



What's New in Polaris 5.1 & Leap 1.1

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New and Modified Polaris Administration Settings

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

Location / Name	Purpose	Default	Level
Administration Permissions			
Access INN-Reach administration: Allow	When granted, the user can access the web-based administration functions to see INN-Reach request activity. See "Give staff permission to access INN-Reach administration functions" on page 22.	No	System
Request Parameters			
INN-Reach: Automatic return at check-in	Specifies whether checking in and returning an INN-Reach item are handled as separate processes or combined in a single process. See "Set INN-Reach request parameters in Polaris Administration" on page 23.	No (The processes are separate by default; set to Yes to check in and return in a single process.)	System, Library, Branch
INN-Reach: Use my branch to ship/receive material	Sets the item branch as the branch for shipping/receiving items requested through INN-Reach. See "Set INN-Reach request parameters in Polaris Administration" on page 23.	Yes	System, Library, Branch
INN-Reach: Use this branch to ship/receive material	Sets a designated branch as the branch for shipping/receiving items requested through INN-Reach. See "Set INN-Reach request parameters in Polaris Administration" on page 23.		System, Library, Branch
Leap Parameters			
RFID: Auto-poll RFID tags	Enables automatic polling of RFID tags in Leap. See "Leap - Auto-Polling for RFID Tags" on page 89.	No	Workstation

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Location / Name	Purpose	Default	Level
Patron Services Parameters			
You Saved Receipt Options	Adds a “you saved” message to printed and email check-out/renewal receipts and the printed Items Out list and sets options for the message. The message helps to remind patrons of the value of library service by displaying how much it would cost to purchase the items. See ""You Saved" Receipt Message" on page 5.	No	System Library Branch
PAC Profiles			
Enriched Data (Novelist tab)	Novelist Select supports a link to whatever NovelList product the library subscribes to. See "Novelist Select Includes All NovelList Links" on page 78.	No	System Library Branch
PowerPAC Profiles			
Dashboards: Web part construction	The IndieBound Book Sense Children's Interest best seller list is expanded into two separate lists: Early and Middle Grade Readers, and Young Adult; separately selectable. See "IndieBound Book Sense "Children's Interest" Best Seller List Expanded" on page 77. Children's Fiction Series also added for selection.	N/A	System
Dashboards: Web page/Web part assignment	The IndieBound Book Sense Children's Interest best seller list is expanded into two separate lists. See "IndieBound Book Sense "Children's Interest" Best Seller List Expanded" on page 77. Children's Fiction Series also added for selection.	N/A	System Library Branch
Portal page content carousels	The IndieBound Book Sense Children's Interest best seller list is expanded into two separate lists. See "IndieBound Book Sense "Children's Interest" Best Seller List Expanded" on page 77. Children's Fiction Series also added for selection.	N/A	System Library Branch
Mobile PAC Profiles			
New and Popular Titles	The IndieBound Book Sense Children's Interest best seller list is expanded into two	N/A	System Library

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Location / Name	Purpose	Default	Level
	separate lists. See "IndieBound Book Sense "Children's Interest" Best Seller List Expanded" on page 77. Children's Fiction Series also added for selection.		Branch
Policy Tables			
PAC Limit by Display	New Types of Material added. See "New Types of Material (TOMs) for PAC Search Filters " on page 68	Yes	System Library Branch

Database Sync Restore Process Improved

The Database Sync Restore process (DBSync) is now a dual-purpose job that handles database backup in the production environment and table backups in the training environment.

- On the production server, the job creates database backups of the Polaris ILS databases. The production job should be scheduled to start after the close of business, but should finish before the training side job starts.
- On the training server the job will back up the existing configurations, restore the production database backups, and then restore the training configurations back on top of the production data.

After the job runs, the training environment gets an updated copy of the production data (patron, bib, item, and workstation information). It receives any table changes (for example, when a new column has been added to the Workstations table or a dependent table) but remains a functioning, separate training environment.

More focused SQL job steps to allow easier troubleshooting if the process stops working as intended; for example, if the training server runs out of disk space.

The training environment processes now offer more options for customization. For example, you can opt to preserve SimplyReports saved reports and jobs. Telephony configurations can also be preserved (only needed when the library uses a telephony server in the training environment). In addition, the training environment can now optionally have a separate list of workstations' enabled states:

- Libraries can now have “training-only” workstations that are enabled on training, but that remain disabled on production. This requires workstations to be added to production first (in a disabled state) and then manually enabled on training after the next execution of the DBSync job. The process will then work as intended for all future iterations.
- Libraries can now also have “production-only workstations” that are enabled on production, but that remain disabled on training. This requires workstations to be added to production first (in an enabled state) and then manually disabled on training after the next execution of the DBSync job. The process will then work as intended for all future iterations.

The DBSync job now requires a site license to ensure that libraries get the latest revision (if needed) during Polaris ILS upgrades. Both the production and training servers should have the license applied. For more information, contact your Customer Account Manager.

"You Saved" Receipt Message

You can now add a "you saved" message to printed and email check-out/renewal receipts and the printed Items Out list. The message helps to remind patrons of the value of library service by displaying how much it would cost to purchase the items. It includes the total value of the current receipt transactions, the value of the patron's year-to-date transactions, and the "lifetime" value of all the patron's transactions.

The value for each item is calculated based on the retail price stored in the item record. If the item doesn't have a price, you can opt to use the Replacement Fee default value for that material type. You can also choose to suppress the message if the value is below a specified dollar amount.

Note:

The You Saved message option does not apply to text message receipts, and it cannot be activated or suppressed for individual patrons.

- **Staff client** - When the You Saved message is implemented at the check-out workstation branch, the value is calculated for all items, regardless of item or patron branch. The message is included on check-out receipts generated from the staff client Check Out workform and (if the branch has opted to include renewals in the calculation) renewals from the Patron Status workform. If the organization has opted to print the message on the Items Out slip, the message also appears when the Items Out slip is printed from the Patron Status Items Out list view.
- **Leap** - When the logged-on user's branch has implemented the You Saved message, the message is included on receipts generated from the Leap Check Out workform (check out or renewal) and from the patron Items Out view (renewal).
- **Polaris PowerPAC and Mobile PAC** - Settings for the patron's registered branch control whether the You Saved message appears on email receipts for items renewed from PAC.
- **Polaris ExpressCheck** - When the You Saved message is implemented at the ExpressCheck workstation's parent branch, the value is calculated for all items, regardless of item or patron branch. If the ExpressCheck station is configured to print one receipt per item (**Parameters | SelfCheck unit | Polaris ExpressCheck Options**), then only one item will be included in the receipt tally.
- **SIP Self-Check Units** - You can include the You Saved message on printer messages, screen messages, or both. The message is added to the existing check-out and renewal messages (if you have opted to include the message for renewals). The system uses the settings of the organization associated with the self-check unit's SIP Service Port.

For setup information, see:

- "Setting Up You Saved Receipt Messages" on page 7
- "Additional Settings for SIP Self-Check Units" on page 8

Customizing the You Saved Message

The default You saved message is **You just saved [Value] by using your library. You have saved [YTDValue] this past year and [LifetimeValue] since you began using the library!** Use Polaris Language Editor (WebAdmin) to customize the You Saved message. Select the Receipts “product.” The message mnemonic is RECEIPT_YOUSAVED. To include monetary values, do not edit the text in brackets. The message is truncated to 255 characters. For more information about editing messages, see WebAdmin online help.

Year-To-Date and Lifetime Savings in the Patron Record

Year-to-date and lifetime savings values are available in the Polaris staff client patron record properties sheet. In the staff client, select the **Properties** icon or press F8 on the Patron Registration or Patron Status workform to view the patron record properties sheet.

In Leap, year-to-date and lifetime savings values are available in the Misc. Info section of the patron record.

Processing the Year-to-Date Amount

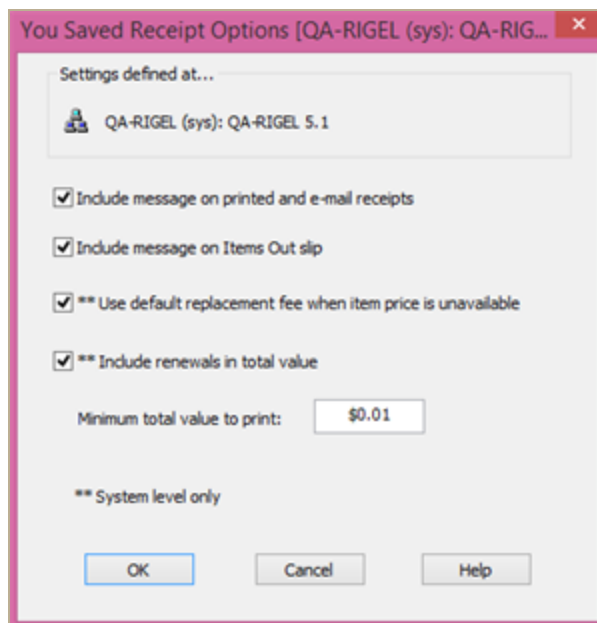
Previous year-to-date values are saved in a new table, PrevYearYouSavedAmount, which is populated when the circulation year-end rollover job runs. Table columns include PatronID (int) and YTDYouSavedAmount (money). The Circ_YearEndCircCountRollover job script rolls over the new YTDYouSavedAmount field from the patron record into the

PrevYearYouSavedAmount table and then zeroes out the YTDYouSavedAmount value in the patron record.

Setting Up You Saved Receipt Messages

These settings affect all Polaris applications that will use the You Saved message, including Leap. To set up You Saved messages:

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization (system, library, or branch), and click the **Patron Services** tab in the details view.
2. Double-click **You Saved Receipt Options**.



3. Select **Include message on printed and e-mail receipts** to add the You Saved message to these checkout receipts.
4. Select **Include message on Items Out slip** to add the You Saved message to the Items Out list (printed from the staff client Patron Status workform and from Leap patron Items Out view).
5. (System level only) Select **Use default replacement fee when item price is unavailable** to use this value for items with no price in the item record. (Default replacement fees are set with the Patron Services parameter **Replacement fee options**.) If you leave this option unchecked and the item record does not include a price, the item is not included in the You Saved calculation.
6. (System level only) Select **Include renewals in total value** to include the value of renewed items in the You Saved calculation.

7. If you want to set a minimum You Saved value to trigger the You Saved message, enter the value in the **Minimum total value to print** box. If the value is below the minimum setting or the sum is 0, no message appears. The default value is \$0.01; in this case, the receipt includes the You Saved message regardless of the calculated You Saved amount.
8. Click **OK**.

Additional Settings for SIP Self-Check Units

To set up the You Saved message for SIP self-check units:

1. Set You Saved options as described in "Setting Up You Saved Receipt Messages" on page 7.
2. In the Administration Explorer tree view, open the **Parameters** folder for the organization (system, library, or branch), and click the **SelfCheck unit** tab in the details view.
3. To include the You Saved message in the self-check printed receipt:
 - a. Set **Use printer messages** to **Yes**.
 - b. Set **Check-out: Append you saved message to Checkout Printer message** to **Yes**.
4. To include the You Saved message in the self-check screen display:
 - a. Set **Use screen messages** to **Yes**.
 - b. Set **Append you saved message to Checkout Screen message** to **Yes**.
5. Select **File, Save**.

INN-Reach Integration - Overview and Implementation

INN-Reach is Innovative's user-initiated direct consortial borrowing system. Libraries running the Polaris ILS can now take advantage of direct interaction with INN-Reach to expand their resource-sharing and consortial-borrowing capabilities, while using established Polaris workflows to manage circulation. Once INN-Reach has been implemented, your library's patrons can discover titles and place holds on items that other participating Sierra, Millennium, or Polaris libraries have contributed to the INN-Reach Central Catalog. The integration also enables your library to loan items it owns to patrons from other libraries who have placed requests on these items through INN-Reach.

When a patron places a request on an item in the INN-Reach Central Catalog, INN-Reach first identifies and authenticates the patron placing the request. If INN-Reach verifies that the patron is registered with your library and authorized to place INN-Reach requests, INN-Reach sends a Create Patron Hold API message to your Polaris library. This message initiates the integrated borrowing process whereby a series of INN-Reach API messages and internal Polaris transactions: create the Interlibrary (ILL) hold request in Polaris; create the virtual item and bib when the item is received; display the ILL item in the patron account; notify the patron that the item is held and ready for pickup; inform the owning library when the item has been shipped back; and then delete the virtual item and bib when the item is checked in at the owing library. See "INN-Reach Integration - Polaris as the Borrowing Library" on page 28.

When a patron from another library places an INN-Reach request on an item owned by your Polaris library, INN-Reach sends a Create Item Hold API message to your library. This API message initiates the integrated lending process whereby a series of API messages and internal Polaris transactions: create the virtual patron record and link a hold for the requested item to that virtual patron; update the hold and item to indicate the item was shipped; confirm the shipment; check the item out to the virtual patron; update the hold request to a Held status when received at the borrowing library; notify the borrowing library that the circulation is complete; and then delete the request and virtual patron record. "INN-Reach Integration - Polaris as the Lending Library" on page 44.

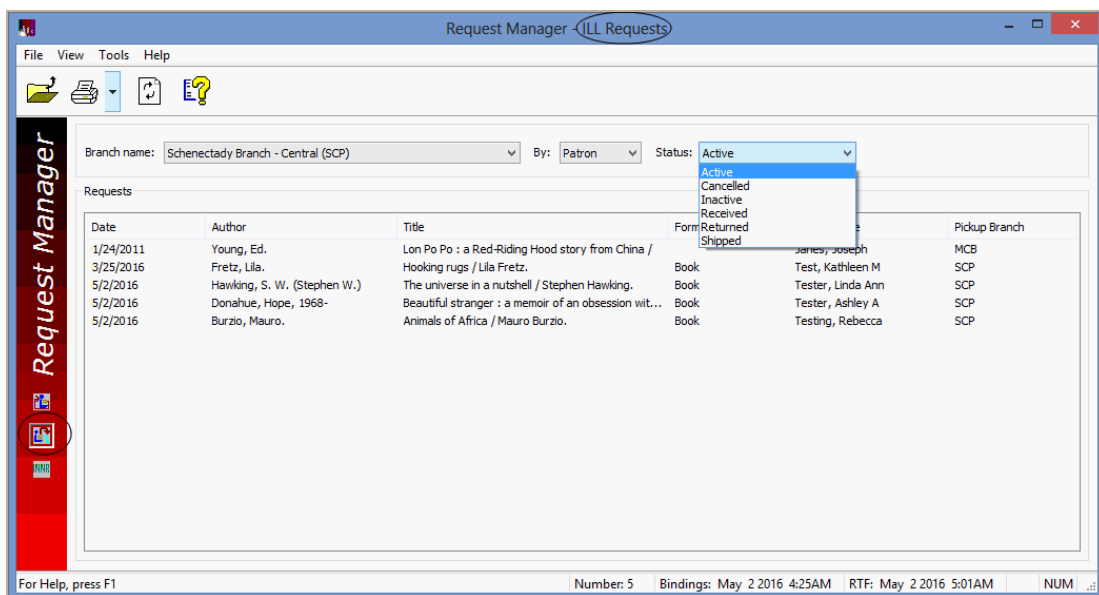
Once licensed for INN-Reach, your library can use the Request Manager to manage both INN-Reach requests placed by your patrons and INN-Reach requests placed on your items by patrons at other participating libraries.

Note:

To use the Request Manager, staff must be assigned the existing **Access Hold Request Manager** and the **Access ILL Request Manager** permissions in Polaris.

INN-Reach requests from your library patrons to borrow items from other libraries are listed on the ILL Requests view in the Request Manager.

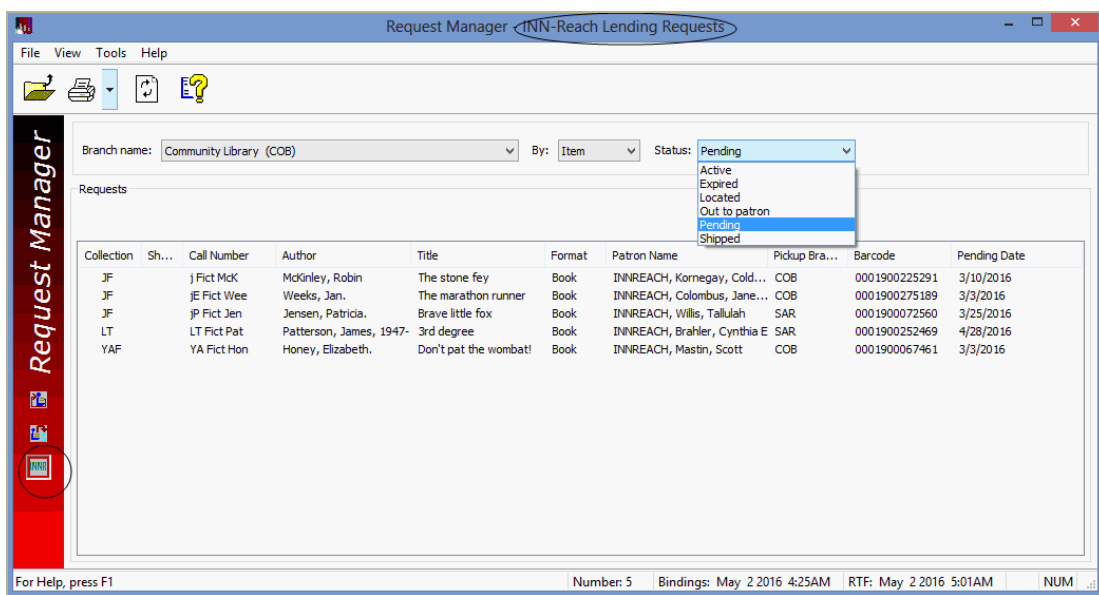
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INN-Reach requests to loan items to patrons at other participating libraries are listed on the INN-Reach Lending Requests view.

Note:

Only Polaris libraries with a license for INN-Reach integration can see this view on the Request Manager workflow.



Implementing INN-Reach Integration with Polaris

To implement INN-Reach integration with your Polaris system, your library, with the assistance of Innovative Interfaces staff, does the following tasks:

- Installs the INN-Reach license key (**ILS_LICENSEKEY_INNREACH**) with Polaris. When the license has been installed, the INN-Reach views, menu options, and toolbar options display in the Polaris application.
- Sets up the local configuration and mapping profile that:
 - Specifies the criteria that must be met for local items to be contributed to the INN-Reach Central Catalog. These criteria are also used in synchronizing your local catalog with the INN-Reach Central Catalog—automatically adding (contributing), deleting (de-contributing), or changing records in the INN-Reach Central Catalog. For example, changing an item's status, material type, or collection may automatically de-contribute the item if it no longer meets the contribution criteria specified in your profile.
 - Maps the Polaris item collections and material types to local INN-Reach ITypes and the local ITypes to central ITypes. The central ITypes are used in template (name) matching to generate the correct virtual INN-Reach items. It is also used in mapping Polaris format IDs to ITypes so that the correct TOM icon for the held item appears in the patron's account. See "Item Material Types for Uploading and Mapping to INN-Reach ITypes" on page 17.
 - Maps the Polaris patron codes to INN-Reach PTypes. This mapping is used to authenticate your patrons when they use the INN-Reach Central Catalog to place holds on items owned by other libraries, and to create virtual patron records when patrons from other libraries place INN-Reach requests on items owned by your library. See "INN-Reach Configuration and Mapping Spreadsheet" on page 15.
- Grants permissions to specific staff members so that they can access INN-Reach administration functions. See "Give staff permission to access INN-Reach administration functions" on page 22.
- Creates INN-Reach item templates in Polaris for each INN-Reach Central item type (IType) the library will use. See "Set up INN-Reach ILL item templates" on page 25.
- Identifies/updates the institutional patron record that will be used as a template in the automatic creation of virtual patron records. See "Enable creation of virtual patron records" on page 27.
- Sets the INN-Reach parameter that specifies the shipping and receiving branch for materials requested through INN-Reach. The INN-Reach parameter is also checked during check in of the ILL item at the borrowing library. Depending on the setting, the item either goes in-transit or "floats" in to the branch where the borrowing patron

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returned the item. See "Set INN-Reach request parameters in Polaris Administration" on page 23.

- (Optionally) Sets the Request parameter to combine the check-in and return processes for INN-Reach ILL requests. If this parameter is set to **Yes**, the item is checked in and the ILL hold status is automatically updated to **Returned**. If the library leaves the parameter set to the default of **No**, the ILL items must be checked in and returned in two separate steps.

INN-Reach Configuration and Mapping Profile

The library, with the help of an Innovative implementation representative, completes the INN-Reach Configuration and Mapping Excel spreadsheet that specifies the criteria for contributing bibliographic and item records to the Central catalog and determines which patrons (patron codes) can place holds on items in the Central catalog. In addition, the spreadsheet maps Polaris patron codes to INN-Reach patron types (PTypes) and Polaris item material types and collections to INN-Reach item types (ITypes). The spreadsheet is then imported into the local Polaris database using a utility.

Once the spreadsheet has been imported into the local Polaris database, the appropriate records are uploaded (contributed) to the INN-Reach Central catalog. In addition, the patron and item mappings specified in the spreadsheet are used to map Polaris patron and item codes to PTypes and ITypes used by the INN-Reach Central catalog. If necessary, the configuration spreadsheet can be modified and then reloaded multiple times.

After the profiled data has been uploaded to the INN-Reach Central catalog, INN-Reach APIs continuously update the Central catalog according to the settings in the profile and changes in your local Polaris database—automatically contributing, de-contributing, and updating records.

See "INN-Reach Configuration and Mapping Spreadsheet" on page 15.

Contribution Rules for Item and Bibliographic Records

Item records from the Polaris database are contributed or de-contributed to the INN-Reach Catalog according to a set of non-configurable rules that must all be met, and additional configurable rules that the library can define to further filter the items.

The item records are checked first to see if they are eligible to be contributed, according to the requirements in the profile. If an item is eligible to be contributed, the linked bibliographic record is also checked to see if it can be contributed. If the bibliographic record meets the requirements defined in the profile, it is contributed. If it does not meet the requirements, neither the bib nor the item record are contributed.

