



# What's New in Polaris and Leap

6.7

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## Polaris Installation Notes

**Important:**

When the new Polaris release is installed on a workstation, the file path changes from 6.6 to 6.7 as in the following examples:

C:\ProgramData\Polaris\6.7

C:\Program Files\Polaris\6.7

C:\Program Files (x86)\Polaris\6.7

## New and Modified Polaris Administrative Settings

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

Setting	Purpose	Level
<b>New Profiles</b>		
Cataloging > Web App: Remote databases: Maximum number of records to return	Specifies the maximum number of records to return in the result set for each remote database in Leap. The default is 250. The maximum is 999.	System, Library, and Branch
Cataloging > Web App: Remote databases: Maximum number that can be searched at once	Specifies the maximum number of local or remote databases that you can search at one time in Leap. The default is 10. The maximum is 25.	System, Library, and Branch
Cataloging > Web App: Remote databases: Maximum search time (seconds)	Specifies the maximum number of seconds to actively search all selected databases. The default is 30. The maximum is 300.	System, Library, and Branch
<b>New Parameters</b>		
Request > Web App: Use patron's preferred branch for multiple holds from record set	Determines whether the Patron's Preferred Location option appears in the Pickup list when you are requesting a single title for multiple patrons in Leap.	System, Library, and Branch

## Polaris API Changes

PAPI now includes several new methods to facilitate integration with patron-facing applications and to allow patrons to set their preferred branch to pick up holds.

The following methods have been added or updated:

Method Name	Purpose
ItemStatusesGet	Returns a list of all Item statuses in the system.
MARCTypeOfMaterialsGet	Returns a list of all MARC type of materials in the system.
MaterialTypesGet	Returns a list of all materials types in the system.
Synch_GetSerialCompressedHoldingsPaged	Returns the compressed holdings data for serial titles by organization and bibliographic record ID. This endpoint allows retrieval of data in batches via "paging." It can be called continuously to retrieve up to 100 records at a time until all records are returned.
Synch_SerialCompressedHoldingsByID	Returns the compressed holdings data for serial titles by organization and bibliographic record ID. This endpoint can be queried using a single pair of organization ID and bibliographic record ID or a comma-delimited list of ID pairs.
SysHoldStatusesGet	Returns a list of all system hold statuses in the system.
PatronBasicDataGet	Method has been updated to return the patron's preferred pickup location for holds in the RequestPickupBranchID element.

Method Name	Purpose
	Method now includes the patron's registration expiration date.
PatronRegistrationCreate	Method has been updated to accept the optional RequestPickupBranchID element. This element specifies the patron's preferred pickup location for holds.
PatronRegistrationUpdate	Method has been updated to accept the optional RequestPickupBranchID element. This element specifies the patron's preferred pickup location for holds.

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

## **Leap Updated for Accessibility**

Polaris has partnered with an external third-party company to evaluate Leap for web accessibility against the WCAG 2.1 guidelines. Changes suggested by the third-party company are implemented in 6.7. There are several accessibility updates, but the most noticeable might be that UI colors are updated to increase visible contrast.



## Hold Requests for Multiple Patrons on One Title in Leap

If multiple patrons want to request the same title, you can now bulk-create requests in Leap for all the patrons who want the title. This feature is useful for libraries that offer author subscription services or manage book club lists.

**Note:**

You can already place hold requests for multiple patrons on a single title in the Polaris staff client. As of version 6.7, you can now place such requests in Leap.

Requesting a single title for multiple patrons in Leap comes with two new conveniences that are not available when you place a similar request in the staff client:

- You can set the pickup location(s) for the hold requests to each patron's preferred pickup location.
- Patrons' requests are placed in random order in the holds queue.

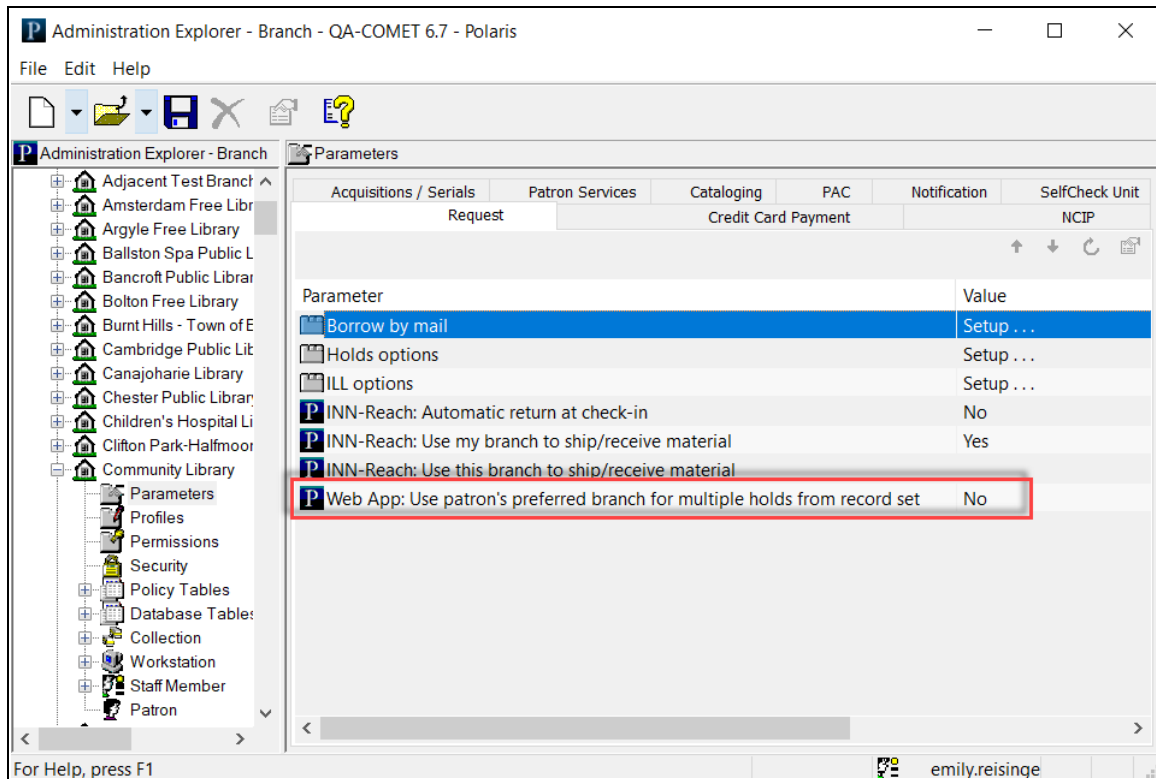
To configure and use this feature, see:

- [Configuring the Web App: Use Patron's Preferred Branch Parameter](#)
- [Requesting a Single Title for Multiple Patrons in Leap](#)

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### Configuring the Web App: Use Patron's Preferred Branch Parameter

A new "Web App: Use patron's preferred branch for multiple holds from record set" parameter appears on the Parameters > Request tab in Polaris Administration. This parameter determines whether the Patron's Preferred Location option appears in the Pickup list when you request a single title for multiple patrons in Leap. The parameter is available at the System, Library, and Branch levels.



To configure the "Web App: Use patron's preferred branch for multiple holds from record set" parameter, select one of the following options:

- No - The Patron's Preferred Location option does not appear in the Pickup list when you request a title for multiple patrons. This is the default setting.
- Yes - The Patron's Preferred Location option is the default value in the Pickup list when you request a title for multiple patrons.

