also apply to Polaris ExpressCheck are covered in the following procedures.

> **Important**:
> When you change Polaris ExpressCheck settings, you must restart Polaris ExpressCheck to see the effects of your changes.

Set Polaris ExpressCheck workflow options

Follow these steps to enable Polaris ExpressCheck and set patron access options.

> **Note**:
> You need Polaris System Administration permissions to do these steps.

Refer to "Setting Administration Permissions" in the Polaris *Administration Guide*.

1. At a staff client workstation, select **Administration**, **Explorer**, **System** from the Polaris Shortcut Bar.
2. In the Administration Explorer tree view, expand the organization folder, and select **Parameters** for the organization.
3. Select the **SelfCheck Unit** tab in the details view, and double-click **Polaris ExpressCheck: Options**.
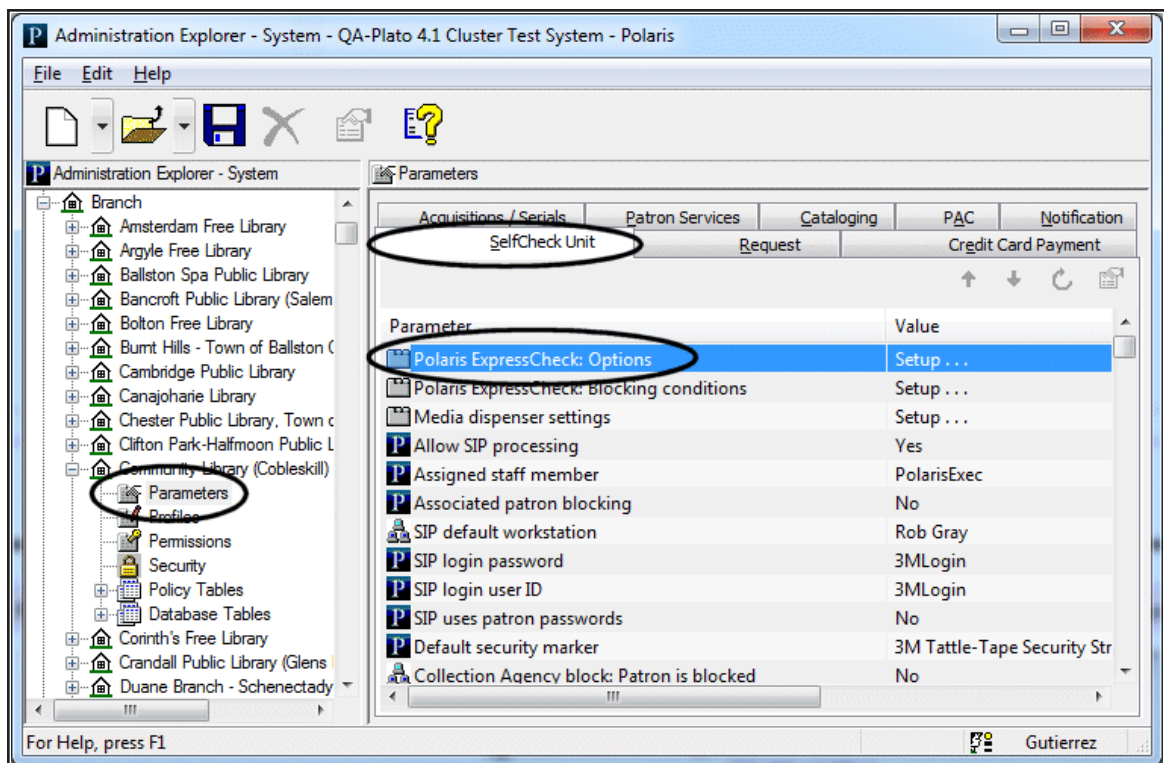
The Polaris ExpressCheck Options dialog box opens to the Enable tabbed page.
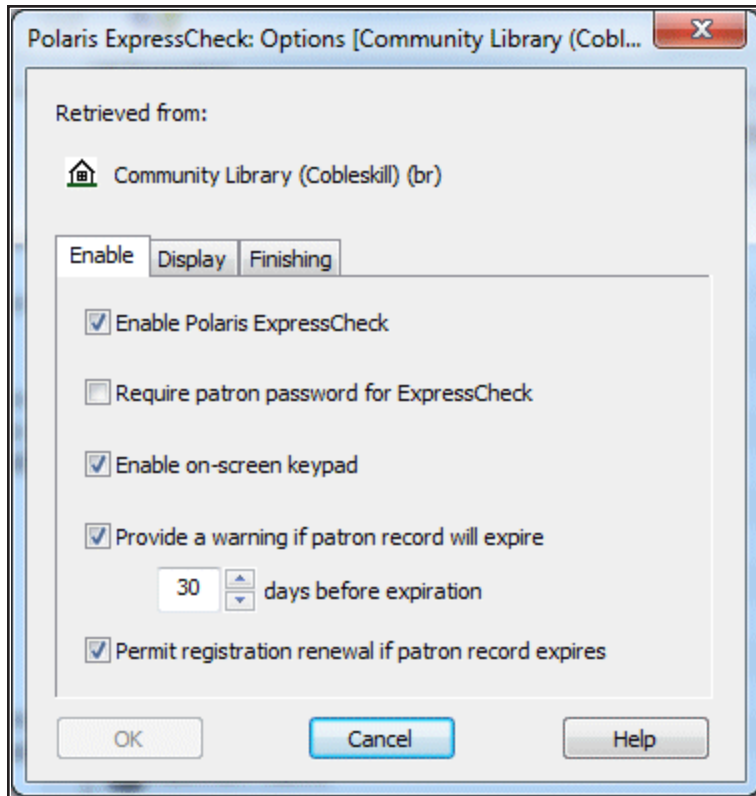
4. Set the following options on the Enable tabbed page:

    *   Select Enable Polaris ExpressCheck.

        > **Note**:
        > This option is also available at the individual workstation level.
        > If it is checked at the system, library, or branch level, it is
        > checked by default for an associated workstation.

    *   To require a patron password for the Polaris ExpressCheck session, select
        Require patron password for ExpressCheck.
        When this option is selected, a patron password is required to check out
        materials. (A patron password is always required to access the patron
        account, regardless of this setting.)If you do not select this option, patrons
        can simply scan their library cards to check out books. However, if you allow
        patrons to type a barcode or user name instead of scanning the card (see
        below), the password must also be entered regardless of this setting.

- To display an on-screen touch "keypad" that a patron can use to enter her barcode number or user name and password, instead of scanning the library card, select **Enable on-screen keypad**.

> **Notes**:
> ○ This option is also available at the individual workstation level. If it is selected at the system, library, or branch level, it is selected by default for an associated workstation. If you have a problem with the keypad display, verify that the option is set for the individual workstation. Also, the keypad will not be displayed if the workstation display is set to a percentage greater than 100%.
> ○ RFID workstations offer an option to go directly to the patron account from the opening screen. Be sure Enable on-screen keypad is set for these workstations, since a password is required to access the account.

When this option is selected, the Polaris ExpressCheck welcome screen displays the default message Forgot your library card? Press here! When the link is selected, the on-screen keypad is displayed with the user name/barcode and password fields. The patron enters the information by touching the appropriate places on the keypad image, and then presses OK.

> **Important**:
> Set the ExpressCheck workstation display to 100%. The message is not evident if the display is set to 125%.

> **Note**:
> To allow user names and a link that allows the patron to receive an email message for a forgotten password, see [Allow user names and a forgotten password link](#).

- To provide an expiration warning message, select **Provide a warning if patron record will expire**, and select the number of days before expiration that should trigger the warning message.

- To allow patrons to renew their registrations, select **Permit registration renewal if patron record expires**.

    Note:
    This option is also available at the individual workstation level. If it is selected at the system, library, or branch level, it is selected by default for an associated workstation.

5. Select the **Display** tab to make the following settings:
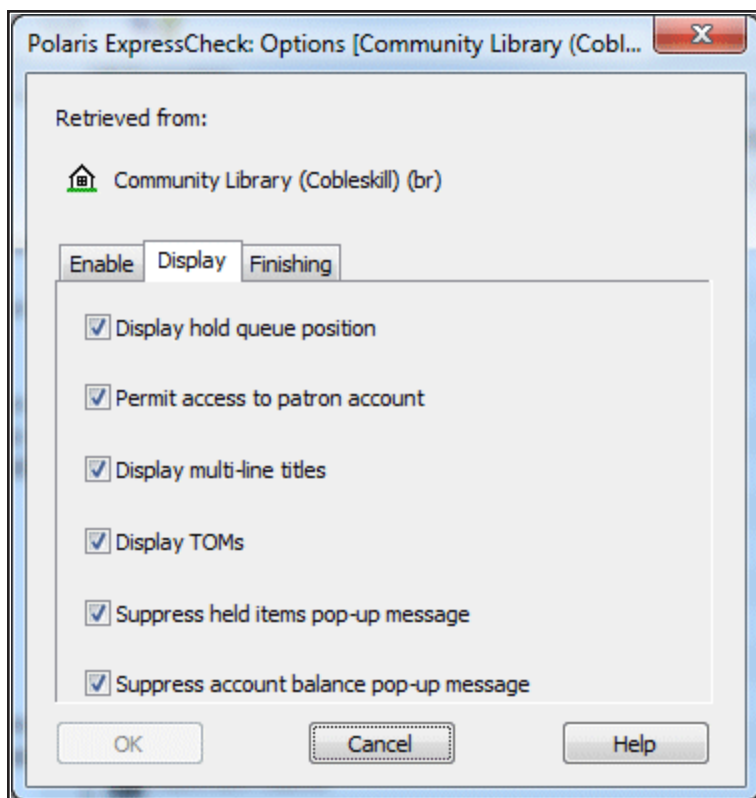
- Select **Display holds queue position** to display the positions of hold requests in the requests queue in the patron's account.

    Note:
    The holds queue position may be confusing in certain circumstances, so you may decide not to display this information to patrons. For example, a request may be first in the queue, but if it is overridden for some reason, it may not be

> filled first. Also, if a branch uses primary and secondary routing groups, the queue position of a request may change if the request is sent to the secondary routing group.

- Select **Permit access to patron account** to allow patrons to view their accounts.

> **Note**:
> This option is also available at the individual workstation level. If it is selected at the system, library, or branch level, it is selected by default for an associated workstation.
> **Important**:
> If you want patrons to be able to check account balances and fines, renew items, and suspend or cancel requests, select this option.

- Select **Display multi-line titles** to display long titles on multiple lines instead of truncating them in the display. A scroll bar appears in the right column if the list of items fills the screen.
- Select **Display TOMS** to display a format (type of material, or TOM) icon for each item. Polaris ExpressCheck uses the PAC format icons.
- Select **Suppress held items pop-up message** to suppress a message in the dashboard area of the screen when the patron has one or more held items. If you do not select this option, the alert is displayed as a pop-up message at the beginning of the patron's transactions.
- Select **Suppress account balance pop-up message** to suppress a message in the dashboard area of the screen when the patron owes money. If you do not select this option, the alert is displayed as a pop-up message at the beginning of the patron's transactions.

> **Note**:
> When the account balance message is displayed and the library has implemented a charge for checkout, the "money owed" dashboard message will increment as chargeable items are checked out and the amount may go over the patron fine limit. However, the accrued amount is not checked against the

limit as items are checked out, only at the beginning of the checkout.

6. Select the **Finishing** tab to make the following settings:
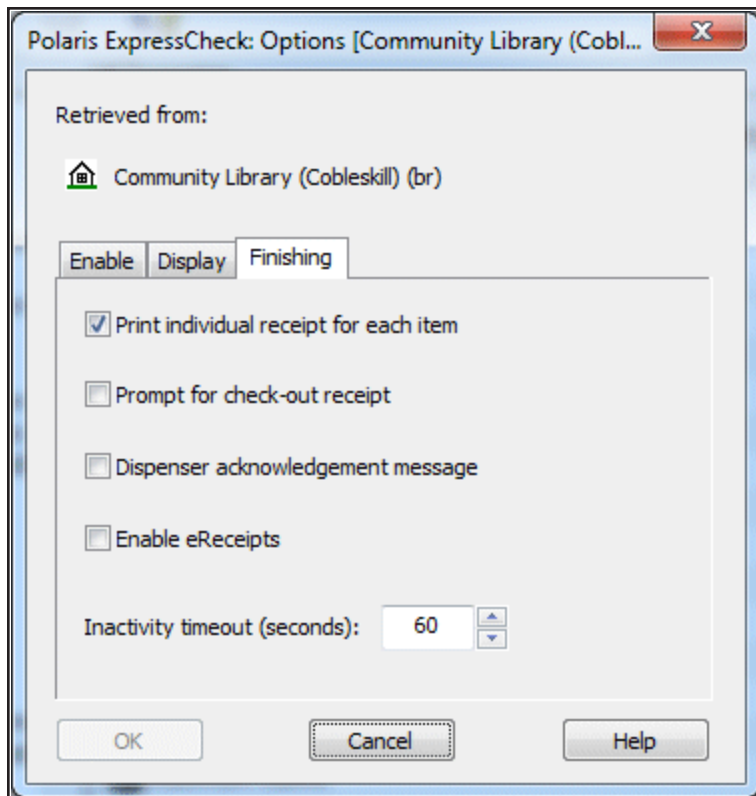
- To print a separate receipt for each item checked out, select **Print individual receipt for each item**.
  By default, all transactions for a patron's session are printed on one receipt. You may want to set this option if you have a security system such as Checkpoint®. The receipt is printed on special paper that masks the item's security tag when placed in the book pocket.

  Note:
  This option is also available at the individual workstation level./

- To display a "Print a Receipt?" prompt, select Prompt for check-out receipt.

  Note:
  This option is also available at the individual workstation level.

