What's New in Polaris and Leap 5.1 SP1

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What's New in Polaris & Leap 5.1 SP1

Polaris Installation Note

When a new Polaris release is installed on a workstation, the file path changes only for a major release. Since this is a Service Pack (SP), the file path remains the same as for version 5.1.

Examples:
: c:\ProgramData\Polaris\Polaris Clients 5.1
: c:\Program Files\Polaris\Polaris Clients 5.1
: c:\Program Files (x86)\Polaris\Polaris Clients 5.1

New and Modified Polaris Administration Settings

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

Location / Name	Purpose	Default	Level
Staff Client Profiles - Added "Leap - Customization Options for Patron Registration " on page 53.			
Web App:Suppress Field: Additional TXT field	When set to **Yes**, the Additional TXT field does not appear on the Patron Registration workform in Leap (Polaris Web App).	No	System
Web App:Suppress Field: County	When set to **Yes**, the County field does not appear on the Patron Registration workform in Leap (Polaris Web App).	No	System
Web App:Suppress Field: Country	When set to **Yes**, the Country field does not appear on the Patron Registration workform in Leap (Polaris Web App).	No	System
Web App:Suppress Field: Fax	When set to **Yes**, the Fax field does not appear on the Patron Registration workform in Leap (Polaris Web App).	No	System
Web App:Suppress Field: Former Barcode	When set to **Yes**, the **Former Barcode** field does not appear on the Patron Registration workform in Leap (Polaris Web App).	No	System

Location / Name	Purpose	Default	Level
Web App:Suppress Field: Phone 3	When set to **Yes**, the **Phone 3** field does not appear on the Patron Registration workform in Leap (Polaris Web App).	No	System
Web App:Suppress Field: Statistical Class	When set to **Yes**, the **Statistical Class** field does not appear on the Patron Registration workform in Leap (Polaris Web App).	No	System
Web App:Suppress Field: Text Messaging Phone	When set to **Yes**, the **Text Messaging Phone** and the **Wireless Carrier** fields do not appear on the Patron Registration workform in Leap (Polaris Web App).	No	System
Web App:Suppress Field: Title	When set to **Yes**, the **Title** field does not appear on the Patron Registration workform in Leap (Polaris Web App).	No	System
Web App:Suppress Field: UDF 1	When set to **Yes**, the **UDF1** field does not appear on the Patron Registration workform in Leap (Polaris Web App).	No	System
Web App:Suppress Field: UDF 2	When set to **Yes**, the **UDF2** field does not appear on the Patron Registration workform in Leap (Polaris Web App).	No	System
Web App:Suppress Field: UDF 3	When set to **Yes**, the **UDF3** field does not appear on the Patron Registration workform in Leap (Polaris Web App).	No	System

Location / Name	Purpose	Default	Level
Web App:Suppress Field: UDF 4	When set to **Yes**, the **UDF4** field does not appear on the Patron Registration workform in Leap (Polaris Web App).	No	System
Web App:Suppress Field: UDF 5	When set to **Yes**, the **UDF5** field does not appear on the Patron Registration workform in Leap (Polaris Web App).	No	System
Web App:Suppress Field: Zip + 4	When set to **Yes**, the **Zip + 4** field does not appear on the Patron Registration workform in Leap (Polaris Web App).	No	System
Web App:Suppress View: Associations	When set to **Yes**, the **Associations** view does not appear on the Patron Registration workform in Leap (Polaris Web App).	No	System, Library, Branch
Web App:Suppress View: Messages	When set to **Yes**, the **Messages** view does not appear on the Patron Registration workform in Leap (Polaris Web App).	No	System, Library, Branch
Web App:Suppress View:Notes	When set to **Yes**, the **Notes** view does not appear on the Patron Registration workform in Leap (Polaris Web App).	No	System, Library, Branch

Location / Name	Purpose	Default	Level
Self-Check Unit Parameters - New See "New SelfCheck Unit Parameters for INN-Reach Check-in Error Messages" on page 32.			
Checkin printer message: Checkin failed (request was PENDING, LOCATED, SHIPPED)	The message that appears on the self-check unit log when an item cannot be checked in from a self-check unit because the item has been requested via INN-Reach and the request has a Pending, Located, or Shipped status.	This item is currently committed for INN-Reach ILL.	System, Library, Branch
Checkin screen message: Checkin failed (request was PENDING, LOCATED, SHIPPED)	The message that appears on the self-check unit screen when an item cannot be checked in from a self-check unit because the item has been requested via INN-Reach and the request has a Pending, Located, or Shipped status.	This item is currently committed for INN-Reach ILL.	System, Library, Branch
Patron Services Parameters - Modified			
Floating Options	When the **Limit by** option is set to **Collection** and **Load balancing** is selected at the system level, **Prompt for additional floating items** can be set at the system, library, or branch level. See "Floating Collections and Load Balancing - Prompt for Additional Floating Items" on page 10.	No	System, Library, Branch

Location / Name	Purpose	Default	Level
Notification options | Reminder	The new **Include integrated eContent titles** check box was added to the existing Reminder settings. This check box is unselected by default so that integrated eContent titles are not included in almost overdue notices. See "Integrated eContent Titles Excluded from Reminder Notices" on page 19.	Unchecked	System, Library, Branch

Updating Patron Registration Check Dates

You can now update the Address Check and Expiration dates for a patron record simultaneously from the Patron Registration workform. On the workform toolbar, select **Tools**, **Update Check Dates**, or press **CTRL+U**.

> **Note:**
> The **Update Check Dates** option is not available on a Secured patron record.

A message box appears.
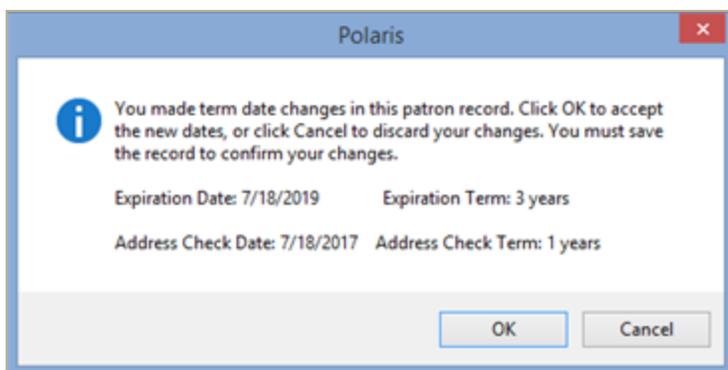
The new dates are based on the Patron Services parameter settings for the patron's branch (**Patron Registration Options** – **General Defaults** tabbed page). When you click **OK** on the message box, the new dates are displayed in the appropriate fields on the Patron Registration workform. Save the record to confirm the updates.

As in previous versions of Polaris, you can also set new Address Check and Expiration dates separately in the Patron Registration workform.

Address Check and Patron Registration Expiration Blocks Now Removed Immediately

You no longer have to manually remove an address check or expiration date block from the Patron Status workform or wait for overnight processing to occur. When you update the address check date and/or expiration date and save the patron record, the address check and/or expiration date blocks are removed immediately.

This feature was also added to Leap.

> **Note:**
> As in previous versions of Polaris, the system process that removes the block looks for the exact block text specified in Polaris Administration (Policy tables, **Patron Block Descriptions**). If the Address Check or Expiration block text is missing or has changed since the block was placed on the patron record, the patron record will be blocked when one of these dates is in the past, but the block will never be removed by real-time or overnight processing and will need to be manually removed.

Missing Part Block Cleared at Check In

Items with system blocks for missing parts can now be checked in at any branch, and the block will be removed immediately even if the item goes *In-transit*, *Held*, or *Transferred* before it is updated to an *In* status. Before this change, if an item had a *This item has missing parts* system block, it had to be checked in at the item's assigned branch and the status updated to *In* before the block was removed.