Non-Configurable Rules for Contributed Items

All the following non-configurable rules must be met for item records to be contributed to the INN-Reach Catalog:

- The status must be Final. (The **Record status** field must be set to **Final** in the Item Record workflow.)
- The Display in PAC flag must be on. (The **Display in PAC** check box must be checked in the Item Record workflow).

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- The item must have a barcode. (The **Barcode** field cannot be empty in the Item Record workform.)
- The item must have an assigned collection. (The **Collection** field cannot be empty in the Item Record workform.)
- It must not be an ILL item. (The **ILL** check box must be unchecked in the Item Record workform.)
- It must not be an eContent item (The **eContent** check box must be unchecked in the Item Record workform.)

If the item passes all the non-configurable rules, then the system checks the rules that the contributing library can configure.

Configurable Rules for Contributed Items

The library can define configurable rules to further filter the contributed items by:

- Branch - The item must belong to one of the listed branches.
- Circulation status - The item must have one of the listed circulation statuses.
- Material type - The item must have one of the listed material types.
- Collection - The item must be assigned to one of the listed collections.

If the item passes all the configurable rules, the system checks the optional configurable rules, if the library has specified them.

Optional Configurable Rules for Contributed Items

The library can define additional configurable rules that check the following settings:

Note:

If it is your library's policy to set the **Holdable**, **Loanable outside system**, or **Non-circulating** check boxes on the Item Record workform, and staff consistently use these settings, you can add them to the configuration rules.

- Holdable - The item must have this flag checked to be contributed.
- Loanable outside system - The item must have this flag checked to be contributed.
- Non-circulating - The item must have this flag un-checked to be contributed.

Configuration Rules for Contributed Bibliographic Records

All the following non-configurable rules must be met for a bibliographic record to be contributed to INN-Reach:

- The record status must be Final.
- The Display in PAC flag must be checked.
- The ILL flag is not checked.
- At least one linked item is contributed to the Central catalog.

INN-Reach Configuration and Mapping Spreadsheet

The library and Innovative staff fill out the INN-Reach Configuration and Mapping Excel spreadsheet that specifies the criteria for items to be contributed to the Central Catalog, and the patron codes for Polaris patrons authorized to place requests on items in the INN-Reach Central catalog.

The spreadsheet is also used for mapping item material types and patron codes in Polaris to the corresponding INN-Reach ITypes and PTypes. This mapping is used in the transmissions between the library and INN-Reach to enable automatic borrowing and lending activities.

INN-Reach Local Server Configuration

On the LocalServer tab, Innovative staff provide data for the following fields:

- **Local Server Code**
- **Local Server Name**
- **Default Agency Code**
- **Cloud Service Base URI**
- **Cloud Service Auth URI**
- **API Authorization Public Key**
- **API Authorization Private Key**

A	B	C
1	InnReach Local Server Configuration (v1)	
2		
3	INN-Reach enabled (Y/N)	N
4	Local Server Code	
5	Local Server Name	
6	Default Agency Code	
7	Honor 'LoanableOutsideSystem' (Y/N)	Y
8	Honor 'Holdable' (Y/N)	Y
9	Honor 'Non-Circulating' (Y/N)	Y
10	"Unavailable/Local Use only" default IR status code	
11	Cloud Service Base URI	
12	Cloud Service Auth URI	
13	API Authorization Public Key	
14	API Authorization Private Key	
15	Email address for service alerts and errors	
16		

Instructions
 The fields marked with a light gray background are provided by Innovative staff.

LocalServer Central Agencies Branches MaterialTypes Collections ItemStatuses PatronCodes

INN-Reach Central Configuration

Innovative staff provide data for the following fields:

- **Central Code**
- **Central Name**

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- Central Discovery Layer URL
- SkyRiver

	A	B	C	D	E	F	G	H	I
1	INN-Reach Central								
2									
3	Central Code								
4	Central Name								
5	Central Discovery Layer URL								
6	SkyRiver (Y/N)	N							
7									
8									
9									
10									
11									
12									
13									
14									
15									
16									
17									
18									
19									
20									
21									
22									
23									

Instructions

The fields marked with a light gray background are provided by Innovative staff.

LocalServer
Central
Agencies
Branches
MaterialTypes
Collections
ItemStatuses
PatronCodes
+

Local INN-Reach Agencies for Uploading

List only the INN-Reach Agency code(s) of **your local Polaris system**.

	A	B	C	D	E	F	G	H	I
1	Local Agencies								
2									
3	Agency Code	Agency Name							
4									
5									
6									
7									
8									
9									
10									
11									
12									
13									
14									
15									
16									

Instructions

List only the INN-Reach Agency code(s) of **your local Polaris system**.

LocalServer
Central
Agencies
Branches
MaterialTypes
Collections
ItemStatuses
PatronCodes
+

Local Polaris Branches for Uploading

List all **your local system's** Polaris branch-level organizations that participate in this INN-Reach Central. Only items and bibliographic records from the listed branches will be uploaded to INN-Reach.

- **Branch Org ID** - The numeric Organization ID for the branch in Polaris.
- **Branch Name** - Name of the branch.
- **Agency Code** - The INN-Reach Agency code to which the branch belongs.
- **Location Code** - The unique location code.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Local Locations												
2													
3	Branch Org ID	Branch Name	Agency Code	Location Code									
4													
5													
6													
7													
8													
9													
10													
11													
12													
13													
14													
15													
16													

Instructions

List all Polaris branch-level organizations from **your local system** that participate in this INN-Reach Central.

Branch Org ID - The numeric Organization ID for the branch in Polaris
Branch Name - Name of the branch

* Only items and bibliographic records from these branches will be uploaded to INN-Reach.

Include the appropriate INN-Reach Agency code value that each branch belongs and a unique location code.

LocalServer Central Agencies **Branches** MaterialTypes Collections ItemStatuses PatronCodes

Item Material Types for Uploading and Mapping to INN-Reach ITypes

The *Upload Polaris Items with These Material Types* table on the left side of this tabbed page is used to list all the Polaris material types for items that will be uploaded to the Central catalog, and the INN-Reach ITypes to which these material types are mapped.

When the items are contributed (uploaded) to INN-Reach, they contain the local ITypes. These INN-Reach local ITypes are mapped to INN-Reach Central ITypes agreed upon by all libraries contributing to the INN-Reach Central catalog.

The Central IType is transmitted in the INN-Reach hold request. When the Polaris library receives items requested through INN-Reach, the Central IType in the INN-Reach hold request is matched to the appropriate Polaris item template so that the virtual item (v_item) record is created with the correct material type and collection. The Central IType in the request is also translated to the mapped Polaris format ID.

- **Material Description** - The Polaris item material type description.
- **Item Material Type ID** - The Polaris item material type ID number.
- **INN-Reach IType** - The INN-Reach IType to which the Polaris Material Type is mapped.

What's New in Polaris 5.1 & Leap 1.1

The *Incoming Central ITypes Mappings* table on the right side of the tabbed page is used to map Central ITypes to Polaris format IDs so that the correct format icon appears in the ILL request.

- **INN-Reach Central IType** - The INN-Reach item type or IType in the Central Catalog.
- **Central IType Description** - The description associated with the Central IType.
- **Polaris Format ID** - The numeric format ID that identifies the Polaris format.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Upload Polaris Items with these Material Types				Incoming Central IType Mappings												
2																	
3	Material Type Description	Item Material Type ID	INN-Reach IType		INN-Reach Central IType	Central IType Description	Polaris Format ID		<div>Instructions</div> <p>Items with the Polaris Item Material Type values listed in the lefthand table will be uploaded to INN-Reach.</p> <p>Include the appropriate INN-Reach numeric IType values you wish your Polaris Material Type codes to map to.</p> <p>Include in righthand table all of the INN-Reach Central ITypes with their appropriate mappings to local Polaris Bibliographic Type of Material Codes. These mappings are used when creating ILL records on your local system as a borrowing library.</p> <div>Polaris Format IDs</div> <ol style="list-style-type: none">1 - Book2 - Printed or Manuscript Music3 - Cartographic Material4 - Visual Materials5 - Sound Records6 - Electronic Resources7 - Archival/Mixed Materials8 - Serial9 - Printed Music10 - Manuscript Music11 - Printed Cartographic Material12 - Manuscript Cartographic Material13 - Map14 - Globe15 - Manuscript Material16 - Projected Medium17 - Motion Picture18 - Videorecording19 - Two Dimensional Nonprojected Graphic20 - Three Dimensional Object (Artifact)21 - Musical Sound Recording22 - Nonmusical Sound Recording23 - Kit24 - Periodical25 - Newspaper								
4																	
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39																	

LocalServer

Central

Agencies

Branches

MaterialTypes

Collections

ItemStatuses

PatronCodes

Item Collections for Uploading

Items assigned to the Polaris Collections listed in this table will be uploaded to INN-Reach.

- **Collection Description** - The Polaris Collection description.
- **Collection ID** - The Polaris Collection ID number.
- **INN-Reach Local Item Type ID** - Include the INN-Reach numeric Local IType values if you want all items in that collection to use that IType. Leave the IType column blank if you prefer to use the Material Type of an item to determine the INN-Reach IType mapping.

What's New in Polaris 5.1 & Leap 1.1

	A	B	C	D	E	F	G	H	I	J
1	Upload Polaris items in these Collections									
2										
3	Collection Description	Collection ID	INN-Reach IType (OPTIONAL)							
4										
5										
6										
7										
8										
9										
10										
11										
12										
13										
14										
15										
16										
17										
18										

Instructions
 Items assigned to Polaris Collections listed in this table will be uploaded to INN-Reach.
 Include the appropriate INN-Reach numeric IType values only if you wish for all items in that collection to use that IType. Leave the IType column blank for any collection that you would prefer that the Material Type of an item determine the INN-Reach IType mapping.

LocalServer Central Agencies Branches MaterialTypes **Collections** ItemStatuses PatronCodes

Item Statuses for Uploading

Items with the Polaris Item Statuses listed in this table will be uploaded to INN-Reach. If you do not want to upload items with a particular status, remove the row from the table.

- **Polaris Status ID** - The Polaris item status ID number
- **Polaris Status Description** - The Polaris item status description
- **INN-Reach Status Code** - The INN-Reach status code to which the Polaris status is mapped
- **INN-Reach Description** - The INN-Reach status description

	A	B	C	D	E	F	G	H	I	J	K	L
2												
3	Polaris Status ID	Polaris Status Description	INN-Reach Status Code	INN-Reach Description								
4	1	In										
5	2	Out										
6	3	Out-ILL										
7	4	Held										
8	5	Transferred										
9	6	In-Transit										
10	7	Lost										
11	8	Claim Returned										
12	9	Claim Never Had										
13	10	Missing										
14	11	Withdrawn										
15	12	Bindery										
16	13	On-Order										
17	14	In-Repair										
18	15	In-Process										
19	16	Unavailable										
20	17	Returned-ILL										
21	18	Routed										
22	19	Shelving										
23	20	Non-circulating										
24	21	Claim Missing Parts										
25												

Instructions
 Items with the Polaris Item Status values listed in this table will be uploaded to INN-Reach.
 * Remove rows from this table if you do **not** want items with that Polaris Item Status to be uploaded.
 Include the appropriate INN-Reach Status code values that you wish for your Polaris Item Status codes to map to.

LocalServer Central Agencies Branches MaterialTypes **ItemStatuses** PatronCodes

Patron Codes for Uploading and Mapping to INN-Reach PTypes

During the data profiling stage, your Polaris patron codes are mapped to INN-Reach local PTypes, and INN-Reach central PTypes are mapped to Polaris patron codes. Mapping Polaris patron codes to Local PTypes enables your patrons to place INN-Reach requests to borrow items from other libraries, and mapping Central PTypes to Polaris patron codes enables the creation of virtual patron records used when your library loans items to patrons from other libraries.

When a local patron (registered in your Polaris system) places an INN-Reach hold request, INN-Reach authenticates the patron by patron code and the mapped local PType is sent to INN-Reach indicating the type of patron account.

When a patron who is not registered in your Polaris library system places an INN-Reach hold request for an item your library owns, the Central PType sent in the request transaction is translated to the mapped Polaris patron code, which is then used in the creation of a virtual patron (v_patron) record linked to the INN-Reach hold request.

The table on the left side of the tabbed page is used to list all the Polaris patron codes for patrons in your system that are allowed to use INN-Reach, and maps these codes to the Local INN-Reach PTypes.

- **Polaris Patron Code** - The Polaris Patron Code ID number
- **Polaris Description** - Polaris Patron Code description
- **Local INN-Reach PType** - The local INN-Reach patron type to which the Polaris patron code is mapped

The table on the right side of the Patron Codes tabbed page maps INN-Reach Central PTypes to Polaris patron codes in order to create virtual patrons in your local system.

- **Central PType** - INN-Reach Central patron type code
- **Central PType Description** - The INN-Reach Central patron type description
- **Polaris Patron Code** - The Polaris patron code to which the INN-Reach Central patron type code is mapped

What's New in Polaris 5.1 & Leap 1.1

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Polaris Patron Code allowed to request (and mappings)													
2														
3	Polaris Patron Code	Polaris Description	INN-Reach PType		Central INN-Reach PType	Central PType Description	Polaris Patron Code							
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Instructions

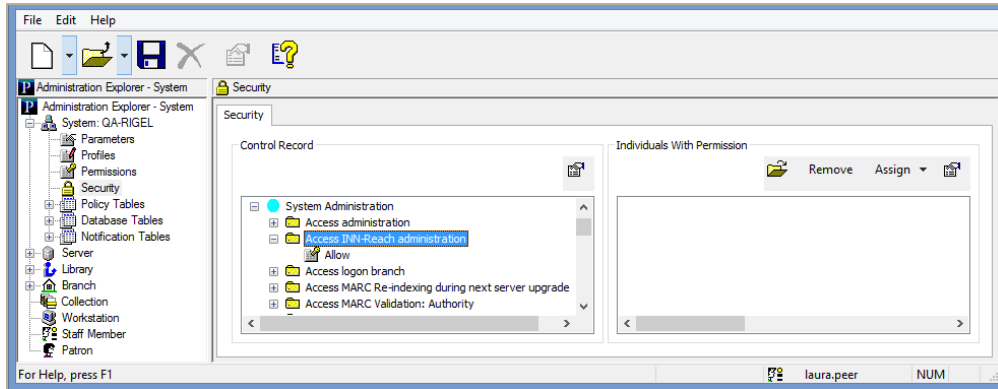
Include in the lefthand table all local Polaris Patron Codes that are allowed to use INN-Reach and the appropriate INN-Reach PType mapping values.

Include in righthand table all of the INN-Reach Central PTypes with their appropriate mappings to local Polaris Patron Codes. These mappings are used when creating virtual patrons on your local system.

LocalServerCentralAgenciesBranchesMaterialTypesCollectionsItemStatusesPatronCodes

Give staff permission to access INN-Reach administration functions

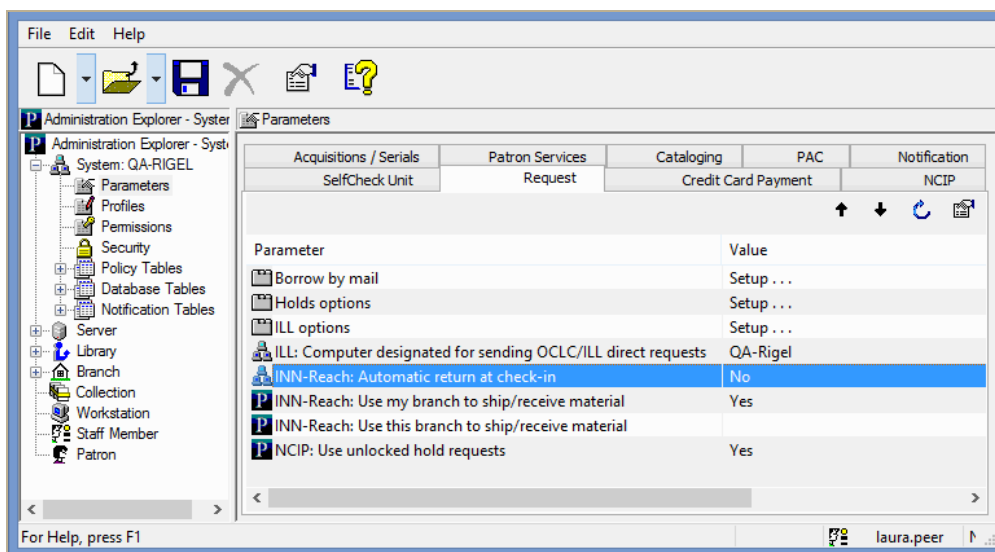
Give the appropriate staff members the new Polaris Administration permission **Access INN-Reach administration: Allow**. This permission grants access to the web-based INN-Reach administration page used to view status and configuration information about the INN-Reach setup and server processes for your local Polaris server.



Set INN-Reach request parameters in Polaris Administration

Three new INN-Reach parameters are available on the **Request** tab in Polaris Administration:

- **INN-Reach: Automatic return at check-in**
- **INN-Reach: Use my branch to ship/receive material**
- **INN-Reach: Use this branch to ship/receive material**



The **INN-Reach: Automatic return at check-in** parameter specifies whether the borrowing library checks in and then returns the INN-Reach ILL item, or checks in and returns the item in a single process. The default is set to **No**. If this parameter is set to **Yes**, the processes are combined.

The following parameters are used to specify the shipping and receiving branch for items requested through INN-Reach:

INN-Reach: Use my branch to ship/receive material - Set this option to **Yes** if various branches in your library system handle shipping and receiving materials requested through INN-Reach. If a designated branch handles all shipping and receiving of material requested through INN-Reach, set this option to **No**, and select the branch in the **INN-Reach: Use this branch to ship/receive material** parameter.

- When this option is set to **Yes**, and patrons from your local library system use INN-Reach to borrow material from another library, virtual items are created in Polaris with the receiving branch as the **Assigned** branch. When patrons return the items to the branch at which they were received, the items remain there until they are shipped back to the owning library. Items returned at other branches go in-transit back the branch at which they were received.
- When this option is set to **Yes**, and patrons from participating libraries place requests for items found in your library's local catalog, the **Pickup** branch for each of these requests is set to the **Assigned Branch** of the item that fills the request. This ensures that the items are held at, and shipped from, the library where they reside.

INN-Reach: Use this branch to ship/receive material - Select a branch as the designated location for shipping and receiving materials requested through INN-Reach. The **INN-Reach: Use my branch to ship/receive material** must be set to **No** to specify a central shipping and receiving branch.

- When a branch is designated as the shipping and receiving branch, and patrons from your local library system borrow material from another library, virtual item records are created in Polaris with the designated central branch as the item's **Assigned** branch. Patrons can return the items at any branch location, but they are always sent to the designated assigned branch for shipment back to the owning library.
- When a branch is designated as the shipping and receiving branch, and patrons from another participating library place requests for items found in your library's local catalog, the **Pickup branch** for each of these requests is set to this central branch. This ensures that the items are transferred to this designated pickup branch for shipment to the other library.

Set up INN-Reach ILL item templates

Before your patrons can borrow items in the INN-Reach Central catalog, your library must create at least one INN-Reach ILL item template for each INN-Reach Central IType your library has mapped in the profile. All libraries that participate in the INN-Reach Central catalog agree upon the Central ITypes. See "Item Material Types for Uploading and Mapping to INN-Reach ITypes" on page 17.

When a local patron, registered in your Polaris library system, places an INN-Reach hold on an item owned by another participating library, the transaction contains the Central IType of the requested item. This Central IType is used during receiving to match to the appropriate Polaris item template so that the virtual item (v_item) record is created with the correct material type, collection, and ILL item circulation settings.

Then, when the physical item arrives by courier at the borrowing library, it is received in Polaris from the Request Manager. This receive transaction automatically sets off a matching process whereby the item is matched to an INN-Reach template the library has created. For the system to automatically identify the correct INN-Reach item template, the template name must begin with **INNER item**, and it must have an INN-Reach Central code and INN-Reach Central IType that match the item being received.

To find the appropriate INN-Reach item template, the system looks for a matching item template named **INNER Item [CentralCode]-[Central_IType]** owned by the staff member's login branch. If no matching INN-Reach item template is owned by that Branch, Polaris attempts find a matching template owned at the Library organization, and if none is found at the Library level, it looks for a matching template owned by the library System.

If a matching template is found, the Brief Item Entry dialog box appears with information from the template. See "Receive the INN-Reach ILL hold request" on page 35.

If no matching template is found, the virtual item and bib are not created in Polaris, and a message informs the user: **There is no INN-Reach item template for [organization name]. Please create one.**

To create INN-Reach item templates that enable automatic creation of virtual item records and bibs in Polaris:

1. Open a new Item Template workform in Polaris.
2. In the **Name** field, enter the template name as follows: **INNER Item [CentralCode]-[Central_IType]** where the CentralCode matches the code for the INN-Reach central server, and the Central_IType matches an IType that has been mapped to Polaris material types/collections. The template name is case-sensitive. You can also enter an optional description that does is not used in the matching process, but can help your library identify the template.

What's New in Polaris 5.1 & Leap 1.1

The screenshot shows the 'Item Template 9235 - Cataloging - Polaris' window. The interface includes a menu bar (File, Edit, View, Links, Tools, Help) and a toolbar with icons for file operations. A vertical sidebar on the left is labeled 'Item Template'. The main area contains several sections for data entry:

- Template Name:** INNRR item p2ir1-200 (INNREACH Book)
- Template owner:** Saratoga Springs Public Library (br)
- Title:** (empty field)
- Author:** (empty field)
- Call number:** (empty field)
- Owner:** Saratoga Springs Public Library (br)
- Assigned:** Saratoga Springs Public Library (SAR)
- Collection:** (None)
- Shelf location:** (None)
- Temporary location:** (empty field)
- Circulation status:** In
- Circulation parameters:**
 - Material type:** Book
 - Loan period:** New Book
 - Fine code:** Book
 - Renewal limit:** 1
 - Stat code:** (None)
 - Name of piece:** (empty field)
 - Home branch:** Saratoga Springs Public Library (SAR)
- Call number:**
 - Scheme:** Dewey Decimal
 - Prefix:** (empty field)
 - Class:** (empty field)
 - Cutter:** (empty field)
 - Suffix:** (empty field)
 - Volume:** (empty field)
 - Copy:** (empty field)
 - ☐ Do not float
- Request:**
 - ☐ Loanable outside system
 - ☐ Do not mail to patron
 - ☒ Holdable
 - Limit to:** (empty dropdown)
 - ☐ Pickup at
 - ☐ Patrons from this library and branches
 - ☐ Patrons from this branch only
 - ☐ Preferred borrowers

At the bottom, there is a status bar with the text 'For Help, press F1' and a 'NUM' indicator.