  This setting can help minimize paper receipts. When this option is enabled, the prompt is displayed when the patron checks items out and exits ExpressCheck from the Patron Account, or when the patron checks out items for which a receipt has not yet been printed.
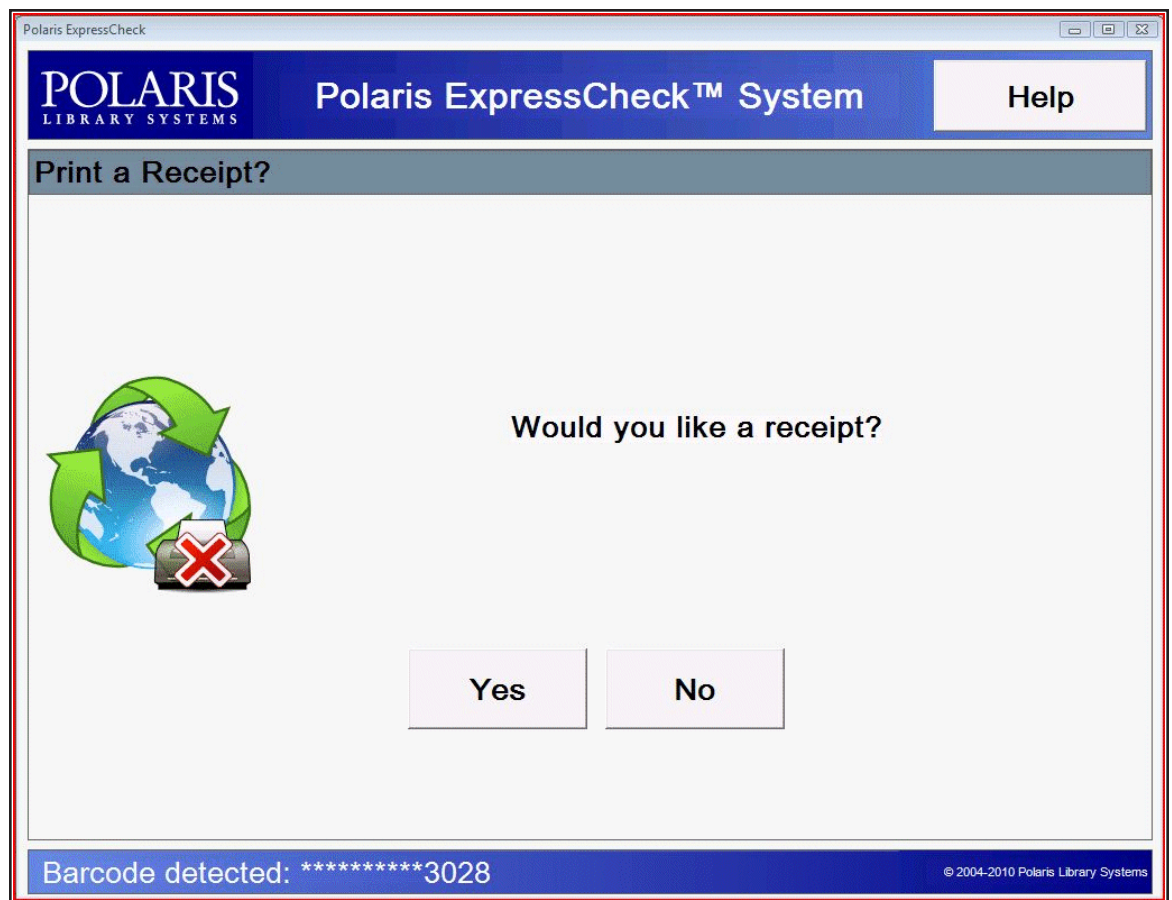
  Note:
  If the workstation setup option Print receipt on timeout is set, a receipt still prints on timeout regardless of your setting for the new receipt prompt. Also, if the workstation setup option

> Display print receipt button is set, the patron can still select the print receipt button to print a receipt. For more information about these options, see Setting Receipt Printing and Display Options.

You can edit the text portions of the prompt using Polaris Language Editor. For more information about editing messages, see the Polaris *Web Admin Guide*.

You can replace the default image with your own image file by editing the **EC_interface.xml** file. Under **checkoutform**, **promptforreceipt**, type a valid image path using the filename attribute. For more information about editing the **EC_interface.xml** file, see Customizing the Interface on page 55.

Example: <promptforreceipt filename="c:\images\tree.png"></promptforreceipt>

- For libraries that use ITG DiscXpress II media dispenser units - to display an on-screen dispenser acknowledgement message, select **Dispenser acknowledgement message**. For more information, see ITG DiscXpress II™ Circulation.
- To enable eReceipts (email and/or text message receipts) for check out and renewal, select **Enable eReceipts**.
  When this option is selected, the patron will receive eReceipts if both the patron's branch and the ExpressCheck workstation's branch have enabled eReceipts in the Patron Services parameter **EReceipt options**, and the eReceipt option is set in the patron's record. The eReceipt is sent when the patron selects **Exit** in Polaris ExpressCheck. For more information about setting up eReceipts, see "Setting Up eReceipts" in the Polaris *Patron Services Administration Guide,* or the equivalent topic in the staff client online Help.
- To change the time at which Polaris ExpressCheck should return to the opening screen after no activity, type or select a value in the **Inactivity timeout (seconds)** box.
  Note: This option is also available at the individual workstation level.

7. Select **OK** on the dialog box.

Related Information

- **Working in Polaris Administration** - For general information about Polaris Administration, see the Polaris *Administration Guide*.
- **Suspending and reactivating hold requests** - Hold request parameters control whether patrons can suspend or reactivate hold requests when they access their patron accounts through Polaris ExpressCheck. For more information, see "Define hold request processing options" in the Polaris *Patron Services Administration Guide* or the equivalent topic in staff client online Help.
- **Accepting credit card payments** - See [Setting Up Credit Card Payments](#).
- **Tracking Polaris ExpressCheck circulation** - For more information about circulation reports, see the Polaris *Patron Services Guide* or online Help for the Polaris staff client. Polaris ExpressCheck uses the default user ID (ID=1).

Allow user names and a forgotten password link

Follow these steps to allow the use of patrons to log on with user names instead of barcodes, and to provide a link that allows patrons to receive an email message if they forget their passwords.

> **Important**:
> The settings described here also apply to Polaris PowerPAC.

1. In the Administration Explorer tree view, open the Profiles folder for the system, and select the **PAC** tab in the details view.
2. Double-click **Patron Access options**.
   The Patron Access Options dialog box appears.

3. Select the **Log In** tab.

4. To allow patrons to set up and change user names, select **Enable patron username**.
    A patron can enter her user name instead of a barcode when logging in to use PAC and Polaris ExpressCheck functions such as viewing the patron account. For more information about patron user names, see "Setting Patron Access Options" in the Polaris *Public Access Administration Guide*.

    > **Note**:
    > When a patron enters a user name or barcode manually, instead of

> scanning the barcode on the library card, she must also enter the account password.

5. To allow patrons to receive an email message containing a forgotten password, select **E-mail forgotten password**.
   When this option is set, the PAC and Polaris ExpressCheck log-in pages include a **Forgot password?** link. When the patron clicks the link, an email message containing the patron password is sent to both the primary and alternate email addresses in the patron record. If no email address is present in the patron record, the system displays an error message.

   > **Note**:
   > If the patron has forgotten both user name and password, the patron must contact the library. Staff can assign a new password. Using this and the barcode, the patron can set up a new user name.

6. Select **Apply** to apply your settings and continue working with Patron Access options, or select **Save** to save your settings and close the Patron Access options dialog box.

7. Select **File** > **Save**.

Related Information

For more information about patron user names, passwords, and other patron access options in PAC, see "Set patron password and user name options" in the Polaris *Public Access Administration Guide*.

Set Polaris ExpressCheck circulation blocks

You can set circulation blocks related to patron records, item records, and material types that apply specifically to Polaris ExpressCheck circulation transactions. Follow these steps to set circulation blocks for ExpressCheck at the system, library, or branch level.

1. In the Administration Explorer tree view, expand the organization folder, and select **Parameters** for the organization.

2. Select the **SelfCheck Unit** tab in the details view, and double-click **Polaris ExpressCheck: Blocking Conditions**.
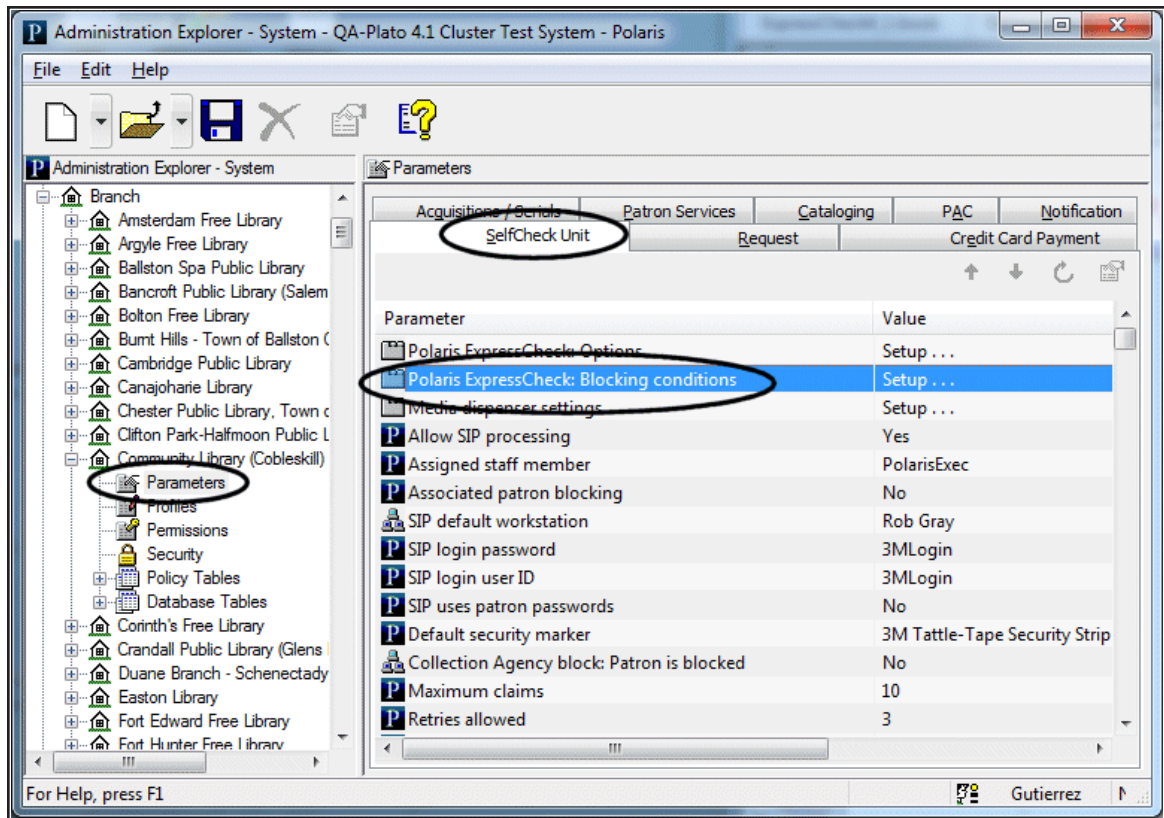
The Polaris ExpressCheck Blocking Conditions dialog box appears. The Patron Blocks tabbed page is selected.

3. Select the conditions related to *patron records* that should prevent patrons from checking out or renewing items at the Polaris ExpressCheck station:

- **Free text blocks** - Blocks transactions by patrons whose records contain free-text blocks.

- **Money owed** - Blocks transactions by patrons whose total charges are greater than a specified amount. If you select **Money owed**, select **Over 2nd level fine amount**, or select **Over**. If you select **Over**, type a threshold amount.

> **Note**:
> The second level fine amount is the value designated for the

patron's registered branch in the Patron/Material Type Loan Limit Blocks policy table. For more information about this table, see "Defining Circ and Request Limit Blocks" in the Polaris *Patron Services Administration Guide*.

- **Collection agency blocks** - Blocks transactions by patrons whose accounts have been sent to a collection agency.

- **Verify borrower blocks** - Blocks transactions by patrons whose records require staff to verify the patron's identity.

  Note:
  If you select this option and allow patrons to renew their registrations through Polaris ExpressCheck (see Set Polaris ExpressCheck workflow options), a patron who renews a registration is allowed to check out at that session, but is blocked from further check-outs until the verify borrower block is resolved. The same patron is blocked immediately at staff-assisted check-out until the block is resolved. For more information about verify borrower (Verify Patron) blocks, see "Resolve a Verify Patron block" in the Polaris *Patron Services Guide*.

- **Address check date in the past** - Blocks transactions by patrons whose records require staff to verify the patron's address.

- **At least .... lost items** - Blocks transactions by patrons who have one or more lost items. If you select this option, set the number of lost items that activates the block.

- **Not registered at this branch** - Blocks transactions by patrons who are not registered at the branch with which the workstation is associated. If this option is set, when a patron registered at a different branch scans her card a message appears and access is denied.

- **Library-assigned blocks** - Select any library-assigned blocks on a patron record that should prevent a patron from doing self-check transactions.

  Note:
  The options available in this list are those defined in the Patron

> Blocks policy table for the organization. If a new library-assigned block is added to the Patron Blocks table, the block is automatically added to the list and is available for selection. For more information about the Patron Blocks table, see "Defining Circ and Request Limit Blocks" in the Polaris *Patron Services Administration Guide*.

- **Patron codes** - Select the patron codes that should be prevented from doing Polaris ExpressCheck transactions.

4. Select the **Item Blocks** tab.
The Item Blocks tabbed page appears.

5. Select the conditions related to *item records* that should prevent check-out and renewal transactions at the Polaris ExpressCheck station:

- **Has a free text block** - Prevents an item with a free-text block from being checked out or renewed at the self-check station.