Floating Collections and Load Balancing - Prompt for Additional Floating Items

If your library system uses floating collections, and as part of floating collections processing limits items by collection and opts for load balancing, you can now choose to display a prompt at checkin when an item would exceed the branch's collection limit. When the staff member scans the item, instead of automatically floating the item to the branch with the lowest ratio of the number of items to collection limit (load balancing), the **Floating item check-in** prompt appears.
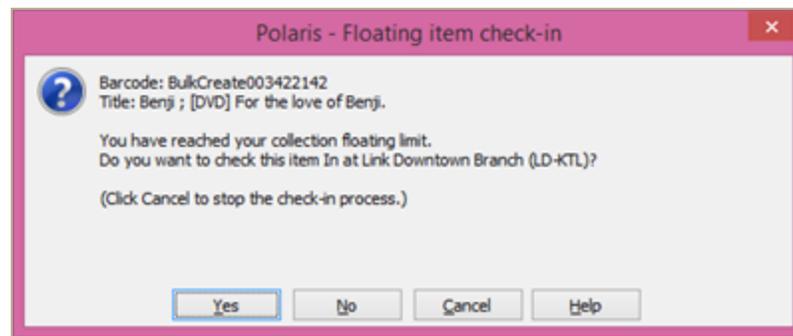
The staff member has the following choices:

- **Yes** - Override the limit and accept the item. The item floats in, and the item's assigned branch is updated to the receiving branch. The item record history records that the item was Modified via floating collections processing.
- **No** - The item floats out.
- **Cancel** - Checkin is terminated.

To set this option in System Administration, select the Patron Services parameter **Floating Options**. You must set the **Limit by** option to **Collection** at the system level only. When you select **Collection**, you can also select **Load balancing**. The new option, **Prompt for additional floating items**, is then available for setting at the system, library, or branch level. Your settings affect both the Polaris staff client and the Web Client.
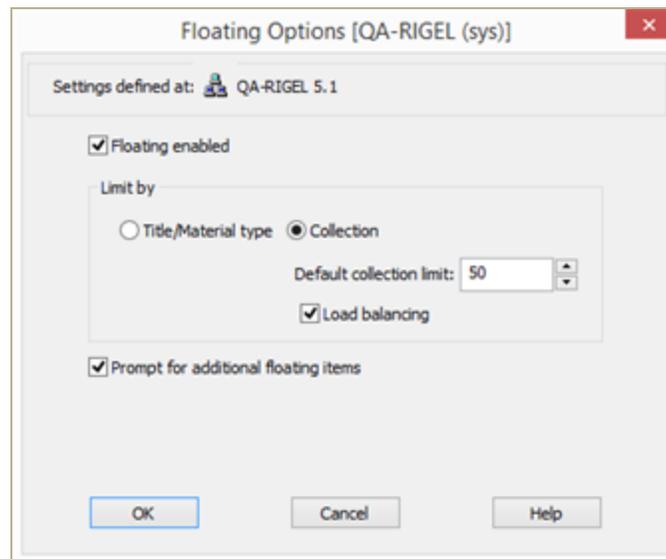
This development does not affect SIP sorter operations, where checkin takes place without staff intervention. When you limit by collection, load balancing is in effect, and the limit has been reached, the item is floated as needed.

For more information about floating collections, see "Setting Up Floating Collections" in Polaris staff client online help.

"Forgot My Password" Email from PowerPAC, Mobile PAC, and Polaris ExpressCheck

As in previous versions of Polaris, you can set Polaris to send an email message to a patron when the patron has forgotten the account password (system-level PAC profiles, **Patron Access Options**, **Log in** tabbed page). In Polaris 5.1 SP1, when the patron clicks the "forgot my password" link, the default message strings have changed; for example, the PowerPAC message strings are shown below:

PACML_FORGOTPASSWORD_1007 - If you know your Username or Barcode, a new password will be sent to the e-mail address(es) we have on file.

PACML_FORGOTPASSWORD_1008 - If you know your barcode, a new password will be sent to the e-mail address(es) we have on file.

As in previous versions, the patron enters a username or barcode as your system requires, and, if a match is found in the database and the email address is on file, a confirmation message is displayed. The default confirmation message string has changed; the PowerPAC message string is shown below:

PACML_FORGOTPASSWORD_1006 - A new password has been sent to the e-mail address(es) we have on file. The message should arrive in your mailbox shortly, but could take 30 minutes or more to arrive.

As an increased security measure, the system now deletes the patron's existing password and auto-generates a new password. The patron receives an email containing the new password. The default email subject and message strings have changed; the PowerPAC message strings are shown below:

PACML_FORGOTPASSWORD_1002 (email subject) - Your library password.

PACML_FORGOTPASSWORD_1003 (email body) - We received a request to mail a new library account password to the e-mail address(es) we have on file.

> Your new password is: {0}
> Username: {1}
> Registered branch: {2}
> Patron account URL: {3}
> For more assistance, please contact the library.

If you have enabled **Patron can change password** (PAC profiles, Patron Access Options, Log in tabbed page), you may want to edit the default messages using Polaris Language Editor (WebAdmin) to encourage the patron to change the new password to one of their choosing. See WebAdmin online help for detailed information about editing message strings. The following table lists some changes you may wish to make:

WebAdmin String ID	Suggested Text
Polaris PowerPAC	
PACML_FORGOTPASSWORD_1007	If you know your Username or Barcode, a new temporary password will be sent to the e-mail address(es) we have on file.
PACML_FORGOTPASSWORD_1008	If you know your barcode, a new temporary password will be sent to the e-mail address(es) we have on file.
PACML_FORGOTPASSWORD_1006	A new temporary password has been sent to the e-mail address(es) we have on file. The message should arrive in your mailbox shortly, but could take 30 minutes or more to arrive. Once you receive the new temporary password, please use the Change Password feature to select a new password of your own choosing.
PACML_FORGOTPASSWORD_1003	We received a request to mail a new temporary library account password to the e-mail address(es) we have on file. Your new temporary password is: {0} Username: {1} Registered branch: {2} Patron account URL: {3} Please use the Change Password feature to select a new password of your own choosing. For more assistance, please contact the library.

WebAdmin String ID	Suggested Text
Mobile PAC	
MP_MSG_FORGOTPASSWORD_INFO_ USERNAME	If you know your Username or Barcode, a new temporary password will be sent to the e-mail address(es) we have on file.
MP_MSG_FORGOTPASSWORD_INFO_ BARCODE	If you know your barcode, a new temporary password will be sent to the e-mail address(es) we have on file.
MP_MSG_FORGOTPASSWORD_SUCCESS	A new temporary password has been sent to the e-mail address(es) we have on file. The message should arrive in your mailbox shortly, but could take 30 minutes or more to arrive. Once you receive the new temporary password, please use the Change Password feature to select a new password of your own choosing.
MP_MSG_FORGOTPASSWORD_EMAIL_ BODY	We received a request to mail a new temporary library account password to the e-mail address(es) we have on file.{0}{1}New password: {2}{3}UserName: {4}{5}Registered branch: {6}{7}Patron account URL: {8}{9}{10} Please use the Change Password feature to select a new password of your own choosing. For more assistance, please contact the library.
Polaris ExpressCheck	
EC_TEXT_EMAILPASSWORD_ INSTRUCTION	If you know your Username or Barcode, a new temporary password will be sent to the e-mail address(es) we have on file.
EC_TEXT_EMAILPASSWORD_ INSTRUCTION_NOUSR	If you know your barcode, a new temporary password will be sent to the e-mail address(es) we have on file.

WebAdmin String ID	Suggested Text
EC_TEXT_EMAILPASSWORD_SUCCESS	A new temporary password has been sent to the e-mail address(es) we have on file. The message should arrive in your mailbox shortly, but could take 30 minutes or more to arrive. Once you receive the new temporary password, please use the Change Password feature to select a new password of your own choosing.
EC_TEXT_EMAILPASSWORD_EMAILBODY	We received a request to mail a new temporary library account password to the e-mail addresses we have on file. Your new password is: {0} Registered branch: {1} Please use the Change Password feature to select a new password of your own choosing. For more assistance, please contact the library.
EC_TEXT_EMAILPASSWORD_EMAILBODY_USR	We received a request to mail a new temporary library account password to the e-mail address(es) we have on file. Your new password is: {0} Username: {1} Registered branch: {2} Please use the Change Password feature to select a new password of your own choosing.For more assistance, please contact the library.

Polaris PowerPAC Context After Timeout

To protect patron privacy, Polaris PowerPAC is designed to return to the system organization context after a timeout period even if the last connection had been to a specific branch organization. For example:

- The user connects to Polaris PowerPAC at the system level.
- The user then clicks a link to an external page with a specific organizational context (for example, a branch's hours page).
- The user has no activity and leaves the browser open for 20 minutes. PowerPAC times out.
- The user then clicks a link to a page with a specific organizational context, but Polaris PowerPAC returns to the system organization context.