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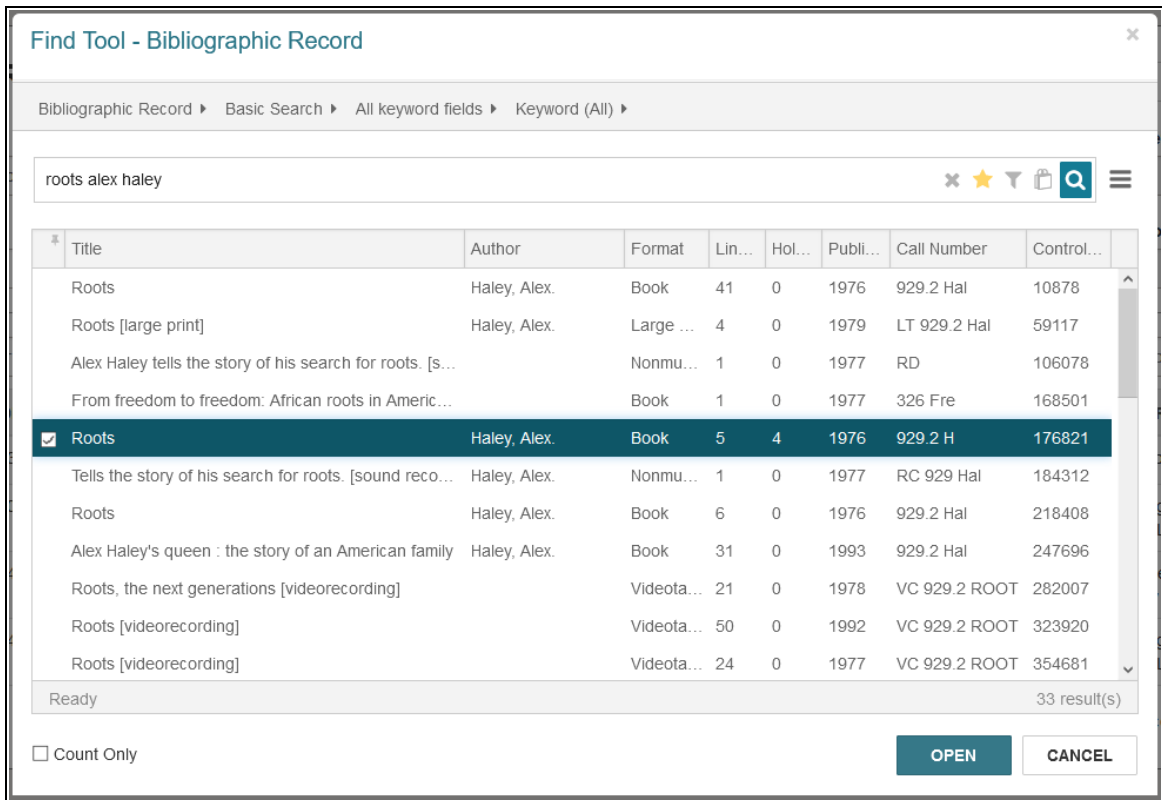
## Requesting the Same Title for Multiple Patrons in Leap

To request the same title for multiple patrons in Leap:

1. Create a patron record set that contains the patrons who want to request the title.
2. Navigate to the Patron Record Set screen for the appropriate patron record set.
3. Select **ACTIONS > Create Multiple Holds**.

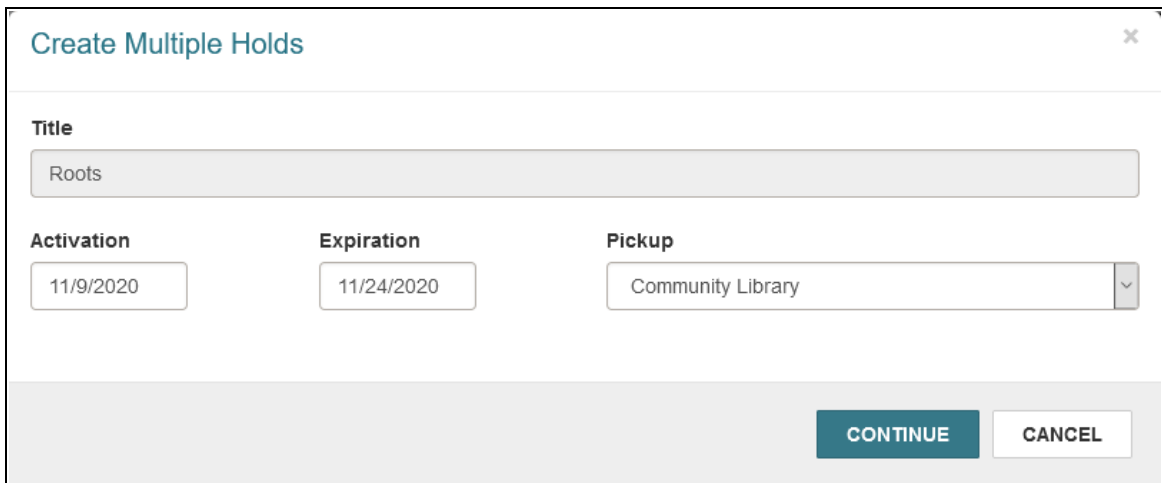
The Bibliographic Record Find Tool screen appears.

4. Search for the bibliographic record you want to request.



5. Select a title, and select **OPEN**.

The Create Multiple Holds screen appears.



6. Select the **Activation** field to select a hold request activation date.

7. Select the **Expiration** field to select a hold request expiration date.
8. Specify the hold request pickup location(s) by doing one of the following:
  - To set the pickup location to the same branch for all hold requests, select a pickup location from the **Pickup** list.
  - To set the pickup location to each patron's preferred pickup location, select **Patron's Preferred Location** from the **Pickup** list.

**Notes:**

- The **Patrons Preferred Location** option appears only if the "Web App: Use patron's preferred branch for multiple holds from record set" parameter is enabled in Polaris Administration. See [Configuring the Web App: Use Patron's Preferred Branch Parameter](#).
- If a patron has not set a preferred pickup location, the patron's registered branch is used to place the request. The registered branch is also used if the patron's preferred pickup location is excluded via the **Hold options > Pickup > Pickup branches to exclude in PAC when creating requests** setting in Polaris Administration and the **Exclude selected branches in staff client setting** is also enabled.
- Patrons can specify their preferred pickup location in PowerPAC. For more information, see [Patron Preferred Pickup Location Setting in PowerPAC](#).

9. Select **CONTINUE**.

Leap attempts to place the hold requests. If a patron is blocked, Leap displays a message.

**Patron is blocked**

Mrs. Garnet D Baker is blocked. Do you want to continue with this operation?

Registration Has Expired
Invalid Address
Address Check Required

**CONTINUE** **CANCEL**

10. If necessary, select **CONTINUE** or **CANCEL** to dismiss any patron block messages. Leap displays messages summarizing the results of the attempt to place multiple hold requests.

Hold request failed to create for 1 patron(s).	X
Hold request is created for 3 patron(s).	X

## PowerPAC One-Click Requests Now Verify Pickup Location Availability

The PowerPAC One-Click Request feature now verifies that the pickup location is available for holds pickup before placing the request. Before placing a One-Click Request, the system checks to determine whether:

- The patron has specified a [preferred pickup location](#).
- The patron's preferred pickup location (if one exists) has been excluded via the **Hold options > Pickup > Pickup branches to exclude in PAC when creating requests** setting in Polaris Administration.
- The patron's registered branch has a default pickup branch specified via the **Hold options > Requests > Default pickup branch** setting in Polaris Administration.

The table below describes the logic that the system uses to determine the pickup location for a One-Click Request.

Does the patron have a preferred pickup location?	Is the preferred pickup location excluded?	Does the patron's branch have a default pickup branch?	Pickup location
Yes	No	N/A	Patron's preferred pickup location
Yes	Yes	Yes	Default pickup branch
Yes	Yes	No	Patron's registered branch
No	N/A	Yes	Default pickup branch
No	N/A	No	Patron's registered branch

## Patron Preferred Pickup Location Setting in PowerPAC

In previous versions, patrons could specify a preferred pickup location for holds by selecting the "Always use this pickup location" option while placing a hold request.