3. Save the template.

Enable creation of virtual patron records

When a patron who is not registered in your Polaris library system places an INN-Reach request on an item owned by your Polaris library, a virtual patron record is generated automatically so that the item can circulate to that patron. The virtual patron record is created using a combination of data and settings from the INN-Reach Create Hold message, the ILL institutional patron saved in the Polaris Administration parameter, and hard-coded defaults. For details regarding the automatic creation of the virtual patron record, see "Other library's patron places a hold request using INN-Reach" on page 45.

Note:

If a patron record is selected in the NCIP parameter, **ILL institutional patron**, you do not need to set up another patron record; only one ILL institutional patron can be selected for the library system. However, if an institutional patron is not identified in the parameter, the request will fail.

To set up the ILL institutional patron that will be used to create virtual patron records:

1. Create a new patron record that will be identified as the institutional patron record.
The gender, statistical class, and other settings will be copied from this institutional patron to the virtual patron record.
2. Select **Administration | Explorer | System**.
3. At the System level, select **Parameters**.
4. Select the **NCIP** tab.
5. Double-click **ILL institutional patron** to open the ILL Institutional Patron dialog box.
6. Click **Find Patron** and select the patron record that will be used to create virtual patron records.
7. Click **OK** to save the institutional patron parameter.

INN-Reach Integration - Polaris as the Borrowing Library

A Polaris library acts as an INN-Reach borrowing library when a local patron goes to the INN-Reach Central Catalog's web interface and places a hold request on an item that was contributed by another participating library. INN-Reach first verifies that the patron is authorized to place holds in the Central Catalog. If the patron is authorized to place requests in the INN-Reach Central Catalog, INN-Reach sends a Create Patron Hold message to the library, which automatically creates an Interlibrary (ILL) hold request in Polaris.

When the book or other physical material arrives at the Polaris library, the ILL item is received in Polaris, which automatically creates the virtual bib and item records necessary for circulating the item in Polaris. The patron's account displays the ILL request in the staff client, Leap, PowerPAC, and Mobile PAC. In addition, the patron is notified that the item is held and ready for pickup.

When the patron returns the item to their local library, it may need to be transferred to a specific branch that handles the courier shipments, depending on the INN-Reach parameter set in Polaris Administration. If another branch handles shipping and receiving, the item is sent in-transit to that library. Otherwise, the item is checked in and automatically updated to Returned, or checked in and then Returned in separate processes. A Polaris Administration parameter setting determines whether the check in and return processes are combined or separate. See "Set INN-Reach request parameters in Polaris Administration" on page 23.

When the ILL request is set to Returned in Polaris, an Item in Transit API message is sent to the library that owns the item. Then, the item arrives back at the owning library where it is checked in. A Final Item Checkin API message is then sent to the Polaris library that automatically deletes the ILL hold request, the virtual item, and the virtual bib.

See also:

- "INN-Reach verifies that the Polaris patron can request the item" on page 29
- "INN-Reach ILL hold request created in Polaris" on page 30
- "Receive the INN-Reach ILL hold request" on page 35
- "Circulate the INN-Reach ILL item" on page 37
- "Check in the INN-Reach ILL item" on page 38
- "Return the INN-Reach ILL item" on page 39
- "Additional INN-Reach Request Processing for the Polaris Borrowing Library" on page 41

INN-Reach verifies that the Polaris patron can request the item

When a Polaris patron submits a request for a title in the INN-Reach Central catalog, an INN-Reach API verify patron message is sent to the Polaris system to ensure that the patron is permitted to request the item. If the authentication fails, the patron will see a message that indicates the reason it failed.

Reason the Patron Was Not Authenticated	Message Displayed
The supplied barcode was not in the database.	Patron barcode not found
The supplied password does not match the patron's password.	Invalid PIN
The patron record is secured or marked as deleted.	Patron record is secured or marked as deleted
The patron code for the record is not in the list of allowable patron codes to use INN-Reach.	Patron denied access because of type of patron
The patron expiration date is in the past.	Patron record is expired
The patron has too many checked out items.	Patron has reached limit of checked out items
The patron's overdue count is above the maximum overdue count allowed.	Unable to place your request. Please try again or contact your library for assistance.
The patron's charges are above the maximum charges allowed.	Unable to place your request. Please try again or contact your library for assistance.
The patron's holds count is above the maximum holds allowed.	Unable to place your request. Please try again or contact your library for assistance.

INN-Reach ILL hold request created in Polaris

When a Polaris patron is authenticated and submits a request in the INN-Reach Central Catalog, INN-Reach searches for an available item in the Central Catalog. If an available item is found that does not belong to the local Polaris library system, INN-Reach sends an API message that creates the ILL request in the patron's account in Polaris.

The following fields display in the Polaris ILL Request workform:

Request Tab

- Title
- Author (if it exists)
- Format

The screenshot shows the 'ILL Request (22945)' window with the 'Request' tab selected. The 'General' tab is also visible. The 'Request' tab contains the following fields:

- Title:** The botany of desire : a plant's-eye view of the world / Michael Pollan.
- Author:** Pollan, Michael.
- Format:** Book (dropdown menu)
- Publisher:** (empty text box)
- Publication year:** (empty text box)
- ISBN:** (radio button, unselected)
- ISSN:** (radio button, unselected)
- LCCN:** (empty text box)
- Volume and issue:** (empty text box)
- Series:** (empty text box)
- Edition:** (empty text box)
- Request type:** Copy (radio button, unselected), Loan (radio button, selected)
- Item barcode:** (empty text box)

At the bottom of the window are three buttons: OK, Cancel, and Help.

General Tab

Note:

The current and previous statuses change as the hold request is processed.

- Current status = Active
- Status Date = Today's date
- Previous status = Inactive
- Patron name = (Linked patron info) Name of Polaris patron who placed the request
- Patron barcode = (Linked patron info) Barcode of patron who placed the request
- Patron phone = (Linked patron info) Phone number of patron who placed the request
- E-mail address = (Linked patron info) E-mail address of the patron who placed the request
- (Delivery) Request date = Today's date
- (Delivery) Need by date = If the transaction includes the Need by date, that date is the used. Otherwise, the Need by date is the current date plus 10 years.
- Pickup branch = Location code mapped to its associated Polaris branch indicated in the INN-Reach configuration.

ILL Request (22945)

General Request Notes

Status

Current Status: Active Status Date: 2/8/2016 Previous Status: Inactive

Patron

Name: Pidgeon, Brian Andrew Barcode: 1001900147676

Phone: 315-634-1234 E-mail address:

Delivery

Request date: 2/8/2016 Need by date: 1/18/2038

Pickup branch: Saratoga Springs Public Library (SAR)

OK Cancel Help

Notes Tab

The following data is copied into the ILL Hold Request, Notes field when the item is created:

- INN-Reach Tracking ID
- INN-Reach Item Agency Code
- INN-Reach Patron Agency Code
- INN-Reach Item Location (if included in the Item Shipped API message from the INN-Reach lending library)

The screenshot shows a dialog box titled "ILL Request (22945)" with three tabs: "General", "Request", and "Notes". The "Notes" tab is selected. It contains three text areas: "Staff Notes 1:" (empty), "Staff Notes 2:" (containing "TrackingID: 2158", "ItemAgency: plag1", and "PatronAgency: plag3", which is circled), and "PAC Notes:" (empty). At the bottom are "OK", "Cancel", and "Help" buttons.

The INN-Reach ILL request is displayed in the patron account in the Polaris staff client, Polaris PowerPAC, Mobile PAC, and Leap.

INN-Reach ILL Request Displayed in Patron Status

In the Polaris staff client, the INN-Reach ILL request displays in the Patron Status workform, Holds view under ILL requests.

Patron Status - 290554 - Holds - Polaris

File Edit View Links Tools Help

Barcode: 1001900147676 Name: Brian Andrew Pidgeon

Acct charges: \$0.00 Patron code: Regular
 Acct credit: \$0.00 Registered branch: Community Library
 Items out: 0 Expiration date: 12/20/2018
 Total overdue: 0 Registration date: 12/20/2005
 Claims/Lost: 1/0 Notification option: Mailing Address
 Items held: 0 Last activity date: 2/8/2016
 Total holds/ILL: 0/32 Address: Sub Teacher

Holds

Polaris requests:

Author	Title	Format	Call Num...	Activation ...	Status	Pickup Bra...	Q...	Hold Until ...	Gr...

ILL requests:

Author	Title	Format	Activation Date	Status	Item	Pickup Bra...
Pollan, Michael.	The botany of desire : a plant's-eye...	Book	2/8/2016 2:43...	Active		Saratoga S...
Van Munching, Philip.	Boys will put you on a pedestal (so ...	Book	2/8/2016 2:28...	Active		Schenecta...
McQuillan, Susan.	Breaking the bonds of food addiction..	Book	2/8/2016 2:36...	Active		Schenecta...

For Help, press F1

INN-Reach ILL Request Displayed in Polaris PowerPAC

The INN-Reach ILL request, along with the TOM icon (as mapped in your profile), is displayed in the patron's account in the Polaris PACs.

My Account

Reid, Christopher J

- \$7.00 owed on your account

My Record

Items Out

Requests (12)

Fines & Fees (\$7.00)

Claimed and Lost

Reading History (2)

Saved Searches

My shopping cart

Log Out

My Lists

Saved Title Lists

Create new saved list...

Help

Name:

Barcode:

Username:

Registered at:

Patron code:

Date of original registration:

Expiration date:

Reid, Christopher J

5070

[None]

Saratoga Springs Public Library

Regular

1/5/2008

1/5/2020

more information

additional note

Refresh eContent

Requests

	Format	Title	Pickup Library	Status
		The 60 greatest old-time radio shows of the 20th century [sound recording]	Saratoga Springs Public Library	Unclaimed (as of 4/8/2016)
		Comeback / Dave Dravecky, with Tim Stafford. by Dravecky, Dave.	Saratoga Springs Public Library	Received (on 4/20/2016)
		Wild swans : three daughters of China / Jung Chang.	Saratoga Springs Public Library	Cancelled (on 3/2/2016)
		Web site usability : a designer's guide / Jared M. Spool, principal investigator ; Tara Scanlon... [et al.], user interface engineering. by Spool, Jared M.	Saratoga Springs Public Library	Active (since 4/28/2016)
		We are all the same : a story of a boy's courage and a mother's love / Jim Wooten. by Wooten, James T.	Saratoga Springs Public Library	Cancelled (on 4/29/2016)
		The truth (with jokes) / by Al Franken.	Saratoga Springs Public Library	Cancelled (on 4/28/2016)
		The North Light illustrated book of painting techniques / Elizabeth Tate. by Tate, Elizabeth.	Schenectady Branch - Central	Shipped (60 days ago)

Receive the INN-Reach ILL hold request

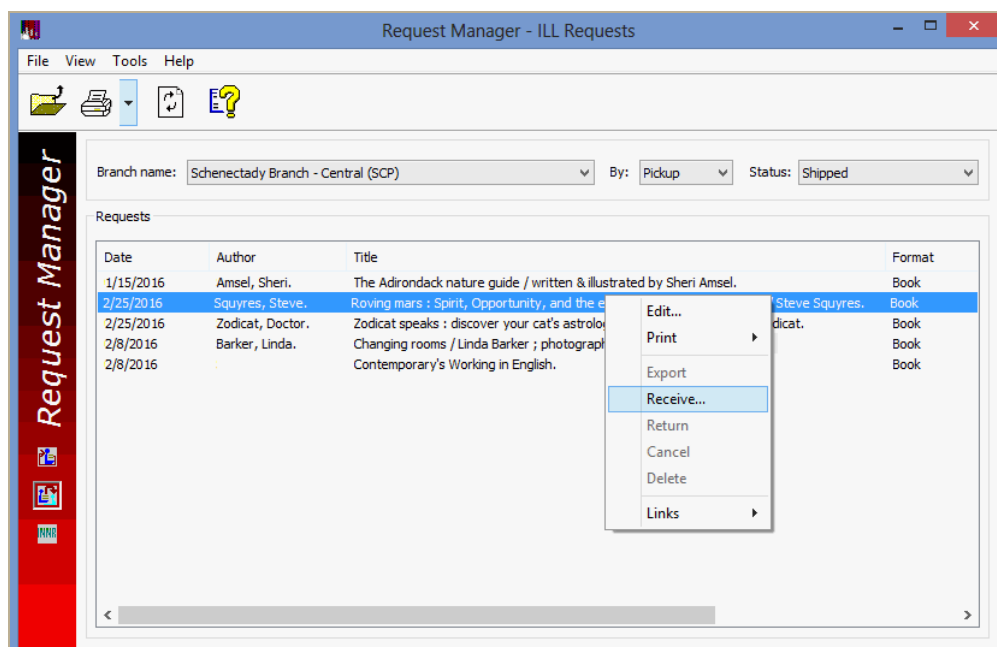
When the physical item arrives from the lending library, a staff member opens the ILL Requests view of the Request Manager, locates the corresponding INN-Reach hold request, receives it, and enters information in the Brief Item Entry dialog box to create the virtual item and bib that enable the item to circulate in Polaris.

To receive the ILL hold request:

1. On the ILL Requests view of the Request Manager, right-click the request and select **Receive** from the context menu.

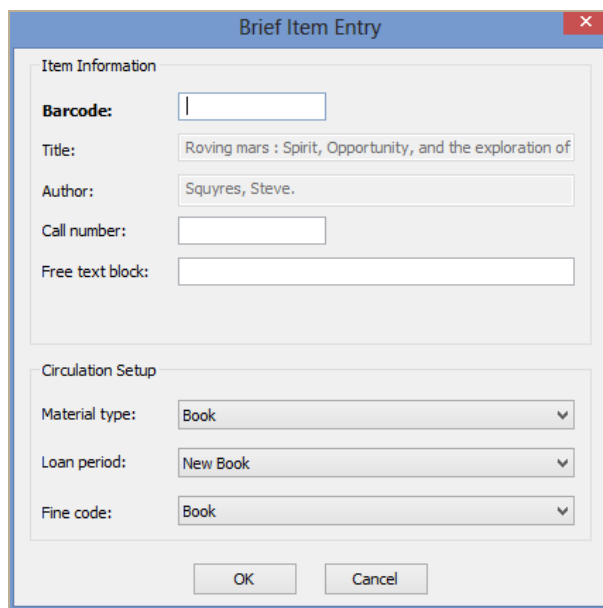
Note:

The list can be filtered by selecting a **Shipped** status. It is possible that the item was shipped without being checked in at the lending library, so you can select the **Active** filter if the request is not found when filtered by **Shipped**.



The system looks for a matching INN-Reach item template. For details on the matching criteria used in finding an INN-Reach item template and the error message if none is found, see "Set up INN-Reach ILL item templates" on page 25.

If a matching item template is found, the Brief Item Entry dialog box opens with the Circulation Setup information filled in from the INN-Reach item template.



The 'Brief Item Entry' dialog box is divided into two sections. The 'Item Information' section contains fields for 'Barcode' (empty), 'Title' (filled with 'Roving mars : Spirit, Opportunity, and the exploration of'), 'Author' (filled with 'Squyres, Steve.'), 'Call number' (empty), and 'Free text block' (empty). The 'Circulation Setup' section contains three dropdown menus: 'Material type' (set to 'Book'), 'Loan period' (set to 'New Book'), and 'Fine code' (set to 'Book'). At the bottom are 'OK' and 'Cancel' buttons.

2. Scan or type the barcode on the item being received so that the item can circulate in Polaris.

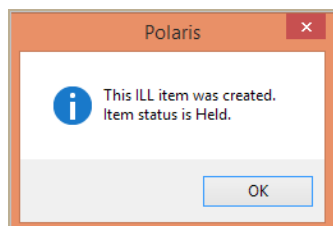
Note:

If the barcode attached to the borrowed material matches an item barcode already in your Polaris system, an error message appears. To resolve this issue and allow the item to circulate, you can affix a temporary barcode to the item and scan that barcode. Your library policy determines how to respond if this occurs.

3. Enter an optional call number and free text block.
4. Click **OK**.

A virtual bib and virtual item are created in Polaris.

A message confirms that the ILL item was created and the item status is Held.



If the receiving branch is not the patron's pickup branch, the ILL item is created with a status of Transferred.

A hold notice is generated and sent to the patron according to the library's existing notification process and the patron's notification preferences.

Then, the item is circulated. See "Circulate the INN-Reach ILL item" on page 37.

Circulate the INN-Reach ILL item

After the Polaris patron is notified that the ILL item requested through INN-Reach is ready for pickup, the patron goes to the pickup branch at which the item is held, and a staff member locates the item and checks it out to the patron.

To circulate the ILL item requested through INN-Reach:

1. Locate the item being held for the patron.
2. Check it out to the patron.

The linked item record's status is Out and the ILL request's status is Received.

ILL Request (23451)

General Request Notes

Status

Current Status: Received Status Date: 5/4/2016 Previous Status: Received

Patron

Name: Testo, Miriama M Barcode: 1000201227625

Phone: 315-634-1234 E-mail address:

Delivery

Request date: 5/4/2016 Need by date: 12/18/2016

Pickup branch: Schenectady Branch - Central (SCP)

☐ Return undistributed

OK Cancel Help

If your library retains patron reading history, and the patron has opted to maintain their reading history, INN-Reach ILL items will be saved in the patron's reading history along with local items.

Check in the INN-Reach ILL item

When the patron returns the ILL item, it is checked in.

If the branch at which the item was returned can ship/receive materials requested through INN-Reach, the item "floats" in to the branch. The linked item history contains a note indicating floating processing was used to keep the item at the check-in branch, instead of sending it in-transit.

If the branch at which the item was returned is not the designated shipping/receiving branch for INN-Reach items, the item goes In-transit to the branch that will ship the item back to the loaning library. See "Set INN-Reach request parameters in Polaris Administration" on page 23.

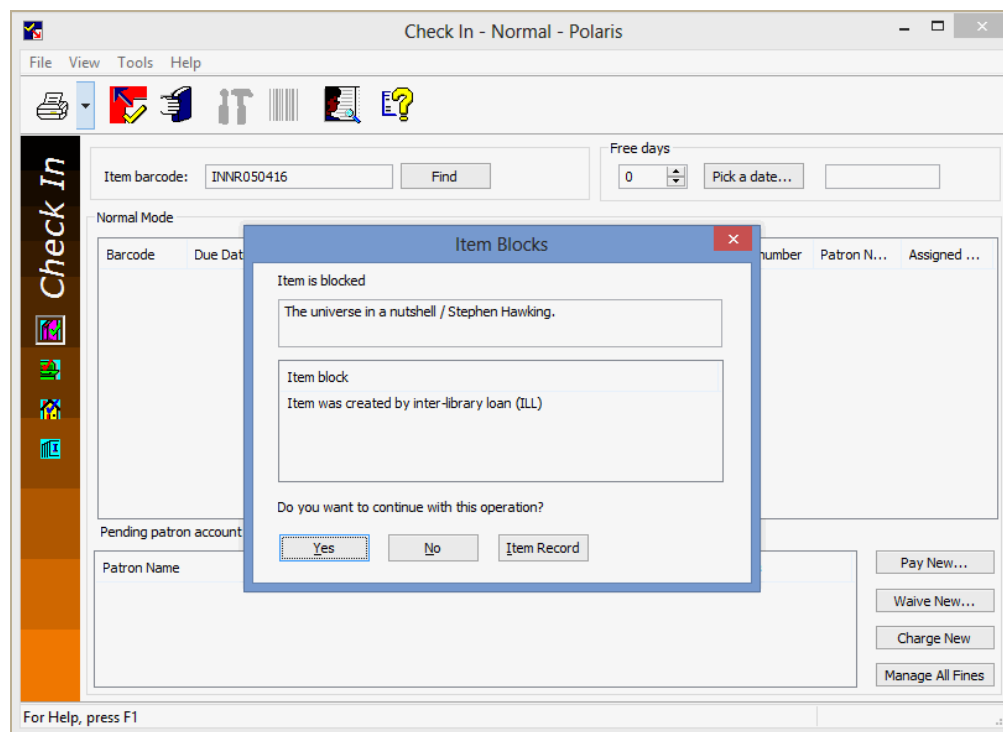
Note:

The patron can also check the item in through the library's sorter.

To check in the ILL item borrowed through INN-Reach:

1. Scan the item barcode on the Check-In workform.

If a blocking message is included in the INN-Reach item template, a dialog box informs you that the item was created by ILL.