This design is unchanged, but beginning with Polaris 5.1 SP1, if you want the URL on the external page to bring the user to the specific organization context in the above circumstances instead of reverting to the system context , place only the organization ID in the **ctx** portion of the URL. For example, use **ctx=30** instead of **ctx=30.1033.0.1**.
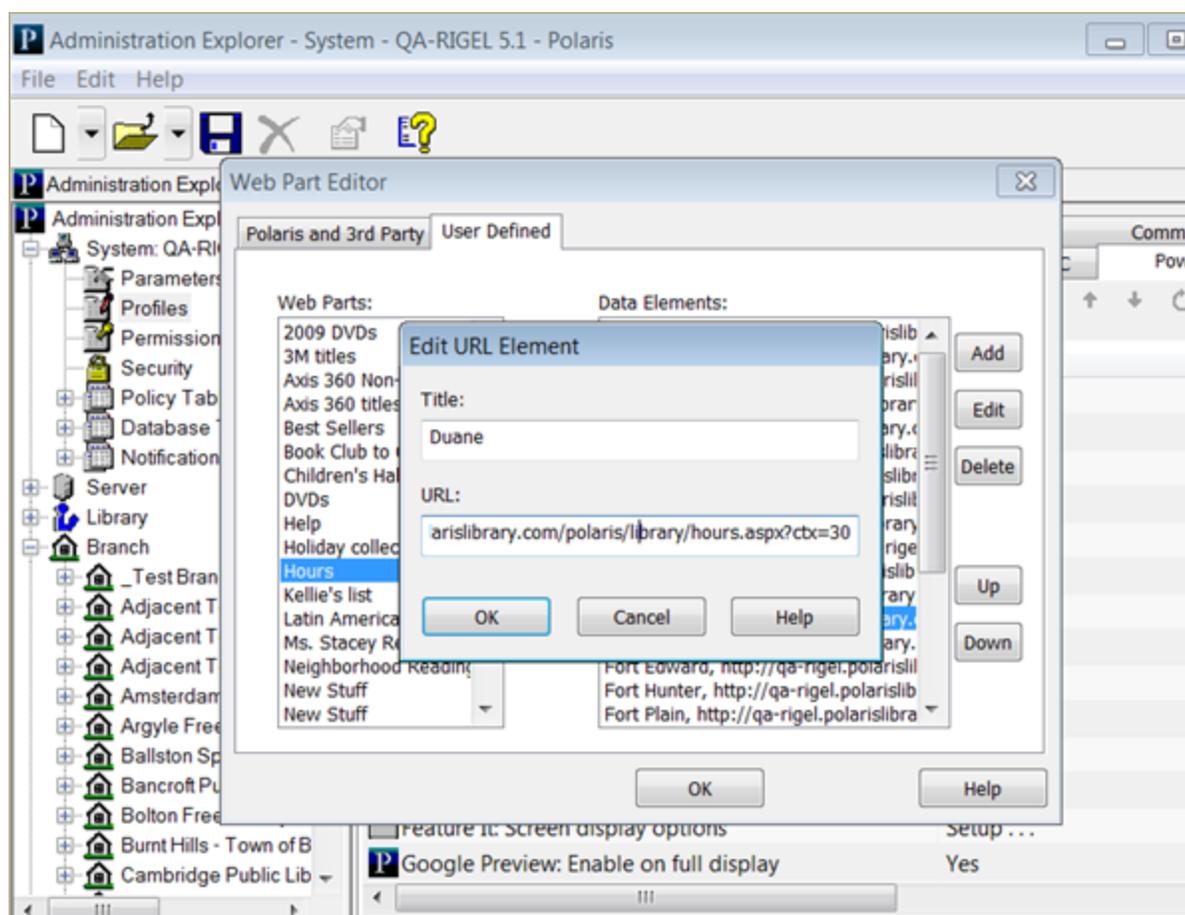
Google Preview in Polaris PowerPAC

Google Preview is a viewer for titles with previews in Google Books. As in previous versions of Polaris PowerPAC, you can offer Google Preview for titles in a user's brief search results list, on the product page (full display) for a title, or in both locations.

Polaris PowerPAC 5.1 includes two changes to the Google Preview feature:

- Google Preview is displayed in Google's Embedded Viewer API. In July 2016, Google changed the method by which the Embedded Viewer API is displayed on the web page. Polaris PowerPAC 5.1 SP1 has been updated to accommodate this change. The update is also available as a patch for earlier versions of Polaris PowerPAC currently in use.

- Polaris PowerPAC displays the Google Preview button only for titles with an ISBN match that have Google previews. On rare occasions, a match is found but Google Preview fails to load when the user clicks the Google Preview button. Polaris Power-PAC now displays the following message in this situation: **Google Preview is not available for this title at this time.**

Integrated Econtent from 3M Rebranded

As a result of vendor changes, the name and icon that identify integrated econtent from bibliotheca's 3M Cloud Library have changed in PAC displays. The applicable default language strings in Polaris Language Editor (WebAdmin) have also changed.

The new name is **Cloud Library**, which is displayed as hover text over the new icon in PAC search results. The following is an example of the icon in Polaris PowerPAC:

The words **3M Cloud Library** and **3M** have been changed to **Cloud Library** in all default WebAdmin strings that contain them. For example, the phrase **use the 3M app** is now **use the Cloud Library app**. The library may want to edit any custom strings.

Bibliographic record fields that include references to the "3M Cloud Library" are not changed as part of this project but are expected to be changed in a future project (timing to be determined by bibliotheca).

Integrated eContent Titles Excluded from Reminder Notices

A new default setting in Polaris Administration excludes integrated eContent titles from almost overdue reminder notices. If your library wants to include integrated eContent titles in almost overdue reminder notices, your administrator must change the default setting by checking the new **Include integrated eContent titles** box on the Reminder tab of the Notification options dialog box (Parameters | Notification options | Reminder). This option can be set at the System, Library, or Branch level.

If this option is left unchecked (the default setting), no integrated eContent titles appear in the almost overdue section of reminder notices. If a patron has borrowed eContent titles that are almost overdue, the titles do not appear in the **almost overdue** section of the notice, but the eContent titles appear in the **other items checked out to you** section of the notice.

MARC Standard Updates

Polaris was updated to comply with the following MARC standard technical notices and updates:

- [Technical Notice (February 19, 2016)](#)
- [Technical Notice (February 26, 2016)](#)
- [Technical Notice (April 7, 2016)](#)
- [MARC 21 Update No. 22](#)

The following changes were made to the Bibliographic record format to comply with MARC Update 22:

- **007/00=c (Electronic resource)**
    - Position 007/01 Specific material designation
        - Added value - **s - Standalone device** and description: Standalone devices consist of storage and reader components as an integrated standalone device. The data storage medium cannot be removed from the playback device with which it is issued. The data carried on the medium can only be read using the integrated special-purpose device.
        - Updated description for value **b - Chip cartridge** to: Removable module containing a miniaturized electronic circuit, mass-produced on a tiny chip or wafer of silicon, designed to provide additional processing, memory, or storage capacity to a computer. Includes several types of solid-state, memory/storage devices such as non-rewritable ROM-chip cartridges and rewritable flash drives (e.g. USB keys).
- **007/00=s (Sound recording)** - New description: A storage medium containing recorded sound or a representation of a musical composition from which sound can be mechanically reproduced, such as a piano roll. A fill character (|) is not allowed in this position.
    - Position 007/01
        - Added value - **r - Remote** and description: Digital sound recording that is accessed, processed, executed, etc. remotely. In this case, the digital sound recording is used via input/output devices connected electronically to a computer. Frequently this involves connection through a computer network.
    - Position 007/03 Speed
        - New description for position 03 - Speed: Playback speed of the sound recording. This code is only intended to relate to the playing speed of a sound recording rendered on a mechanical device.

- Added value - **n - Not applicable** and description: Speed is not applicable to remote digital sound recordings because it pertains to calculations specific to physical aspects of carriers.
  - Position 007/10 Kind of material
    - New description for position 10 - Kind of material: Kind of material used in the manufacture of sound recordings (both instantaneous and mass-produced). This code is only intended to relate to a sound recording rendered on a mechanical device.
    - Added value - **n - Not applicable** and description: Kind of material is not applicable to remote digital sound recordings because it pertains to calculations specific to physical aspects of carriers.