In version 6.7, patrons can also specify their preferred pickup location for holds by editing their account settings in PowerPAC. A new "Preferred pickup location" setting is available on the My Account screen.

When a patron places a request, PowerPAC sets the pickup library to their preferred pickup location by default.

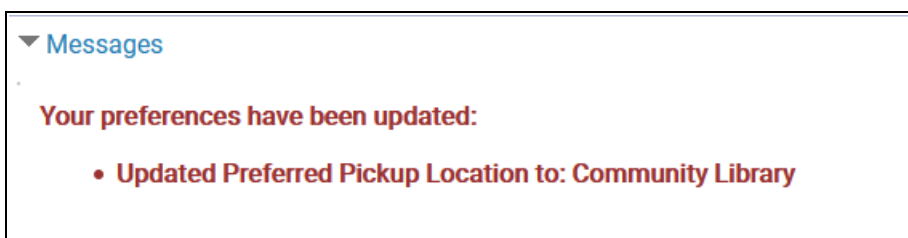
### Note:

Patrons can set their preferred pickup location using either method described above.

To set their preferred pickup location on the My Account screen, patrons can:

1. Sign in to PowerPAC.
2. Select **My Account > My Record**.
3. Expand the **Contact Information and Preferences** panel.
4. Select a location from the **Preferred pickup location** list.
5. Select **Submit Change Request**.

A confirmation message appears in the **Messages** panel.



## Leap Bibliographic Bulk Change

You can now use Leap to change the Non-MARC, Leader, and MARC-tag information on several bibliographic records at once. You can do the following with data fields:

- Insert a new tag.
- Insert a subfield in a tag in any location within that tag, or insert a subfield before or after a specific subfield.
- Delete the first instance of a tag, the last instance of a tag, or all instances of a tag.
- Delete a subfield with any data, with specific data, or delete the last instance of the subfield.
- Change a specific tag's subfield code without changing the data in the subfield.
- Replace a tag's subfield data with specific data.
- Change a tag's indicator only.
- Correct non-filing indicators.

**Note:**

The following tags/subfields cannot be modified or deleted because they are used in duplicate detection: 10\$a, 20\$a, 22\$a, 24\$a, 28\$a, 35\$a, and 37\$a.

To bulk-change data fields in bibliographic records:

1. Go to a bibliographic record set in Leap.
2. Open a record from the set.



3. Select the **Actions** menu > **Bulk Change**.

The screenshot shows the Leap interface for a 'Bibliographic Record Set'. The record name is 'SAF\_SR\_Regression\_BibList\_RS' and the owner is 'Amsterdam Free Library (br)'. The record status is 'Final'. The 'Actions' menu is open, showing options: Bulk Change, Create Item Record Set, Create Authority Record Set, Export, Delete, and Undelete. Below the menu is a table of records with columns: TITLE, AUTHOR, FORMAT, LINKED ITEMS, HOLDS, PUB DATE, CALL NO., CONTROL NUMBER, and STATUS.

TITLE	AUTHOR	FORMAT	LINKED ITEMS	HOLDS	PUB DATE	CALL NO.	CONTROL NUMBER	STATUS
1001 designs for needlepoint and cross stitch	Borsuck, B.	Book	4	0	1977	746.44 B	133	Final
1,001 questions and answers about Judaism.	Gross, David C., 1923-	Book	1	0	1978	296 G87	513	Final
A forest Christmas	Holm, Mayling Mack.	Book	11	0	1977	JP Fict Hol	20	Final
A summer in the South	Marshall, James, 1942-1992	Book	13	0	1977	J Fict Mar	23	Final
Adultery and other choices	Dubus, Andre, 1936-1999	Book	2	0	1977	Fict Dub	216	Final
Africa dream	Greenfield, Eloise.	Book	6	0	1977	JP Fict Gre	367	Final

The Bibliographic Record Bulk Change page opens.

The screenshot shows the 'Bibliographic Record Bulk Change' page. The record title is 'TestingMultFilePE - F\_14' and the call number is 'QA-DEWEY 7.0'. There are buttons for 'UPDATE BIBS' and 'CANCEL'. Below are tabs for 'Non-MARC', 'Data Fields', 'Leader', '006 Tag', '007 Tag', and '008 Tag'. The 'Display in PAC' and 'Do Not Overlay' settings are both set to '(No change)'. The 'Record Owner' section has 'From' and 'To' dropdowns, both set to '(No change)'. There is a checkbox for 'Create Resource Entities for Vendor Account' which is unchecked. At the bottom, there is a checkbox for 'Save Provisional Records as Final' which is unchecked, and a dropdown menu.







4. Select a tab to choose the type of data to change in this record set:

## Bibliographic Record Bulk Change

TestingMultFilePE - F\_14

QA-DEWEY 7.0

---

 **Non-MARC**
 Data Fields
 Leader
 006 Tag
 007 Tag
 008 Tag

**Display in PAC**

(No change)
▼

**Do Not Overlay**

(No change)
▼

**Record Owner**

**From**

(No change)
▼

**To**

(No change)
▼

**Note:**

Additional fixed-field changes are planned for development in 7.0.

- **Non-MARC:** select this tab to change Polaris-specific bibliographic information (such as **Display in PAC** or **Do Not Overlay**).
- **Data Fields:** select the drop-down list under **Operation** to choose the type of change to make (for example, insert a new tag, delete a tag, insert a sub-field).
- **Leader:** select this tab to make changes to the LDR tag (such as Records status, Bibliographic level, or Encoding level).
- **008 Tag:** select this tab to make changes to the 008 tag (such as for Index, Language, Cataloging Source).

## Change Non-MARC Information

Select the Non-MARC tab to change the following Polaris-specific information:

1. **Display in PAC:** to display (or not display) the records in the PAC, select Checked or Unchecked.
2. **Do Not Overlay:** to change the setting that specifies if the bibliographic records can be overlaid, select Checked or Unchecked.
3. **Record Owner:** to change the owner of the records, select the current owner in the **From** list, and select the new owner in the **To** list.
4. **Save Provisional Records as Final:** to change provisional bibliographic records to final records, select the check box to the right.
5. **Create Resource Entities for Vendor Account:** to create resource entities to manage electronic resources, select the **Create Resource Entities for Vendor Account** check box, and then select a vendor account from the list.
6. Select **Update Bibs**.

**Bibliographic Record Bulk Change** UPDATE BIBS CANCEL

Another Unicode Record Set  
Stillwater

Non-MARC Data Fields Leader 008 Tag

Display in PAC: (No change) Do Not Overlay: Checked

Record Owner:  
From: (No change) To: (No change)