- **Is held for a different patron** - Prevents an item from being checked out if the item has a status of Held or Transferred for a patron other than the circulating patron. (If you permit the check-out, the previous request is reactivated.)

> **Note**:
> If patrons check out items on hold for themselves, the requests are cleared.

- **Fills a request for a different patron** - Prevents an item from being checked out if the item fills a hold request for a patron other than the circulating patron. (If you permit the check-out, the request is maintained as is.)

- **Is checked out to a different patron** - Prevents an item from being checked out if the item is already checked out to a patron other than the circulating patron.

- **Is from another library** - Prevents an item from being checked out if the item's Assigned Branch is different from the branch with which the Polaris ExpressCheck station is associated.

- **Circulation status** - Select the status descriptions, such as Binding or Lost, that should prevent an item from being checked out or renewed at the

Polaris ExpressCheck station.

> **Note - On Order Items**:
> If your library uses Polaris Acquisitions, you may want to block items with the status On Order because the on-order item records may be linked to purchase order or invoice line items. When circulation is blocked, the items can be processed in Acquisitions to be sure the item records are ready for circulation.

> **Note - Lost Items**:
> If you choose to allow items that have been declared lost to be checked out, your settings for normal check-out in the Patron Services parameter Lost item recovery apply to the check-out. See "Setting Lost Item Recovery Defaults" in the Polaris *Patron Services Administration Guide*.

- **Library-assigned blocks** - Select any library-assigned blocks on an item record that should prevent the item from being checked out or renewed at the Polaris ExpressCheck station.

> **Note**:
> You can select the library-assigned blocks related to items at the *branch level only*. The options available in this list are those defined in the Item Block Descriptions database table for the branch. If a new block is added to the Item Block Descriptions table, the block is automatically added to the list and is available for selection. For more information about the Item Block Descriptions table, see "Defining Circ and Request Limit Blocks" in the Polaris *Patron Services Administration Guide*.

- **Charge for checkout** - When an item's assigned branch has set charges for check-out and/or renewal on this type of item, these settings determine whether the transaction can take place at the ExpressCheck workstation. Select **Check out and charge the patron account** to allow the transaction. Select **Stop item check-out**, **display message** to block the transaction and direct the patron to the circulation desk. For more information about checkout and renewal charges, see "Charging for Checkout and Renewal" in

the Polaris *Patron Services Administration Guide*.

6. Select **OK** in the dialog box.
   The Administration Explorer appears.

Related information

- **Blocking specific material types** - See [Set Polaris ExpressCheck circulation by material type](#).
- **Blocking if associated records are blocked** - Checkout and renewal from ExpressCheck may be blocked for a patron if an associated patron has exceeded the 2nd level fine amount as determined by the governing library for patron blocks, or if the associated patron has exceeded the maximum overdue limit as determined by the governing library for patron blocks. For more information about setting up blocking relationships, see "Patron Associations" in the Polaris *Patron Services Guide*.
- **Accepting credit card payments** - See [Setting Up Credit Card Payments](#).
- **Working in Polaris Administration** - For general information about Polaris Administration, see the Polaris *Administration Guide*.
- **More about circulation blocks** - See "Defining Circ and Request Limit Blocks" in the Polaris *Patron Services Administration Guide*.

Set Polaris ExpressCheck circulation by material type

You can allow or block circulation of specific material types in the SelfCheck Material Types policy table. This table also includes settings related to ITG's EM and AVLocker functions. Follow these steps to set material type circulation for Polaris ExpressCheck at the system, library, or branch level.
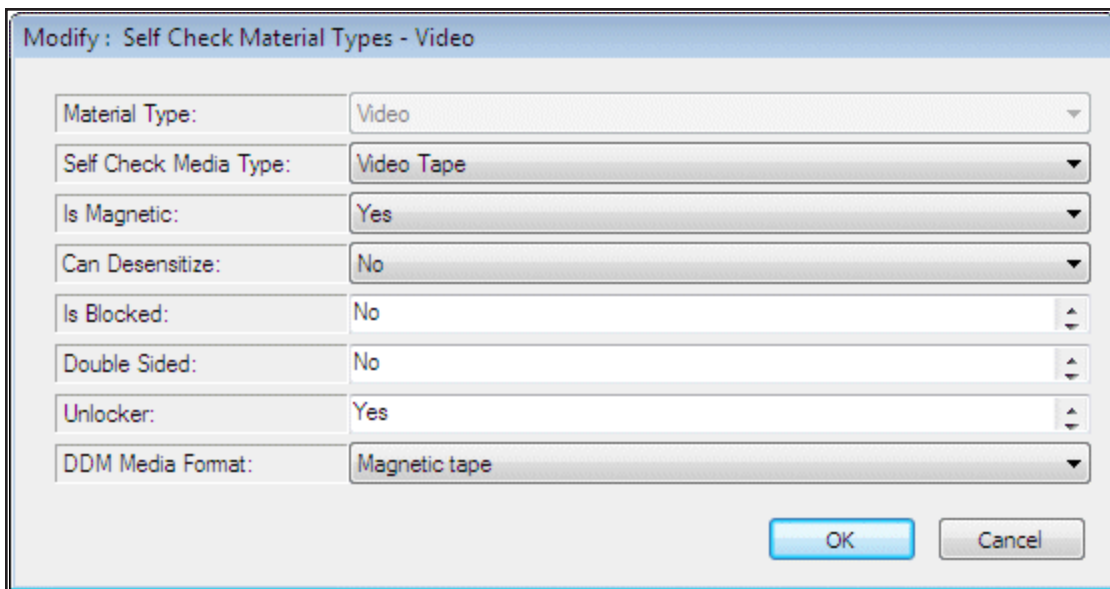
> **Note**:
> If you use the ITG DiscXpress II media dispenser, you must also set the material types that can circulate from the dispenser. See [Enable the media dispenser for Polaris ExpressCheck](#).

1. In the Administration Explorer, open the Policy Tables folder for the organization, and select SelfCheck Material Types. The SelfCheck Material Types table is displayed in the details view.

> **Note**:
> The Self-Check Material Types policy table is displayed from the Administration Explorer only. You cannot access the table from an organization workform.

2. Double-click the material type entry you want to block, or select the material type and select the Update button [a].
The Modify dialog box opens.

> **Note**:
> The SelfCheck Media Type setting applies only to self-check units that rely on SIP communication, and not to Polaris ExpressCheck workstations.

3. If you want to block the material type from ExpressCheck circulation, set **Is Blocked** to **Yes**.

4. If you use Polaris ExpressCheck on ITG hardware with electromagnetic (EM) strip security, set these options:

   a. In the **Is Magnetic** box, indicate whether the material type is magnetic by choosing one of the following options:

- If the material type is not affected by magnetic fields, select **No**.

- If the material type is a magnetic medium, such as a video tape or cassette tape, select **Yes**.

- If you are not sure if the media can be damaged by magnetic fields, select **Unknown**.

b. In the **Can Desensitize** box, indicate whether the security strip for the material type can be desensitized by choosing one of the following options:

- If the material type is not a magnetic medium, has a security strip, and *can be desensitized*, select **Yes**.

- If the material type is a magnetic medium, such as a video tape or cassette tape, select **No**.

- If the material type is not circulated, select **No**.

- If you do not know if the material type can be damaged by magnetic fields or if it has a security strip, select **Unknown**.

c. In the **Double Sided** box, specify whether both spine and main magnets should be used when desensitizing an item.

5. If you use Polaris ExpressCheck on ITG hardware with the AV locker option, in the **Unlocker** box, specify whether the AV security locker should be opened following a checkout of this material type.

6. If you use Polaris ExpressCheck with EnvisionWare RFID, select the **DDM Media Format** to map to this Polaris material type.
   DDM media formats include the following:

- Book

- CD/DVD

- Magnetic Tape

- Other

- Other, careful handling is required

- Undefined

- Very small item, special handling may be required

Note:
For more information about DDM formats and EnvisionWare
RFID, go to: http://www.envisionware.com/en/ddm_use

7. Select **File**, **Save**.

ITG DiscXpress II™ Circulation

Polaris ExpressCheck and the Polaris staff client support circulation from ITG DiscXpress II units. These units consist of a tower of dispensers, each holding up to 100 discs such as DVDs. The staff member or patron scans the item barcode from the item's empty case. When a barcode for one of these items is successfully scanned, there are no blocks to check-out, and the system finds a matching barcode in the unit, the patron goes to the dispenser unit to pick up the item. At the dispenser unit, the patron scans her barcode into the DiscXpress unit to retrieve the item.

Polaris supports one ITG DiscXpress II unit (one network address) per location (branch organization). At each branch, multiple staff client and Polaris ExpressCheck workstations can connect to the location's unit.

> **Note**:
> Polaris integration with ITG DiscXpress II is available by separate license.

Check-Out Processing

Patron authentication and checking for patron and item circulation blocks occur as in normal check-out processing, before the system checks for DiscXpress items. Then, when an item is scanned and a material type is detected that has been identified for DiscXpress processing by the check-out workstation's branch (see Enable the media dispenser for Polaris ExpressCheck), Polaris queries the dispenser unit specified in the Network location setting for the workstation's branch. If a matching item barcode is found in the dispenser unit, a message regarding the item is displayed on the check-out screen (see Enable the media dispenser for Polaris ExpressCheck). At the end of the check-out session, the dispenser acknowledgment message is displayed. The patron must acknowledge the message to continue. If the message is not acknowledged, the process times out as in any other check-out.

> **Note**:
> For more information about staff client circulation and the media dispenser, see "ITG DiscXpress II - Circulation Overview" in the Polaris *Patron Services Administration Guide* or the equivalent topic in staff client online Help.

ExpressCheck Receipts and the Media Dispenser

If the patron opts to print a receipt or if the receipt prints when the patron selects Exit, the system uses the receipt text specified for the workstation branch (see Enable the media dispenser for Polaris ExpressCheck). If the option to print individual receipts for each item has been enabled for the ExpressCheck unit, the message prints at the end of each item in the dispenser unit. If you have chosen to include the dispenser location, this information is included for each item checked out, indicating the dispenser and slot number for the item.

> **Note**:
> If the patron opts to not print a receipt or to receive a receipt by email, no additional dispenser receipt is printed.

Enable the media dispenser for Polaris ExpressCheck

1. Follow these steps to set up media dispenser processing in Polaris Administration.
   Select the ITG DiscXpress option during Polaris ExpressCheck installation.
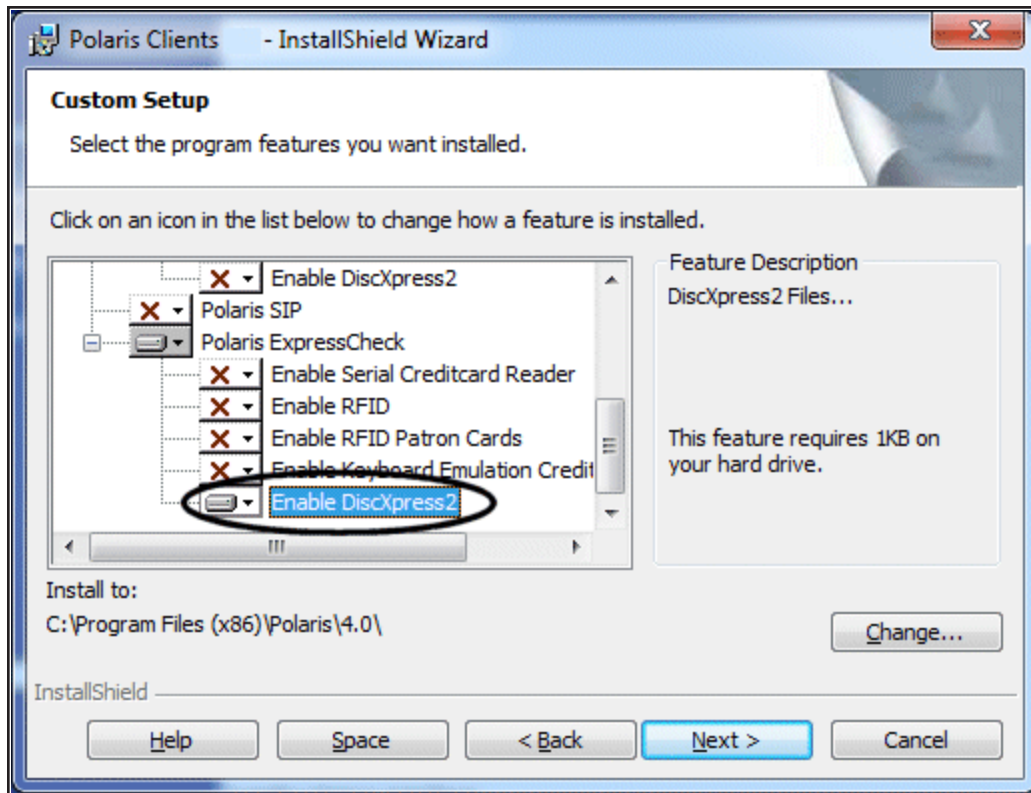
For more information about installing Polaris ExpressCheck, see Install Polaris ExpressCheck client software.