- **382 - Medium of Performance**
  - Added subfield **r**
    - MARC Name/Display Name: Total number of individuals performing alongside ensembles
    - Description: The total number of individual performers given in all instances of subfield $b needed to perform in the musical work/expression alongside one or more ensembles. Use subfield $s to record total number of individual performers when no ensembles are involved
    - Required: no
    - Validate: yes
    - Repeatable: no
    - Obsolete: no
  - Added subfield **t**
    - MARC Name/Display Name: Total number of ensembles
    - Description: The total number of ensembles needed to perform in the musical work/expression.
    - Required: no
    - Validate: yes
    - Repeatable: no
    - Obsolete: no
  - Renamed subfield **e**: MARC Name/Display Name: Number of ensembles of the same type

- **753 - System Details Access to Computer Files**
  - Added subfield **0**
    - MARC Name/Display Name: Authority record control number or standard number
    - Description - Subfield $0 contains the system control number of the related authority record, or a standard identifier such as an International Standard Name Identifier (ISNI). The control number or identifier is preceded by the appropriate MARC Organization code (for a related authority record) or the Standard Identifier source code (for a standard identifier scheme), enclosed in parentheses. See MARC Code List for Organizations for a listing of organization codes and Standard Identifier Source Codes for code systems for standard identifiers. Subfield $0 is repeatable for different control numbers or identifiers. NOTE: Subfield $0 is sometimes referred to in the field descriptions as Authority record control number.
    - Required: no
    - Validate: yes
    - Repeatable: yes
    - Obsolete: no
  - Added subfield 2
    - MARC Name/Display Name: Source of term
    - Description: MARC code that identifies the source of the terms in subfield $a and $c when they are from a controlled list.
    - Required: no
    - Validate: yes
    - Repeatable: no
    - Obsolete: no

The following changes were made to the Authority record format to comply with MARC Update 22:

- **382 - Medium of Performance**
  - Added subfield **r**
    - MARC Name/Display Name: Total number of individuals performing alongside ensembles
    - Description: The total number of individual performers given in all instances of subfield $b needed to perform in the musical work/-expression alongside one or more ensembles. Use subfield $s to record total number of individual performers when no ensembles are involved.

- Required: no
- Validate: yes
- Repeatable: no
- Obsolete: no

○ Added subfield **t**

- MARC Name/Display Name:Total number of ensembles
- Description: The total number of ensembles needed to perform in the musical work/expression.
- Required: no
- Validate: yes
- Repeatable: no
- Obsolete: no

○ Renamed subfield **e**: MARC Name/Display Name - Number of ensembles of the same type

Subfield 020$q Added to Purchase Order, Invoice, and Selection List Line Items

MARC standard changes in 2013 removed trailing binding information from subfield 020$a and added it to 020$q, and the Polaris database and indexes were updated to support this change. Subfield 020$q is now added to Polaris Acquisitions line item workforms, so it is no longer necessary to search bibliographic records for this information.

The 020$q subfield is displayed after the 020$a subfield. If more than one 020$q exists, the values in $q are separated by spaces. For example, **020^^‡a0914378260‡qpbk.‡qv. 1‡c$5.00** is displayed as **0914378260 pbk. v. 1**.

New PCDF Message

When the user adds and saves a new PCDF (patron custom data field), the PCDF is not available for Find Tool searches until the ERMS daemon is recycled. The following message now displays when the user saves the new PCDF: "The ERMS Daemon must be recycled before your changes will take effect. See your system administrator for more information."

Integrated RFID with bibliotheca's liber8:connect

You can now implement integrated RFID in the Polaris staff client and Leap with bibliotheca's liber8:connect product. The Polaris staff client and the Security Manager stand-alone installations now include **liber8:connect** as an RFID vendor option.

New Polaris API Method for Patron Authentication

A call to AuthenticatePatron will be required before calling any public method that requires a patron's password. Upon success, this method will return an access token. The access token will be used in place of the patron's password when building the hash for secure patron methods.

Third-party applications that consume the Polaris API (PAPI) will need to be updated to use this method for patron authentication.

> **Note:**
> It is strongly recommended that HTTPS be used with this call. The HTTP body data will contain the patron's barcode and password.

URI

/public/{version}/{lang_ID}/{app_ID}/{org_ID}/authenticator/patron

HTTP Verb

POST

Request Body XML

<PatronAuthenticationData>

<Barcode></Barcode>

<Password></Password>

</PatronAuthenticationData>

XML Body Elements

Name	Required	Description/Notes
Barcode	Yes	Barcode
Password	Yes	Password

Authorization Required?

Yes

XML Elements Returned

Name	Description/Notes
AccessToken	Access token to be used in place of the patron's password when building the hash for patron methods.
PatronID	Patron ID

Example

https://[hostname]/PAPIService/REST/public/v1/1033/100/1/authenticator/patron

Header

Date: Sat, 14 May 2011 22:23:32 GMT

Authorization: PWS polarisdev:/uessDsxjU9iY2QJDNJbV+CZ62U=

Content-Type: text/xml

Body

<PatronAuthenticationData>

<Barcode>21756003332060</Barcode>

<Password>1234</Password>

</PatronAuthenticationData>

Return

<PatronAuthenticationResult>

<PAPIErrorCode>0</PAPIErrorCode>

<ErrorMessage/>

<AccessToken>$2a$10$nN4s2fmVtX.9PQnczt5zTOmTKFLrV/vZlDsoqAuaVANcRR14q0F3K</AccessToken>

<PatronID>358255</PatronID>

</PatronAuthenticationResult>

Error Code

-3001 Unable to authenticate the patron credentials

Patron Barcode in Separate Field in SIP Patron Authentication

To ensure that third-party vendors can always identify a patron's barcode when a patron logs in with a user name, the patron barcode will now be stored in a separate PB (patron barcode) field in the SIP authentication messages.

Additional INN-Reach Integration Features

Libraries licensed to use INN-Reach integration with Polaris can take advantage of the following new features and processing in Polaris 5.1 SP1.

> **Note:**
> New INN-Reach reports assist in tracking items borrowed and loaned through INN-Reach. See "New INN-Reach Reports" on page 36.

Send, Receive, and Process *Patron Claims Returned* INN-Reach API Messages

When a Polaris borrowing library adds a claim to a patron's record for a checked-out INN-Reach item, a *Patron Claims Returned* INN-Reach API message is sent to the item's owning library. This API message is sent immediately upon claiming the INN-Reach item with a claim type of either *Claimed returned* or *Claimed never had* from the Polaris staff client or Leap.

When a Polaris lending library receives a *Patron Claims Returned* INN-Reach API message from the borrowing library, a claim is created in the virtual patron's record, and the item's status is set to *Claimed Returned*. If the item is found and returned to the lending library, the usual INN-Reach processing commences. If the lending library receives an *In-Transit* or a *Return Uncirculated* message for an item that was previously claimed, the claim is deleted.

Send, Receive, and Process *Owner Renew* INN-Reach API Messages

In the rare case where a Polaris *lending* library renews an INN-Reach item from the Polaris staff client or Leap, an *Owner Renew* INN-Reach API message with the updated due date and time is sent to the borrowing library. The item is renewed using the new due date and time in the API message, the item history is updated, and a renewal transaction is logged. Polaris Administration settings that limit or charge for renewals are ignored.

When a Polaris borrowing library receives an *Owner Renew* INN-Reach API message, the item is renewed without regarding counts, limits, or charges your library may have set for renewals.

Send, Receive, and Process the Item Call Number in the *Item Shipped* API Message

When a Polaris lending library ships an INN-Reach item to the borrowing library, the item call number is sent in the bibCallNumber field in the *Item Shipped* INN-Reach API message. This ensures that the call number added to the borrowing library's system matches the call number on the physical item. If no item call number is found, the bibliographic call number is sent. If no bibliographic call number is found, the message is sent without the call number.

If a Polaris lending library uses the Fill Now process to fill the INN-Reach hold request with another copy of the same title, the item call number is also added to the Item Shipped message.