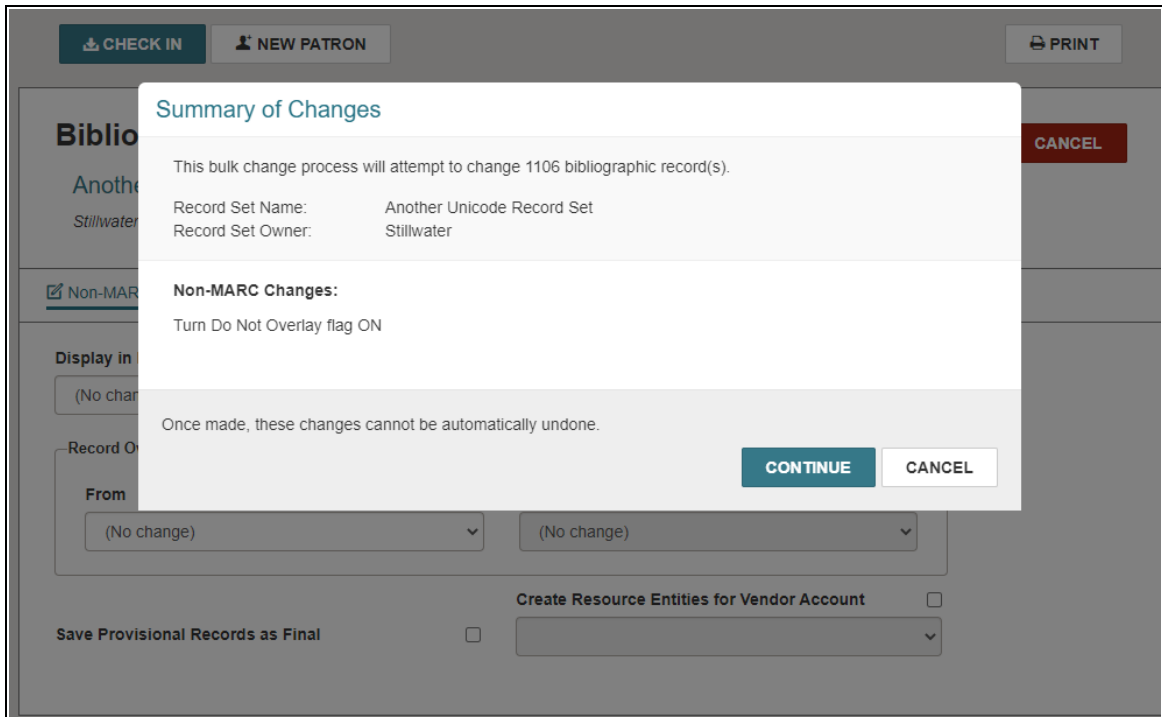
Save Provisional Records as Final:  Create Resource Entities for Vendor Account:

The Summary of Changes dialog opens.

7. Check the Summary and do one of the following:
  - Select **Continue** to make the bulk changes. A message tells you the change was added to the bulk change queue. You return to the Bibliographic Record

Set page.

- Select **Cancel** to return to the Bibliographic Bulk change page without making changes.



---

## Select Data Fields to Change

1. In the Operation box, select the operation you want the bulk change to perform on the data fields you specify.

## Bibliographic Record Bulk Change

UPDATE BIBS
CANCEL

Another Unicode Record Set

Stillwater

---

Non-MARC
 Data Fields
 Leader
 006 Tag
 007 Tag
 008 Tag

---

**Operation**

Insert a new tag
▼

**Tag Number**

**Indicator One**

**Indicator Two**

**Subfields**

\$	a	Lullaby	↩
----	---	---------	---

🗑️ \$a Lullaby

ADD TO CHANGE QUEUE

**Change Queue**

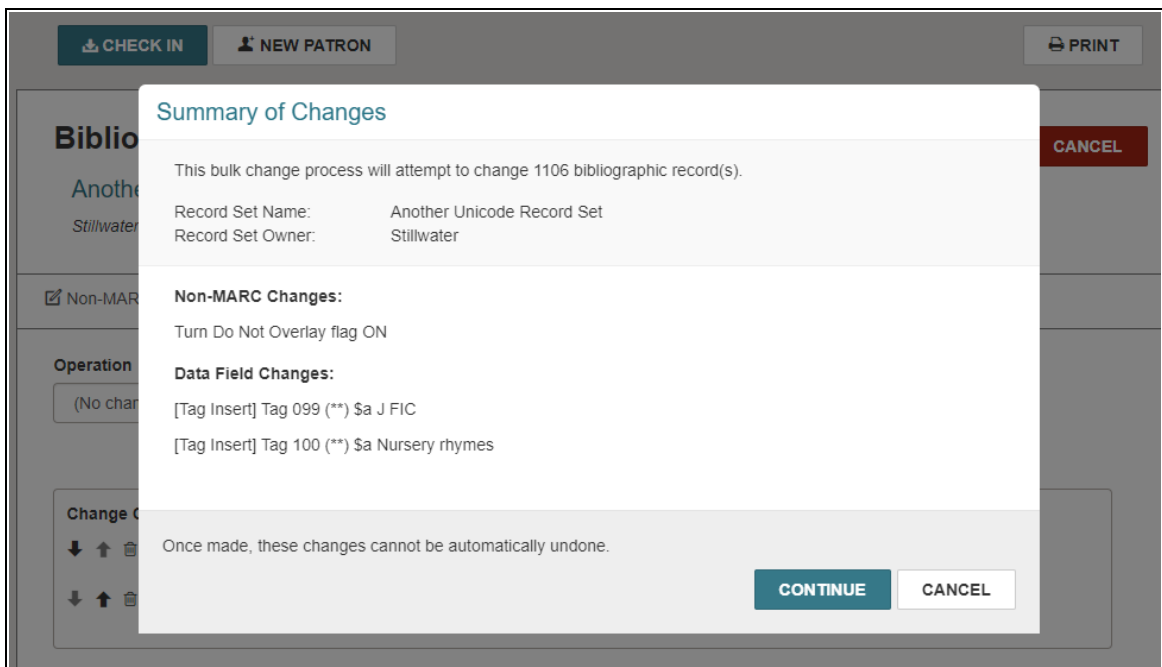
⬇ ⬆ 🗑️ [Tag Insert] Tag 099 (\*\*) \$a J FIC

⬇ ⬆ 🗑️ [Tag Insert] Tag 650 (\*\*) \$a Nursery rhymes

The operation choices follow:

- Insert a new tag
- Insert new subfield(s) into an existing tag (before a specific subfield)
- Insert new subfield(s) into an existing tag (after a specific subfield)
- Delete an existing tag (first instance only)
- Delete an existing tag (last instance only)
- Delete an existing tag (all instances)
- Delete a subfield (any data) from an existing tag
- Delete a subfield (with specific data) from an existing tag
- Delete a subfield (any data) from an existing tag (last instance only)
- Change a tag's number only (subfields and data stay the same)
- Change a specific tag's subfield code only (data stays the same)

- Replace a tag's subfield (with specific data)
  - Correct non-filing indicator values (initial articles 'a', 'an' or 'the')
2. When you have completed your changes to the Data Fields, select **Update Bibs**. The Summary of Changes dialog opens.
  3. Check the Summary and do one of the following:
    - Select **Continue** to make the bulk changes. A message tells you the change was added to the bulk change queue. You return to the Bibliographic Record Set page.
    - Select **Cancel** to return to the Bibliographic Bulk change page without making changes.



## Specify the Leader Tag

Select the Leader tab to change the Leader-tag information.

1. Go to the position you want to change.

**Note:**

When you select the LDR/06, a message reminds you to make the appropriate changes to the 008.

2. In the "From" field on the left, select the value to change.

**Tip:**

If you are correcting invalid values, you can select an invalid value for the position in the From box, or you can select **{All invalid values}** from the list. The bulk change process replaces the invalid values with the selection in the To box.

3. In the "To" field on the right, select the value to put in the selected position.
4. Select any other positions you want to change in the 008 tag, and specify the "From" and "To" values.