2. Click **Yes** to continue checking in the ILL item.

Return the INN-Reach ILL item

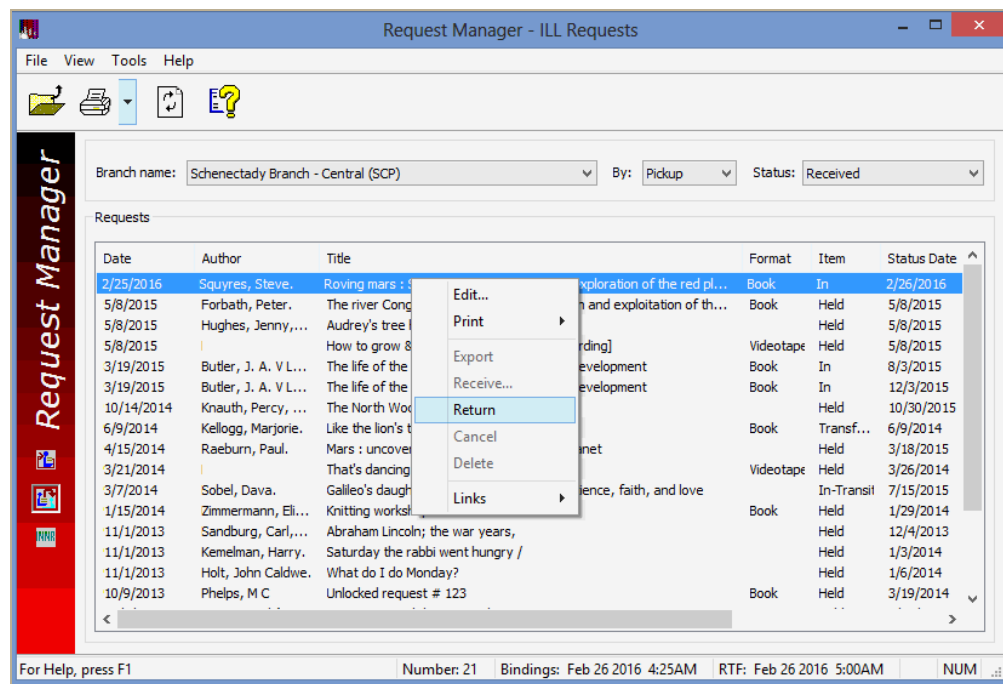
Note:

If the **INN-Reach: Automatic return at check-in** parameter is set to **Yes** in Polaris Administration, the Return processing in Polaris is performed automatically when the item is checked in.

When the physical item is ready to ship back to the owning library, and it is at the library responsible for shipping it back, the ILL request is set to Returned and an Item in Transit API message is sent to the lending library. Then, when the item arrives, an API message confirms that the circulation is complete, which automatically deletes the ILL hold request and the virtual item and bib.

To return the ILL item:

1. On the Request Manager | ILL Requests view, filter the list by the request status **Received** and the item status of **In**.
2. Locate the ILL item that needs to be returned, right-click and select **Return**.



- The ILL request's status is set to Returned, and the virtual item's status is set to Returned-ILL.
- An Item in Transit INN-Reach API message is sent to the lending library, and the Polaris library sends the physical item back to the lending library via courier.
- When the lending library receives the physical item and checks it in, a Final Item Checkin INN-Reach API message is sent to the borrowing library.

What's New in Polaris 5.1 & Leap 1.1

- The request is updated with the final processing date and time, the virtual item and bib are deleted, and the ILL hold request is deleted.

Additional INN-Reach Request Processing for the Polaris Borrowing Library

INN-Reach request processing also handles the following situations:

Polaris patron places an INN-Reach request resulting in a hold on a locally-owned item

When a patron registered with the local Polaris library system places a hold request through INN-Reach on an item that was contributed by the same local Polaris library system to which the patron belongs, the following occurs:

- INN-Reach determines that the requested item was contributed by the same Polaris library and already exists in the patron's local catalog.
- INN-Reach generates a local item-level hold with a status of Active in the patron's Polaris system.
- If the item is found that fulfills the hold request, the request becomes Pending.
- The item-level hold request is displayed in the patron's account in the Polaris staff client, PowerPAC, Mobile PAC, and Leap.
- The item is checked out to the local Polaris patron, and a transaction confirming the check-out is sent to the INN-Reach Central Catalog.

Patron or Staff Member Cancels the INN-Reach Hold Request in Polaris

If the requested item has not yet been shipped by the owning library, and the request is canceled in Polaris, either by the patron from their PAC account or by library staff from the Polaris staff client or Leap, the Active ILL Request is updated to Canceled and a Cancel Item Hold INN-Reach API message is sent to the owning library.

Owning Library Denies the Hold

If the owning library denies the hold, and INN-Reach determines that no other items in the Central catalog are available to fill the hold request, INN-Reach sends a Cancel Request API message to the borrowing s library. This cancels the ILL hold request in Polaris, and the canceled request is displayed in the patron's account in PowerPAC, Mobile PAC, the Polaris staff client, and Leap.

Items Returned Uncirculated

If the item has been shipped, but the patron who requested it no longer wants to borrow the item, the Polaris borrowing library can update the item to indicate it was returned without being circulated, which automatically sends a Return Uncirculated API message.

To update an ILL item to indicate it was returned uncirculated:

If the item has been shipped, but not yet received, check the **Return Uncirculated** check box on the ILL Request. When the item arrives and is received in Polaris, the Return Uncirculated API message is sent.

The screenshot shows the 'ILL Request (23051)' dialog box with the 'General' tab active. The 'Status' section contains three fields: 'Current Status' (Shipped), 'Status Date' (3/23/2016), and 'Previous Status' (Inactive). The 'Patron' section contains four fields: 'Name' (Reid, Christopher J), 'Barcode' (5070), 'Phone' (315-634-1234), and 'E-mail address' (empty). The 'Delivery' section contains three fields: 'Request date' (3/ 3/2016), 'Need by date' (5/ 1/2017), and 'Pickup branch' (Schenectady Branch - Central (SCP)). At the bottom, the 'Return uncirculated' checkbox is checked and circled. The dialog has 'OK', 'Cancel', and 'Help' buttons at the bottom right.

If the item is already being held, locate the item on the holds shelf and check it in. When the message asks if you want to hold the item for the patron, click **No**. The Return Uncirculated API message is sent.

Borrowing Library Renews the Item

When a patron registered with your local Polaris library system renews an INN-Reach item (from their account in PowerPAC, Mobile PAC, or Express Check), or a staff member renews the INN-Reach item for the patron (from the staff client or Leap), an INN-Reach API

What's New in Polaris 5.1 & Leap 1.1

message informs the lending library that the item has been renewed. Any Polaris Administration settings for renewals, such as charges, are applied to the renewal.

INN-Reach Integration - Polaris as the Lending Library

A Polaris library acts as an INN-Reach lending library when a patron at another participating library goes to the INN-Reach Central Catalog web interface and places a hold request on an item owned by the Polaris library. This sends an INN-Reach Create Item Hold API to the Polaris library and automatically creates the virtual patron record and a regular (non-ILL) item-level hold request, which is placed on the item and linked to that virtual patron.

The INN-Reach hold request appears in the Request Manager, from which a staff member can print a request-to-fill (paging list) to use in locating the requested item.

Upon check-in of the requested item, the hold's status is updated to Shipped, and item's status is updated to Held in Polaris. In addition, an INN-Reach API message confirming the item's shipment is sent to the library to which the patron belongs.

At receipt of the item at the borrowing library, an INN-Reach API acknowledgment message is sent to the Polaris lending library, which checks the item out to the virtual patron.

When the patron returns the item, the borrowing library ships the physical item back to the Polaris lending library, the item's status is updated to In-Transit, and the hold request is deleted. The item arrives at the Polaris lending library where it is checked in, which deletes the hold request and the virtual patron record. If the item belongs at the branch where it is checked in, the item's status is updated to **In**. If the item belongs to another branch, the item's status is updated to **In-transit**. In either case, a Final Item Checkin INN-Reach API message is sent to the borrowing library indicating the ILL circulation is complete, and the virtual patron record is marked for deletion if there are no other outstanding INN-Reach requests associated with the virtual patron.

See also:

- "Other library's patron places a hold request using INN-Reach" on page 45
- "Lending library processes the INN-Reach request and ships the item " on page 49
- "Item is received at the borrowing library and checked out in Polaris" on page 53
- "Item is returned to the Polaris lending library" on page 55
- "Additional INN-Reach processing when Polaris is the lending library" on page 56

Other library's patron places a hold request using INN-Reach

When a patron who is not registered in the local library's Polaris database uses the INN-Reach to place a hold request for an item, and INN-Reach finds the Available item in the local Polaris database, a virtual patron (v_patron) record and an item-level hold request are created automatically.

Virtual Patron Record

The virtual patron record contains the following data and settings derived from the INN-Reach Create Hold message, the ILL institutional patron template (patron record specified in the ILL Institutional patron parameter in Polaris Administration), and hard-coded defaults:

Note:

An ILL Institutional patron must be selected in the **NCIP, ILL institutional patron** parameter in Polaris Administration to enable creation of the virtual patron record. See "Enable creation of virtual patron records" on page 27.

- Barcode - **INNREACH**[patronID]
- Registered branch - Assigned branch of the requested item
- Last name - **INNREACH**
- First name - The first 32 characters provided in the INN-Reach Create Hold message, which consists of the patron's last name and first name
- Middle name - The next 32 characters from the INN-Reach Create Hold message.
- Gender - As set in the institutional patron template
- Patron code - The patron code that is mapped to the Central PType in the Create Hold message. If no match is found, the patron code from the template is used.
- User defined fields - All user-defined fields, including custom fields, are blank.
- Email address and Alternative email address - Set in the institutional patron template
- Exclude from notices and reminders - As set in the institutional patron template. All options are selected, excluding the virtual patron from receiving any notices or reminders.
- Statistical class - Set from the ILL Institutional patron. The statistical class is branch-specific. If the registered branch is different from the branch in the template, the system attempts to map the Pat Stat Class based on the description. If there is a matching description in the Registered branch, it is mapped; if not the Statistical class is blank.

What's New in Polaris 5.1 & Leap 1.1

Patron Registration - 371132 - General - Polaris

File Edit View Links Tools Help

Barcode: INNREACH371132 Registered at: Community Library (COB)

Last name: INNREACH Patron code: Test code for Rotterdam

First name: Mastin, Scott

Middle name:

Title: Suffix:

Expiration: Term: 0 Date: 5/16/2020

General

Gender: ☐ Male ☒ Female ☐ N/A

Statistical class: Northville Central SD

Password: ****

Language: English

Former barcode:

Birth date:

Date of original registration: 3/3/2016

Last activity date:

Exclude from notices and reminders:

☒ Overdue ☒ Almost overdue/auto-renew ☒ Exclude from collection agency

☒ Hold ☒ Patron record expiration ☒ Maintain reading history

☒ Billing ☒ Inactive patron ☐ Do not delete patron record

User defined fields

ID Number

Privileges / Restrictions

Voter Registration

CybraryN Use Only (XXX,YYY)

Not Currently In Use

For Help, press F1 NUM

- Non-blocking notes (Patron Status workform, Notes view) - The INN-Reach patron agency, the patron address (if included in the Create Hold transaction), and the INN-Reach pickup location.

Patron Status - 371132 - Notes - Polaris

File Edit View Links Tools Help

Barcode: INNREACH371132 Name: Mastin, Scott INNREACH

Acct charges:	\$0.00	Patron code:	Test code for Rotterdam
Acct credit:	\$0.00	Registered branch:	Community Library
Items out:	0	Expiration date:	5/16/2020
Total overdue:	0	Registration date:	3/3/2016
Claims/Lost:	0/0	Notification option:	Mailing Address
Items held:	0	Last activity date:	
Total holds/ILL:	1/0	Address:	ILL office

Notes

Non-blocking:

plag2 - Raquette Lake Free Library

PatAddr:

PickupLoc: sa058:Inlet Public Library:IPL-01

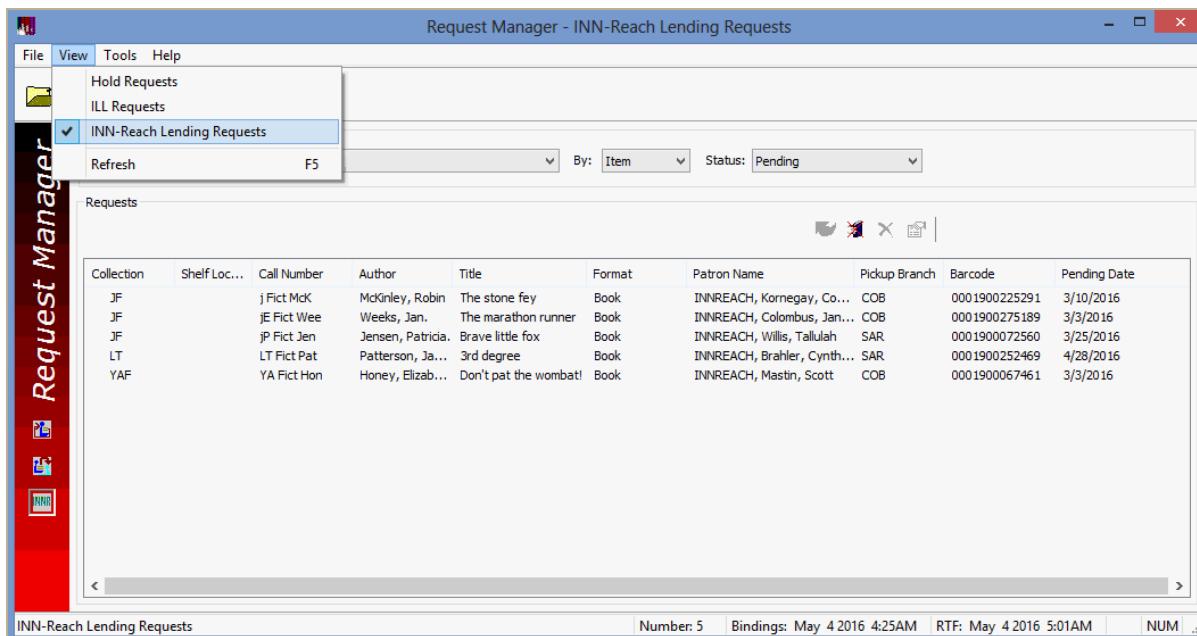
Blocking:

For Help, press F1 NUM

Item-Level Hold Request

After the virtual patron record is created, a regular (non-ILL) item-level hold request with a status of Active is created in Polaris. If the item is available to fill the request, the request status is updated to Pending, and the Pickup branch is set to the item's assigned branch or the branch designated for shipping INN-Reach materials. See "Set INN-Reach request parameters in Polaris Administration" on page 23.

The INN-Reach hold request is displayed in the Request Manager on the new INN-Reach Lending Request view.



The Hold Request workform displays the virtual patron's barcode (preceded by INNREACH) on the General view.

What's New in Polaris 5.1 & Leap 1.1

Hold Request - 843502 - Don't pat the wombat! - General

File Edit View Links Tools Help

Request

Status: Pending 3/3/2016 Request date: 3/3/2016 **Activation:** 3/ 3/2016

Pickup: Community Library (COB) Origin: ILL **Expiration:** 8/ 7/2016

☒ This item only ☐ Borrow by mail Tracking No.:

Patron

Barcode: INNREACH371132 Find Registered at: Community Library (br)

Name: Mastin, Scott INNREACH Patron code: Test code for Rotterdam

Notification option: Mailing Address

Details

Title: Don't pat the wombat! Find

Author: Honey, Elizabeth. ISBN: 0375805788

Constituent title: Constituent author:

Publisher: Alfred A. Knopf, Date: 2000 Edition: LCCN: 99087237

Item barcode: 0001900067461 Call number: YA Fict Hon

Volume: Format: Book

Issue: ISSN: Copy:

Series: Pages:

For Help, press F1 NUM

The **Non-public note** field on the General view displays the INN-Reach tracking ID, the item agency code, and the patron agency code. This information is used primarily for troubleshooting.

A library staff member checks the Request Manager for INN-Reach holds to fill. See "Lending library processes the INN-Reach request and ships the item " on page 49.

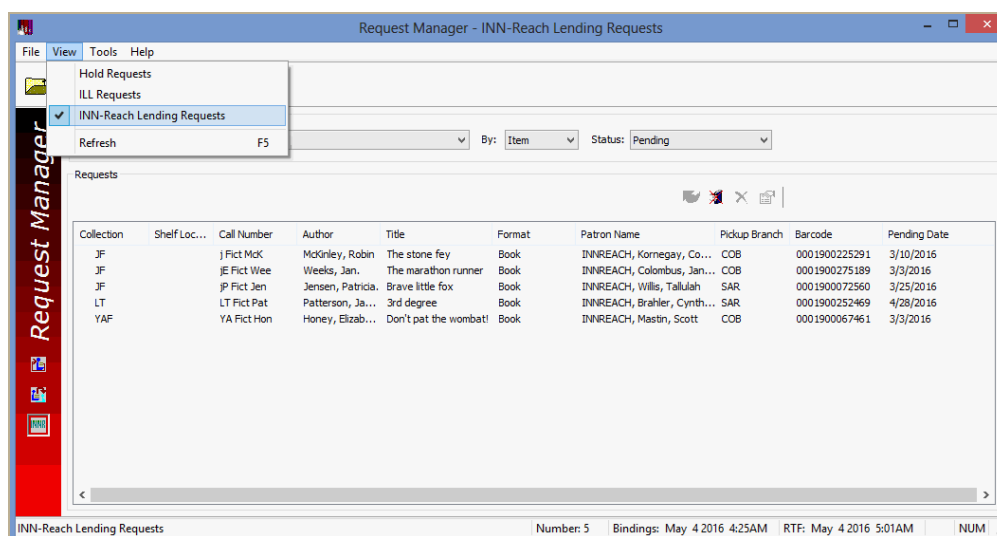
Lending library processes the INN-Reach request and ships the item

To process the INN-Reach request, a staff member at the Polaris lending library checks the Request Manager for INN-Reach holds that need to be filled; prints a Requests to Fill list to locate the item in the stacks; brings the item back to the circulation desk or ILL department; scans the item; prints a pickup slip to go with the item; and ships the item to the borrowing library or transfers the item to the branch that handles the shipments for the library. For information on designating the shipping and receiving branch, see "Set INN-Reach request parameters in Polaris Administration" on page 23.

Note:

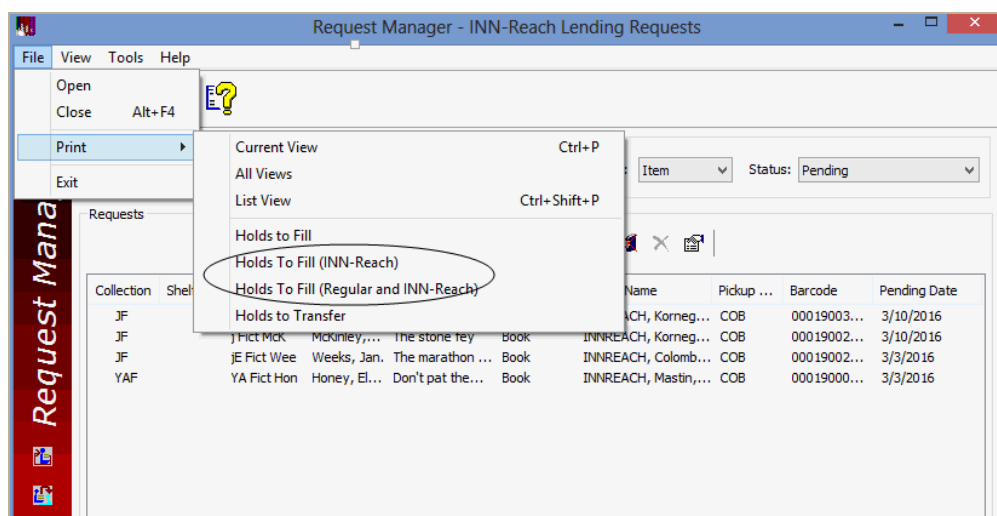
The **INN-Reach pickup slip** check box must be selected on the Check-in - Tools | Options dialog box for the Check-In workflow.

1. Check the Request Manager for any INN-Reach holds to fill on the INN-Reach Lending Requests view.



2. If there are INN-Reach hold requests waiting to be filled, select either **Holds To Fill (INN-Reach)** or **Holds To Fill (Regular and INN-Reach)**, depending on whether you want INN-Reach hold requests on a separate or combined requests-to-fill list.

What's New in Polaris 5.1 & Leap 1.1



The Hold Requests To Fill (INN-Reach) list (or the combined list) is printed.

For each INN-Reach hold request, the following information is included:

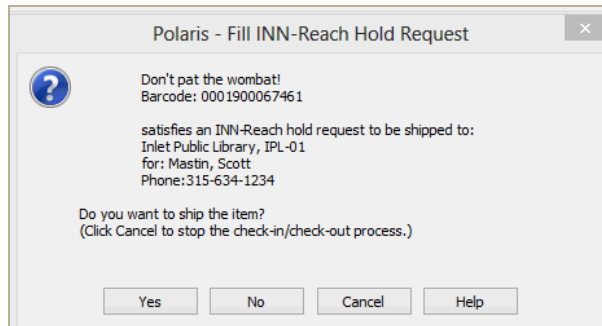
- The item's call number, barcode, title, and author.
- The virtual patron's name (prefaced by INNREACH), the patron code, the INNReach patron barcode, the patron phone number (if it exists), and the pickup library (where the courier will pick up the item to be shipped to the other library).

Hold Requests To Fill (Regular and INN-Reach)					
Fill Branch: COB					
JF j Fict Jam	Book	0001900126762	This item only		
Shoebag returns			James, Mary, 1927-		
Jones, Michael J	Saratoga Resident	SAR	1000200161270		
315-634-1234, 315-634-1234			Pickup Library: SAR		
JF j Fict McK	Book	0001900225291	This item only		
The stone fey			McKinley, Robin		
INNREACH, Kornegay, Colden P	Test code for Rotterdam	SAR	INNREACH371158		
315-634-1234			Pickup Library: COB		
JF jE Fict Wee	Book	0001900275189	This item only		
The marathon runner			Weeks, Jan.		
INNREACH, Colombus, Janet C	Test code for Rotterdam	SCP	INNREACH371131		
315-634-1234			Pickup Library: COB		
JF jP Fict Com	Book	0001900076827	This item only		
Losing things at Mr. Mudd's			Coman, Carolyn.		
Reid, Christopher J	Regular	SAR	5070		
315-634-1234, 315-634-1234			Pickup Library: SAR		

What's New in Polaris 5.1 & Leap 1.1

3. Take the list of INN-Reach hold requests into the stacks, locate the item that fulfills the request, and bring the item back to the location that handles ILLs for your library.
4. Scan the item on the Check-In workflow.