When a Polaris borrowing library receives an INN-Reach ILL item, the item's call number from the *Item Shipped* INN-Reach API message automatically appears in the Brief Item Entry dialog box where the user can click **OK** to generate the virtual item record with this number, or enter a new call number and then click **OK**. When the virtual item is created, the call number appears in the **Class number** field . If the item call number is not in the API message, the Class number from the INN-Reach item template is used, if the template includes this number. The INN-Reach item template's Call number (prefix, cutter, suffix, volume, copy) are saved to the item record's **Call number** field.
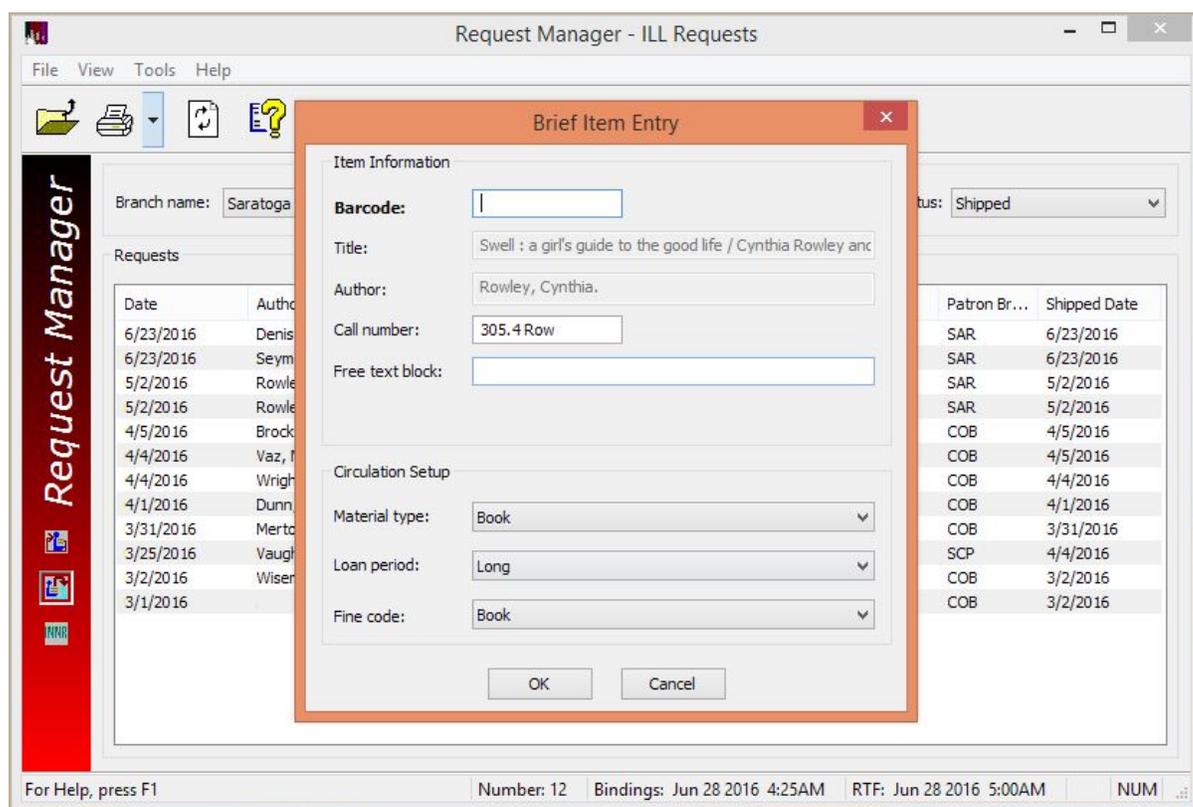
New SelfCheck Unit Parameters for INN-Reach Check-in Error Messages

Libraries using INN-Reach integration can now customize the message text that displays on the screen and log when patrons attempt to check in INN-Reach items using a self-check unit. The following new SelfCheck Unit parameters were added at the System, Library, and Branch levels for the printed log and the screen display:

> **Note:**
> To change the default message text for either or both messages, type over the default value **This item is committed for INN-Reach ILL** and press **Enter**.

- **Checkin printer message: Checkin failed (request was PENDING, LOCATED, SHIPPED)**
- **Checkin screen message: Checkin failed (request was PENDING, LOCATED, SHIPPED)**
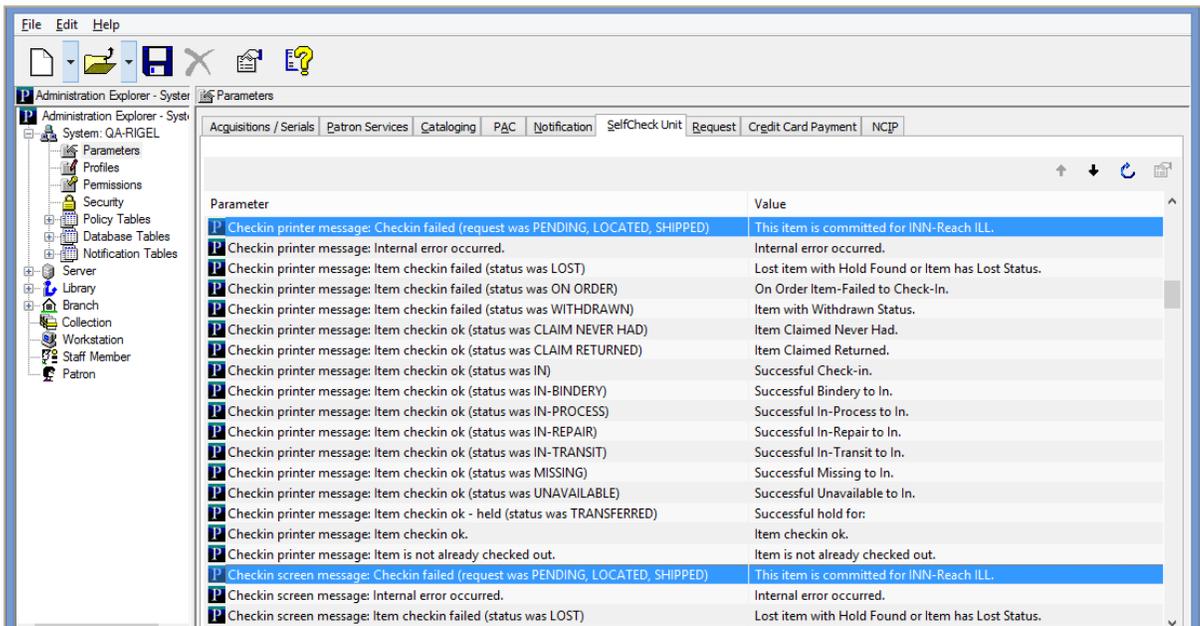
SIP Check-In for Items Linked to INN-Reach Hold Requests

When an item that is linked to a pending, located, or held INN-Reach hold request is placed on a SIP sorter and scanned, the system detects the linked INN-Reach hold request and the following processing occurs:

> **Note:**
> When an item fails SIP check-in because it is linked to an INN-Reach hold request, the error messages that appear on screen and in the printed log are set according to the new Self Check Unit parameters in Polaris Administration. See "New SelfCheck Unit Parameters for INN-Reach Check-in Error Messages" on page 32.

- If the item is linked to a pending or located INN-Reach hold request and the branch can ship and receive INN-Reach items, the check-in fails, an error message appears, and the item is sent to an exception bin. A staff member retrieves the item from the exception bin, checks it in through the Polaris staff client or Web App (Leap), prints the INN-Reach pickup slip, then ships it to the borrowing library.

- If the item is linked to a pending or located INN-Reach hold request but the branch cannot ship and receive INN-Reach items, the item's status is changed to Transferred and the hold request status is set to Shipped. It is sent to the branch designated as the INN-Reach shipping and receiving branch.

- If the item is already held and linked to a shipped INN-Reach hold request, the check-in fails, an error message appears, and the item is sent to the exception bin. For held items, the process is the same whether the branch can ship INN-Reach items or not. The hold request status remains Shipped and the item's status remains Held.

Nightly SQL Job Cancels INN-Reach ILL Holds That Have Never Been Filled

When a borrowing library's INN-Reach ILL request with a status of *Active* is found, the Nightly SQL Job identifies the request's *NeedBy* date, and if that date has passed, the *Active* request is set to *Cancelled*. A *Cancel Item Hold* transaction is sent to the lending library, and a transaction is written for the cancellation (using the patron's registered branch as the transaction branch).

The job also checks the *System-level Parameter, Holds Options, Terms* for the setting in the **Delete cancelled in [number of days]** field. If the number of days since the hold was cancelled has exceeded the number of days in the parameter, the job deletes the INN-Reach ILL request.

New ILL Request Transaction

When a patron at a Polaris borrowing library has placed an ILL hold request through INN-Reach, and the lending library denies the hold request, INN-Reach attempts to find another item that can fill the hold request. If another item is found, and the system determines that the incoming request matches a previous request, the original ILL request is deleted, a new ILL request replaces the deleted request, and the following transaction is logged: TR_ CIRC_ILLREQUEST_RECREATE

Held Until Date Added to the ILL Requests Table

To enable a Polaris borrowing library to find and report on ILL items that are held but not yet picked up (unclaimed), and the hold until date has passed or is approaching, a new **HoldTill Date** column was added to the ILL Requests table. When the ILL item is updated to a Held status, the column is populated based on the held date plus the number of days in the **Held Period** field in the existing **ILL options** parameter (Parameters | Requests | ILL options | Restrictions).