2. In Polaris Administration, double-click the SelfCheck Unit parameter **Media dispenser settings**. This parameter is available at the system, library, or branch level.
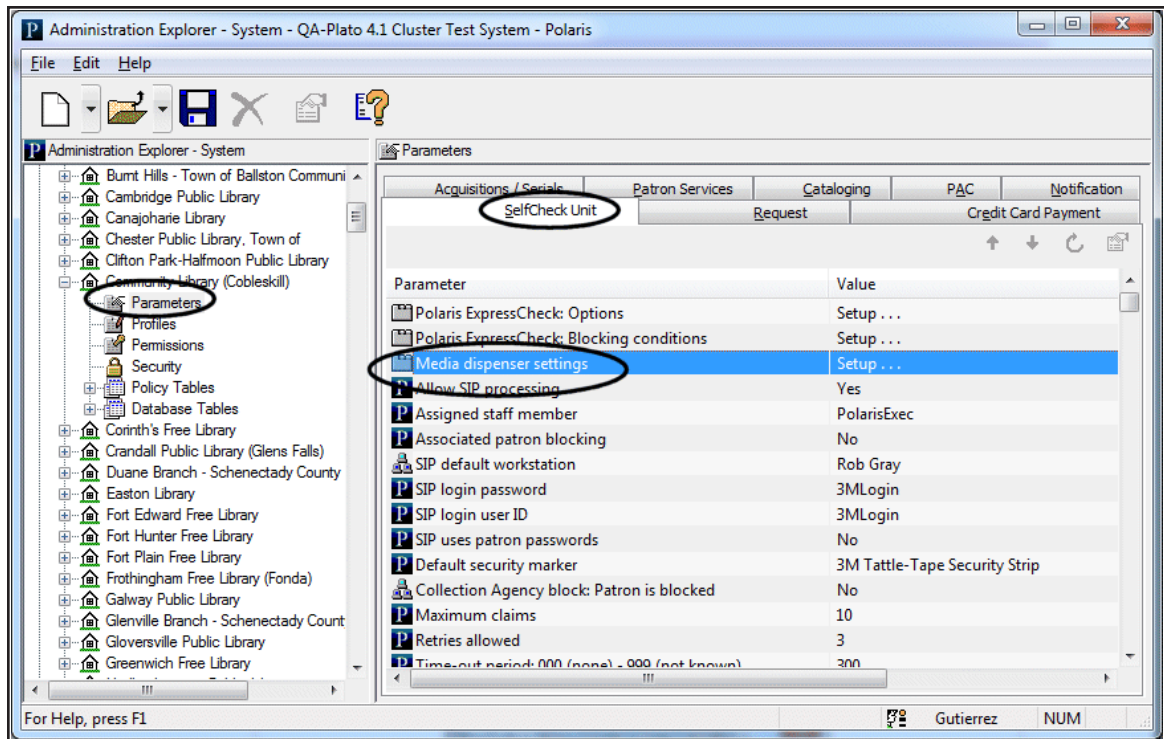
The Media Dispenser Settings setup dialog box opens.

> **Note**:
> Your settings on this dialog box also apply to this organization's staff client workstations that are connected to the media dispenser.
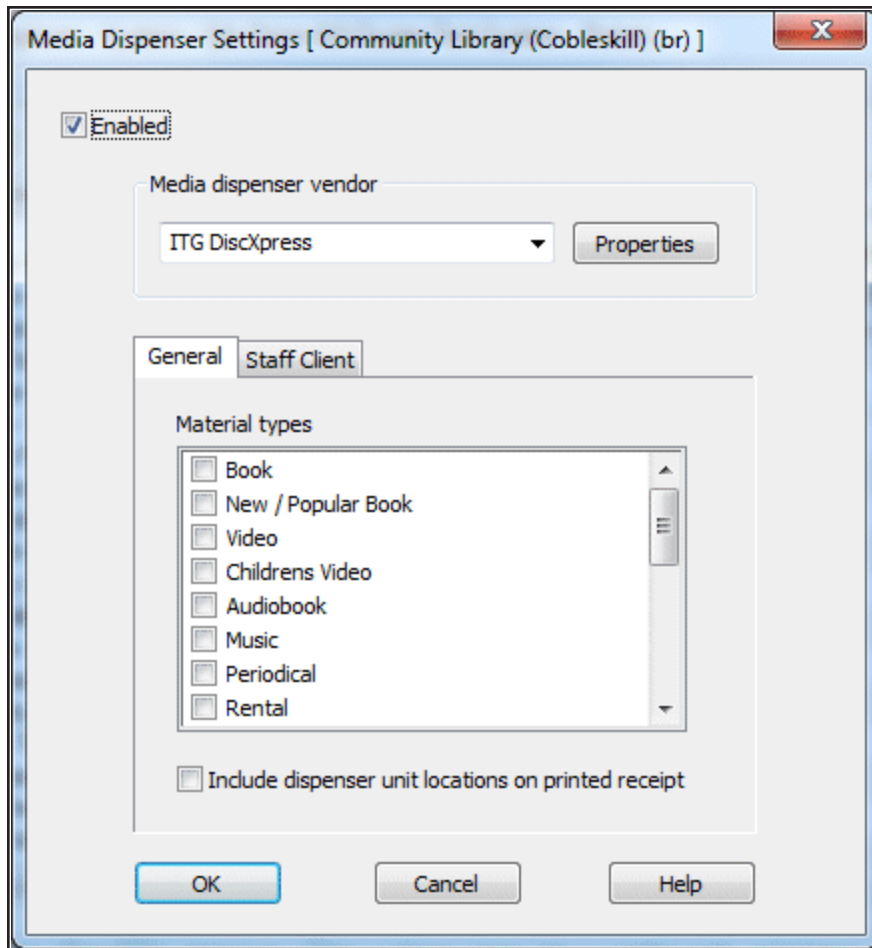
3. Select **Enable**.

    Note:
    ITG DiscXpress II is the only media dispenser vendor currently
    available.

4. Specify the network location of the dispenser unit:

    a. Select **Properties**.
        The ITG DiscXpress dialog box opens.
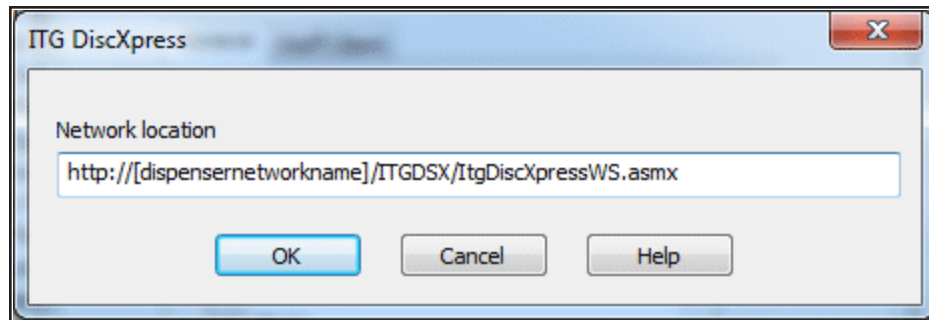
b. Type the full network address or URL of the dispenser unit (100-character limit). This information is provided by your network administrator and is determined when the device is installed on your network.

c. Select **OK**.
    The ITG DiscXpress dialog box closes.

5. On the General tab, select the material types that can be dispensed by the unit. The list includes all the item material types defined at the system level. You must select at least one material type.

6. To include the dispenser location and slot number on printed check-out receipts, select **Include dispenser unit location on printed receipt**.
    This option applies to both staff client and ExpressCheck receipts. Normal check-out receipts from the appropriate staff client workforms and from Polaris ExpressCheck must be enabled to include this information on a printed receipt. Separate dispenser receipts are not printed.

> **Note**:
> For more information about settings on the Staff Client tab, see "Enable the media dispenser" in the Polaris *Patron Services Administration Guide* or the equivalent topic in staff client online Help.

7. Select **OK** on the Media Dispenser Settings dialog box.

8. To display the on-screen dispenser acknowledgment message in Polaris ExpressCheck, open the SelfCheck Unit parameter **Polaris ExpressCheck: Options**, and on the **Finishing** tab, select **Dispenser acknowledgement message**.
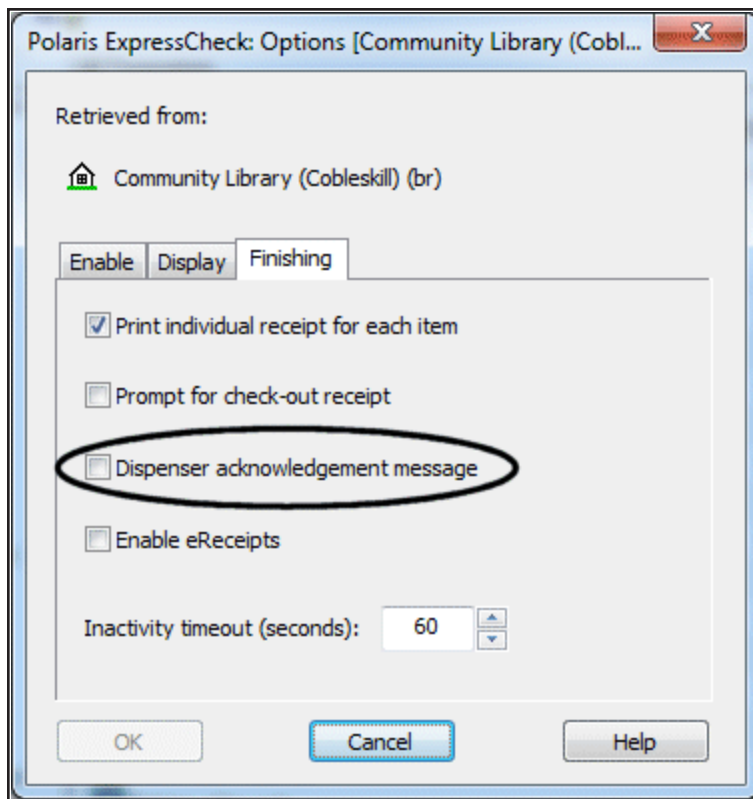
The default message is **Checkout Completed Successfully! Please retrieve item from the dispensing unit**. You can edit the message using Polaris Language Editor (WebAdmin); the string ID is
EC_TEXT_CHECKOUT_COMPLETE_DISPENSER

See Editing Messages.

- A similar message is printed on the ExpressCheck check-out receipt. The default message is **Please retrieve items from the dispensing unit**. As appropriate items are checked out at the ExpressCheck workstation, the screen also displays the reminder message **Please remove items from the dispensing unit**. These messages are also available for editing using Polaris Language Editor. The strings IDs are
EC_TEXT_CHECKOUT_RCPT_DISPENSER
EC_TEXT_CHECKOUT_REMINDER

- If the system fails to communicate with the dispenser unit during checkout, the ExpressCheck workstation displays an on-screen message, also

available for editing. The default text is **The dispensing unit is not responding**. **The item cannot be checked out**. **Please contact a librarian**. The string ID in Polaris Language Editor is **EC_TEXT_CHECKOUT_ERROR_DISPENSER_COMM**

9. Select **OK** on the Polaris ExpressCheck Options dialog box.

Setting Up Credit Card Payments

Polaris supports credit card payments from Polaris ExpressCheck with PayPal®, Comprise™ and EnvisionWare®. Your library must establish an account with the e-commerce provider directly. Then, you can set up Polaris for credit card payment processing.

You will need the following information regarding the library's e-commerce account:

- Vendor (library) name, user name and password
- Partner code (your e-commerce provider)
- Partner's server name

If you have already established an account to accept credit card payments from the PAC, the staff client, or Leap, you do not need a separate account for Polaris ExpressCheck. However, you need to enable credit card processing from Polaris ExpressCheck in Polaris Administration. You can also specify a separate flat processing fee for payments made from Polaris ExpressCheck. For details, see Set up credit card payments from Polaris ExpressCheck.

Once credit card payments are set up, payments for fines and fees are allowed from Polaris ExpressCheck if both the following conditions are true:

- The patron's registered branch allows credit card payments.
- The ExpressCheck workstation's branch allows credit card payments.

Credit Card Reader

Polaris ExpressCheck requires a magnetic swipe credit card reader for payments. Be sure the credit card reader is connected to the Polaris ExpressCheck workstation, and that one of the credit card reader options is selected when you install the Polaris ExpressCheck client on the workstation. See Install Polaris ExpressCheck client software. If you use a serial credit card reader, select **Enable Serial Creditcard Reader**

during installation. If you use a USB device, select **Enable Keyboard Emulation Creditcard Reader** during installation. You can use any swipe reader that supports keyboard emulation and returns the swipe data in ISO 7813 format followed by a CR.

> **Note**:
> The MagTek Mini Swipe credit card reader must be configured and installed for keyboard emulation on 64-bit Windows workstations. It cannot be installed as a serial credit card reader because the MagTek Mini Swipe driver is not compatible with 64-bit versions of Windows. See Install Polaris ExpressCheck client software.

Credit Card Fine Payments

Serial mode readers work only for Polaris ExpressCheck clients that are directly connected to the Polaris server. USB keyboard emulation readers work both for Polaris ExpressCheck clients that are directly connected, and for clients that connect to a Terminal Server.

In serial mode, Polaris controls when the magnetic swipe reader will accept a card swipe. In USB keyboard emulation mode, the magnetic swipe reader is not controlled and accepts a card swipe at any time.

Once credit card processing is set up, patrons can pay fines in two ways at the Polaris ExpressCheck workstation. A logged-in patron can pay fines from the Fines and Fees page of the patron account. The patron selects some or all charges to pay and clicks **Pay fines now** to display the payment form. Also, if a patron owes more than the organization's Money Owed block amount (see Set Polaris ExpressCheck circulation blocks), a Money Owed dialog box is displayed after the patron's barcode has been read and the patron has selected a language. In this case, the patron can select **Pay Now** to pay all the charges on the account. In either case, when the transaction is complete, the patron can receive an email receipt that lists the charges paid. In the staff client (Patron Status workform - Account view), a transaction note indicates that payment was made through Polaris ExpressCheck.

> **Note**:
> When a lost-and-paid item is checked out in Polaris ExpressCheck, the payment is made by credit card, and Payflow Pro credit card processing is still enabled, the system attempts to refund the credit card account. If the attempt fails, the payment remains on the user's account. You can opt to

receive an error report when the refund attempt fails. Open the organization workform (system, library, or branch) in Polaris Administration, select Enable Error Reporting, and specify an email address to receive the error message.

Set up credit card payments from Polaris ExpressCheck

Follow these steps to set up Polaris ExpressCheck credit card payment processing in Polaris Administration.