A message indicates the item satisfies an INN-Reach hold request and asks whether to ship the item to the library. The message box displays the item title and barcode, the library's name and INN-Reach code, the name of the patron who placed the request, and the patron's phone number.



5. Click **Yes** to trap the hold.

Note:

If you click **Cancel**, no action is taken and the hold request and item status remain unchanged. If you click **No**, a message box indicates the hold will be denied, asks if you are sure you want to deny the hold, and provides the options **Yes** or **No**. If you click **Yes**, the hold is denied.

When **Yes** is selected, the item's status is updated to Held, and the request status is updated to Shipped. An INN-Reach API message is sent to the borrowing library indicating the item has been shipped.

The INN-Reach pickup slip is printed. The slip can be printed on a page or receipt printer.

The default text, *This item is available for pickup at the designated location*, can be edited using the Polaris WebAdmin tool. The string is under RECEIPT_INNREACH_PICKUP and the text specified for the transacting branch is used.

```
03/09/2016 9:31 AM
This item is available for pickup at the designated location.

Ballston Spa Public Library
CALL NO.: 741.5 Har
AUTHOR: Harrison, Hazel.
TITLE: How to paint and draw : drawing, watercolour, oil & acrylic, pastel
BARCODE: 0090800615015
RECORD NO.: 2449294
PICKUP AT: Saratoga Public Library

Saratoga Public Library
SARATOGA-DOCK

Jones, Michael J
Saratoga Public Library

315-634-1234
```

What's New in Polaris 5.1 & Leap 1.1

Note:

If the pickup slip fails to print or is misplaced, the staff member can scan the item barcode to reprint the pickup slip. A message box displays: **This INN-Reach item has already been checked in.** When the user clicks **OK**, the pickup slip is reprinted.

6. Put the physical item along with the pickup slip in the courier bag for courier pickup.

Item is received at the borrowing library and checked out in Polaris

When the item is received at the borrowing library, an INN-Reach API message is sent to the Polaris library that automatically checks out the item to the virtual patron, updates the item's circulation status to **Out**, and updates the hold status to **Out to patron**.

The Hold Request workform | Notes view, Request History pane displays **An item linked to this request has been checked out** in the **Action** column.

Hold Request - 843500 - Pucker - Notes

File Edit View Links Tools Help

Request

Status: Out to patron 3/4/2016 Request date: 3/3/2016 Activation: 3/ 3/2016

Pickup: Schenectady Branch - Central (SCP) Origin: ILL Expiration: 3/ 3/2026

☒ This item only ☐ Borrow by mail Tracking No.:

Notes

Staff display:

Patron:

Non-public: TrackingID: 2359 PatronAgency: plag1 PickupLoc: mv007:Balston Spa Public Library:BSP-01

PAC display:

Request Satisfied By

Bib Contro...	Item Barcode	Status	Branch	Not ...
666490	0000413677501	Out	Schenectady Bran...	

Request History

Date	Status	Barcode	Branch	User	Action
3/4/2016 11:09:30 AM	Out to patron	0000413677501	Schenectady Branch - Central	PolarisExec	An item linked to this request has been checked out
3/3/2016 3:55:00 PM	Active			PolarisExec	Request activated during request creation

For Help, press F1 NUM

The Item Record workform | History view displays the message **Item was received at an INN-Reach library** when the item was received at the borrowing library and then **Checked out** when the item is checked out in Polaris.

What's New in Polaris 5.1 & Leap 1.1

Item Record 2452744 - Circulation History - Polaris

File Edit View Links Tools Help

Barcode: 0000413677501 Record status: Final ☐ ILL ☐ EContent ☐ Non-circulating ☒ Display in PAC

Title: Pucker Bib control number: 666490

Author: Gideon, Melanie, 1963- Parent item: Item control number: 2452744

Call number: Fict Gid YA Price: \$16.99 Issue control no.:

Owner: Schenectady Branch - Central (br) Shelf location: (None)

Assigned: Schenectady Branch - Central (SCP) Temporary location:

Collection: Young Adult Fiction (YAF) Circulation status: Out 3/4/2016 11:09:30 AM

Home branch: Schenectady Branch - Central (SCP) ☐ Do not float

History

Date	Assigned Branch	Status	Action	Location	User/WKS	Pat
3/4/2016 11:09:30 AM	Schenectady Bran...	Held -> Out	Checked out	Schenectady Branch...	PolarisExe...	371
3/4/2016 11:09:29 AM	Schenectady Bran...	Held	Item was received at an INN-Reach library	Schenectady Branch...	PolarisExe...	371
3/4/2016 10:30:56 AM	Schenectady Bran...	Held	Item was shipped to an INN-Reach library	Schenectady Branch...	Joanne.R...	371
3/4/2016 10:30:56 AM	Schenectady Bran...	Held	At Schenectady Branch - Central (SCP)	Schenectady Branch...	Joanne.R...	371
3/4/2016 10:30:56 AM	Schenectady Bran...	In -> Held	Automatic status change from Check In	Schenectady Branch...	Joanne.R...	

For Help, press F1 NUM

Item is returned to the Polaris lending library

The patron at the borrowing library returns the item, the library ships the item back to the Polaris lending library, and INN-Reach sends an Item Shipped API message which initiates the following processes in Polaris:

- The item is checked in and the item status is set to **In-transit** to the item's Assigned branch.
- The item-level hold request is deleted
- The following note is added to the Item Record workform, History view: **Returning in-transit from an INN-Reach library.**

The returned INN-Reach item arrives at the lending library where it is checked in, and the following events occur:

- The virtual patron record is marked for deletion, and it will be deleted from the database the next time the Patron Nightly Processing SQL job runs in Polaris.
- A Final Item Checkin INN-Reach message is sent to the borrowing library indicating the item has been returned and checked in.

Additional INN-Reach processing when Polaris is the lending library

The INN-Reach integration also handles canceled and denied INN-reach hold requests; requests filled with a substitute copy; item deletions or status changes that cause de-contributions from the INN-Reach Central catalog; and renewals.

INN-Reach Hold is Canceled

When a patron or staff member from another participating library cancels an INN-Reach hold request before it is filled, an INN-Reach API message is sent to the Polaris library, which automatically deletes the item-level hold in Polaris.

INN-Reach Hold is Denied

If the lending library decides to override the INN-Reach request and let their local patron check out the item instead, the staff member denies the hold, and an Owning Site Cancels Request INN-Reach API message is sent to INN-Reach.

INN-Reach then attempts to find another item in the Central Catalog that will fill the request. If another item is found, a hold is placed on that item. If another item cannot be found, INN-Reach Central sends a Cancel Request INN-Reach API message which cancels the request at the patron's borrowing library.

Note:

INN-Reach will never choose an item from the same server as the original item that was previously denied. If there are items within that library that can alternately fill the request, it is expected that the staff member at the lending library would use Fill Now to fill the request with another item instead of denying it.

Deletion or Status Change De-Contributes Item from Central Catalog

The items your library has contributed to the INN-Reach Central Catalog are modified or de-contributed to the Central Catalog based on circulation and cataloging updates to these records in the local Polaris database. When an INN-Reach hold request is placed on an item, but before the item is shipped from the Polaris library, the item is deleted or a status change in Polaris causes its de-contribution in the Central Catalog, a Deny Hold message is sent to INN-Reach Central.

Fill Now is Used to Substitute an Item for the One Requested

The library cannot find the exact item requested, so a staff member uses the **Fill Now** option on the Hold Request workform to replace the item with another copy. The staff member scans the replacement item's barcode. If the item is linked to the same bib (the Bibliographic Control Number is the same as the original request) and has been contributed to the INN-Reach Central Catalog, an INN-Reach Transfer Request API message is sent to the

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borrowing library. The request status and replacement item status are updated to Held and the INN-Reach pickup slip is printed.

Hold Request - 843767 - Above suspicion - General

File Edit View Links Tools Help

Request
Status: Pending 3/29/2016 Request date: 3/29/2016 Activation: 3/29/2016
Pickup: Stillwater Public Library (STI) Origin: ILL Expiration: 7/16/2016
☒ This item only ☐ Borrow by mail Tracking No.:

Patron
Barcode: INNREACH371194 Find Registered at: Stillwater Public Library (br)
Name: Smith, Laura J INNRE for Rotterdam

Details
Title: Above suspicion Find
Author: Sharkey, Joe. ISBN: 0671796445
Constituent title: Constituent author:
Publisher: Simon & Schuster, Date: 1993 Edition: LCCN:
Item barcode: 0003300040999 Call number: 364.152 Sha
Volume: Format: Book
Issue: ISSN: Copy:
Series: Pages:

Scan/Enter Item Barcode
Item barcode: OK Cancel

For Help, press F1 NUM

Lending Library Receives an Item is Renewed Message from the Borrowing Library

When a borrowing library's patron renews an item that belongs to your library, a Borrower Renew INN-Reach API message is sent to your Polaris library system, which automatically renews the item in Polaris. If there are renewal limits or charges set for your Polaris library, they are ignored.

New and Updated Type of Material (TOM) Definitions and Icons

Polaris 5.1 includes new and modified bibliographic Type of Material (TOM) definitions. TOMs are used in many displays and search filters in the Polaris staff client, PowerPAC, Mobile PAC, Leap, SimplyReports, and Express Check. During your upgrade to Polaris 5.1, any bibliographic records that meet the criteria for the new or updated TOMs will automatically be assigned the appropriate TOMs so there will be no downtime before the new TOMs appear in Polaris.

To assist your library in transitioning to the new definitions, and to support comparisons and evaluations before and after the upgrade, two processes will occur as part of the upgrade to Polaris 5.1:

1. For each of the pre-5.1 TOM definitions (except Book), a bibliographic record set will be created containing the records that currently have that TOM as the primary TOM.

The record sets will be named Primary TOM pre-5.1 [TOM description].

Examples:

Primary TOM pre-5.1 - Audio Book

Primary TOM pre-5.1 - DVD

After the upgrade, you can retrieve each record set and look at the format column to see the effect (if any) on the primary TOM for each record.

Then, you can use the Bibliographic Bulk Change process to make any necessary adjustments to the records.

2. The primary TOMs and the TOM index will be recalculated so records that conform to the new or changed definitions will be assigned the new TOMs automatically. (No leader or fixed-field values will be changed.)

After the upgrade, you can use the Find Tool **Limit by | Type of Material** filter to see the records that conform to each new or changed TOM definition.

From these Find Tool results, you can create bibliographic record sets and use the Bibliographic Bulk Change process to make any necessary adjustments to the records.

Depending on how your library has adjusted the leader and fixed field settings in existing records, you may see many records with changed TOM or very few. In cases where the TOM definition is narrower (more specific) than before, such as with the new DVD and Music CD definitions, fewer records may be assigned those TOMs. In cases where records had no dedicated TOM assigned because none existed for the type of resource, for example vinyl records and video games, the new TOMs are assigned if the correct coding already exists in the records.

New TOM Definitions

The following new TOM definitions were added to Polaris:

- "New TOM: Atlas " on page 59
- "New TOM: Audio Book on Cassette" on page 60
- "New TOM: Audio Book on CD" on page 60
- "New TOM: Blu-ray + DVD" on page 60
- "New TOM: Book + DVD" on page 61
- "New TOM: Emagazine" on page 62
- "New TOM: Streaming Music" on page 62
- "New TOM: Streaming Video" on page 63
- "New TOM: Video Game" on page 64.
- "New TOM: Vinyl" on page 64

Updated TOM Definitions

The following existing TOMs were updated:

- "Changed TOM: Audio Book" on page 64.
- "Changed TOM: AudioEbook Renamed Eaudiobook" on page 65.
- "Changed TOM: Book + CD" on page 65
- "Changed TOM: DVD" on page 66.
- "Changed TOM: Music CD" on page 66

New TOM: Atlas



The Atlas Type of Material (TOM) is assigned to bibliographic records coded any of these three ways:

1. Leader position 06=e or f AND 008/25=e
2. in the same 006 tag:006/00=e or f AND 006/08=e
3. in the same 007 tag:007/00=a AND 007/01=d

If the bib record also meets the criteria for Map (map) or Cartographic material (cmt) or Manuscript Cartographic material (mcm) or Printed Cartographic material (pcm), **Atlas** is the primary TOM.

New TOM: Audio Book on Cassette



The Audio Book on Cassette (abt) Type of Material (TOM) is assigned to bibliographic records coded as follows:

- Leader position 06=i
AND in the same 007 tag:
- 007/00=s AND 007/01=s

If the bib record also meets the criteria for Audio Book, Audio Book on Cassette takes precedence as the primary TOM.

New TOM: Audio Book on CD



The Audio Book on CD (abc) Type of Material (TOM) is assigned to bibliographic records coded as follows:

- Leader position 06=i
AND in the same 007 tag:
- 007/00=s AND 007/01=d AND 007/03=f

If the bib record also meets the criteria for Audio Book, Audio Book on CD takes precedence as the primary TOM. If the bib record also meets the criteria for Book+CD, then Book+CD takes precedence.

New TOM: Blu-ray + DVD



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The Blu-ray + DVD (bdv) Type of Material (TOM) is assigned to bibliographic records coded as follows:

- Leader position 06=g
AND
- Fixed field position 008/33=v
AND in the same 007 tag:
- 007/00=v AND 007/01=d AND 007/04=s
AND in the same 007 tag:
- AND 007/00=v AND 007/01=d AND 007/04=v

If the bib record also meets the criteria for Videorecording (vid) or DVD (dvd) or Blu-ray (brd), or Book + DVD (bkv), Blu-ray + DVD takes precedence as the primary TOM.

New TOM: Book + DVD



The Book+DVD (bkv) Type of Material (TOM) is assigned to bibliographic records coded in either of these two ways:

1. Leader position 06=a
AND
006/00 = g
AND in the 007 same tag:
007/00=v AND 007/01=d AND 007/04=v
2. Leader position 06=g
AND
006/00 = a
AND in the 007 same tag:
007/00=v AND 007/01=d AND 007/04=v

If the bib record also meets the criteria for Book (bks), Videorecording (vid), or DVD (dvd), Book + DVD is the primary TOM.

New TOM: Emagazine



The Emagazine (emg) Type of Material (TOM) is assigned to bibliographic records coded as follows:

- Leader position 07=s
AND
- 008/21=p and 008/23=o

If the bib record also meets the criteria for Ebook (ebk) or Serial (ser) or Periodical (per), Emagazine takes precedence as the primary TOM.

Emagazine TOM Assigned to Integrated OverDrive Periodicals

When records from OverDrive for electronic periodicals are imported into Polaris through the integrated eContent APIs, the media type in the OverDrive API is now mapped to the correct MARC values so that the records are assigned the Emagazine TOM. See "New TOM: Emagazine" on page 62.

Note:

After the upgrade to Polaris 5.1, these values are assigned to new records that are automatically imported, but records that were already in the database before the upgrade will not be automatically changed. The library can use the Bibliographic Bulk Change process to update any existing records for OverDrive periodicals.

New TOM: Streaming Music



The Streaming Music (stm) Type of Material (TOM) is assigned to bibliographic records coded as follows:

- Leader position 06=j
AND
- 008/23=o (online) or s (electronic)

Note:

Some streaming music providers use a single bibliographic record with one 856 link that points to a page from which the user can either stream or download the music. For that reason, either an "o" or an "s" is valid in the 008/23.

New TOM: Streaming Video



The Streaming Video (stv) Type of Material (TOM) is assigned to bibliographic records coded as follows:

- Leader position 06=g
AND
- 008/29=o or s

If the bib record also meets the criteria for Projected Medium (pgr), Videorecording (vid), Visual Materials (vis) or Electronic Resource (elr), Streaming Video takes precedence as the primary TOM.

Notes:

Some streaming video providers use a single bibliographic record with an 856 link that points to a page from which the user can either stream or download the video. For that reason either an "o" or an "s" is valid in the 008/29.

Streaming Video TOM Assigned to Integrated OverDrive Streaming Videos

When records from OverDrive for streaming videos are imported into Polaris through the integrated eContent APIs, the media type in the OverDrive API is mapped to the correct MARC values so that the records are assigned the Streaming Video TOM. See "New TOM: Streaming Video" on page 63.

Note:

After the upgrade to Polaris 5.1, these values are assigned to new records that are automatically imported, but records that were already in the database before the upgrade will not be automatically changed. The library can use the Bibliographic Bulk Change process to update any existing records for OverDrive streaming videos.

New TOM: Video Game



The Video Game (vgm) Type of Material (TOM) is assigned to bibliographic records coded either of the following two ways:

1. Leader position 06=m AND 008/26=g
2. 006/00=m AND 006/09=g (in the same tag)

If the bibliographic record also meets the criteria for Electronic Resource or DVD, or Streaming Video, Video Game is the primary TOM.

This TOM may be used for hand-held, mobile, PC, and online games.

New TOM: Vinyl



The Vinyl (vyl) Type of Material (TOM) is assigned to bibliographic records coded as follows.

- Leader position 06=i or j
AND in the same 007 tag:
- 007/00=s AND 007/01=d AND 007/03= a or b or c or d or e

If the bib record also meets the criteria for Audio Book (abk) or Sound Recording (rec) or Musical Sound Recording (msr) or Nonmusical Sound Recording (nsr), Vinyl takes precedence as the primary TOM.

Changed TOM: Audio Book

The existing TOM definition for Audio Book was modified to conform to current national cataloging standards and practices.

Before this change, the TOM definition included the requirement that Leader position 06 have a value of "a" (language material), but national standards recommend a value of "i" (non-musical sound recording) in the Leader 06.

Audio Book is assigned as the primary TOM for bibliographic records coded as follows:

- Leader position 06=i
AND
007/00=s

No change was made to the precedence ranking.

Note:

The pre-5.1 definition of Audio Book was:
Leader position 06=a OR 006/00=a
AND
007/00=s

Changed TOM: AudioEbook Renamed Eaudiobook

The AudioEbook TOM name was changed to Eaudiobook to make the electronic aspect of the audiobook more prominent; conform to common publisher and library usage; and eliminate confusion that arose when only the "audio" part of the type of material was displayed in list view columns. The TOM definition did not change; the MARC coding that previously defined an AudioEbook TOM will now define an Eaudiobook TOM.

Changed TOM: Book + CD

The TOM definition for Book+CD was changed so that 007/12=e AND 007/13=d are no longer required. In addition, the new definition allows catalogers to code the Leader 06/008 for the book with the 006 for the accompanying CD, or to code the Leader 06/008 for the CD with the 006 for an accompanying book.

Book+CD is assigned as the primary TOM for bibliographic records coded either of the following two ways:

1. Leader position 06= i or j
AND
006/00=a
AND in the same 007 tag:
007/00=s and 007/01=d and 007/03=f
2. Leader position 06=a
AND
006/00=i or j
AND in the same 007 tag:

007/00=s and 007/01=d and 007/03=f

No change was made to the precedence ranking; if a bibliographic record also meets the criteria for the new TOM Audio Book on CD, the Book+CD TOM takes precedence.

Note:

The pre-5.1 definition of Book+CD was:

Leader position 06=i OR a

AND

006/00=a

AND all in the same 007 tag:

007/00=s AND 007/01=d AND 007/12=e AND 007/13=d

Changed TOM: DVD

The DVD Type of Material (TOM) was updated to conform to the current national standards.

DVD is assigned as the primary TOM for bibliographic records coded as follows:

- Leader position 06=g
AND
- 008/33=v
AND in the same 007 tag:
- 007/00=v AND 007/01=d AND 007/04=v

As a result of this change, records for Blu-ray titles will no longer meet the definition for DVD (because of the different 007/04 value), and therefore Blu-ray titles will not be retrieved when searching for DVDs unless the record meets the new TOM definition for Blu-ray + DVD.

Note:

The pre-5.1 definition of DVD was:

007/00=v AND 007/01=d (all in the same 007 tag)

Changed TOM: Music CD

The Music CD Type of Material (TOM) was updated to conform to the current national standards and to prevent records with other formats from being assigned the Music CD TOM.

Before this change, the TOM definition for Music CD required Leader 06=j or 006/00=j AND one 007 tag where 007/00=s AND 007/01=d. This definition was too broad, resulting in records with other recording types, such as vinyl record, being assigned the Music CD TOM.

Music CD is assigned as the primary TOM for bibliographic records coded as follows:

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- Leader position 06=j or 006/00=j
AND in the same 007 tag:
- 007/00=s AND 007/01=d AND 007/03=f (1.4 m. per sec)

The precedence ranking was not changed.

Note:

The pre-5.1 definition was:
Leader position 06=j OR 006/00=j
AND all in the same 007 tag:
007/00=s AND 007/01=d

New Types of Material (TOMs) for PAC Search Filters

Polaris 5.1 includes new and modified Type of Material (TOM) definitions and icons. For details, see "New and Updated Type of Material (TOM) Definitions and Icons" on page 58. The new TOMs are available for the PAC Limit by search filter list. By default, all are enabled in the PAC Limit By Display policy table.

The table below lists new and existing TOMs by name and code.

Note:

New TOMs are noted in the table. If you have already used a description for a TOM Limit by filter that duplicates a new description, at upgrade the description for the new TOM will appear in the Limit by list with the number (2) appended. To prevent confusion, you can edit the description in the PAC Limit By Display policy table.