If the pickup library is changed for an ILL hold request that is already received and held, the HoldTillDate is updated using the original date when the item was updated to Held plus the number of days specified in the **Held Period** field for the new pickup branch.

> **Note:**
> The HoldTill date column is populated for INN-Reach and regular ILL items.

Alert Message Appears When Receiving an Item the Patron Decided Not to Borrow

When an item requested through INN-Reach is received in Polaris at the borrowing library, a message appears if the ILL request has the **Return Uncirculated** box checked, which indicates the patron no longer wants the item.
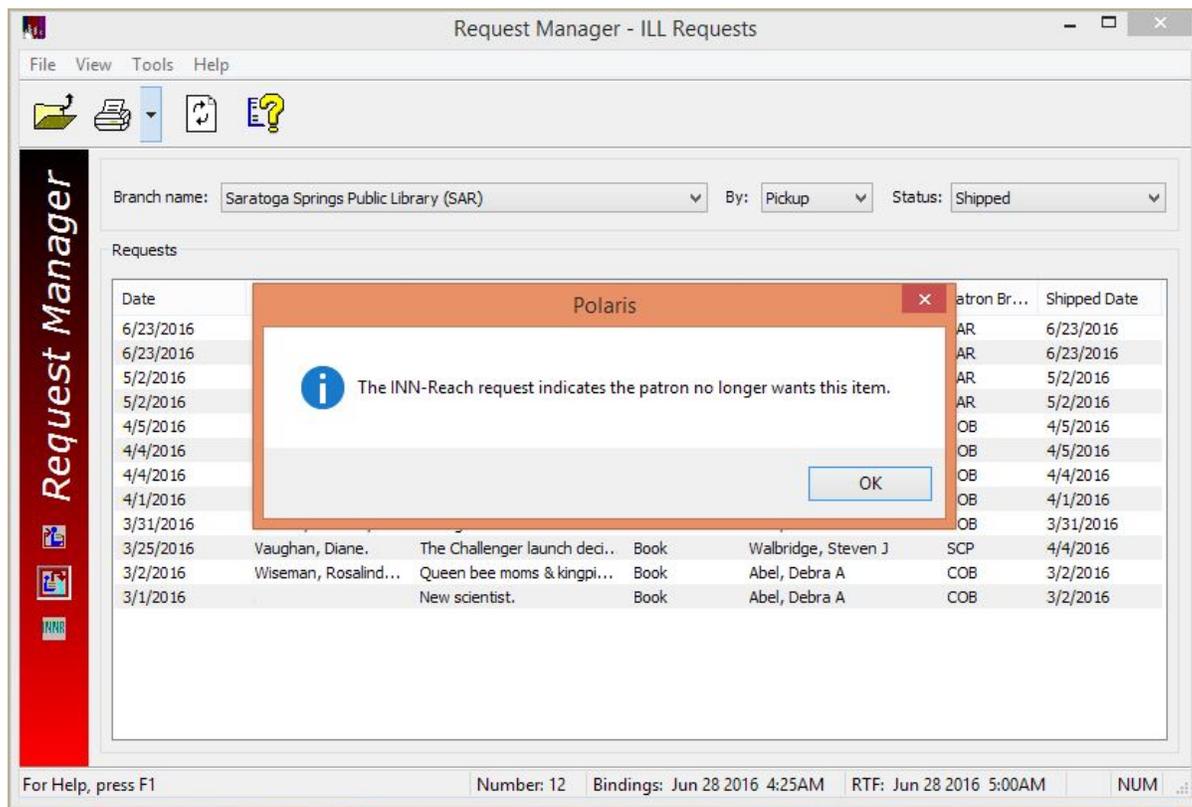
When the staff member clicks **OK**, the item is removed from the *Shipped* view of the Request Manager. The staff member can then return the uncirculated INN-Reach item to the lending library.

New INN-Reach Reports

Polaris libraries that use INN-Reach integration can generate reports to assist in tracking items borrowed or loaned through INN-Reach. These reports are listed under Utilities | Reports and Notices | Circulation | INN-Reach.

> **Note:**
> When you select a new report for the first time, you may need to click the Refresh button before the report parameters appear.
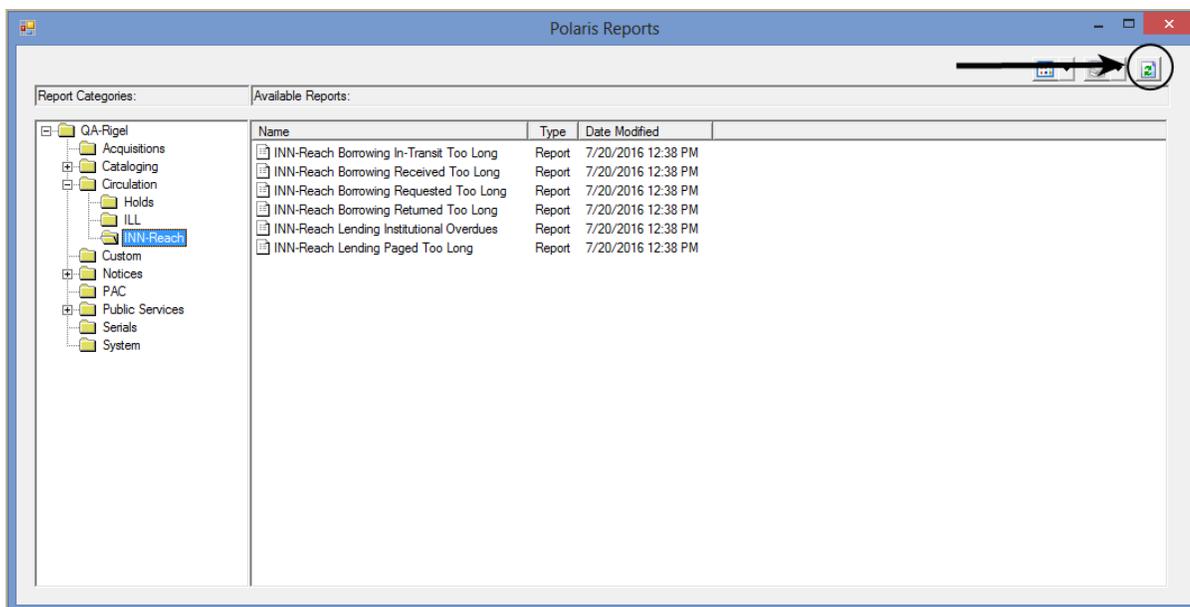
INN-Reach Borrowing In-Transit Too Long Report

A Polaris borrowing library can use this report to identify INN-Reach ILL items that were shipped from the lending library a specified number of days ago, or more, but have not yet been received.

To generate the report, set the following parameters and click **Submit**:

- **Organization** - The organization is the branch of the patron who requested the item. Select one or more branches or select **<All>**.
- **Number of days shipped** - The number of days since the item was shipped from the lending library and has yet to be received at the borrowing library. For example, if you enter 5 days, the report will include ILL items that were shipped at least 5 days ago from the lending library and still have not been received at the borrowing library.
- **Group option** - The default selection is **Group by Patron Branch** which groups the report in tables by the branch of the patron who requested the item. Select **Not Grouped by Patron Branch** to generate the report without the branch grouping.