5. Select **Update Bibs**.

## Bibliographic Record Bulk Change

Another Unicode Record Set

Stillwater

UPDATE BIBS

CANCEL

---

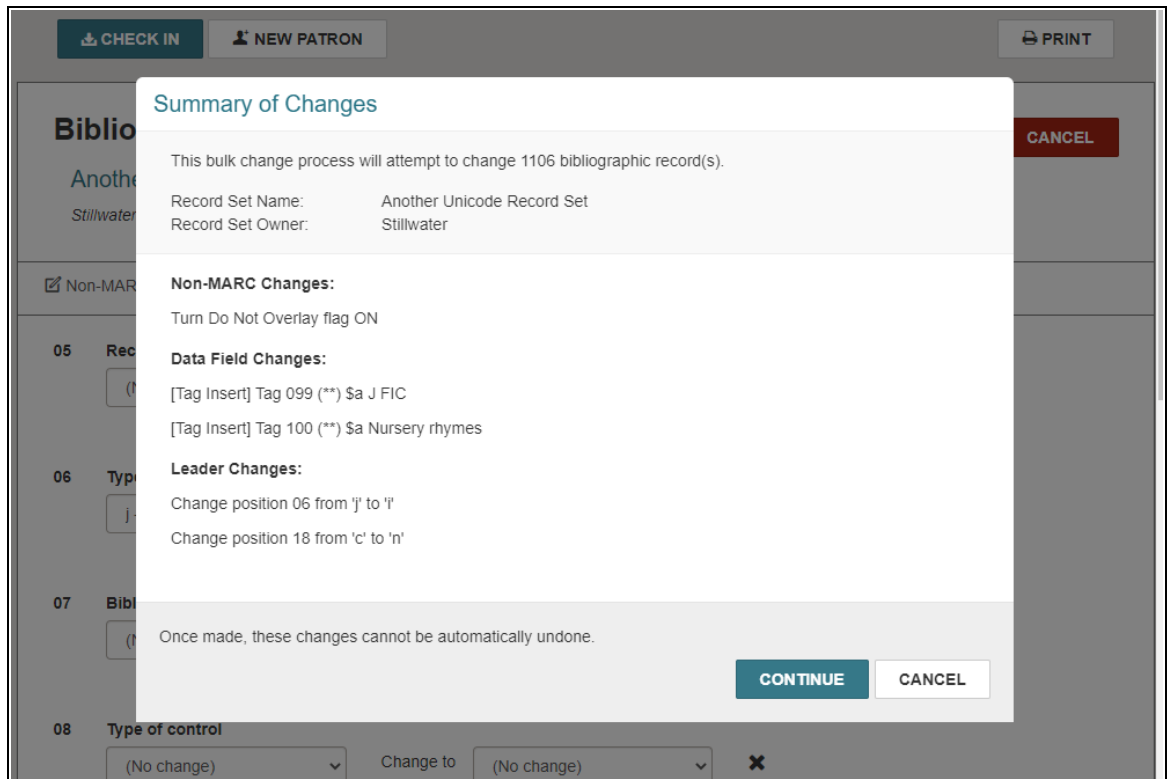
Non-MARC
Data Fields
Leader
006 Tag
007 Tag
008 Tag

<b>05</b>	<b>Records status</b>	Change to		✘
	<input type="text" value="(No change)"/>		<input type="text" value="(No change)"/>	
<b>06</b>	<b>Type of record</b>	Change to		✘
	<input type="text" value="j - Musical sound recordin"/>		<input type="text" value="i - Nonmusical sound recc"/>	
<b>07</b>	<b>Bibliographic level</b>	Change to		✘
	<input type="text" value="(No change)"/>		<input type="text" value="(No change)"/>	
<b>08</b>	<b>Type of control</b>	Change to		✘
	<input type="text" value="(No change)"/>		<input type="text" value="(No change)"/>	
<b>09</b>	<b>Character coding scheme</b>	Change to		✘
	<input type="text" value="(No change)"/>		<input type="text" value="(No change)"/>	
<b>17</b>	<b>Encoding level</b>	Change to		✘
	<input type="text" value="(No change)"/>		<input type="text" value="(No change)"/>	
<b>18</b>	<b>Descriptive cataloging form</b>	Change to		✘
	<input type="text" value="c - ISBD punctuation omit"/>		<input type="text" value="n - Non-ISBD punctuation"/>	
<b>19</b>	<b>Linked record requirement</b>	Change to		✘
	<input type="text" value="(No change)"/>		<input type="text" value="(No change)"/>	

The Summary of Changes dialog opens.



6. Check the Summary and do one of the following:
  - Select **Continue** to make the bulk changes. A message tells you the change was added to the bulk change queue. You return to the Bibliographic Record Set page.
  - Select **Cancel** to return to the Bibliographic Bulk change page without making changes.



## Specify the 008 Tag

Select the 008 tab to change 008-tag information:

1. Select the material type to edit from the **Type of Material** list.

2. Select the down-arrow that corresponds to the 008 tag position you want to change.

**Bibliographic Record Bulk Change** UPDATE BIBS CANCEL

Another Unicode Record Set  
Stillwater

Non-MARC Data Fields Leader 006 Tag 007 Tag 008 Tag

Type of Material  
Books

06  Type of date

15-17 Place of publication

18-21 Illustrations

22 Audience

23 Form of item

24-27 Nature of contents

3. To change an existing value. Select a "From" value from the left drop-down list and select a "To" value from the right drop-down list.
4. Select the positions you want to change in the 008 tag of all records in the record set.

5. Click **Update Bibs**.

The Summary of Changes dialog opens.

6. Check the Summary and do one of the following:

- Select **Continue** to make the bulk changes. A message tells you the change was added to the bulk change queue. You return to the Bibliographic Record Set page.
- Select **Cancel** to return to the Bibliographic Bulk change page without making changes.

**Summary of Changes**

This bulk change process will attempt to change 1106 bibliographic record(s).

Record Set Name: Another Unicode Record Set  
Record Set Owner: Stillwater

**Non-MARC Changes:**  
Turn Do Not Overlay flag ON

**Leader Changes:**  
Change position 06 from 'j' to 'i'  
Change position 18 from 'c' to 'n'

**Fixed Field Changes:**  
008 Books: Change position 06 from 'e' to 'm'  
008 Books: Change position 15-17 from 'am ' to 'aru'

Once made, these changes cannot be automatically undone.

**CONTINUE** **CANCEL**

## Leap Copy Cataloging

Leap's bibliographic find tool now offers the ability to search both local and remote databases for bibliographic records. You can copy the cataloging details of bibliographic records from any database you can search.

Three new Cataloging Profiles are added to Polaris Administration in the staff client to help with Leap's performance when returning records from a remote database search:

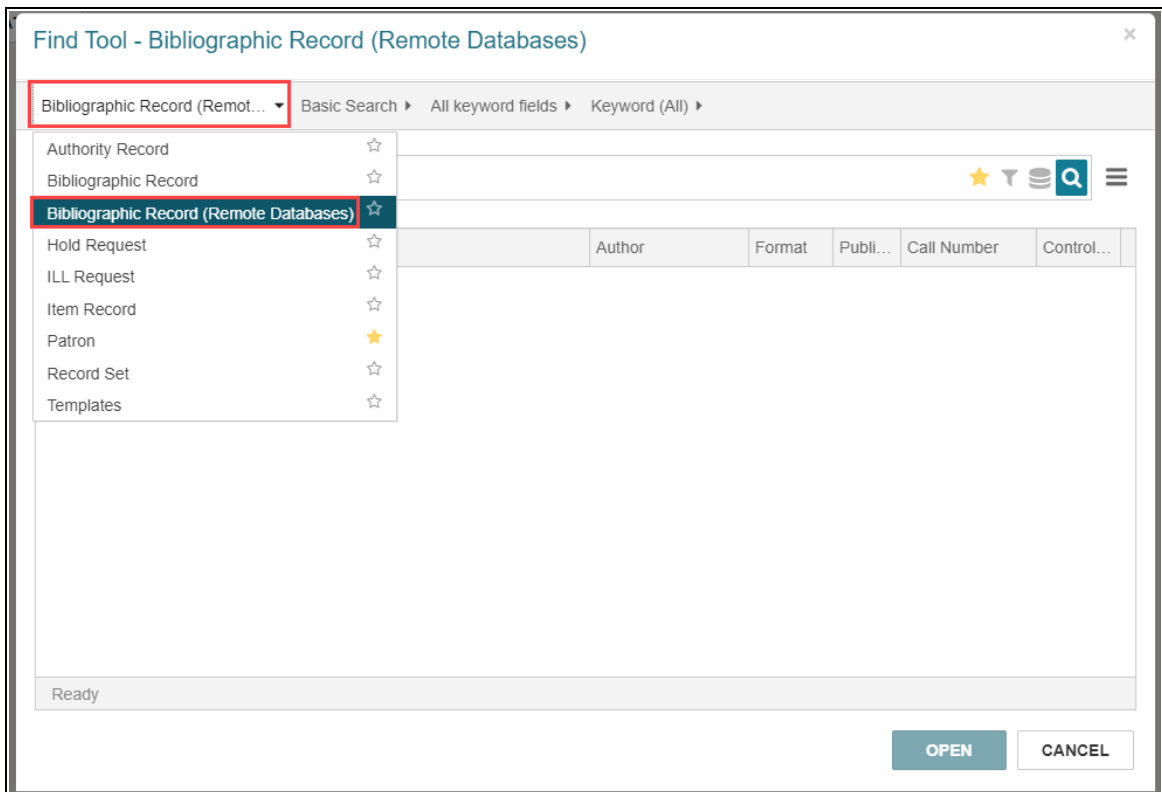
- Web App: Remote databases: Maximum number that can be searched at once
- Web App: Remote databases: Maximum number of records to return
- Web App: Remote databases: Maximum search time (seconds)

**Tip:**


Search "Cataloging Profiles" in the Polaris staff client help for detailed information about these new profiles.

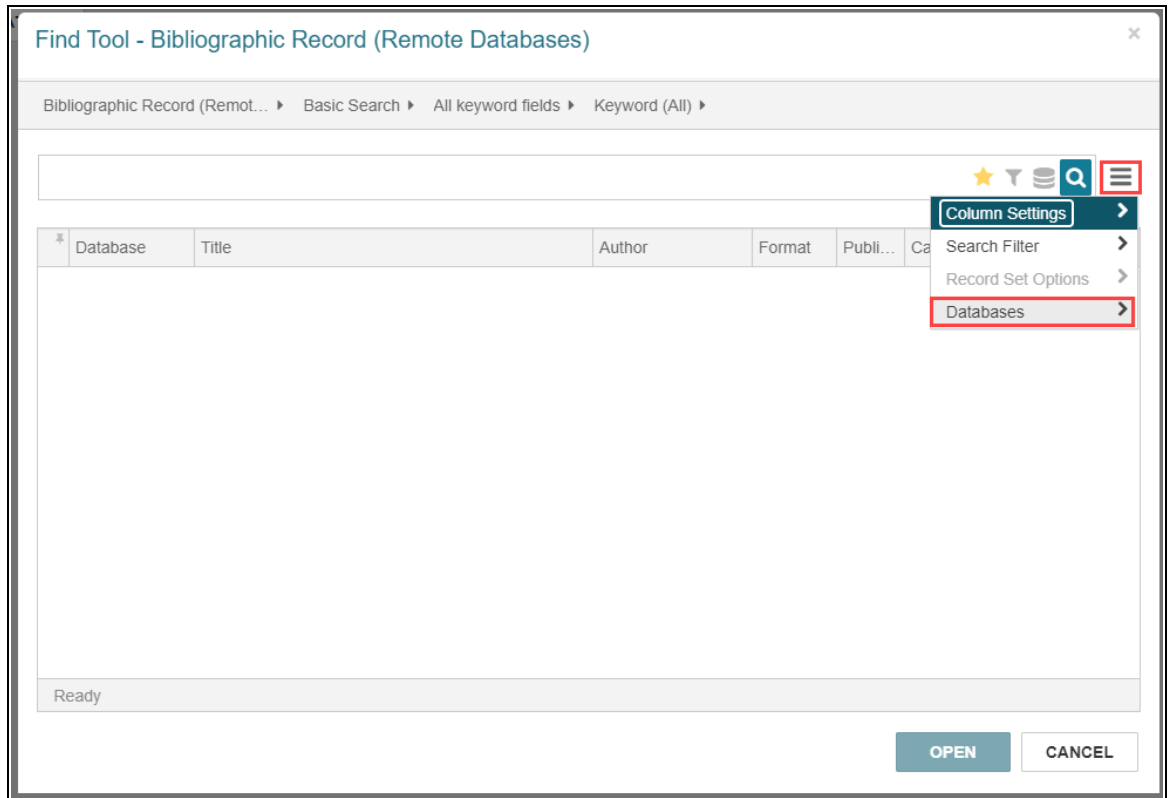
To search the Leap remote databases:

1. Go to the Leap Find tool and select Bibliographic Record (Remote Databases).



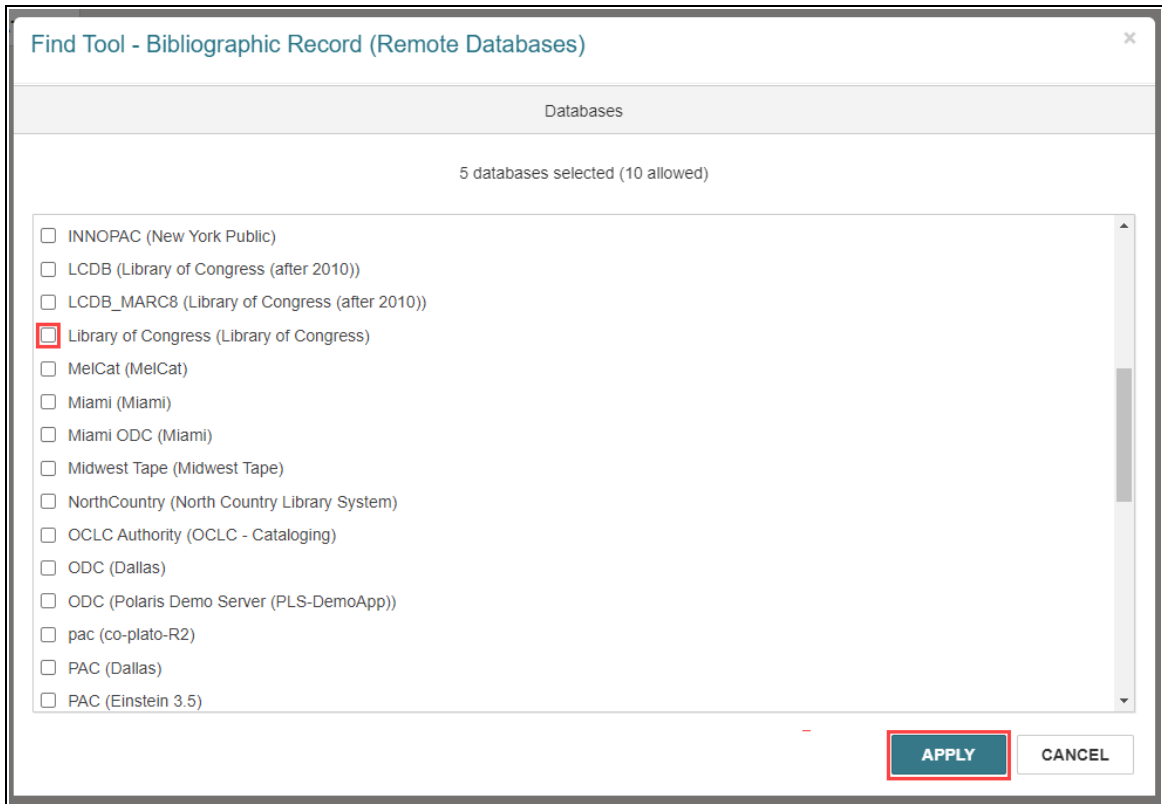
2. Do one of the following to select Databases:

- Select the Database icon  beside the Search icon.
- From the hamburger menu, select Databases.