Format/Type of Material	Code	Icon Filename	Enabled by Default
Abstract	abs	formatid39.gif	Y
Archival/mixed materials	mix	formatid07.gif	N
Atlas (New)	atl	formatid47.gif	Y
Audio book	abk	formatid37.gif	Y
Audio book on cassette (New)	abt	formatid53.gif	Y
Audio book on CD (New)	abc	formatid52.gif	Y
Blu-Ray Disc	brd	formatid40.gif	Y
Blu-Ray + DVD (New)	bdv	formatid45.gif	Y
Book	bks	formatid01.gif	Y

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Format/Type of Material	Code	Icon Filename	Enabled by Default
Book + Cassette	bcs	formatid43.gif	Y
Book + CD	bcd	formatid42.gif	Y
Book + DVD (New)	bkv	formatid46.gif	Y
Braille	brl	formatid28.gif	N
Cartographic material	cmt	formatid03.gif	N
Digital collection	dmc	formatid38.gif	Y
DVD	dvd	formatid33.gif	Y
EAudioBook (was Audioebook)	aeb	formatid41.gif	Y
Ebooks	ebk	formatid36.gif	Y
Electronic resources	elr	formatid06.gif	Y
Emagazine (New)	emg	formatid50.gif	Y
Globe	glb	formatid14.gif	Y
Kit	kit	formatid23.gif	N
Large print	lpt	formatid27.gif	Y
Manuscript cartographic material	mcm	formatid12.gif	N

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Format/Type of Material	Code	Icon Filename	Enabled by Default
Manuscript material	mss	formatid15.gif	N
Manuscript music	mmu	formatid10.gif	N
Map	map	formatid13.gif	Y
Microform	mic	formatid26.gif	N
Motion picture	mot	formatid17.gif	Y
Music CD	mcd	formatid35.gif	Y
Musical sound recording	msr	formatid21.gif	Y
Newspaper	new	formatid25.gif	Y
Nonmusical sound recording	nsr	formatid22.gif	Y
Periodical	per	formatid24.gif	Y
Printed cartographic material	pcm	formatid11.gif	N
Printed music	pmu	formatid09.gif	N
Printed or manuscript music	mus	formatid02.gif	N
Projected medium	pgr	formatid16.gif	Y

What's New in Polaris 5.1 & Leap 1.1

Format/Type of Material	Code	Icon Filename	Enabled by Default
Serial	ser	formatid08.gif	Y
Sound recording	rec	formatid05.gif	Y
Streaming music (New)	stm	formatid48.gif	Y
Streaming video (New)	stv	formatid49.gif	Y
Three-dimensional object (artifact)	art	formatid20.gif	Y
Two-dimensional nonprojected graphic	ngr	formatid19.gif	Y
Video game (New)	vgm	formatid44.gif	Y
Videorecording	vid	formatid18.gif	Y
Videotape	vcr	formatid34.gif	Y
Vinyl (New)	vyl	formatid51.gif	Y
Visual materials	vis	formatid04.gif	N

Waive Payment Type for Third-Party Cash Management Applications

Library staff using a third-party cash management application can waive fines and fees from the cash management application interface. In previous versions of Polaris, these transactions were recorded as cash payments. A custom SIP payment type of 08 - waive has now been added to record the transactions correctly.

The cash management application sends a 37 (fee paid) request with 08 in position 21-22 when a staff member waives a single or multiple charges. Polaris then waives the associated charge or charges in the patron's account.

Note:

Contact your cash management system vendor if you would like to implement this feature.

For details, see the following situations:

Single Charge Waive Transaction

1. The staff member elects to waive an individual charge in the cash management application.
2. The cash management application sends a single 37 fee paid request with 08 in position 21-22.
3. Polaris waives the individual charge and replies with a 38 fee paid response. This will result in a patronacctxncodeid of 6 - waive existing charge.

Multiple Charge Waive Transactions

1. The staff member elects to waive multiple charges in the cash management application. At the same time, the staff member can also elect to pay some charges.
2. The cash management application sends multiple 37 fee paid requests. If they are paying some individual charges at the same time, there will be as many 37 requests as necessary to match the charges the staff member has selected to reconcile (both waives and payments). Waive transactions are sent with 08 in position 21-22. Payments are sent with 00 in position 21-22 to indicate that they are being paid with cash.
3. Polaris waives or pays the individual charges and replies with a 38 fee paid response for each waive or payment. For waives, this will result in a patronacctxncodeid of 6 - waive existing charge.

Bulk Waive a Specified Dollar Amount

1. The staff member elects to bulk-waive a certain dollar amount in the cash management application; for example, \$10.
2. The cash management application sends a 37 fee paid request with 08 in position 21-22 to waive \$10.00.
3. Polaris applies the waive amount to charges from oldest to newest until the amount has been used up, possibly ending with a partial waive of a charge. Polaris replies with a 38 fee paid response for the bulk waive, resulting in a patronacctxncodeid of 6 - waive existing charge for each of the waived charges.

Note:

Bulk waive and bulk pay transactions cannot be submitted at the same time. There are no changes to bulk payment processing. For bulk payments, charges are paid from oldest to newest, sometimes resulting in a charge being partially paid.

Reports

The custom waive transactions appear in the Daily Cash Drawer report.

Updates for MARC Technical Notices

Polaris 5.1 includes updates to coding to comply with the changes in the following Library of Congress, MARC Standards technical notices:

- [TECHNICAL NOTICE \(October 22, 2015\)](#)
- [TECHNICAL NOTICE \(November 12, 2015\)](#)
- [TECHNICAL NOTICE \(December 9, 2015\)](#)

"Did You Mean" Search Suggestion Improvements

"Did You mean" search term suggestions have been improved in Polaris PowerPAC (keyword, phrase, and exact searches) and Polaris PowerPAC Children's Edition (keyword "Look for" searches).

Suggestions Displayed Only When There Are Potential Results

When Did You Mean is enabled, suggestions are displayed only if there would be results in the Polaris database when the user clicks a suggestion. Potential results in the Polaris database take into account any **Search by**, **Limit by**, and **More Search Options** selections, as well as resource groups, that were in effect when the search was launched. However, if the user changes a selection in the **Limit By** dropdown or a selection in **More Search Options** and then clicks the Did You Mean suggestion without clicking **Go** again, the new selections are ignored.

Note:

This change applies only to searches in the Polaris database. If the user is also searching a remote database, Did You Mean suggestions may display even if there will be no results in the Polaris database, in case the remote database will return results. No attempt is made to determine if there will be hits in the remote database due to concerns about processing time.

As in previous versions, you can also set the PowerPAC profile **Did You Mean: Suggestions are to display even when hits are returned** to **Yes** to display Did You Mean suggestions in PowerPAC even when search results are returned. If the profile is set to **No**, Did You Mean suggestions are displayed only when the search produces no hits. (The profile does not apply to Children's PAC, where suggestions are displayed only when a search as entered produces no hits.)

The Did You Mean process identifies a possible search suggestion or suggestions in a Did You Mean Overrides table match, a sound value (metaphone) match in the underlying SearchSuggestions table, or one or more matches in the spell check dictionary.

At least one bibliographic record will be retrieved if the user follows the suggestion. If the process returns multiple suggestions, each suggestion is checked individually and is not displayed in the suggestion list if it produces zero hits. Any returned records must have **Display in PAC** checked.

In previous versions, if spell check processing returned multiple suggestions, the first suggestion was displayed with a "more" link, which opened a small pop-up window that showed the other suggestions. This feature now applies to multiple suggestions from the SearchSuggestions table as well as spell check matches. Multiple matching suggestions from the SearchSuggestions table show all the suggestions that will return at least one record.

When the user clicks a Did You Mean suggestion, there may be a pause while the search is conducted; the pause is most noticeable when CQL filters from the **Limit by** list were applied to the search. Processing is limited to 10 seconds. The user is not prevented from doing other actions during processing time, but if another action is taken, the Did You Mean results are not returned. No additional search transaction is logged when the user clicks a Did You Mean suggestion.

Improved Author Name Suggestions

Better "Did You Mean" suggestions are returned for many author names when the user misspells the name. In previous versions, author names were included in SearchSuggestions only if the author name was used as both an author and a subject. The requirement that an author name also be used as a subject has been removed, allowing many more author names to be included in the SearchSuggestions table.

Did You Mean at Polaris 5.1 Upgrade

- The monthly Did You Mean Processing job is no longer used to repopulate the SearchSuggestions table. This process now occurs as part of the nightly Keyword Processing step in the job sequence.
- The addition of author names that are not subjects to the SearchSuggestions table significantly increases the number of rows in the table, so processing time may be increased.
- The KeywordCounts table is no longer used.

IndieBound Book Sense "Children's Interest" Best Seller List Expanded

The Children's Interest best seller list has been expanded into two separate lists: Early and Middle Grade Readers, and Young Adult. The lists are available for selection as follows:

PowerPAC Profiles (Administration):

- **Dashboards: Web part construction** (Web Part Editor) (system level only)
- **Dashboards: Web page/Web part assignment** (Add Web Parts) – At upgrade, on any pages where the former Children's Interest list was enabled for display, both the Early and Middle Grade Readers and the Young Adult lists will be enabled for display.
- **Portal page content carousels** – If a Content Carousel for the Children's Interest list was selected for display on the portal page, on upgrade both the Early and Middle Grade Readers and the Young Adult lists will be enabled for display.

Mobile PAC Profile (Administration): **New and Popular Titles**

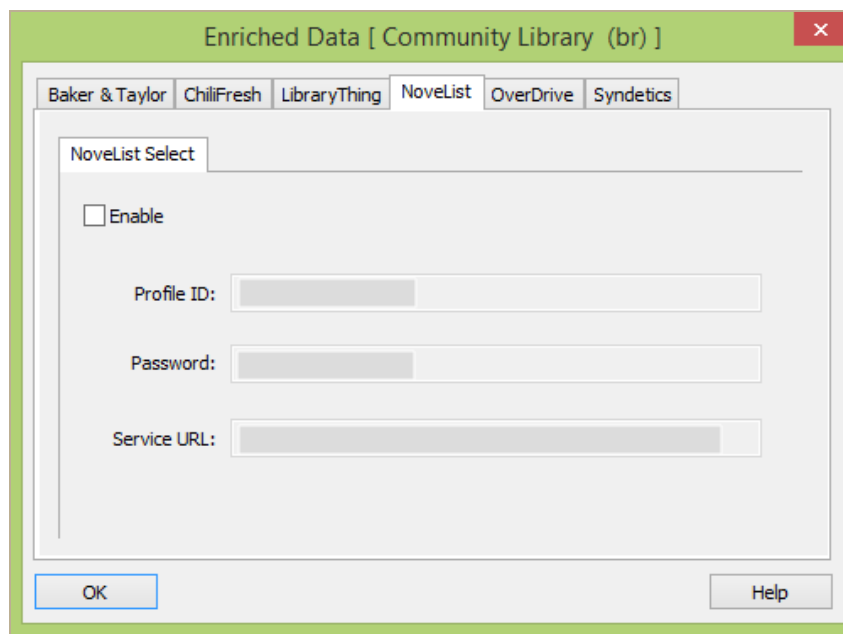
Carousel Toolkit (Utilities menu)

In addition, the IndieBound (Book Sense) best seller list Children's Fiction Series can now be selected for display using the profiles and Carousel Toolkit as listed above.

NoveList Select Includes All NoveList Links

EBSCO's NoveList Select now supports a link to whatever NoveList product the library subscribes to. Because of EBSCO's change, it is no longer necessary to enable NoveList and NoveList Select separately in Polaris.

In Polaris Administration, the PAC profile Enriched Data reflects this change. Regardless of your NoveList subscription type, check **Enable** on the NoveList Select subtab and supply your EBSCO profile ID, password, and service URL.



Prior to Polaris 5.1, the NoveList tab on the Enriched Data dialog box included subtabs for both NoveList and NoveList Select. Until you can upgrade to Polaris 5.1, you can suppress the obsolete NoveList "drawer" from display on the PAC product page by clearing the check boxes on the NoveList subtab. This places the drawer in the "not enabled" list in the **Product Page: Configure** profiles for PowerPAC and Mobile PAC, and suppresses the drawer from display.

Bibliographic Record Displays Number of Linked Items

The Bibliographic Record workform now displays the number of linked items in the header.

Bibliographic Record 400608 - MARC21 - Polaris

File Edit View Links Tools Help

Control number: 400608 Owner: QA-RIGEL 5.1 (sys) Items: 199 Record status: Final

Title: Harry Potter and the sorcerer's stone

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

Tag	Ind	Data
LDR		cam 22 a 4500
001		400608
005		20071011091742.0
008		971022s1998 nyua j 000 1 eng d
010		1a 97039059 /AC
020		1a9780590353403 :1c\$22.99
020		1a0590353403 :1c\$19.95
035		1aAGD-9311
050	00	1aPZ7.R798351bHar 1998
082	00	1a[Fic]1221
092		1bRow
099		1aj Fict1bRow
100	1	1aRowling, J. K.
245	10	1aHarry Potter and the sorcerer's stone /1cby J. K. Rowling ; illustrations by Mary Grandpre.
260		1aNew York :1bA. A. Levine Books,1cc1998, 1997.
300		1a309 p. :1bill.
500		1a"An imprint of Scholastic Press."
500		1aFirst in the series.
500		1aIncludes Pre-pub ed.
520		1aRescued from the outrageous neglect of his aunt and uncle, a young boy with a great destiny proves his worth while attending Hogwarts School for Wizards and Witches.
650	0	1aFantasy.
650	0	1aWitches1vFiction.

For Help, press F1

NUM

In-Transit Items Count Toward Floating Limits

Before this change, only items with a status of In were counted towards the floating collection limits set in the **Floating: Collection Limits** policy table in Polaris Administration. Now, items with a status of In-transit are also counted towards these floating limits. For libraries that use load balancing, counting the items In-transit to the library, as well as the In items, ensures that the library does not receive too many items into its collection.

Changed Label on the Patron Record Bulk Change Dialog Box

The Block/Notes tab on the Patron Record Bulk Change dialog box was modified so that the **Text to add** and **Text to delete** labels are aligned with the editable fields when you select **Free text blocks**, **Add** or **Delete**.

The screenshot shows the 'Patron Record Bulk Change' dialog box with the 'Blocks/Notes' tab selected. The dialog has several tabs: 'Registration', 'Address', 'General', 'UDFs', 'Blocks/Notes', and 'Report/Record Set'. The 'Blocks/Notes' tab contains three main sections: 'Library assigned blocks', 'Free text blocks', and 'Non-blocking notes'. The 'Free text blocks' section is circled in red. It includes a checked checkbox, an 'Actions' dropdown menu set to 'Add', and a text input field labeled 'Text to add:'. The 'Text to add' label is aligned with the input field. Below this are sections for 'Non-blocking notes' and 'Blocking notes', each with an unchecked checkbox and an 'Actions' dropdown menu. At the bottom of the dialog are 'OK', 'Cancel', and 'Help' buttons.

PatronID in SIP Patron Authentication Messages

A new value has been added to the SIP authentication messages that allows any third-party content providers who can consume this value to maintain content on a patron's account even if the patron barcode has been replaced. (for example, due to a lost card). The new **PC** field containing the PatronID has been added to the 24 Patron Status and 64 Patron Information response messages consumed by the third-party vendor.

To implement this feature with OverDrive, follow these steps:

Note:

To implement this feature with other third-party vendors, first contact the vendor to be sure the new value can be used. Then contact Innovative Interfaces. The process will be similar to the OverDrive example below.

1. Upgrade to Polaris 5.1.
2. Submit a support request to Innovative Interfaces via OverDrive Marketplace.

OverDrive receives the request and asks for a list of current IDs/barcodes and corresponding Patron IDs, so they can be linked together. This will ensure that all users can continue to access their existing checkouts and holds.

3. Generate the list and send it to OverDrive.

Upon receiving the list, OverDrive will link each user's barcode or ID to their new Patron ID. OverDrive updates the authentication configuration to capture the Patron ID from the SIP response as the user's identification.

SimplyReports

Editing Saved Reports

You can now edit all column and filter settings for saved Item, Patron, Patron Account, and Holds List and Count reports. To edit a saved report:

1. Select the **My Reports** tab, and select the **My reports** subtab.
2. Select the type of report you want to edit in the **Select one or more report types** box. The saved reports of this type are listed.
3. Select the check box next to a report in the list of saved reports.

The screenshot shows the 'SimplyReports' interface. At the top, there's a navigation bar with tabs: Patrons, Patron Account, Holds, Items, Bibs, Authorities, Serials, Funds, Invoices, Orders, My Reports, Admin, and Help. The 'My Reports' tab is selected, and the 'My reports' subtab is active. Below the navigation bar, there's a section for 'Saved reports'. On the left, a dropdown menu titled 'Select one or more report types' is open, showing a list of report types including 'Item list reports', which is highlighted. On the right, there's a table of saved reports. The table has columns: Select, Report name, Report description, Creation date, Last run date, Creator, Report type, and Actions. The 'CommunityItems2015+' report is selected with a checkmark. Below the table, there are buttons for 'Schedule reports', 'Run reports', 'Publish report', and 'Advanced publish'.

Select	Report name	Report description	Creation date	Last run date	Creator	Report type	Actions
<input type="checkbox"/>	CommunityItems2015		01/15/2016	01/15/2016	dorianne.gutierrez	Item list reports	Delete Edit
<input checked="" type="checkbox"/>	CommunityItems2015+		01/15/2016	01/15/2016	dorianne.gutierrez	Item list reports	Delete Edit
<input type="checkbox"/>	Lost and Claimed	Community Library	01/22/2016	01/22/2016	dorianne.gutierrez	Item list reports	Delete Edit
<input type="checkbox"/>	Lost and Claimed2	Community Library	02/09/2016	02/09/2016	dorianne.gutierrez	Item list reports	Delete Edit

4. Click **Edit** under **Actions**. A message asks if you are sure you want to edit this report. If you want to continue, click **OK**.

The tabbed page for the selected report type opens. The report information at the top of the page is blue to indicate that you are editing a saved report. The filter options are expanded, and column and filter options are displayed with the options set as they were when the report was saved.

Note:

As in previous versions of SimplyReports, saved reports preserve the column selection but do not preserve the column order.

What's New in Polaris 5.1 & Leap 1.1

Report type: **Item list reports** Report created by: **dorianne.gutierrez**
Created on: **1/15/2016 10:45:18 AM** Last run date: **1/15/2016 10:45:18 AM**
Report name: **CommunityItems2015+** Report description:

Report output columns: Item PO release date, Item assigned branch name, Item assigned collection abbreviation, Item assigned collection name, Item call number, Item call number prefix, Item call number suffix

Columns selected for output: Item assigned branch abbreviation, Item due date, Item barcode

Columns selected for sort: Item due date

☒ Include header rows
☐ Text file Delimiter type: **Comma & Quotes**
☒ Excel file

Continue

Item general filters
☐ Item record set: [dropdown]
Assigned branch: [dropdown]

5. Change the column and filter selections as desired.
6. Click **Continue**. The Report Preview window opens.

Close window

☐ Download report output

☒ Save report parameters for later use

Report name: **CommunityItems2015**

Report description: [text input] **Save report parameters**

☐ Create item record set from report results

7. Leave the report name unchanged to overwrite the previous version of the report, or type a new name for the edited report.
8. Click the **Save Report parameters** icon to save your edited report. For more information about saving your report parameters and making the report available to other staff members, see SimplyReports online help.

Last Run Date Updated for Manual Report Runs

In previous versions, the last run date for a saved report was updated only when a scheduled report ran automatically. The last run date is now updated when you run the report manually

as well as when it runs automatically.

Online Help Streamlined

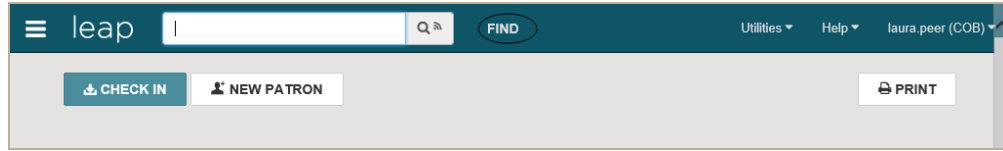
Help with SimplyReports is now available in a streamlined interface from the Help tab. SimplyReports online help is cross-referenced, searchable, and indexed, and you can print topics as you choose. The Help buttons and the redundant information associated with them have been removed from individual tabbed pages.



Leap - Find Tool Improvements

The following improvements were made to the Leap Find Tool:

- The Find Tool link is now more visible.



- Search results in the Leap find tool are now filtered by the user's permission if the **Find Tool: Filter search results by permission** Staff Client profile setting is set to **Yes** in Polaris Administration.
- The Find Tool display is larger on a tablet (iPad) or desktop.
- You can now search for hold requests. "Leap - Search for Hold Requests" on page 87

Leap - Search for Hold Requests

You can now search for hold requests using the Leap Find Tool.

Note:

If you do not have the **Hold request: Access** permission for a request, the request still appears in the search results list, but when you click the row to open the request, the Override dialog box appears.

When you search for hold requests in the Leap Find Tool, you can select search qualifiers and filters to limit the search results. The Qualifier list on the initial Find Tool view and the filter list on the Search filters view contain the following limiters:

- Activation date
- Author
- Borrow by mail
- Expiration date
- Format
- ISBN
- ISSN
- Item barcode
- Patron barcode
- Patron code
- Patron name (First Last)
- Patron name (Last, First)
- Patron's registered library
- Pickup library
- Request date
- Request ID number
- Status
- Title
- Tracking
- Unclaimed date

The qualifiers and filters can be used in combination to further limit the search results. For example, you can search by the patron's pickup library and apply a filter to limit the results to hold requests with an Active status.

What's New in Polaris 5.1 & Leap 1.1

Find Tool - Hold Request

Hold Request ▸ Basic Search ▸ Pickup library ▸ Exact ▸

✖ Schenectady Branch - Central (SCP)

Date	Status	Title	Format	Patron	Pickup Branch
2/18/2015	Active	Rainy Sunday	Book	Gabeloff, Ruth Kissel	Schenectady...
4/8/2015	Active	Southampton Row [compact audio disc]	Nonmusical S...	CRAWFORD, MARK...	Schenectady...
5/18/2015	Active	Jonathan Livingston Seagull : a story	Book	Carero, B Jeanie	Schenectady...
5/18/2015	Active	Jonathan Livingston Seagull : a story	Book	VanGenderen, Bani	Schenectady...
5/18/2015	Active	Jonathan Livingston Seagull : a story	Book	Sweet, Barb A	Schenectady...
5/18/2015	Active	Jonathan Livingston Seagull : a story	Book	Valenti, Barbara Jeanne	Schenectady...
5/18/2015	Active	Jonathan Livingston Seagull : a story	Book	Jimenez, Bailee E	Schenectady...
5/18/2015	Active	Jonathan Livingston Seagull : a story	Book	Mason, Ba C.	Schenectady...
5/18/2015	Active	Jonathan Livingston Seagull : a story	Book	Heim, Banisher D	Schenectady...
5/18/2015	Active	Jonathan Livingston Seagull : a story	Book	Madcharo, Baozhen	Schenectady...
5/18/2015	Active	Jonathan Livingston Seagull : a story	Book	Haag, Claudette M	Schenectady...