Note:
Credit card payments for fines and fees are allowed from Polaris ExpressCheck if both the following conditions are true:

- The patron's registered branch allows credit card payments
- The ExpressCheck workstation's branch allows credit card payments.

1. Confirm that the Polaris ExpressCheck option **Permit access to patron account** is selected so patrons can pay selected fines from their patron accounts. See [Set Polaris ExpressCheck workflow options](#).
2. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Credit Card Payment** tab in the details view.
3. Double-click **Online Payments: Configure**.

   The Online Payments Settings dialog box opens.
4. If you are setting up credit card processing for the first time, follow the steps listed in "Set up PayPal credit card payments" in the *Polaris Patron Services Administration Guide* or staff client online Help.
5. Select the **ExpressCheck** tab on the Online Payments Settings dialog box.

   The ExpressCheck tabbed page is displayed.
6. Select **Allow online payments**.

   The payment options become available.
7. Set the minimum fine amount you want to accept by credit card payment.

8. If you want to charge a processing fee for fine payments, specify the amount in the Processing fee box for online payments. The maximum value is $20.00.

9. If you want patrons to receive an automatic payment receipt, select **Send email receipt**.

   The email receipt is sent to the email address in the patron record. If the patron record does not include an email address, no email receipt is sent. The patron cannot specify an email address during the payment process.

10. If you want to display a privacy policy link on the processing fee, payment, and payment verification pages in Polaris ExpressCheck, select **Display privacy policy**.

    When this option is selected, your privacy policy message is displayed when the patron selects the privacy policy link. You specify your privacy policy text using the Polaris Language Editor. The message ID is EC_TEXT_POLICY_PRIVACY. For information about editing ExpressCheck language files, see the Polaris *Web Admin (Language Editor) Guide*.

11. If you want to display a refund policy link on the processing fee, payment, and payment verification pages in Polaris ExpressCheck, select **Display refund policy**.

    When this option is selected, your refund policy message is displayed when the patron selects the refund policy link. You specify your refund policy text using the Polaris Language Editor. The message ID is EC_TEXT_POLICY_REFUND. For information about editing ExpressCheck language files, see the Polaris *Web Admin (Language Editor) Guide*.

12. Select **OK** to save your settings.

> **Important**:
> To accept credit card payments, the Polaris ExpressCheck workstation must be equipped with a credit card reader, and you must select the credit card reader option when you install the Polaris ExpressCheck application on the workstation. See Install Polaris ExpressCheck client software on page 7.

Related Information

For more information about the following topics, see "Setting Up Credit Card Processing" in the Polaris Patron *Services Administration Guide* or staff client online Help:

- Credit card processing in the staff client and PAC

- Credit card reports

- Test values for Payflow Pro processing

- Error logs

Customizing the Interface

An .xml file, **EC_interface.xml**, controls the appearance of Polaris ExpressCheck. The file specifies the graphic images, colors, and help movie file. It is placed in **C:\ProgramData\Polaris\[version]\Config** when Polaris ExpressCheck software is installed on the workstation. If your library installs Polaris ExpressCheck on local workstations, the interface can be customized for each workstation. If Polaris ExpressCheck is installed on a Terminal Server, changes to **EC_interface.xml** affect all sessions using Polaris ExpressCheck on that Terminal Server instance.

You can customize **EC_interface.xml**. For example, you can edit a copy of **EC_interface.xml** to use your own graphics for the logo graphic in the upper left corner of the Polaris ExpressCheck screen, the Welcome screen background image, the Welcome screen foreground image, and the help movie. You can also change the color scheme and other elements of the interface.

To preserve your changes from being overwritten when Polaris ExpressCheck is reinstalled or updated, you save your customizations as an overlay file named EC_interface_user.xml. When Polaris ExpressCheck is started up, and when it is reinstalled, the system applies your overlay file to the defaults.

Customize graphics, colors, and help file

In **EC_interface.xml**, you can see the sections that control the appearance of various portions of the Polaris ExpressCheck interface, such as **<headerpanel>**, **<welcomeform>**, **<checkoutform>**, and so forth. The string **filename=" "** in each section, with no filename between the quotation marks, indicates that the default graphic file is in use. Working with a copy of **EC_interface.xml** that becomes your overlay file, you can insert your own filename between the quotation marks. If you do not want to display any graphic in that specific area, change **visible="true"** to **visible="false"**.

```
EC_interface_user.xml - Notepad
File  Edit  Format  View  Help
<?xml version="1.0" encoding="utf-8" ?>
<expresscheckinterface>

        <application>
                <backcolor color="#F5F5F5"></backcolor>
        </application>

        <form>
                <backcolor color="#F5F5F5"></backcolor>
                <forecolor color="#000000"></forecolor>
        </form>

        <dialog>
                <backcolor color="#ECE9D8"></backcolor>
                <forecolor color="#000000"></forecolor>
                <titlebar backcolor="#778899" forecolor="#000000" ></titlebar>
        </dialog>

        <headerpanel>
                <backcolor colorstart="#BDB76B" colorend="#F5F5F5"></backcolor>
                <forecolor color="#800000"></forecolor>
                <!-- An empty filename uses the built-in image (104x80, transparent) -->
                <logo visible="true" filename=""></logo>
        </headerpanel>

        <statuspanel>
                <backcolor colorstart="#F5F5F5" colorend="#BDB76B"></backcolor>
                <forecolor color="#000000"></forecolor>
        </statuspanel>

        <welcomeform>
                <greeting color="#000080"></greeting>
                <instruction color="#696969"></instruction>
                <!-- An empty filename uses the built-in image (1003x616) -->
                <backgroundimage visible="true" filename=""></backgroundimage>
```

No filename displays the default graphic. Insert your filename between the quotation marks.

To suppress a graphic, change visible = "true" to visible = "false"
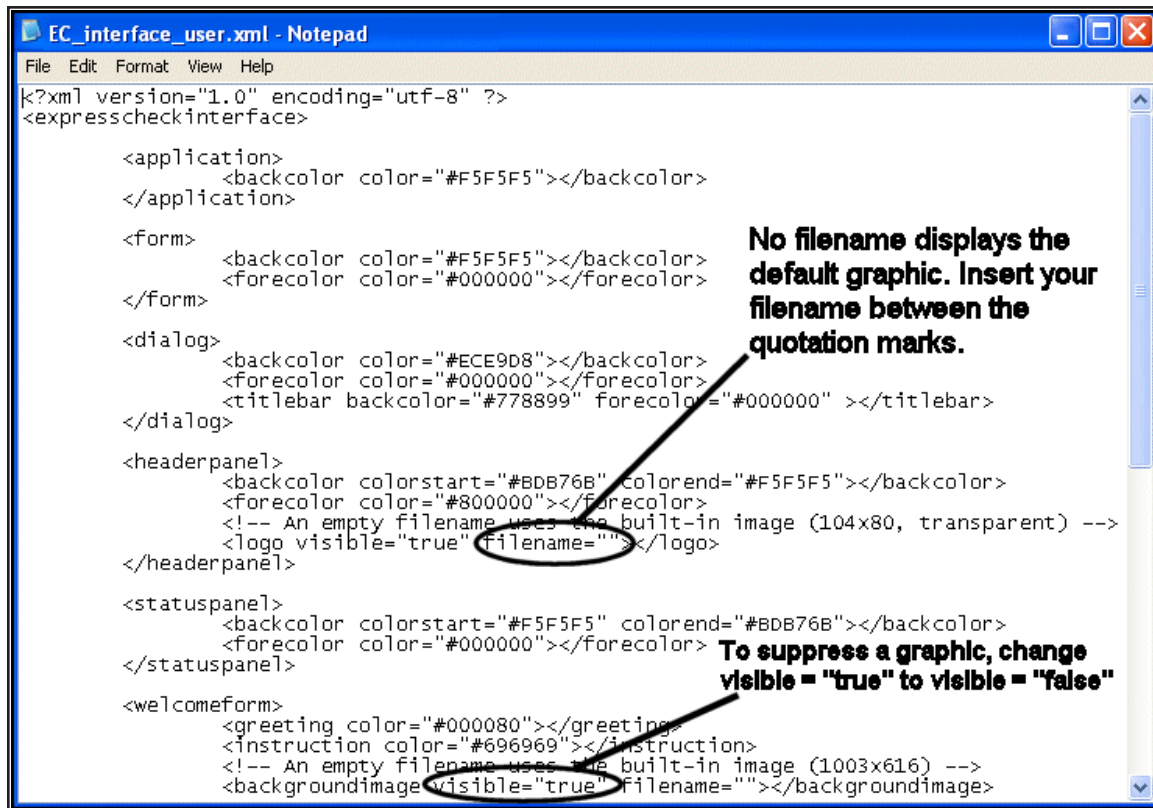
Follow these steps to use your own logo, Welcome screen images, custom colors, or help file in the Polaris ExpressCheck interface.

> **Notes**:
>
> - You can use animated .gif files, such as revolving images.
> - The help movie file can be any movie file format, such as .mpg or .wmv, that the workstation can display.
> - The help file requires Windows Media Player 10 or later.

1. Create and save your custom graphic files or movie file.

    > **Important**: Be sure your graphics files have modify permissions. Read-only graphics cause serious errors during automatic load. cause serious errors during automatic load.

    You can save the files on the network or on the Polaris ExpressCheck workstation

hard drive. If you save the files to a network location, the Polaris ExpressCheck workstation needs access to the location. Note the complete path for each file. On the Polaris ExpressCheck workstation, save the files in **C:\ProgramData\Polaris\ [version]\Config**.

> **Important**:
> Polaris recommends that you place your custom graphics files in the Config folder or a local network share. Placing the custom files in Polaris ExpressCheck's bin folder is not recommended.

2. On the Polaris ExpressCheck workstation, copy **C:\ProgramData\Polaris\ [version]\Config\EC_interface.xml**, and re-name your copy **EC_interface_user.xml**. This copy will become your overlay file.

3. Right-click EC_interface_user.xml, select Properties from the context menu, and clear the Read-only check box.

> **Tip**:
> If the word wrap feature is active in the text editor, turn it off. In Notepad, this option is on the Format menu.

4. Open **C:\ProgramData\Polaris\[version]\Config\EC_interface_user.xml** in any text editor, such as Notepad.

5. Locate the areas you want to edit and insert the appropriate graphic filepath/filename between the quotation marks. Do not delete the quotation marks.

> **Important**:
> Type the complete filepath.

For example, to insert your own logo in the upper left corner of the header area, locate the **<headerpanel>** section of the file, and insert your logo graphic filepath/filename between the quotation marks in **filename = " "**.

```
<headerpanel>
        <backcolor colorstart="#BDB76B" colorend="#F5F5F5"></backcolor>
        <forecolor color="#800000"></forecolor>
        <!-- An empty filename uses the built-in image (104x80, transparent) -->
        <logo visible="true" filename="">/logo>
</headerpanel>
```

As another example, to insert your own graphic at the top of the check-out page, locate the **<checkoutform>** section of the file, find **<instructionimage** in this section, and insert your graphic filepath/filename between the quotation marks in **filename = " "**.

6. To change the image in the center of the page, locate the **<welcomeform>** section of the file, find **<instructionimage** in the **<welcomeform>** section, and insert your own graphic filepath/filename between the quotation marks in **filename = " "**.

> **Note**:
> The background image on the page is controlled by the **<backgroundimage** attributes in the **<welcomeform>** section. You can edit them in the same ways.

> **Tip**:
> To suppress the display of any central image, find **<instructionimage** and change **visible="true"** to **visible="false"**.

7. To change colors, locate the areas you want to edit and type the HTML (hexadecimal) color code for the color you want to use.
    For example, to change the greeting color on the Welcome screen from dark blue to black, locate the **<welcomeform>** section and edit the **greeting color** code from **#000080** to **#000000**. Do not delete the quotation marks that begin and end the color code.

```
<welcomeform>
        <greeting color="#000080"></greeting>
        <instruction color="#696969"></instruction>
        <!-- An empty filename uses the built-in image (1003x616) -->
        <backgroundimage visible="true" filename=""></backgroundimage>
        <!-- An empty filename uses the built-in image (?x?) -->
        <instructionimage visible="true" filename="" width="470" height="304"
top="192" left="272"></instructionimage>
    </welcomeform>
```

> **Tip**:
> HTML color charts are readily available on the Internet. For example, see this link:
> http://www.web-source.net/216_color_chart.htm

As another example, you can customize the alternating row foreground and background colors in the ExpressCheck interface, and the grid view background

color.

Row foreground and background colors:

**expresscheckinterface/checkoutform/gridview/alternatingrow forecolor =""
backcolor =""**

Grid view background color:

expresscheckinterface/checkoutform/gridview/background color=""

Insert the hexadecimal color code between the quotation marks. Do not delete the quotation marks that begin and end the color code.

> **Note**:
> Libraries with ExpressCheck workstations running Windows XP may want to customize row colors, since display text may be hard to read against the default colors on XP workstations.

8. To customize the font color and font size for the "main buttons" in the Polaris ExpressCheck interface, edit the font color and size in the buttons node. Main **buttons** include the following: Help, Exit, Calculate [future], Back to Checkout, My Account, Print Receipt, Print Summary. The default color is black; the default font

size is 20.