If **Group by Patron Branch** is selected, the report is grouped and sorted in tables by the patron branch. The heading **Patron Branch: [branch name]** appears at the top of each table, and within each table the data appears in the following columns, sorted first by the item location, then by the shipped date (ascending order):

- **Item Location** - The lending library that owns the item. If the item location is not included in the API message, *Not Supplied* appears in this column.
- **Call Number** - The lending library's item call number
- **Item Barcode** - The lending library's item barcode
- **Title** - The lending library's item title
- **Patron No.** - The borrowing patron's ID
- **Shipped Date** - The date the lending library shipped the item

INN-Reach Borrowing In-Transit Too Long
(5 days or more)

Patron Branch: Community Library

Item Location	Call Number	Title	Patron No.	Shipped Date
plag1-Amsterdam Public Library	SERIAL June 25, 2005	New scientist.	354091	3/2/2016
plag1-Amsterdam Public Library	LT Fict Bro	The reckless one / [large print] / Connie Brockway.	354091	4/5/2016
plag1-Balston Spa Public Library	974.748 Dun	Saratoga County heritage / Editor-in-chief, Violet B. Dunn, assisted by Robert S. Hayden and Clayton H. Brown.	354091	4/1/2016
plag1-Balston Spa Public Library	741.5 Wri	Batman aliens / by Ron Marz ; art by Bernie Wrightson.	354091	4/4/2016
plag1-Balston Spa Public Library	791.4572 Vaz	The Lost chronicles / Mark Cotta Vaz.	354091	4/5/2016
plag2-Long Lake Library	537.09 HEN	The papers of Joseph Henry. Editor: Nathan Reingold. Assistant editors: Stuart Pierson and Arthur P. Molella with the assistance of James M. Hobbins and John R. Kerwood.	354091	5/24/2016

If **Not Grouped by Patron Branch** is selected, the same columns appear on the report as in the grouped version with an additional **Patron Branch** column on the right. The report is sorted first by item location, then by patron branch, and then by the shipped date (ascending).

INN-Reach Borrowing In-Transit Too Long
(5 days or more)

Item Location	Call Number	Title	Patron No.	Shipped Date	Patron Branch
plag1-Amsterdam Public Library	SERIAL June 25, 2005	New scientist.	354091	3/2/2016	Community Library
plag1-Amsterdam Public Library	LT Fict Bro	The reckless one / [large print] / Connie Brockway.	354091	4/5/2016	Community Library
plag1-Balston Spa Public Library	822.33 Sha	As you like it / by William Shakespeare.	26080	3/24/2016	Mary Cay's Branch
plag1-Balston Spa Public Library	974.748 Dun	Saratoga County heritage / Editor-in-chief, Violet B. Dunn, assisted by Robert S. Hayden and Clayton H. Brown.	354091	4/1/2016	Community Library
plag1-Balston Spa Public Library	741.5 Wri	Batman aliens / by Ron Marz ; art by Bernie Wrightson.	354091	4/4/2016	Community Library
plag1-Balston Spa Public Library	791.4572 Vaz	The Lost chronicles / Mark Cotta Vaz.	354091	4/5/2016	Community Library
plag1-Balston Spa Public Library	305.4 Row	Swell : a girl's guide to the good life / Cynthia Rowley and Ilene Rosenzweig.	2697	5/2/2016	Saratoga Springs Public Library
plag1-Balston Spa Public Library	510.76 Lef	Let's review. Math B / Lawrence S. Leff.	371256	7/7/2016	Saratoga Springs Public Library
plag2-Long Lake Library	537.09 HEN	The papers of Joseph Henry. Editor: Nathan Reingold. Assistant editors: Stuart Pierson and Arthur P. Molella with the assistance of James M. Hobbins and John R. Kerwood.	354091	5/24/2016	Community Library

INN-Reach Borrowing Received Too Long Report

A Polaris borrowing library can use this report to identify INN-Reach ILL items that were received a specified number of days ago or more but still remain at the library because the patrons who requested the items have not picked them up. The ILL requests linked to these Received items can have one of the following statuses: Recd-Held, Recd-Satisfied, Recd-Transferred, Recd-Used or Recd-Unused.

To generate the report, specify the following parameters and click **Submit**:

- **Organization** - The organization is the branch the patron selected as the pickup branch for the ILL item when the request was placed in the INN-Reach interface. Select one or more branches or select **<All>**.
- **Number of days received** - This is the number of days since the item was received. For example, if you enter 10, the report will include the ILL items that were received at least 10 days ago and still have not been picked up and checked out.
- **Group option** - The default selection is **Grouped by Pickup Branch** which groups the report in tables by pickup branch. Select **Not Grouped by Pickup Branch** to generate the report without the branch grouping.

If **Grouped by Pickup Branch** is selected, the report is grouped and sorted in tables by the pickup branch. Each table is headed by **Pickup Branch: [*branch name*]**, and within each table the data appears in the following columns, sorted by the received date (ascending):

- **Call Number** - The lending library's item call number
- **Item Barcode** - The lending library's item barcode
- **Title** - The lending library's item title
- **Circ Status** - The item's circulation status
- **Item Location** - The lending library's assigned branch name
- **Patron Branch** - The branch where the borrowing patron is registered
- **Patron No** - The borrowing patron's ID
- **Received Date** - The date the item was received

INN-Reach Borrowing Received Too Long
(10 days or more)

Pickup Branch: Link Downtown Branch

Item Location	Call Number	Item Barcode	Title	Patron Home Library	Patron No.	Received Date
march-Millennium High School Fiction	POWELL	31298002099920	darch Novels, 1944-1962 / Dawn Powell.	plag3-*Not Supplied*	258239	7/5/2016
plag1-Balston Spa Public Library	973 Levy	0090800620544	American vertigo : traveling America in the footsteps of Tocqueville / Bernard-Henri Levy.	plag4-*Not Supplied*	370480	6/27/2016
plag1-Balston Spa Public Library		0090800634388	Woodworking techniques : best methods for building furniture / from Fine woodworking.	plag4-*Not Supplied*	370480	6/28/2016
plag1-Balston Spa Public Library	331.4 Qui	0090800535973	Going back to work : a survival guide for comeback moms / by Mary W. Quigley and Loretta E. Kaufman.	plag4-*Not Supplied*	152703	7/1/2016
plag1-Balston Spa Public Library	PA 919.89 Tho	0090800552234	Scott, Shackleton and Amundsen : amibition and tragedy in the Antarctic / by David Thomson.	plag4-*Not Supplied*	370547	7/1/2016
plag2-Long Lake Library		0092300170780	Dogs with jobs : working dogs around the world / Merrily Weisbord and Kim Kachanoff.	plag4-*Not Supplied*	370480	6/27/2016
plag2-Long Lake Library	759 Ses	0092300170624	The Poetic vision : American tonalism / Ralph Sessions ... [et al.].	plag4-*Not Supplied*	370474	6/27/2016
plag2-Northville Library	094.4 Ell	31259000245477	Book finds : how to find, buy, and sell used and rare books / Ian C. Ellis.	plag4-*Not Supplied*	370547	7/1/2016
plag2-Raquette Lake Free Library	070.92 Dun	0092800169209	But enough about me : a Jersey girl's unlikely adventures among the absurdly famous / Jancee Dunn.	plag4-*Not Supplied*	370480	6/27/2016

If **Not Grouped by Pickup Branch** is selected, the **Pickup Branch** is the first column on the left, followed by the same columns as on the grouped report. The ungrouped report is sorted first by the pickup branch, then the received date (ascending).

INN-Reach Borrowing Received Too Long
(10 days or more)

Pickup Branch	Call Number	Item Barcode	Title	Circ Status	Item Location	Patron Branch	Patron No.	Received Date
Link Downtown Branch	613.25 Aga Aga		The South Beach diet : the delicious, doctor-designed, foolproof plan for fast and healthy weight loss / Arthur Agatston.	Claim Returned	plag2-*Not Supplied*	Link Downtown Branch	152703	6/8/2016
Link Downtown Branch	PA 720.973 Hil	0090800549081	The Wright space : pattern and meaning in Frank Lloyd Wright's houses / Grant Hildebrand.	Claim Returned	plag1-Balston Spa Public Library	Link Downtown Branch	152703	6/8/2016
Link Downtown Branch	364.1523 Lar	0092300140189	The devil in the white city : murder, magic, and madness at the fair that changed America / Erik Larson.	Claim Returned	plag2-Long Lake Library	Link Downtown Branch	370474	6/9/2016
Link Downtown Branch	FR 448.242 Cha	0092300101132	Mes premiers pas en francais / by M. L. Chapuzet and W. M. Daniels.	Claim Never Had	plag2-Long Lake Library	Link Downtown Branch	370474	6/10/2016
Link Downtown Branch	070.92 Dun	0092800169209	But enough about me : a Jersey girl's unlikely adventures among the absurdly famous / Jancee Dunn.	Held	plag2-Raquette Lake Free Library	Link Downtown Branch	370480	6/27/2016
Link Downtown Branch	973 Levy	0090800620544	American vertigo : traveling America in the footsteps of Tocqueville / Bernard-Henri Levy.	Held	plag1-Balston Spa Public Library	Link Downtown Branch	370480	6/27/2016
Link Downtown Branch		0092300170780	Dogs with jobs : working dogs around the world / Merrily Weisbord and Kim Kachanoff.	Held	plag2-Long Lake Library	Link Downtown Branch	370480	6/27/2016
Link Downtown Branch		0090800634388	Woodworking techniques : best methods for building furniture / from Fine woodworking.	Held	plag1-Balston Spa Public Library	Link Downtown Branch	370480	6/28/2016

INN-Reach Borrowing Requested Too Long Report

A Polaris borrowing library can use this report to identify INN-Reach ILL items that have been requested but still have not been received after a specified number of days past the request date (the date the INN-Reach ILL request became Active).