Ready Filtered to 908 of 1,007 result(s)

☐ Count Only

OPEN **CANCEL**

Note:

When searching hold requests for Bound-With titles, a search for a constituent title retrieves any hold requests placed on that title, but not requests placed directly on the host title. A search for a host title returns all requests placed for the host and constituent titles.

When you select a hold request in the Find Tool results list, the Hold Request workflow opens. To return to the Find Tool results list, select **RESULTS**.

Hold Request

SAVE **ACTIONS ▾** **REFRESH** **RESULTS** **CLOSE**

Listening is an act of love : a celebration of American lives from the StoryCorps Project

Request ID: **787502**

Status: **Shipped 3/25/2008**

Request Date: **1/2/2008**

Origin: **Patron**

Bib Control Number: **735533**

☐ This item only

☐ Borrow By Mail

Tracking Number:

Patron barcode: **1001900147643**

Patron name: **Kate DeSarbo**

Registered at: **Community Library**

Notification Option: **Mailing Address**

[Details](#) ☐ Notes ☒ Satisfied By [History](#)

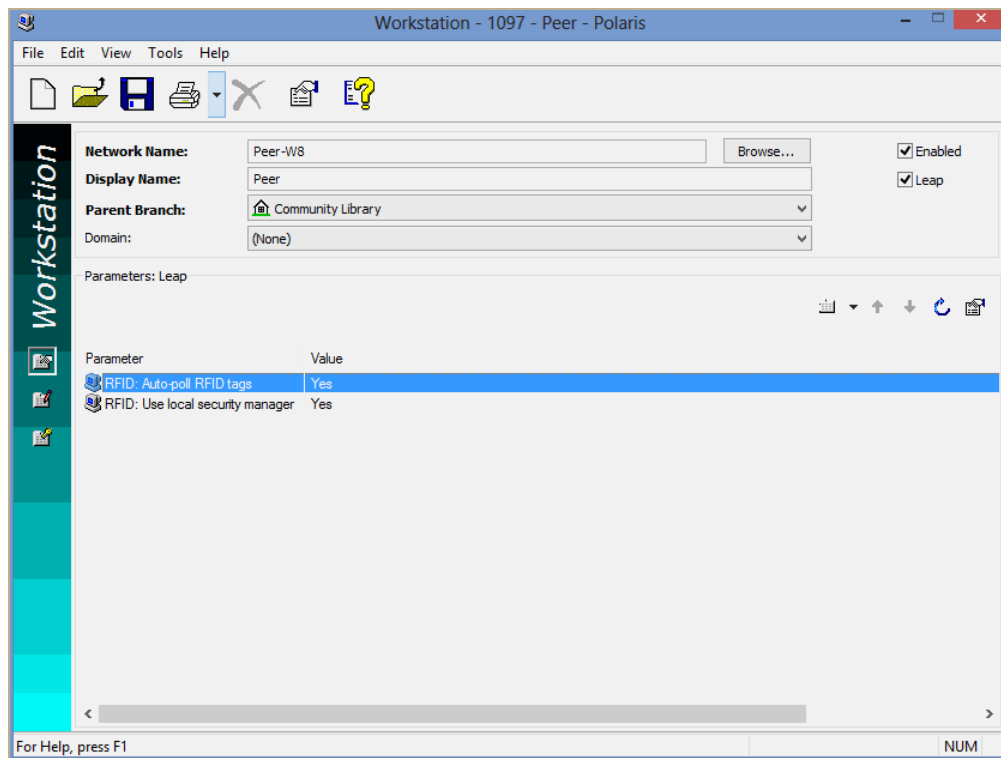
Leap - Auto-Polling for RFID Tags

If the workstation record in Polaris has Leap enabled, and the workstation parameter **RFID: Use local security manager** is set to **Yes**, you can now set a new parameter to enable automatic polling of RFID tags in Leap.

When auto-polling has been implemented in Leap, the RFID reader is polled every 2-3 seconds when the Check In or Check Out workform is open. When the Check In workform is open and items with RFID tags are placed on the RFID pad, the items are checked in. When the Check Out workform is open and items with RFID tags are placed on the RFID pad, the items are checked out unless you stop auto-polling from the Check Out workform.

To enable automatic RFID polling in Leap:

1. Open the Workstation record for the Leap-enabled workstation in Polaris Administration.
2. Select **View | Parameters | Leap**.
3. Set the Leap parameter **RFID: Auto-poll RFID tags** to **Yes**.



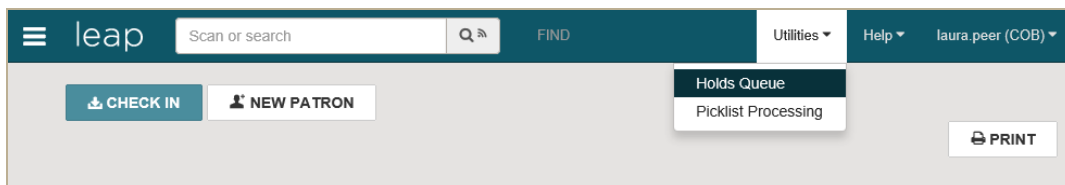
4. Save the workform.

Leap - Holds Queue

You can access the new Leap Holds Queue from:

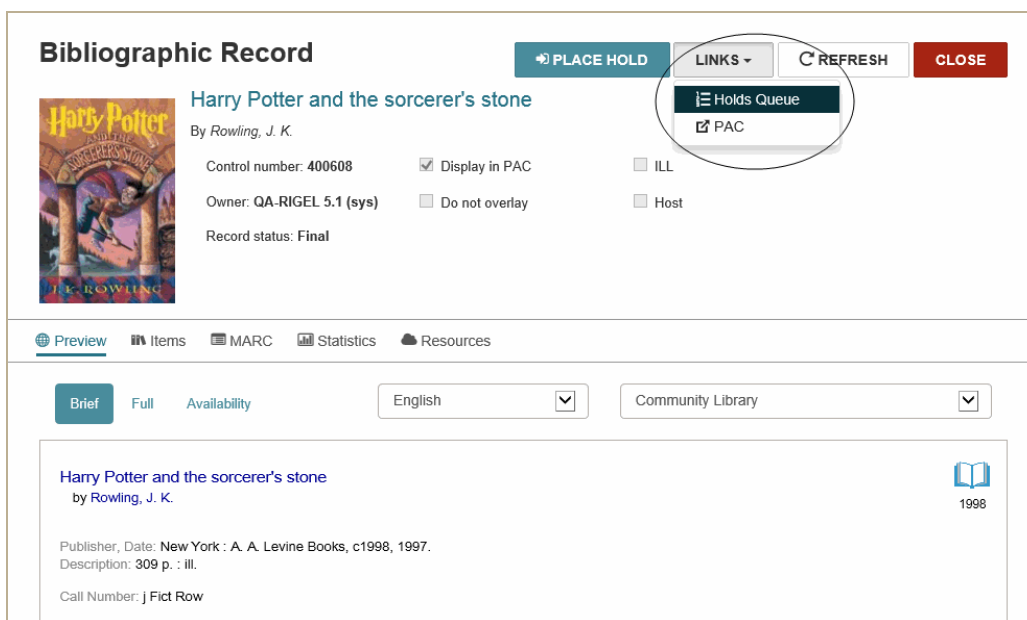
- **The Find Tool**

Select **Utilities | Holds Queue** to open the Find Tool and search for the requested title.



- **The Bibliographic Record**

Open the requested title in the Bibliographic Record workform and select **LINKS | Holds Queue**.



- **The Item Record**

You can select **LINKS | Holds Queue** on the Item Record workform.

What's New in Polaris 5.1 & Leap 1.1

Item Record

PLACE HOLD

LINKS ▾

CHECK IN

REFRESH

CLOSE

Pride and prejudice [DVD]

Holds Queue

Barcode: 0000300689502

Material type: Video

☐ ILL

Call number: DVD Pri vol 1

Shelf location: None

☐ eContent

Collection: MVLS DVD

Issue:

☐ Non-circulating

Temp location:

Price: \$20.00

☒ Display in PAC

Assigned branch: Community Library

Circulation status: Out || 1/12/2008 10:49:14 AM

Bib control number: 468301

Circulation

Controls

Blocks and Notes

History

Statistics

Notices

Due date: 2/8/2008 11:59:00 PM

Current borrower: 1001900159515

Check-out date: 1/12/2008 10:49:10 AM

Renewals taken: 0

Loaning branch: Community Library

Original due date: 2/8/2008 11:59:00 PM

Renewals limit: 1

Held for:

Held at:

Renewal date:

Last location

Last use

In-transit/Transferred

Check-in at:

Borrower: 1001900145001

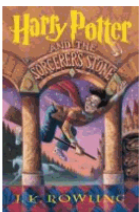
From:

The Holds Queue displays the following columns of information (from left to right) for each hold request placed on the title:

- Position - The position of the hold in the queue
- Patron name - The patron's last name and first name
- Patron branch - The branch at which the patron is registered
- Status - The status of the hold request
- Pickup branch - The branch designated as the patron's pickup branch
- Volume - If there is volume information for the title, it is displayed.
- Issue - If the held item is linked to an issue, the information is displayed.
- Request date - The date the patron placed the hold request
- Expiration date - The hold expiration date

What's New in Polaris 5.1 & Leap 1.1

Holds Queue



Harry Potter and the sorcerer's stone
By Rowling, J. K.
Control number: 400608

[REFRESH](#)
[🔄](#)
[CLOSE](#)

	POSITION	PATRON NAME	PATRON BRANCH	STATUS	PICKUP BRANCH	VOLUME	ISSUE	REQUEST DATE	EXPIRATION DATE
<input type="checkbox"/>	1 of 41	Shaw, Eric C	Amsterdam Free Library	Shipped	Mohawk Valley Library System			4/16/2014	10/13/2014
<input type="checkbox"/>	2 of 41	Izquierda, Laura	Community Library	Shipped	Corinth's Free Library			1/29/2015	2/8/2015
<input type="checkbox"/>	3 of 41	Roman, Rashad	Duane Branch - Schenectady County Public Library	Pending	Kellie's Branch			4/24/2015	4/23/2016
<input type="checkbox"/>	4 of 41	Romand, Tami	Easton Library	Pending	Kellie's Branch			4/24/2015	4/23/2016
<input type="checkbox"/>	5 of 41	Romano, Ella B	Galway Public Library	Pending	Kellie's Branch			4/24/2015	4/23/2016

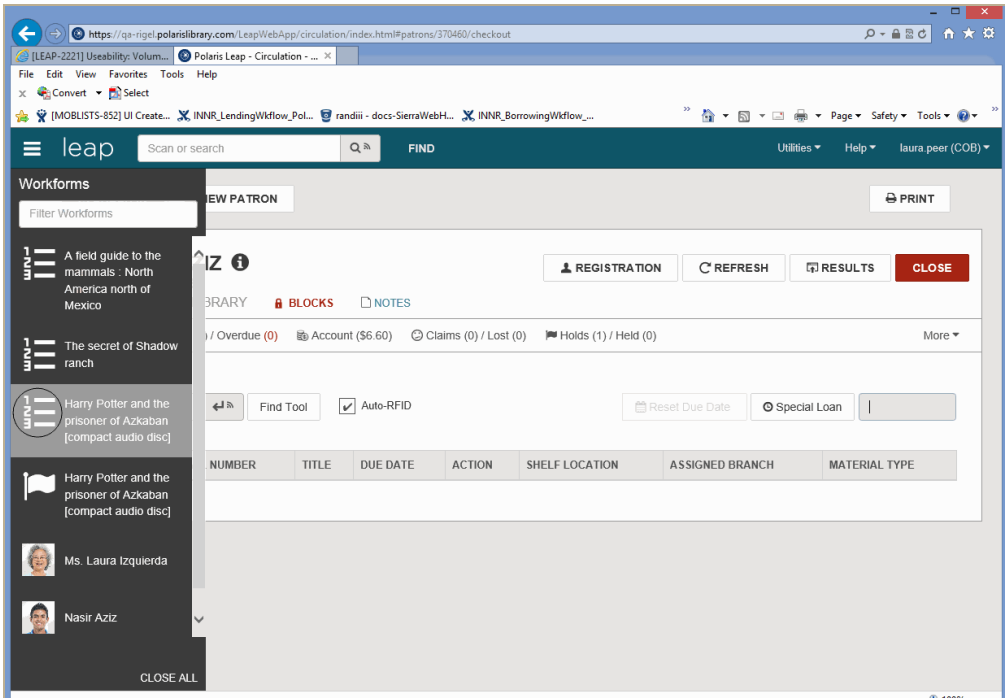
If you accessed the Holds Queue by searching for the requested title in the Find Tool, you can select the return button to go back to the Find Tool search results.



If you accessed the Holds Queue by linking from either the Bibliographic Record or Item Record workform, you return to that workform when you select **CLOSE** on the Holds Queue.

When the Holds Queue is still open and you open another workform, you can return to the Holds Queue workform from the workform tracker.

What's New in Polaris 5.1 & Leap 1.1



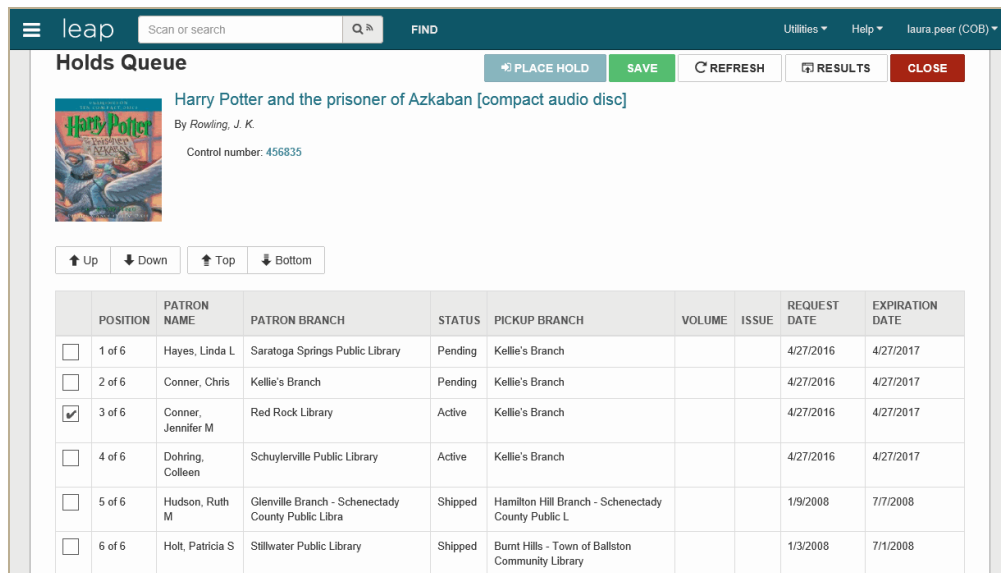
Change the Position of Hold Requests in the Queue

Note:

The Circulation permission **Modify hold queues: Allow** is required to change the position of holds in the queue.

To change the position of a hold request in the Leap Holds Queue:

1. Select **Utilities | Holds Queue** to open the Find Tool and search for the requested title.
2. Select the title to open the Holds Queue workform.



The screenshot shows the 'Holds Queue' interface in the Leap system. At the top, there's a search bar and navigation links. Below the search bar, the title 'Harry Potter and the prisoner of Azkaban [compact audio disc]' is displayed, along with the author 'By Rowling, J. K.' and the control number '456835'. A small image of the book cover is also visible. Below the title, there are buttons for 'Up', 'Down', 'Top', and 'Bottom' to adjust the queue position. A table lists the hold requests with columns for Position, Patron Name, Patron Branch, Status, Pickup Branch, Volume, Issue, Request Date, and Expiration Date. The third row is selected, indicating it is the current hold request being viewed.

	POSITION	PATRON NAME	PATRON BRANCH	STATUS	PICKUP BRANCH	VOLUME	ISSUE	REQUEST DATE	EXPIRATION DATE
<input type="checkbox"/>	1 of 6	Hayes, Linda L.	Saratoga Springs Public Library	Pending	Kellie's Branch			4/27/2016	4/27/2017
<input type="checkbox"/>	2 of 6	Conner, Chris	Kellie's Branch	Pending	Kellie's Branch			4/27/2016	4/27/2017
<input checked="" type="checkbox"/>	3 of 6	Conner, Jennifer M	Red Rock Library	Active	Kellie's Branch			4/27/2016	4/27/2017
<input type="checkbox"/>	4 of 6	Dohring, Colleen	Schuylerville Public Library	Active	Kellie's Branch			4/27/2016	4/27/2017
<input type="checkbox"/>	5 of 6	Hudson, Ruth M	Glenville Branch - Schenectady County Public Libra	Shipped	Hamilton Hill Branch - Schenectady County Public L			1/9/2008	7/7/2008
<input type="checkbox"/>	6 of 6	Holt, Patricia S	Stillwater Public Library	Shipped	Burnt Hills - Town of Ballston Community Library			1/3/2008	7/1/2008

3. Select the check box next to the hold request, and select the **Up**, **Down**, **Top**, or **Bottom** button to move the hold request in the list.

The position of the hold request is changed in the queue.

Place a hold request from the Holds Queue

To place a hold request from the Holds Queue:

1. Select the title the patron wants to request.
2. Select the **Place Hold** button.

If no patron records are currently open, the Find Tool opens.

If patron records are open, the **Select a patron** dialog box opens where you can select the patron to place the hold, or select FIND TOOL... to search for another patron.

3. Select the patron to place the hold.

Leap - Check In - In House Mode

You can use the In House mode of the Leap Check In workform to check in items that did not circulate, but were used by patrons while in the library. For more information on In House mode, see Polaris online Help.

To use the In House mode for Check In:

1. Open the Check In workform, and select **In House**.
2. Scan each item's barcode, or if the Auto-RFID check box is selected, place the items on the reader pad.

As each item barcode is scanned or RFID tag is read, the item appears in the list with the comment, **Item is currently in the library. In house check-in successful.**

BARCODE	TITLE	COMMENT	SHELF LOCATION	COLLECTION
0001900045988	The amazing dandelion	Item is currently in the library. In House check-in succeeded.		Children's Nonfiction (JNF)

The item's history is updated with **Checked in via In House**. If any checked in items have blocks or satisfy a hold request, a message appears.

Leap - Check In - Inventory

You can use the new Inventory mode on the Leap Check In workform to take an inventory of items on the shelf by scanning item barcodes or reading RFID tags. Items are not checked in when you use the Inventory mode in Leap; it is used to update the **Last inventory date** field in the item record. For more information on Inventory mode, see Polaris online Help.

To update the last inventory date for item records:

1. Open the Check In workform, and select **Inventory**.
2. Scan each item's barcode, or if the Auto-RFID check box is selected, place the items on the reader pad.

Check In CLOSE

Normal Bulk In House Inventory

↵ FIND TOOL ☐ Auto-RFID CLEAR LIST

BARCODE	STATUS	TITLE	COMMENT
0001900133420	In	The Country diary of an Edwardian lady, 1906 : a facsimile reproduction of a naturalist's diary	Inventory update successful.
0001900045988	In	The amazing dandelion	Inventory update successful.

As each item barcode is entered, or RFID tag is read, the item barcode, status, and title appear with the comment **Inventory update successful**.

The item's inventory date is updated, and a row is added to the item record history with the note Inventory date was updated.

If any checked in items satisfy a hold request, a message appears.

Leap - Merge Patron Records

You can now merge duplicate patron records using Leap.

To merge two patron records using Leap:

1. Search for and select the patron's primary record (the record that you want to keep).
The patron's record opens.
2. Select **REGISTRATION** to open the Patron Record | Registration view.

3. Select **MERGE**.

The Merge Patron Records dialog box appears.

4. Choose **Select record to delete**.

The Find Tool opens.

5. Search for and select the secondary record (the record you want to delete), and select **OPEN**.

The primary patron record's details appear on the left side of the dialog box, and the secondary record's details appear on the right side. The details are based on the settings in the Patron Services Administration parameter Check Out: Optional Patron Data. If you want to review the secondary record before merging, select **Open record**.

6. Select **MERGE** to merge the records.

A message box asks if you want to continue with the merge.

7. Select **CONTINUE**.

All the information in the primary record is saved, the secondary record is deleted, and the following data is copied from the deleted record into a single updated record.

- Barcode – Copied to the Former barcode field.
- Blocks – Copied to the Free Text and Library Assigned fields.
- Notification history – All previously-generated notices are copied.
- Items out - The list of items out.
- Hold requests – Active, Inactive, Pending, Located, Canceled, Not supplied, and Out to patron holds and ILL requests with a status of Held, Shipped, or Unclaimed.
- Claimed and lost items – The claimed and lost item counts are totaled in the saved record.
- Patron account – The charges and credits are totaled on the saved record. The YTD and Lifetime Circ as well as the new YTD and Lifetime You Saved amounts are also totaled on the saved record.
- Notes – The notes from the deleted record are appended to the notes on the saved record and separated by a blank line. A note indicates the record was merged and provides the barcode of the deleted record and the date/time that the merge occurred.

In addition, a new transaction: *Modified via Leap merge* is recorded for the saved record.

For more information on merging patron records, see Polaris staff client online Help.

Leap - Manage Multiple Items at Check-in

If you have the required Polaris permissions, you can now modify multiple items at check-in from Leap.

Note:

The permissions required to modify items at check-in are the same for Leap as for the Polaris ILS. See the Polaris staff client online Help for information about permissions.

To modify multiple items at check-in:

1. Select **CHECK IN**.
2. If you want to change the display, choose **Normal**, **Bulk**, or **In House**.
3. Select the check boxes next to the items you want to modify. If you want to modify all items in the list, select the check box in the list header.
4. Select **ACTIONS**, and select **Manage Item Record** from the drop-down list.