Insert the hexadecimal color code and font size between the appropriate quotation marks. Do not delete the quotation marks that begin and end the color code or font size. A sample is shown below.

```
<expresscheckinterface>

.

.

.

<!-- main menu buttons text and size customizations -->

<buttons>

<help color="#000000" size="20"></help>

<backtocheckout color="#000000" size="20"></backtocheckout>

<myaccount color="#000000" size="20"></myaccount>

<printreceipt color="#000000" size="20" ></printreceipt>

<printsummary color="#000000" size="20"></printsummary>

<calculate color="#000000" size="20"></calculate>

<exit color="#000000" size="20"></exit>

</buttons>

.

.

.

</expresscheckinterface>
```
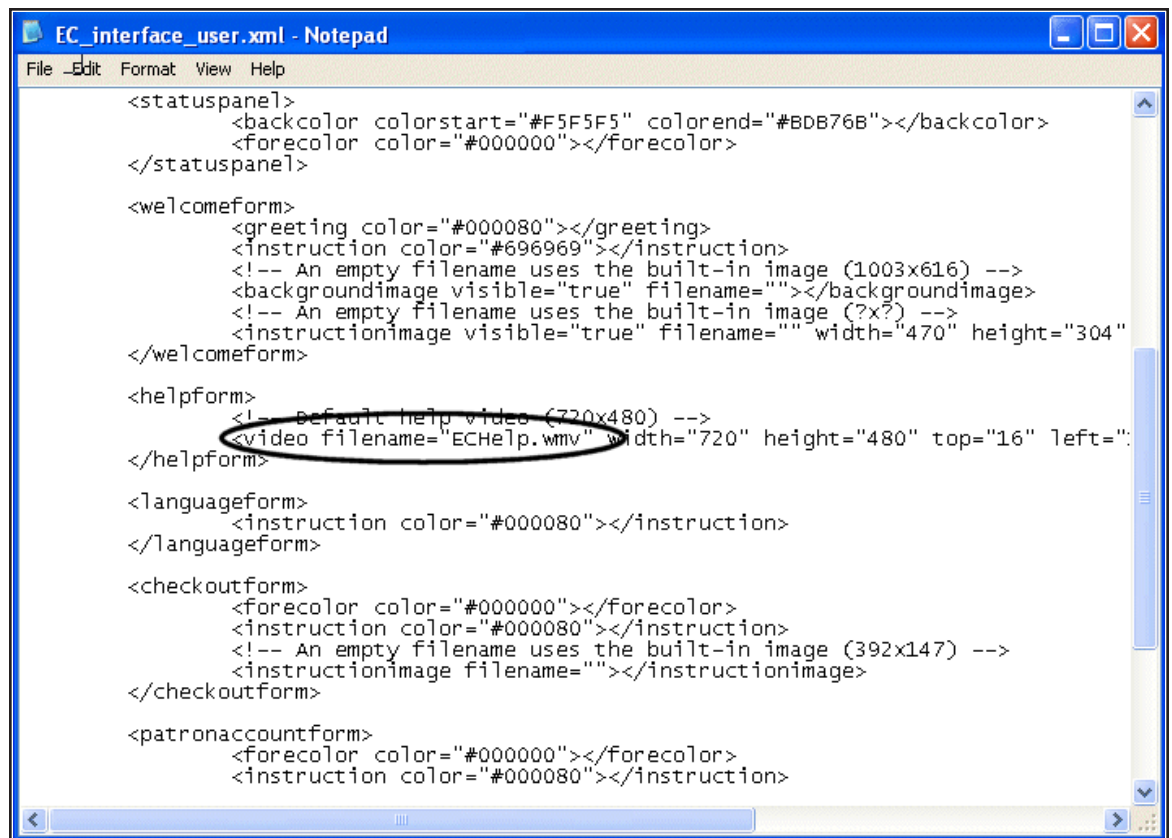
9. To replace the default help video clip **ECHelp.wmv** with a custom help movie file, follow these steps:

> **Tip**:
> You can suppress the help button entirely. Under the **<headerpanel>**

> element, change **<help button visible = true>** to **<help button visible = false>**.

a. Locate the text string **video filename**.

b. Delete the default file name **ECHelp.wmv**, and type your custom help filepath/filename in its place. Do not delete the quotation marks that begin and end the file name.

> **Important**:
> Type the complete filepath.

> **Tip**:
> Video files can be quite large. To minimize load time for a large file when the patron selects **Help**, place the file on the workstation.

10. Omit all lines in the overlay file *except* the sections with your customizations and the minimum required elements.
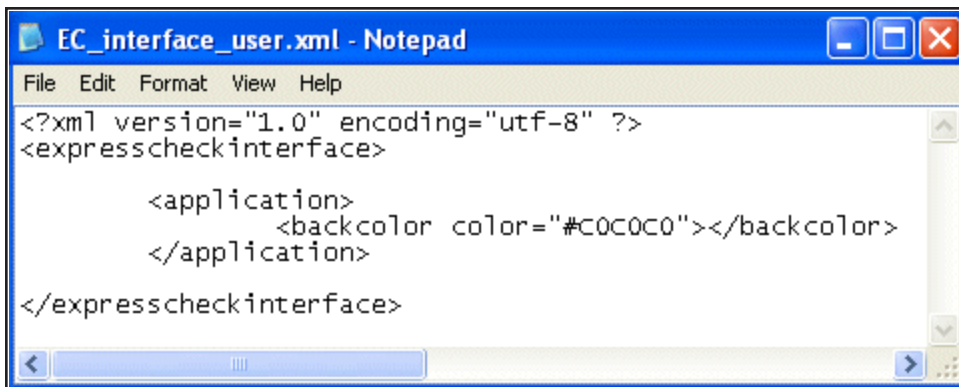
    The following minimum elements are *required* in **EC_interface_user.xml**:

    <?xml version="1.0" encoding="utf-8" ?>

    <expresscheckinterface>

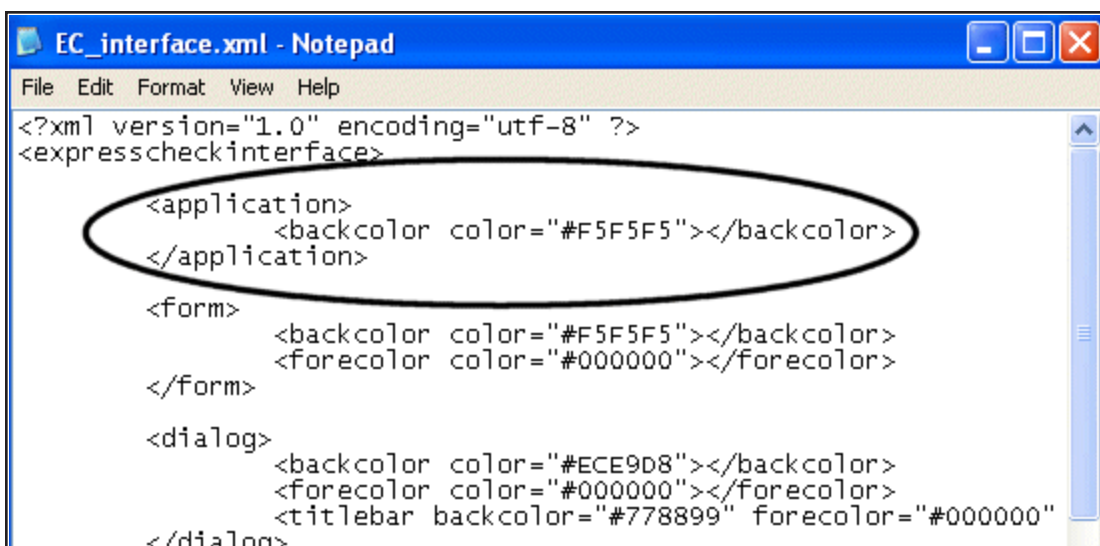   **</expresscheckinterface>**

    Your customizations should appear between **<expresscheckinterface>** and **</expresscheckinterface>**. The following example shows a complete overlay file with a single color customization:

Here is the equivalent section in the default file:

> **Important**:
> The overlay file must contain the minimum elements and your customizations, and nothing else. Omit all the default specifications from the file.

11. Save your changes, and close **EC_interface_user.xml**.

12. Copy **EC_interface_user.xml** to **C:\ProgramData\Polaris\[version]\Config** on each workstation that should have the custom interface.

> **Important**:
> Back up your overlay file **EC_interface_user.xml** and all your custom graphic files, and document your changes.

13. In **C:\ProgramData\Polaris\[version]\Bin** run **setpolarisfolders.exe**. This will update all changes to all copies of **EC_interface_user.xml**.

Related Information

- You can specify which patron account page is initially displayed when the user selects **My Account**. In **EC_interface.xml**, under the **patronaccount** form element, set the initialtab element to an index value from 0-3 as follows:
  - 0 - My Account page
  - 1 - Items Out page
  - 2 - Requests page
  - 3 - Fines & Fees page
- See Editing Messages

Editing Messages

The Polaris Language Editor or WebAdmin Tool is a web-based tool you can use to customize English and other licensed language strings (message text) in all the parts of Polaris that support multiple languages, including Polaris ExpressCheck. You can compare, add, edit and distribute language strings easily, without editing individual files.

Message text is stored in the Polaris database. You can add or customize language strings at the system, library, and branch levels. Branch settings override library settings; settings made at the library level override system-level settings.

Polaris Language Editor is automatically installed when you install Polaris Web server software. In Polaris Administration, the server record must have a web connection defined, and a value defined for the PAC parameter **URL of the Mobile PAC's root** or **URL of the PowerPAC's root**. The server must be registered as a workstation in Polaris Administration, and both the workstation and staff user must have the Polaris permission **WebAdmin access: Allow**. In Polaris Administration, this permission is available at the system level under the System Administration security node. For more information about registering workstations and setting Polaris permissions, see the Polaris *Administration Guide* or Polaris staff client online Help.

To access the Language Editor, open your browser and navigate to the site where the Language Editor is installed. You must supply your Polaris username, password, and domain to log in to the Language Editor. Then select **ExpressCheck** in the **Product** list to find and edit ExpressCheck messages. For detailed information about using the Language Editor, select the Language Editor **Help** tab or see the Polaris *Language Editor* or *WebAdmin Guide.*

> **Important**:
> In older versions of Polaris ExpressCheck, message text was stored in **EC_messages.xml** and the custom overlay file **EC_messages_user.xml**. These files are obsolete in Polaris ExpressCheck 3.5 and later versions.

Using Polaris ExpressCheck Offline

Polaris ExpressCheck can be used for check-out in offline mode. Offline mode requires the files **PolPatron.mdb** and **PolSystem.mdb** from the Polaris Offline folder on the server, copied to **C:\ProgramData\Polaris\[version]\[datalink]\Offline** on the Polaris ExpressCheck workstation. (Refer to "Set up offline Polaris" in the Polaris Patron Services Administration Guide.)

Offline check-out differs slightly from check-out in normal mode:

- The standard loan period for the workstation's parent organization is used.
- Item barcodes are printed on check-out receipts, but not item titles.

Offline mode is enabled only for the specific Polaris ExpressCheck session. When the offline session is over, you copy the offline transaction files to a staff circulation workstation and upload them for processing. When the Polaris ExpressCheck application is closed and restarted, normal mode is resumed.

> **Important**:
> A valid NT account is required to exit Polaris ExpressCheck while in offline mode. The account should have local rights to log on to the workstation, and should have logged on at least once. Typically the workstation domain user account is used. See Install Polaris ExpressCheck client software.

This unit covers the following topics:

- Start an offline session
- Upload offline transaction files

Start an offline session

Follow these steps to start an offline session at the Polaris ExpressCheck workstation.

Important:
You need a keyboard connected to the workstation to do this procedure. For connection instructions, see Connect a keyboard, mouse, and CD drive.

1. Select the following files in the Polaris Offline folder on your library's server:

2. Copy the files to the following folder on the Polaris ExpressCheck workstation:

3. Double-click the Polaris ExpressCheck shortcut on the desktop to start Polaris ExpressCheck, if the application is not currently running.

   The Welcome screen appears.

4. Press **CTRL+ALT+S**.

   The Setup screen appears.

5. Select **Offline**, and select **OK**.

   The Setup screen closes, and the Polaris ExpressCheck session is in offline mode.

   Note:
   To stop the offline session, select the logo image area at the upper left corner of the Polaris ExpressCheck window. See Start or close the Polaris ExpressCheck application. When Polaris ExpressCheck is restarted, normal online mode resumes.

Related information

Upload offline transactions to the Polaris database - After the Polaris ExpressCheck offline session, transfer the offline transaction information to the Polaris database. See Upload offline transaction files.

Upload offline transaction files

Follow these steps to view and upload offline transaction files from the Polaris ExpressCheck workstation to your staff circulation workstation.

1. When the Polaris ExpressCheck offline session is over, copy the transaction files from the Polaris ExpressCheck client (located at **C:\ProgramData\Polaris\[version]\[datalink]\OfflineTransaction**) to the same location on the staff client workstation.

2. Log on to Polaris on the staff workstation, and select **Circulation**, **Bookmobile** from the Polaris Shortcut Bar.

3. Proceed with "View and upload offline transaction files" in the Polaris *Patron Services Administration Guide*, or see the same topic in the staff client online Help.

Appendix: Workstation Setup (SeePoint™ Units Only)

The information in this unit helps you identify the components of the equipment, follow safety guidelines, and care for your SeePoint equipment.

> **Note**:
> The information in this unit does not apply to other vendors' hardware.
> See your vendor documentation if you use non-SeePoint hardware.

Although you can open connection and access panels to power the workstation and make connections, you should not attempt to repair any parts inside the Polaris ExpressCheck workstation. If you experience any problem, contact your Polaris Library Systems Site Manager immediately.

The following actions may *invalidate your warranty*:

> **Important**:
> This list contains examples, but is not intended to be exhaustive. If in doubt, always contact your Polaris Library Systems Site Manager.

- Opening the workstation or disassembling it in any way
- Changing the operating software that came loaded on the station
- Changing, altering or modifying any component of the station
- Updating Internet Explorer or service packs that came loaded on the station without the express permission of Polaris Library Systems
- Using devices that are not UL/FCC/CE approved with the station
- Plugging any non-USB device (even a keyboard) into the station *while it is powered on*
- Installing the Polaris ExpressCheck station outdoors

You *can* do these activities without affecting the terms of your warranty:

- Clean the station and touch screen as described in this guide
- Open the access panel to access the ports
- Calibrate the touch screen
- Change the indoor location of the station
- Update Polaris ExpressCheck software on the station

This unit covers the following topics:

- [Setting Up the Workstation](#)
- [Connecting Devices to the Workstation](#)
- [Changing the Front Panel Sign](#)
- [Installing an Overhead Sign](#)
- [Powering Up and Shutting Down](#)
- [Adjusting the Touch Screen](#)
- [Configuring Barcode Scanners](#)

Setting Up the Workstation

When the Polaris ExpressCheck workstation arrives at your site, unpack the workstation carefully.