The Databases dialog opens.

3. Select up to 10 remote databases (the SA controls max that can be selected).



4. Select **Apply**. You return to the Find Tool - Bibliographic Record (Remote Databases) dialog.

5. Type a keyword and select **Open**. A list of search results appears.

The screenshot shows a web interface titled "Find Tool - Bibliographic Record (Remote Databases)". The search path is "Bibliographic Record (Remot...) > Basic Search > All keyword fields > Keyword (All)". The search term "icon" is entered in the search box. Below the search box is a table of search results. The first row is selected and highlighted in dark blue. The table has columns for Database, Title, Author, Format, Publi..., Call Number, and Control... The status bar at the bottom indicates "Retrieving results from remote database (570 results pending) Add Pending Results" and "180 result(s)". At the bottom right, there are buttons for "SEARCH STATUS >", "OPEN" (highlighted with a red box), and "CANCEL".

Database	Title	Author	Format	Publi...	Call Number	Control...
<input checked="" type="checkbox"/> PAC (MAIN)	James Dean : American icon	Dalton, David.	Book	1984	791.43028 Dal	4068
PAC (MAIN)	The art of humanism	Clark, Kenneth, 1...	Book	1983	709.45 Cla	10985
PAC (MAIN)	The English vision : the picturesque in architecture...	Watkin, David, 19...	Book	1982	712.0942 Wat	15922
PAC (MAIN)	Baroque	Martin, John Rup...	Book	1977	709/.03/2	17581
PAC (MAIN)	A concise history of American architecture	Roth, Leland M.	Book	1979	720/.973	18088
PAC (MAIN)	The Renaissance artist at work : from Pisano to Titi...	Cole, Bruce, 193...	Book	1983	709.45 Col	20075
PAC (MAIN)	Sculpture : processes and principles	Wittkower, Rudolf.	Book	1977	730	26614
PAC (MAIN)	Concepts of modern art.	Richardson, Tony,...	Book	1974	709/.04	28161
PAC (MAIN)	The New York School : the painters and sculptors ...	Sandler, Irving, 1...	Book	1978	709/.747/1	28201
PAC (MAIN)	Michelangelo	Hibbard, Howard,...	Book	1974	700/.92/4 B	28248


6. Select a record from the search results. The MARC record appears.



7. Select **Save** to copy the MARC information into the Leap database.

### New Bibliographic Record

SAVE
📄
CLOSE



#### Big brown bear

By McPhail, David, 1940-

**Control number:**

**Owner:**

**Record status:**

Display in PAC
  Do not overlay
  Host
  ILL

---

MARC

```

LDR      | | | | | cam a22 | | | | | a 4500
001      410005
005      20130326083330.0
008      980317s1999 200caua j      000 1 eng u
010      $a 98015568 /AC
020      $a0152048170 $c$11.95
020      $a0152023453 $c$10.95
020      $a0152019995 (pbk.& Penworthy) : $c$3.95
035      $aAGF-5127
050 00   $aPZ8.3.M2395 $bBi 1999
082 00   $a[E] $221
            
```

Select **Close** to exit to the standard Bibliographic Record options without saving to the Leap database.

**Note:**

Polaris 6.7 saves with no MARC validation or duplicate detection. The system does link the saved record to existing authority records. MARC validation or duplicate detection are planned for the next release with MARC editing.

## Combine Serials Issues

Leap users can now combine issues of a serial using the new **Combine Issues** button on the Serials Check In workform.

**Tip:**

If the publication will regularly include this combined issue, modify the publication pattern.

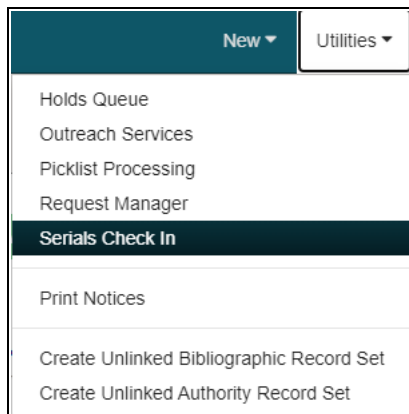
For the permissions needed to work with serials and standing order parts, search the Polaris online help for "Serials Workflow Permissions."

You can combine issues, but not standing-order parts. The two issues must be linked to the same publication pattern to be combined. If they are not linked to the same publication pattern, an error message appears, and the issues are not combined. Issues with the following status also cannot be combined:

- Received
- Claimed

### To combine serial issues

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



The serials Find Tool opens.

2. In the Find Tool, type the title of a serial.
3. Select a result, and select **Open**. The Serials Check In workform opens.

- Select two issues in the issue list by selecting the check boxes to the left of each issue.

### Serials Check In

SAVE
ACTIONS ▾
REFRESH
RESULTS
CLOSE

GQ

Status: **Currently Received**

Serial holding record ID: **1525**

Copy no.: 1

Call number:

Destination: **Southern Adirondack Library System (SAL)**

Bib control number: **342231**

Collection: **(None)**

Material type:

Non-Public Notes

Non-Public Warning Notes

Check In
Combine Issues
Undo Check In
Delete

Issue/Part Status: Not Received ▾

Filter by Column ▾ Filter

DESIGNATION	CATEGORY	EXPECTED	STATUS	STATUS DATE	PATTERN	ROUTE STATUS
<input type="checkbox"/> Caption Y (Oct. 2020)	Basic Bib / 1	10/22/2020	Expected	8/18/2020	Open	
<input checked="" type="checkbox"/> Caption Z (Nov. 2020)	Basic Bib / 1	11/22/2020	Expected	8/18/2020	Open	
<input checked="" type="checkbox"/> Caption A (Dec. 2020)	Basic Bib / 1	12/22/2020	Expected	8/18/2020	Open	
<input type="checkbox"/> Caption B (Jan. 2021)	Basic Bib / 1	1/22/2021	Expected	8/18/2020	Open	
<input type="checkbox"/> Caption C (Feb. 2021)	Basic Bib / 1	2/22/2021	Expected	8/18/2020	Open	

- Select **Combine Issues**. The Combine Issues dialog box appears.

### Combine Issues

**Combine:** <Both> ▾      **Designation:** Caption Z/A (Nov./Dec. 2020)

**Title of:**

**Public:**

**Non-public:**

**Non-public/warning:**

**Expected arrival date:** 11/22/2020

CONTINUE
CANCEL

6. Select or type information into the fields as described:
  - **Combine:** select one of the following options.
    - **Chronology** to list the lower of the two volume numbers for the combined issue, and list the expected dates of each issue separated by a slash.
    - **Enumeration** to list the volume numbers of the issues with a slash to separate the two numbers, and list only the first of the expected dates.
    - **<Both>** to list the volume numbers of the issues with a slash to separate the two numbers, and list the expected dates of each issue separated by a slash.
  - **Designation:** shows the possible volume number and date of the combined issues depending on what option you select in the **Combine** drop-down list. You can change this text if needed.
  - **Title of:** you cannot edit this text.
  - **Public:** enter an optional public note.
  - **Non-public:** enter an optional note for staff.
  - **Non-public/warning:** enter an optional warning for staff.
  - **Expected arrival date:** defaults to the earliest of the two arrival dates. You can change this date if needed.
7. Click **Continue**. A message appears to tell you the issues were combined successfully.

**Note:**

The new issue has the status of expected only if both combined issues each had the status of "expected." If the two combined issues have expected and another status, the combined issue will have the non-expected status.