The screenshot shows the 'Check In' interface with a table of items. The 'ACTIONS' dropdown menu is open, showing options: Clear List, Manage Item Record (selected), Replace Barcode, and Print List. The table contains three items:

<input checked="" type="checkbox"/>	BARCODE	DUE DATE	STATUS	COMMENT	TITLE	MATERIAL TYPE	SHELF LOCATION	CALL NUMBER		
<input checked="" type="checkbox"/>	0000300713864	12/7/2007	Out -> In		A beautiful mind [DVD]	Video		DVD B		
<input checked="" type="checkbox"/>	0000300800448	2/8/2008	Out -> In		Citizen soldiers : [compact audio disc] the U.S. Army from the Normandy beaches to the Bulge to the surrender of Germany, June 7, 1944-May 7, 1945	Audiobook		CD 940.54 Amb	Scott K Nacua	Community Library
<input checked="" type="checkbox"/>	0000300808953	4/12/2012	Out -> In		Spider-Man's amazing powers	Book		YA Graphic Buc	Debra Lynne Maxson	Community Library

The Manage Item Record dialog box opens.

The screenshot shows a 'Manage Item Record' dialog box. It features a title bar with the text 'Manage Item Record' and a close button (X). The main area contains several fields, each with a checkbox and a text input field with a dropdown arrow. The fields are: 'Collection' (checkbox), 'Shelf Location' (checkbox), 'Material Type' (checkbox), 'Circulation Status' (checkbox), 'Non-Public Note' (checkbox), 'Library Assigned Block' (checkbox), and 'Free Text Block' (checkbox). At the bottom right, there are 'OK' and 'CANCEL' buttons.

5. Select the check box next to each item record field you want to change, and select an option for the field in the drop-down list box.
6. When you have selected all the changes to make to the selected items, select **OK** to close the Manage Item Record dialog box and make the changes.

The message **Item record(s) updated successfully** appears if all the changes can be made to all the selected records. A transaction is added to the database for each changed item. In addition, the Item Record workform, History view displays a row for each change that was made to the item record, for example **Assigned collection modified via Manage Item dialog from Check In**.

If one or more of the selected records cannot be changed, the following types of messages appear:

- **Locked item [barcode] cannot be modified from check-in.** This message appears if the item record is locked (open) in either the Polaris staff client or Leap.
- **Item [barcode] must be in and from this branch.** This message appears if the item status has been updated to a status of other than In but the Check In workform displays an In status, or the item's assigned branch has been changed but it still displays as the logged-on branch in the Check In workform.
- **Quick-circ item [barcode] cannot be modified from check-in.** This message appears if the item is a Quick-circ item.
- **ILL item [barcode] cannot be modified from check-in.** This message appears if the item was created via Polaris ILL.

Leap - Circulate Uncataloged Items

If you have the required permissions, you can now create on-the-fly records to circulate uncataloged items in Leap.

Note:

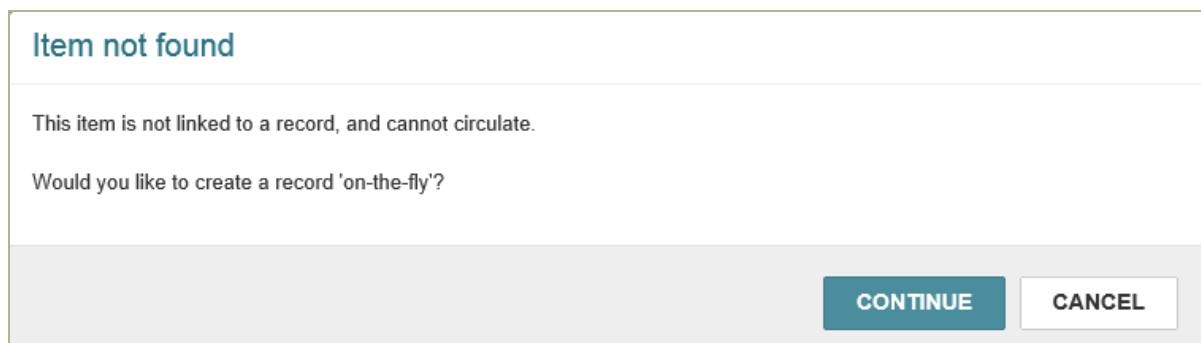
To create on-the-fly records, the check-out branch must have created an item template named "on-the-fly".

To create on-the-fly records at check-out:

1. Scan the item's barcode, and if the barcode is not recognized, the **Item not found** dialog box opens.

Note:

Barcode validation is performed if set in Polaris Administration.



Item not found

This item is not linked to a record, and cannot circulate.

Would you like to create a record 'on-the-fly'?

CONTINUE **CANCEL**

2. Click **CONTINUE** to create a record 'on-the-fly'.

The Brief Item Entry dialog box appears.

Brief Item Entry

Barcode

0032654654

☒ Set OTF Block

Title *

Material Type

Book

Author

Loan Period

Standard

Call Number

Fine Code

Book

Free Text Block

CONTINUE

CANCEL

- Enter the **Title**, **Author**, **Call Number**, and **Free Text Block**. Only the title is required to create an on-the-fly item.
- If you want to change the default selections, choose a different **Material Type**, **Loan Period**, or **Fine Code**.
- If you want to check out the item without setting the on-the-fly block, clear the **Set OTF Block** check box.
- Select **CONTINUE**.

If the **Set OTF Block** check box is checked, a message informs you that the brief item was created and that the item requires full cataloging. If the **Set OTF Block** check box is not checked, the item is checked out without the OTF block.

Cataloging required

This item was created 'on the fly' and requires full cataloging.

OK

Leap - Reprint Past Receipts

You can now reprint past receipts for patrons.

To print receipts that were printed previously:

1. Open the Patron record and go to the Account Summary | Transaction Summary view.

The screenshot shows the Polaris Leap interface for a patron named NASIR AZIZ (ID: 1229195408668). The interface includes a header with the patron's name, ID, and a 'COMMUNITY LIBRARY' label. There are buttons for 'REGISTRATION', 'REFRESH', and 'CLOSE'. Below the header, there are tabs for 'BLOCKS' and 'NOTES'. A summary bar shows various account statistics: Check Out (0), Out (0) / Overdue (0), Account (\$0.00), Claims (0) / Lost (0), and Holds (1) / Held (0). The main section displays a 'History' tab with a table of transactions. The table has columns for DATE, TYPE, REASON, TITLE, BARCODE, AMOUNT, and NOTE. Two transactions are listed, both marked with a checkmark in the first column. The first transaction is dated 5/6/2016 2:17:51 PM, is a 'Pay' transaction for an 'Overdue Item' titled 'Manchild in the promised land', with a barcode of 0001900107994 and an amount of \$3.10. The second transaction is dated 5/6/2016 2:16:58 PM, is a 'Pay' transaction for a 'Hold Request' titled 'I know this much is true', with a barcode of 0004300090356 and an amount of \$3.50. A 'Print List' button is visible at the bottom right of the table.

	DATE	TYPE	REASON	TITLE	BARCODE	AMOUNT	NOTE
<input checked="" type="checkbox"/>	5/6/2016 2:17:51 PM	Pay	Overdue Item	Manchild in the promised land	0001900107994	\$3.10	Patron paid charge.
<input checked="" type="checkbox"/>	5/6/2016 2:16:58 PM	Pay	Hold Request	I know this much is true	0004300090356	\$3.50	Patron paid charge.

2. Select the transactions for which you want to reprint receipts.
3. Select **Print List**.

The receipts are printed.

The screenshot shows a printed receipt titled '5/6/2016' and 'Polaris Leap - Circulation - Patron - 370460 - accounttransactions'. It contains two sections of transaction details. The first section is for the transaction dated 05/06/2016 2:17:51 PM, which is a 'Pay' transaction for an 'Overdue Item' titled 'Manchild in the promised land'. It includes the barcode 0001900107994, the amount \$3.10, and the note 'Patron paid charge.' The second section is for the transaction dated 05/06/2016 2:16:58 PM, which is a 'Pay' transaction for a 'Hold Request' titled 'I know this much is true'. It includes the barcode 0004300090356, the amount \$3.50, and the note 'Patron paid charge.'

Leap - Circulate Items Requested via INN-Reach

If your library has a license for Polaris integration with INN-Reach, you can use Leap to loan items requested through INN-Reach to patrons outside of your library system.

Note:

For this release, you can use Leap to loan items to patrons outside of your library system who have placed requests on these items using the INN-Reach catalog. If a patron registered with your library system places a request through INN-Reach to borrow an item from another contributing library, the requests are handled using ILL processing in the Polaris staff client. "INN-Reach Integration - Overview and Implementation" on page 9

The following updates were made to Leap to enable the INN-Reach integration features in Polaris 5.1:

Trapping an Item for a Non-Local INN-Reach Hold at Check-In or Check-Out

Note:

Non-local INN-Reach hold requests are placed when a patron outside of your library system places a request for an item that your library owns and has contributed to the INN-Reach catalog.

When checking in items or checking out items (if your library traps for holds at check out), the following message appears if the item satisfies a non-local hold request placed through INN-Reach:

Fill INN-Reach hold request

Title

Barcode: barcode number

satisfies an INN-Reach request to be shipped to library name, for

patron last name, first name

phone number

Do you want to ship the item?

If you select **Yes** to place the hold for the patron outside of your library system, the following events occur:

- The item's circulation status is updated to Held.
- The hold request status is set to Shipped.

- The hold history is updated with messages:
 - *An item has trapped and is being held for this request.*
 - *Item was shipped to an INN-Reach library.*
- The item history is updated with these messages:
 - *At [transacting branch].*
 - *Item was shipped to an INN-Reach library.*
- A pickup slip is printed (if the option to print a pickup slip is enabled for the workflow) on a receipt printer or a page printer, depending on your library's setup. See "Leap - Print Pickup Slips for INN-Reach Items" on page 108.

The pickup slip contains the following information:

[Date and Time]

This item is available for pickup at the designated location. This is the default text that appears on the pickup slip, but you can modify this text in Polaris WebAdmin, Receipts.

[Item's assigned branch]

Call NO: Item call number from the linked item record.

Author: Author from the INN-Reach request

Title: Title from the INN-Reach request

Barcode: Barcode from the linked item record.

Record NO: Item record ID from the INN-Reach request

Pickup at: The pickup location from the INN-Reach request

Patron name

Patron phone number

If you select **No**, another message prompts you to confirm that you want to deny the hold. When you deny the INN-Reach request, the item is checked in, the hold is denied with a system-supplied reason, and the borrowing library is notified.

When checking in an item using Bulk Check-In, if the System Administration parameter **Alert in bulk check-in if the item will fill holds** is unchecked, no message appears and the item updated to Held and the hold request status is set to Shipped.

Check-In or Check-Out an Item Already Held for a Non-Local INN-Reach Request

If you scan an item to check it in or check it out, and that item is already held for a patron who placed a non-local INN-Reach request, a message informs you that the item is held for that

patron and cannot be checked in or out.

At check-in, the following message appears:

This INN-Reach item has already been checked in and is currently being held for:

[Patron last name, Patron first name]

Phone number

At check-out, the following message appears:

This item satisfies an INN-Reach request and cannot be checked out. It is being held for:

Patron last name, Patron first name

Phone number

Fill a Non-Local INN-Reach Request with a Substitute Item for the Same Title

In some cases, you may need to substitute a different copy for the specific copy requested through INN-Reach. The item can fill the request as long as it is associated with the same bibliographic record as the item originally requested, it has a barcode, and it has been contributed to INN-Reach.

You can open the hold request from the Picklist or the Patron Record | Holds view and select **Fill Now**. Then, scan the substitute item's barcode.

If the item meets the requirements, the hold request becomes Held and the hold and item history views are updated. If your library has set the Polaris Administration option to prevent holds on items with a status of IN, a message informs you that the item is in and asks if you want to fill the request.

When you fill the request at a branch other than the pickup location, a message informs you that the item will be transferred to the pickup branch for shipment.

Use the Picklist to Deny an INN-Reach Request or Indicate the Requested Item is Missing

When you deny an INN-Reach request from the Picklist, the hold request is deleted and a message is sent to INN-Reach.

If you cannot find the requested item and mark it as Missing, the hold request is deleted, the item record's status is set to Missing, and a message is sent to INN-Reach.

Options on the Patron Record for Non-Local Hold Requests

When a patron who is not registered at your library uses INN-Reach to place a hold on an item that your library owns and has contributed to the INN-Reach catalog, a temporary virtual patron record is created to enable circulation of the requested item. On the Holds view of the Patron workform for the virtual patron, the non-local hold requests are listed and only certain actions can be performed for these non-local holds.

From the Holds view, you can select a hold request and use the **Fill Now** or **Deny** option. For more information, see the Polaris staff client online Help.

The following options are not available for non-local INN-Reach hold requests:

- **Cancel**
- **Reactivate**
- **Ask Me Later**
- **Delete**
- **Add to Group**

When you open a non-local hold request listed from the holds view, the pickup location, activation date, and expiration date cannot be modified.

Leap - Print Pickup Slips for INN-Reach Items

Note:

The INN-Reach options are available in Leap only if your library has a license for INN-Reach integration.

If your library has a license for INN-Reach integration, the Leap **Settings | Print Options** page now include options to print INN-Reach pickup slips from the Check In, Check Out, Hold Request, Patron Status, and Item Record workforms. You can set the INN-Reach Pickup Slip option without affecting other selections.

Settings

SAVE

CLOSE

Print Options

Special Loan

Workform User Defaults

RFID

Check in

☒ Fine receipt

☐ only if no eReceipt

☐ In-transit slip

☐ Holds only

☒ Hold slip

☐ Hold call slip

☐ Hold pickup slip

☒ INN-Reach Pickup Slip

Check out

☒ Check out receipt

☐ only if no eReceipt

☐ Fine receipt

☐ only if no eReceipt

☐ In-transit slip

☐ Holds only

☐ Hold slip

☐ Hold call slip

☒ Hold pickup slip

☒ INN-Reach Pickup Slip

Patron status

☒ Check out receipt

☐ only if no eReceipt

☒ Fine receipt

☐ only if no eReceipt

☐ In-transit slip

☐ Holds only

☒ Hold slip

☐ Hold call slip

☐ Hold pickup slip

☒ INN-Reach Pickup Slip

ILL requests

☐ In-transit slip

☐ Print ILL Slip

☐ Print ILL Pickup Slip

Hold requests

☐ In-transit slip

☒ Hold slip

☐ Hold call slip

☐ Hold pickup slip

☒ INN-Reach Pickup Slip

Item record

☒ Fine receipt

☐ only if no eReceipt

☐ In-transit slip

☐ Holds only

☒ Hold slip

☐ Hold call slip

☐ Hold pickup slip

☒ INN-Reach Pickup Slip

Leap - Other Improvements

The following additional improvements were made to Leap:

Default settings for Special Loan and Special Renew

The Special Loan (in Check Out and Settings) and Special Renew (in Items out) options now display the default value of 7 in the text field for the Loan period.

The screenshot shows the 'Special Renew' interface. At the top, there are tabs: 'Renew', 'Special Renew', 'Reset Due Date', 'Estimate Fines', and 'More'. A 'Filter Items' button is on the right. Below the tabs, there is a calendar for May 2016. The calendar shows the days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and the dates. The date 18 is highlighted in blue. To the right of the calendar, there is a 'Loan period' text field with the value '7' and a 'Days' dropdown menu. Below the text field, there are two radio buttons: 'Apply to next item only' and 'Apply to all items for this patron'. At the bottom right, there are two buttons: 'SPECIAL RENEW' and 'CANCEL'.

New Notices view on the Item Record

You can use the new Notices view on the Item Record workform to see when overdue or hold notices were sent for the item.

The screenshot shows the 'Item Record' interface. At the top, there are buttons: 'PLACE HOLD', 'LINKS', 'CHECK IN', 'REFRESH', and 'CLOSE'. Below the buttons, the title 'Fireflies' is displayed, followed by 'By Ryder, Joanne'. The interface is divided into three columns for item details: Barcode (0001900114529), Call number (j 595.7 Ryd), Collection (Children's Nonfiction), Temp location, Assigned branch (Community Library), Material type (Book), Shelf location (None), Issue, Price (\$4.95), Circulation status (Out || 8/11/2015 8:47:27 AM), Bib control number (358), ILL, eContent, Non-circulating, and Display in PAC. Below the details, there is a tabbed interface with tabs: 'Circulation', 'Controls', 'Blocks and Notes', 'History', 'Statistics', and 'Notices'. The 'Notices' tab is selected and highlighted. Below the tabs, there is a table showing overdue and hold notices. The table has three columns: 'Reminder', '1st overdue', and 'Bill'. The first row shows a reminder on 9/5/2015 6:07:34 AM, a 1st overdue on 1/7/2016 11:41:08 AM, and a bill on 3/18/2016 3:23:21 PM. The second row shows a 2nd overdue and a hold. The third row shows a 3rd overdue.

Prevent repeating holds messages when checking in items held for Outreach patrons

When you check in an item in Leap and a message indicates the item is being held for an outreach patron, you can select the **Do not show this message to me again** option to prevent the same message from displaying again during your logged-in session.

Number of held Items is displayed in Patron Record view bar

When you are checking out items to a patron, you can now see the number of items that are being held for that patron.

MS. LAURA IZQUIERDA

A12291954
COMMUNITY LIBRARY BLOCKS NOTES

Check Out (0) Out (2) / Overdue (2) Account (\$29.00) Claims (0) / Lost (1) Holds (13) / **Held (1)** More ▾

Find Tool ☐ Auto-RFID Reset Due Date Special Loan

Link to a patron record from the Item Record History view

You can now link to the patron record by clicking the patron ID number in the PatronID column on the Item Record | History view.

Item Record PLACE HOLD LINKS ▾ CHECK IN REFRESH CLOSE

Fireflies
By Ryder, Joanne.

Barcode: 0001900114529 Material type: Book ☐ ILL
Call number: J 595.7 Ryd Shelf location: None ☐ eContent
Collection: Children's Nonfiction Issue: ☐ Non-circulating
Temp location: Price: \$4.95 ☒ Display in PAC
Assigned branch: Community Library Circulation status: Out || 8/11/2015 8:47:27 AM Bib control number: 358

Circulation Controls Blocks and Notes **History** Statistics Notices

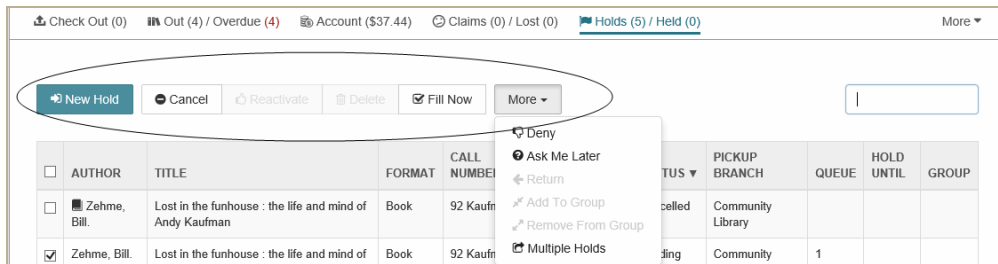
DATE	ASSIGNED BRANCH	STATUS	ACTION	LOCATION	USER/WKS	PATRONID
3/18/2016 3:23:21 PM	Community Library	Out	Bill notice: Mail	Community Library	marycay.phelps/Phelps-W8	1509

Action buttons and options reordered on the Patron Record Holds view

The Patron Record | Holds view was modified so that the buttons for the most common actions are visible when you open the Hold view, and the options for less common actions

What's New in Polaris 5.1 & Leap 1.1

are under the More menu.



Create New Hold Request form updated

The fields were modified and reordered on the Create New Hold Request form, and the **Tracking number** field was replaced by the **Volume** field. In addition, the **Constituent title** and **Author** fields appear only for Bound-With titles.

A screenshot of the 'Create New Hold Request' form. It has a grid layout with various input fields. The 'Title' field contains 'How to be a clown'. The 'Author' field contains 'Meyer, Charles Robert, 1926-'. The 'ISBN/ISSN' field contains '0679204067'. The 'Format' field contains 'Book'. The 'Series' field contains 'A Ringling Bros. and Barnum & Bailey book'. The 'Edition' field is empty. The 'Pages' field is empty. The 'Publisher' field contains 'D. McKay Co.,'. The 'Call NO' field is empty. The 'Issue' field is empty. The 'Date' field contains '1977'. The 'LCCN' field contains '77002421'. The 'Serial Copy' field is empty. The 'Constituent Title' field contains 'A clown in love'. The 'Constituent Author' field contains 'Villeneuve, Mireille'. The 'Volume' field is empty. There is a 'FIND TOOL' button and a 'Barcode' field with a 'Scan a barcode' button.

User-Defined Fields (UDFs) display in patron information pop-up

You can now see a patron's user-defined fields on the Info pop-up if your organization has selected these fields for display in the **Check-out: Optional patron data** parameter in Polaris Administration.

Picklist scroll bar improvements

Scrolling was improved for the Picklist so that the action bar and filter remain visible while scrolling through the list of items.

What's New in Polaris 5.1 & Leap 1.1

LocatedAsk Me LaterMissingDenyProperties

Filter requests

Total items | 7 total

<input type="checkbox"/>	Large Type	LT Fict Pat	Patterson, James, 1947-	3rd degree	Book	SAR	0001900252469
<input type="checkbox"/>	Young Adult Fiction	YA Fict Hon	Honey, Elizabeth.	Don't pat the wombat!	Book	COB	0001900067461

Picklist counts were added to the view bar

When you open the Picklist, the totals are displayed for each view for the selected branch. These counts are updated as hold requests change statuses.

PicklistCommunity LibraryREFRESHCLOSE

Pending (7)Located (1)Unclaimed (4)Holds to Transfer (0)

LocatedAsk Me LaterMissingDenyProperties

Filter requests

Total items | 7 total