> **Important**:
> Never pick up the workstation by the enclosure that contains the touch screen. Always pick up the unit by the base. As you set up the workstation, refer to [Safety Instructions](#) for important information regarding setup and operation.

Keep the packaging in case you need to return the workstation for service. Notify Polaris Library Systems immediately if there are any components. Notify the shipper within 24 hours if the equipment is damaged.

Connection and Access Panels

The connection panel is located underneath the right rear corner of the base. This area contains the power switch and connecting points for the power cord, network jack and optional phone plug.

The access panel is located on the back of the computer enclosure, behind the touch screen. The panel is secured with two screws. Remove both screws to allow the access panel door to swing down and out. This area contains a standard computer "soft switch" for shutdown, and the I/O plate to connect external hardware devices such as a printer, keyboard, or CD drive. You can run cables through the slot in the access panel door.

> **Note**:
> You can rotate the touchscreen to reach the access panel conveniently. See Adjust the angle of the touch screen.

Connecting the Power Cord

To connect the power cord, plug the female end of the cord into the connection on the connection panel. Plug the male end of the power cord into a standard electrical outlet.

> **Note**:
> The Polaris ExpressCheck workstation is set to operate at 110V current (North American standard). If you require 220V current, you need to flip the workstation voltage switch. See Voltage Selection.

Connecting the Network Cable

A standard RJ-45 network connection is located on the connection panel. A standard Category 5 cable for any Local Area Network or High Speed Modem may be used with this jack. Plug the cable into the network jack first, and then into the network connection on the workstation. To give the workstation a "home" on your network, follow Microsoft's instructions for adding a workstation to a domain.

Connecting the Printer

Polaris ExpressCheck includes a receipt printer as standard equipment. Be sure the printer driver is installed on the workstation. To connect the printer itself, remove the access panel door and plug the printer's USB cable into the USB port. Run the printer cable through the access panel door before you replace it. Then plug the printer's power cord into the electrical outlet. You must also set up the printer in the Polaris ExpressCheck application. See Set receipt printing and display options.

> **Tip**:
> Consider purchasing a small USB hub for the ExpressCheck workstation. The hub will provide additional USB ports if you need them, and will make them more conveniently accessible.

Connecting a Keyboard, Mouse, and CD Drive

Although patrons use the touch screen at the Polaris ExpressCheck workstation, you need a keyboard and mouse to use while you set up the workstation. Some libraries leave these connected for maintenance purposes, simply tucking them out of the way while the workstation is in use by patrons. You may also need to connect a CD drive if you are installing software by this method.

Power Switches

The main power switch is a two-position toggle switch on the connection panel. This switch controls all accessories, computer components and amplified speakers.

A standard computer "soft switch" is located on the I/O plate behind the access panel. When you press and release this switch, an orderly shut-down command is issued to the workstation. If the workstation does not respond to the shut-down command, hold the switch for seven seconds to force a hard shut-down of the computer.

Cleaning

To clean the housing and base of the Polaris ExpressCheck workstation, wipe them down with a small amount of warm, soapy water on a lint-free cloth. Be careful that water does not drip or seep into the housing or the base.

To clean the touch screen, spray a household cleaner such as Windex™ or an ammonia-based solution onto a soft, lint free cloth. Wipe the screen with the cloth. Never spray

the cleaner directly onto the screen. Be careful that the cleaner does not drip or seep into the system.

Safety Instructions

Follow the guidelines in this section for personal and public safety, and to preserve your equipment and warranty.

Voltage Selection

To avoid damaging your workstation, be sure that the voltage selection switch is set to match the AC power available at your location:

- 115V/60Hz in most of North and South America and some Far Eastern countries such as South Korea and Taiwan
- 230V/50Hz in most of Europe, the Middle East and the Far East
- 100V/50Hz in eastern Japan and 100V/60Hz in western Japan. (The voltage selection switch must be set to the 115V position even though the AC supply in Japan is 100V.)

To check or change the voltage selection switch, follow these steps:

1. Shut down, power off, disconnect, and unplug the workstation (see Shut down the Polaris ExpressCheck station).
2. Set the workstation on a soft surface and tip it so the metal chassis underneath the base faces you.
3. Using a flat blade screwdriver, gently pop off the coin-sized metal cover to expose the red voltage selection switch. If your location uses 110V or 115V AC power, you see the number 115.
4. If your location uses 220V or 230V, use a flat blade to flip the switch.

Disconnecting and Connecting Network Cable

To decrease the possibility of shorting out your workstation when disconnecting a network cable, first unplug the cable from the network connection in the connection panel of the workstation, and then from the network jack. When reconnecting a network cable, first plug the cable into the network jack, and then into the network connection on the workstation.

Disconnecting and Connecting Devices

To avoid possible damage to the system board, wait five seconds after turning off the workstation before you disconnect or connect a non-USB device (for example, a keyboard and mouse) from the computer. For more information, see Connecting Devices to the Workstation.

Grounding

To help prevent electric shock, plug the workstation and any device power cables into properly grounded power sources. These power cables are equipped with three-prong plugs to help ensure proper grounding. Do not use adapter plugs or remove the grounding prong from a cable. If you must use an extension cable, use a three-wire cable with a properly grounded plug.

Position and Care

- Never pick up the workstation by the enclosure that contains the touch screen. Always pick up the unit by the base.
- Be sure that nothing rests on the station's cables and that the cables are not located where they can be stepped on or tripped over.
- Do not spill food or liquids on the station.
- Do not push any objects into the openings of the station. Doing so can cause fire or electric shock by shorting out interior components.
- Keep your station away from radiators and heat sources. Also, do not block cooling vents or place your station where air flow may be impeded.

Connecting Devices to the Workstation

If the Polaris ExpressCheck station does not include an integrated keyboard, you may want to connect a keyboard and mouse for temporary set-up purposes. Some libraries leave these connected for maintenance convenience, and store them behind the unit during business hours. You can also connect a CD drive if necessary.

Connect a keyboard, mouse, and CD drive

Follow these steps to connect a keyboard, mouse, and CD drive to the Polaris ExpressCheck workstation.

> **Important**:
> You must shut down the workstation and turn the power off, then wait five seconds before you do this procedure. See Shut down the Polaris ExpressCheck station.

1. Remove the access panel on the workstation (see Connection and Access Panels).

    > **Note**: You can tip the touchscreen to reach the access panel conveniently. See Adjust the angle of the touch screen.

2. Connect a keyboard and mouse to the PS2 ports labeled **keyboard** and **mouse** on the I/O plate.
3. Run the cords through the slot on the access panel.
4. Restart the workstation by setting the main power switch (in the connection panel) to the on position.
5. Enter the starting setup by pressing F2 at the first boot screen.
   The setup screen appears.
6. Use the up and down arrow keys to highlight **General Configuration**, and press **Enter**.
   A setup screen appears where you can specify the boot sequence.
7. Use the right arrow key to select **CD-ROM** as the first boot device.
8. Save the changes, and power off the workstation.

9. From the area where you removed the access panel, pull out the flat gray cables that are tucked inside the enclosure.

10. Connect the IDE cable (the shorter of the two gray cables) to the CD-ROM drive. The IDE cable is correctly oriented if the red stripe along the edge of the gray cable is aligned with pin 1 on the CD-ROM drive.

11. To power the CD-ROM drive, connect the drive to the 4-pin Molex connector inside the access panel.

12. Restart the workstation, allowing it to boot normally so you can use the CD drive to update software or back up files.

> **Note**: If you are booting to the CD-ROM drive, restart the system with your bootable CD inside the drive.

Related Information

- **Disconnecting devices** - Shut down and power off the workstation completely (refer to Shut down the Polaris ExpressCheck station), then wait five seconds before disconnecting the keyboard, mouse, or CD drive.
- **USB devices** - Consider purchasing a small USB hub for the ExpressCheck workstation. The hub will provide additional USB ports if you need them, and will make them more conveniently accessible.

Changing the Front Panel Sign

You can use the front panel sign on the SeePoint workstation to provide instructions or other messages to help patrons get started.

Change the front panel sign

Follow these steps to insert a new sign in the front panel.

> **Note**:
> If your workstation is new, a protective sticker covers the acrylic panel to protect it from scratches. Peel the sticker off to expose the panel.

1. Using the provided Allen wrench, loosen the screws at the corners of the acrylic panel that covers the sign.

   > **Note**:
   > If you must completely extract the screws to remove the old sign, be sure to keep the rubber washers in place on the screws.

2. Slip the new page behind the acrylic panel. If necessary, use clear tape to keep the page in place.
3. Hand-tighten the screws, making sure the new page is straight, level and centered.
4. Using the Allen wrench, tighten all the screws just until the rubber washers begin to compress. Do not over-tighten the screws.

Related Information

Optional overhead sign - See [Installing an Overhead Sign](#).

Installing an Overhead Sign

Your SeePoint workstation may include an optional overhead sign. Be sure the sign kit contains the following materials:

- Two inner clamps, 2 outer clamps (for mounting sign frame on touch screen support poles)
- Eight 1/4-28 socket head screws (for attaching clamps to touch screen support poles)
- Four 1/4-20 sign support screws (for attaching the sign frame to the clamps on the touch screen support poles)
- Two 6-32 screws (for attaching the top cap of the sign frame)
- One Allen wrench
- Two acrylic panels
- One sign frame

Install the overhead sign

Follow these steps to assemble and mount the overhead sign on the Polaris ExpressCheck workstation.

1. Attach an inner and outer clamp to each touch screen support pole, using 4 socket head screws for each clamp assembly.
   The clamps should be mounted high on the poles, as close as possible to the head pivot.

   > **Note**:
   > The outer clamp has two center holes used for attaching the sign support legs. The picture shows sign support screws partially mounted in the center holes.
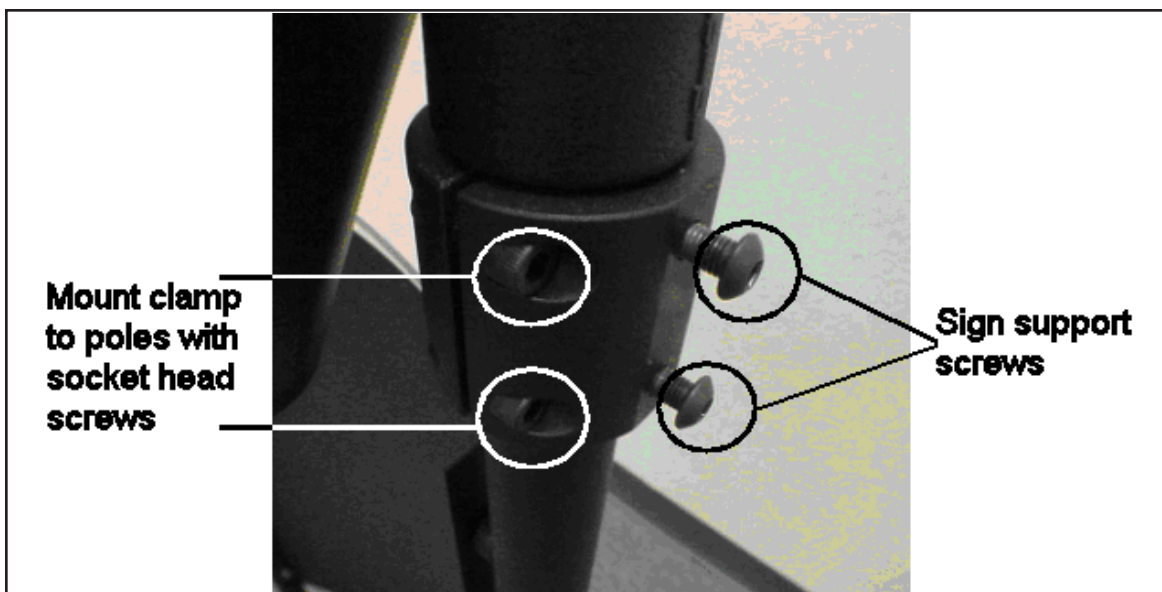
2. Remove the protective paper cover from the two acrylic panels.

3. Insert your sign between the two acrylic panels. You can secure the sign in place with clear tape if necessary.

4. Holding the two acrylic panels together, slide the panels into the frame's left and right channels until they seat into the bottom support channel.

   > **Caution**:
   > Be careful not to scratch the acrylic panels while sliding them into the frame.

5. Attach the top cap to the frame with the two screws provided.
   The picture shows an assembled frame.

6. Attach the bottom of the frame support legs to the clamps on the touch screen support poles, using the four sign support screws and Allen wrench provided.

Powering Up and Shutting Down

You start and stop the Polaris ExpressCheck workstation much like any Windows workstation.

Power Up the Workstation

Follow these steps to start the Polaris ExpressCheck workstation.

1. Connect the power and network cables to the Polaris ExpressCheck workstation. (Refer to Connecting the Power Cord and Connecting the Network Cable.)
2. Connect the printer to the workstation. (Refer to Connecting the Printer.)
3. Connect a keyboard and mouse to the workstation for set-up purposes (See Connect a keyboard, mouse, and CD drive.)
4. Turn the power switch on the connection panel to the on position, and allow the workstation to start up.

> **Note**:
> You may wish to adjust the Windows volume on the workstation. Go to Start, Control Panel to adjust the volume.