## Serials Check In Status Filter

You can now filter the Leap Serials Check In table according to issue or part status.

To filter serial issues or parts:

1. Go to **Utilities > Serials Check In**.  
The Find Tool - Serial Holdings Record page opens.
2. Type the title of a serial and select the search icon.  
A result list appears.
3. Select a serial title from the result list and select **Open**.  
The Serials Check In page opens.

### Serials Check In

SAVE
ACTIONS ▾
↺
📄
CLOSE

GQ

Status: **Currently Received**

Serial holding record ID: **1525**

Copy no.: **1**

Call number:

Destination: **Southern Adirondack Library System (SAL)**

Bib control number: **342231**

Collection: **(None)**

Material type:

Non-Public Notes

Non-Public Warning Notes

📄 Check In
More ▾

Issue/Part Status: All ▾
Filter by Column ▾
Filter

	DESIGNATION	CATEGORY	EXPECTED	STATUS	STATUS DATE	PATTERN	ROUTE STATUS
<input type="checkbox"/>	Caption A (Feb. 2010)	Basic Bib / 1	2/22/2010	Claimed	8/11/2020	Open	
<input type="checkbox"/>	Caption B (Mar. 2010)	Basic Bib / 1	3/21/2010	Received	8/19/2020	Open	
<input type="checkbox"/>	Caption C (Apr. 2010)	Basic Bib / 1	4/21/2010	Received	7/20/2020	Open	
<input type="checkbox"/>	Caption D (May 2010)	Basic Bib / 1	5/21/2010	Received	8/18/2020	Open	
<input type="checkbox"/>	Caption E (June 2010)	Basic Bib / 1	6/21/2010	Pending Claim	8/7/2013	Open	
<input type="checkbox"/>	Caption F (July 2010)	Basic Bib / 1	7/21/2010	Pending Claim	8/7/2013	Open	

4. Select a status from the **Issue/Part Status** list.

**Note:**

The default selection and Not Available status can be configured in Polaris Administration. See "Specify the Display of Issues on the Check In Workform" for more details.

### Serials Check In

SAVE
ACTIONS ▾
↺
↻
CLOSE

GQ

Status: **Currently Received**

Serial holding record ID: **1525**

Copy no.: 1

Call number:

Destination: **Southern Adirondack Library System (SAL)**

Bib control number: **342231**

Collection: **(None)**

Material type:

Non-Public Notes

Non-Public Warning Notes

Check In
More ▾

Issue/Part Status:

All ▾

Filter by Column ▾
Filter

	DESIGNATION	CATEGORY	EXPECTED	STATUS DATE	PATTERN	ROUTE STATUS
<input type="checkbox"/>	Caption A (Feb. 2010)	Basic Bib / 1	2/22/2010	2/11/2020	Open	
<input type="checkbox"/>	Caption B (Mar. 2010)	Basic Bib / 1	3/21/2010	3/19/2020	Open	
<input type="checkbox"/>	Caption C (Apr. 2010)	Basic Bib / 1	4/21/2010	4/20/2020	Open	
<input type="checkbox"/>	Caption D (May 2010)	Basic Bib / 1	5/21/2010	5/18/2020	Open	
<input type="checkbox"/>	Caption E (June 2010)	Basic Bib / 1	6/21/2010	6/7/2013	Open	
<input type="checkbox"/>	Caption F (July 2010)	Basic Bib / 1	7/21/2010	8/7/2013	Open	

The Serials Check In table shows only the issues or parts with the selected status.

### Serials Check In

SAVE
ACTIONS ▾
↺
🖨
CLOSE

GQ

Status: **Currently Received**

Serial holding record ID: **1525**

Copy no.: **1**

Call number:

Destination: **Southern Adirondack Library System (SAL)**

Bib control number: **342231**

Collection: **(None)**

Material type:

Non-Public Notes

Non-Public Warning Notes

Check In
More ▾

Issue/Part Status: Expected ▾
Filter by Column ▾
Filter

	DESIGNATION	CATEGORY	EXPECTED	STATUS	STATUS DATE	PATTERN	ROUTE STATUS
<input type="checkbox"/>	Caption Z (Nov. 2020)	Basic Bib / 1	11/22/2020	Expected	8/18/2020	Open	
<input type="checkbox"/>	Caption A (Dec. 2020)	Basic Bib / 1	12/22/2020	Expected	8/18/2020	Open	
<input type="checkbox"/>	Caption B (Jan. 2021)	Basic Bib / 1	1/22/2021	Expected	8/18/2020	Open	
<input type="checkbox"/>	Caption C (Feb. 2021)	Basic Bib / 1	2/22/2021	Expected	8/18/2020	Open	
<input type="checkbox"/>	Caption D (Mar. 2021)	Basic Bib / 1	3/21/2021	Expected	8/18/2020	Open	
<input type="checkbox"/>	Caption E (Apr. 2021)	Basic Bib / 1	4/21/2021	Expected	8/18/2020	Open	

5. You can narrow your search further by doing the following:

- Filter by Column to further narrow your results.
- Type a keyword to filter by in the **Filter** field

**Note:**

The Issue/Part Status and Filter by Column work as an "AND" between filters. Set the Issue/Part Status to "All" to use the Filter by Column options only.

## Database Sync Restore Options Include System Administration Settings

You can now opt to include system administration configuration settings when running the Database Sync Restore job to update a training or testing environment for Polaris. To continue using the Database Sync Restore job without copying system administration settings, no action is required.

To opt in, you must contact your site manager.

If you are considering opting in, please note that the Database Sync Restore job never copies the following settings:

- **Server records**
- **Environment color and sign-on messages:** Profiles > Staff Client > Client visual alert Configuration
- **Credit Card Payment options:** Parameters > Credit Card Payments > Online payments: configure
- **Collection Agency options:** Parameters > Patron Services > Collection agency options
- **Report Server setup:** Profiles > Staff Client > Report server setup
- **Email/SMTP setup:** Profiles > PAC Email notification: Server running SMTP service and Email notification: Email address of sender

**Note:**

System administration settings that are excluded in previous versions of the Database Sync Restore job (for example, notice export options), are still excluded when the option to copy system administration settings is enabled.



## Improvements to Collection Processing Reports

The following Polaris collection processing reports now include the patron's email address and alternate email address in the report output:

- Submission Report
- Update Report
- Collection Agency Synchronization Report

This improvement means that libraries no longer need to export delinquent patron email addresses via SimplyReports in order to provide them to the collection agency.

## International Date Formats in Circulation Receipts

Dates in all circulation receipts and slips now appear in the date format that is appropriate for your location. Polaris uses the server's configuration to determine the date format to display. For example, servers configured for Canada use the date format most common in Canada.

This change affects the following types of receipts and slips:

- Check-in receipts
- Check-out and renewal receipts (including those generated from offline transactions)
- Fine payment receipts
- ILL slips
- Hold slips
- In-transit slips and combined in-transit and pickup slips

## **Improvements to Staff Client User Documentation**

In previous versions, the Polaris staff client user documentation was embedded in the software application, and you could only access it after signing in to the staff client.

In Polaris 6.7, when you launch the documentation using the Help menu in the staff client, the documentation opens in a browser window. This improvement means that you can:

- Use the documentation even when you are not signed in to the staff client.
- Share documentation topics with others by sending hyperlinks.

## Web Admin Tool Updates

The table below lists the most important new strings added in Polaris 6.7.

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### PowerPAC Strings

Mnemonic String	Text
PACML_CHANGEPREFERENCES_REQUEST_PREF_BRANCH	Preferred pickup location
PACML_SUBMITEDITBASICINFO_PREF_BRANCH	Updated Preferred Pickup Location to