5. See the following topics for information about installing and configuring the Polaris ExpressCheck client application:

   - Calibrate the touch screen
   - Test and configure a serial scanner or Configure a USB barcode scanner
   - Install Polaris ExpressCheck client software
   - Register the workstation in Polaris
   - Assign permission to close Polaris ExpressCheck
   - Setting Account and Circulation Options
   - Set receipt printing and display options
   - Set RFID, scanner, and security options
   - Set Polaris ExpressCheck circulation by material type

Related Information

- **Workstation does not power up** - Try these steps:
  1. Make sure that the unit is plugged into a wall socket that has the correct power voltage. See Voltage Selection.
  2. Make sure the power cord is completely plugged into the connection panel.
  3. Make sure the power switch on the connection panel is in the on position.
  4. Open the access panel, and press and release the "soft switch" on the I/O plate (see Power Switches).
  5. If the system still fails to start, contact your Polaris Library Systems Site Manager.
- **Power loss** - The workstation is set to restart automatically after a power loss. At installation, you can set the Polaris ExpressCheck application to start up automatically when the workstation restarts. See Install Polaris ExpressCheck client software.

Shut down the Polaris ExpressCheck station

Follow these steps to shut down and power off the Polaris ExpressCheck workstation.

1. At the Polaris ExpressCheck workstation, close the Polaris ExpressCheck application (see Start or close the Polaris ExpressCheck application).
2. On the Windows desktop, press **Start**.
3. Select **Shut Down** from the Start menu.

   > **Note**:
   > Any speakers and powered accessories remain on until the main power switch is toggled to the off position.

4. Toggle the main power switch (in the connection panel) to the off position.

Related Information

Standby - As an alternative to powering down the workstation every night and powering up in the morning, consider setting a standby schedule for the computer. This method has these advantages: you do not have to access the connection panel twice daily; the workstation remains on the network to receive updates; switch wear is minimized;

power consumption is still reduced; and the workstation remains safe. Use the Windows Control Panel function **Power Options** to set a standby schedule.

Adjusting the Touch Screen

You can adjust the angle of the touch screen, and recalibrate the screen to adjust the cursor movement.

Adjust the angle of the touch screen

The Polaris ExpressCheck workstation is equipped with secure bolts at the top of the touch screen supports. Using the supplied wrench, loosen each side slowly and equally without completely disengaging the bolt. The pivot mechanism gradually allows the screen to tilt. Set the screen to a comfortable viewing angle and tighten the bolts so the head remains securely in place. Do not over-tighten the bolts.

> **Important**:
> Do not remove the pivot bolts or leave them loose.

Calibrate the touch screen

When the touch screen is properly calibrated, the cursor moves smoothly to position beneath your fingertip. You may need to calibrate the touch screen after shipping, if the workstation is moved in the library, and occasionally as a routine maintenance task. Follow these steps to calibrate the touch screen.

1. At the Polaris ExpressCheck workstation, close the Polaris ExpressCheck application (refer to Start or close the Polaris ExpressCheck application).
2. On the Windows desktop, press Start.

   > **Note**:
   > You need the permission Close ExpressCheck: Allow to close the application. See Assign permission to close Polaris ExpressCheck.

3. If you received your Polaris ExpressCheck unit during or after March 2006, follow these steps:

   > **Note**:
   > This procedure is for a touch screen equipped with a Hampshire®

> TSHARC™ interface card. If you do not see the Hampshire TSHARC Control Panel program, do step 4 instead.

    a. From the Start menu, select **Programs**.

    b. From the list of programs, select **Hampshire TSHARC Control Panel**.
The Hampshire TSHARC Control Panel opens.

    c. Select the **Calibration** tab and follow the instructions.

4. If you received your Polaris ExpressCheck unit before March 2006, follow these steps:

    a. From the Start menu, select **Control Panel**.

    b. Select **Elo Touchscreen**.
A pop-up control panel appears.

    c. Select **Calibrate** or **Align**.
The calibration screen appears.

    d. From a position of normal use, touch each target with your finger as it appears, and follow the prompts.
Thoroughly test your calibration. If the touch screen is properly calibrated, the cursor moves smoothly to position beneath your fingertip.

Configuring Barcode Scanners

Polaris ExpressCheck SeePoint workstations are currently equipped with Symbol® serial barcode scanners instead of USB scanners. Older units may use USB scanners.

If you are starting up a Polaris ExpressCheck workstation with a serial scanner for the first time, you need to test and configure the scanner by scanning certain barcodes. See Test and configure a serial scanner.

If you are starting up an older Polaris ExpressCheck workstation with a USB scanner, you need to scan certain barcodes to configure the scanner every time the workstation is powered up. Other barcodes are convenient for troubleshooting purposes, and to change the audio signal volume on the USB scanner. See Configure a USB barcode scanner.

> **Important**:
> If you have Polaris ExpressCheck units with Symbol USB scanners already in use, and you are upgrading Polaris ExpressCheck software from a version of Polaris earlier than 3.1 build 413, or Polaris 3.2 build 357, you need to reset the Polaris ExpressCheck workstation to the USB scanner after the Polaris upgrade. See Set RFID, scanner, and security options.

Scanners and Screen Savers

You may want to set the Screen Saver for the Polaris ExpressCheck workstation to display an informative message. In the Windows XP control panel for **Display**, on the Screen Saver tabbed page, set the appropriate wait time for the workstation and select the **Marquee** Screen Saver type. On a Windows Vista and Windows 7 workstations, select **Personalization** in the Control Panel, and select **Screen Saver**, **3D Text**. For a serial scanner, specify text that tells patrons to touch the screen to activate the workstation. For a USB scanner, specify text that tells patrons to scan their account barcodes.

Test and Configure a Serial Scanner

Follow these steps to test and configure your serial scanner.

1. Use a laser printer to print the serial scanner barcodes that follow this procedure. See [Barcodes for Serial Scanners](#).

2. At the Polaris ExpressCheck workstation, start C:\Program Files\Symbol\SSI VB Demo\ScanEngineDemo.exe.
   The Scan Engine Demo window opens.
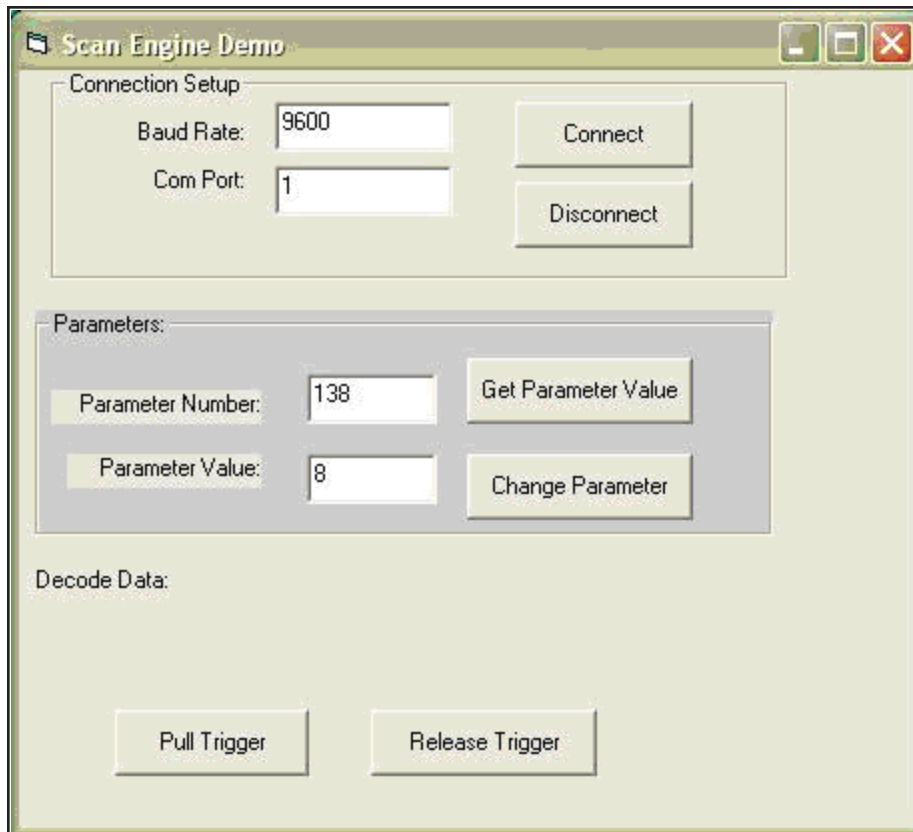
3. Change the **Com Port** setting to **2**.

4. Select **Connect**.

5. Select **Disconnect**.

6. Close the Scan Engine Demo window.

7. From the barcodes you printed in step 1, scan the configuration barcode Send **Packeted Decode Data**.

8. If the library uses Codabar barcodes, scan these configuration barcodes from your printed barcodes:

- **Enable Codabar**

- **Enable NOTIS Editing**

9. Open Notepad or another text editor.

10. Scan some actual item barcodes into your text editor, and confirm that the barcodes have scanned correctly.
    If you find issues, contact your Polaris Site Manager.

Barcodes for Serial Scanners

This table lists the barcodes necessary to configure your Symbol serial barcode scanner at startup, and additional barcodes useful for adjustments and troubleshooting. The barcodes are reproduced following the table (see Printable Barcodes for Serial Scanners).

> **Note**:
> For a complete set of barcodes, go to http://support.symbol.com/support/product/manuals.do and search for the *MiniScan MS-XX04 Series Integration Guide*.

MiniScan MS-XX04 Series Integration Guide Page Number	Barcodes	Purpose
10-8	Set All Defaults	Recommended for troubleshooting. Restores all scanner defaults.
10-97	Send Packeted Decode Data	Required for start-up.
10-70	Enable Codabar	Scan this if you use Codabar bar-codes.
10-72	Enabls NOTIS Editing	If you scan Enable

		Codabar, also scan Enable NOTIS Editing.

Printable Barcodes for Serial Scanners

Set All Defaults

Send Packeted Decode Data
(01h)

Enable Codabar
(01h)

Enable NOTIS Editing (01h)
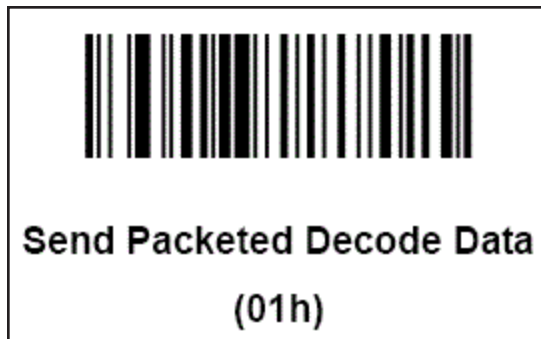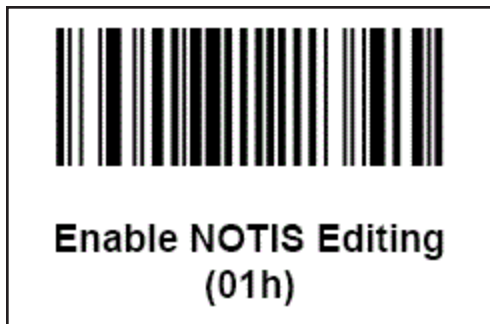
Configure a USB barcode scanner

Follow these steps to obtain and scan the barcodes for configuring a USB barcode scanner.

1. Print the USB barcode pages that follow this procedure. See Printable Barcodes for USB Scanners.

2. When the Polaris ExpressCheck station is started after being powered off, do these steps (required):

   a. Scan the **Scan Options** barcode.

   b. Scan the **Data As Is** barcode.

   > **Note**:
   > If you scan the wrong data format barcode, scan the Data Format Cancel barcode to cancel the error.

   c. Scan the **Enter** barcode.

3. If you need to adjust the scanner, try scanning one or more of these barcodes:

   - **Continuous On** - Keeps power on after each scan attempt.

   - **Omnidirectional Pattern** - For units equipped with the omni-directional scanner, sets the scanner light pattern from a straight line to a moving pattern. (Smart Raster resets the pattern to a straight line.)

   - **Enable Codabar** - Sets the scanner to recognize the Codabar barcode pattern.

- **Enable NOTIS Editing** - Sets the scanner to ignore leading and trailing Codabar characters.

4. To adjust the volume of the audio signal, scan one of these barcodes:

- **Low Volume**

- **Medium Volume**

- **High Volume**

Barcodes for USB Scanners

This table lists the barcodes necessary to configure your Symbol USB barcode scanner at startup, and additional barcodes useful for adjustments and troubleshooting. The barcodes are reproduced following the table (see Printable Barcodes for USB Scanners).

> **Note**:
> For a complete set of barcodes, go to
> http://support.symbol.com/support/product/manuals.do and search for
> the MiniScan MS-XX07 Series Integration Guide.

MiniScan MS-XX04 *Series Integration Guide* **Page Number**	**Barcodes**	**Purpose**
10-80	Scan Options Data As Is	Required for start-up.
10-81	Enter Data Format Cancel	Required for start-up. Enter inserts a carriage return at the end of the bar-code. Data Format Cancel is useful if you have scanned the wrong data format.

10-11	Continuous On (00h)	Recommended for troubleshooting. To reset the scanner if it has been inadvertently turned off, leave this barcode under the beam and reboot the workstation.
10-12	Omnidirectional Pattern (06h) Smart Raster (01h)	Recommended for troubleshooting. Smart Raster turns the omni-directional feature off.
10-62	Enable Codabar (01h)	Recommended for troubleshooting.
10-64	Enable NOTIS Editing (01h)	If you scan Enable Codabar, also scan Enable NOTIS Editing.
10-8	Low Volume Medium Volume High Volume	Change the volume of the audio signal.
10-17	Set All Defaults	Recommended for troubleshooting. Restores all scanner defaults.

Printable Barcodes for USB Scanners

Scan Options

*Data As Is

Enter

Data Format Cancel

Continuous On

Omnidirectional Pattern

* Smart Raster

Enable Codabar

Enable NOTIS Editing

Low Volume

Medium Volume

*High Volume

```
Set All Defaults
```

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