To generate the report, specify the following parameters and click **Submit**:

- **Organization:** - The organization is the branch of the patron who requested the INN-Reach ILL item from the lending library. Select one or more branches or select **<All>**.
- **Number of days requested**: - This is the number of days since the item was requested. For example, if you enter 10, the report will include the ILL items that were requested 10 days or more before the report was run and still have not been received.
- **Group option:** - The default selection is **Grouped by Patron Branch** which groups the report in tables by the branch of the patron who requested the item. Select **Not Grouped by Patron Branch** to generate the report without the branch grouping.

If **Grouped by Patron Branch** is selected, the report is grouped and sorted in tables by the branch of the patron who requested the item. Each table is headed by **Patron Branch: [*branch name*]**, and within each table, the data appears in the following columns sorted first by the item agency code, then by the requested date (ascending):

- **Item Agency Code** - The item agency code from the API message
- **Call Number** - The lending library's item call number
- **Title** - The lending library's item title
- **Patron No.** - The borrowing patron's ID
- **Requested Date** - The date the item was requested

INN-Reach Borrowing Requested Too Long
(10 days or more)

Patron Branch: Saratoga Springs Public Library

Item Agency Code	Call Number	Title	Patron No.	Requested Date
aair1	658.85 ANT	High octane selling : boost your creative power to close more sales / Ray Anthony & Malcolm Kushner ; illustrations by David Bamberg.	40573	3/29/2016
aair1	CD PB ALL I06	In blue [sound recording] / Karrin Allyson.	208275	3/29/2016
aair1	821.914 MAK	Making for planet Alice : new women poets / edited by Maura Dooley.	195459	3/29/2016
aair1	J LISLE	Angela's aliens / Janet Taylor Lisle.	209054	4/11/2016
aair1	641.302 VAU	The Oxford book of health foods / J.G. Vaughan and P.A. Judd.	122451	4/27/2016
earch	J 624.5 NEL	The Golden Gate Bridge / Sharlene and Ted Nelson.	371233	4/21/2016
earch	PB J ANIMAL (SERIES)	Shetland in the shed / Ben M. Baglio ; illustrations by Jenny Gregory ; cover illustrations by Mary Ann Lasher.	122451	4/27/2016
earch	636.76 Col	Shih tzu / Gerarda M. Collins, Robert P. Parker.	122451	4/27/2016
earch	943.9004924 So69m	Masquerade : dancing around death in Nazi-occupied Hungary / Tivador Soros ; edited and translated from the Esperanto by Humphrey Tonkin ; forewords by Paul and George Soros.	371141	4/28/2016
fair1	811.52 SAR	Collected poems (1930-1993) / May Sarton.	215027	3/29/2016
fair1	811.54 WIL	Among angels : poems / by Nancy Willard and Jane Yolen ; illustrated by S. Saelig Gallagher.	215027	3/29/2016
fair1	809.3003 CAL	Cult fiction : a reader's guide / Andrew Calcutt & Richard Shephard.	323070	3/31/2016
fair1	809.3003 CAL	Cult fiction : a reader's guide / Andrew Calcutt & Richard Shephard.	323070	3/31/2016
fair1	811.54 WIL	Among angels : poems / by Nancy Willard and Jane Yolen ; illustrated by S. Saelig Gallagher.	371233	4/21/2016
fair1	CD PR JAY R76	Rainy day music [sound recording] / The Jayhawks.	122451	4/27/2016
fair1	FIC DRUZHNIKOV	Angels on the head of a pin : a novel / Yuri Druzhnikov ; translated from the Russian by Thomas Moore.	122451	4/27/2016
fair1	917.94 MOR	Angels & aliens : a journey west / Mary Morris.	122451	4/27/2016
fair1	242.335 ALL	All is calm, all is bright : true stories of Christmas / [compiled by] Cheryl Kirking.	263947	5/31/2016
iarch	TG25.S225 A5 1970	The Golden Gate Bridge : report of the Chief Engineer to the Board of Directors of the Golden Gate Bridge and Highway District, California, September, 1937.	371233	4/21/2016

If **Not Grouped by Patron Branch** is selected, the same columns appear as on the grouped report with an additional **Patron Branch** column on the right. The report is sorted first by the item agency code, then by patron branch, and then by the requested date (ascending).

INN-Reach Borrowing Requested Too Long
(10 days or more)

Item Agency Code	Call Number	Title	Patron No.	Requested Date	Patron Branch
aair1	647.94788 CRO 2001	Camping Colorado / Melinda Crow.	371086	7/7/2016	Link Downtown Branch
aair1	641.509794 WAT	Chez Panisse Cafe cookbook / Alice Waters and the cooks of Chez Panisse in collaboration with David Tanis and Fritz Streiff ; illustrations by David Lance Goines.	371229	7/7/2016	Link Downtown Branch
aair1	641.509794 WAT	Chez Panisse Cafe cookbook / Alice Waters and the cooks of Chez Panisse in collaboration with David Tanis and Fritz Streiff ; illustrations by David Lance Goines.	371229	7/7/2016	Link Downtown Branch
aair1	658.85 ANT	High octane selling : boost your creative power to close more sales / Ray Anthony & Malcolm Kushner ; illustrations by David Bamberg.	40573	3/29/2016	Saratoga Springs Public Library
aair1	CD PB ALL I06	In blue [sound recording] / Karrin Allyson.	208275	3/29/2016	Saratoga Springs Public Library
aair1	821.914 MAK	Making for planet Alice : new women poets / edited by Maura Dooley.	195459	3/29/2016	Saratoga Springs Public Library
aair1	J LISLE	Angela's aliens / Janet Taylor Lisle.	209054	4/11/2016	Saratoga Springs Public Library
aair1	641.302 VAU	The Oxford book of health foods / J.G. Vaughan and P.A. Judd.	122451	4/27/2016	Saratoga Springs Public Library
earch	PB JE ABRACADABRA (SERIES)	Poof! Rabbits everywhere! / by Peter Lerangis ; illustrations by Jim Talbot.	371229	7/8/2016	Link Downtown Branch
earch	J 624.5 NEL	The Golden Gate Bridge / Sharlene and Ted Nelson.	371233	4/21/2016	Saratoga Springs Public Library
earch	PB J ANIMAL (SERIES)	Shetland in the shed / Ben M. Baglio ; illustrations by Jenny Gregory ; cover illustrations by Mary Ann Lasher.	122451	4/27/2016	Saratoga Springs Public Library
earch	636.76 Col	Shih tzu / Gerarda M. Collins, Robert P. Parker.	122451	4/27/2016	Saratoga Springs Public Library
earch	943.9004924 So69m	Masquerade : dancing around death in Nazi-occupied Hungary / Tivador Soros ; edited and translated from the Esperanto by Humphrey Tonkin ; forewords by Paul and George Soros.	371141	4/28/2016	Saratoga Springs Public Library
fair1	811.54 BUK	What matters most is how well you walk through the fire / Charles Bukowski.	371229	7/7/2016	Link Downtown Branch
fair1	811.52 SAR	Collected poems (1930-1993) / May Sarton.	215027	3/29/2016	Saratoga Springs Public Library

INN-Reach Borrowing Returned Too Long Report

A Polaris borrowing library can use this report to identify INN-Reach ILL items that have been returned to the lending library but have not been received/checked in.

To generate the report, specify the following parameters and click **Submit**:

- **Organization:** - This is the branch that returned the INN-Reach ILL item to the lending library. Select one or more branches or select **<All>**.
- **Number of days returned:** - This is the number of days since the item was returned to the lending library. For example, if you enter 10 days, the report will include INN-Reach ILL items that were returned at least 10 days ago and still have not been received at the lending library.
- **Group option**: The default selection is **Grouped by Returning Branch**. Select **Not Grouped by Returning Branch** to generate the report without the branch grouping.

If **Grouped by Returning Branch** is selected, the report is grouped in tables by the branch that returned the item. Each table is headed by **Returning Branch: [*branch name*]**, and within each table the data appears in the following columns sorted first by the item location and then by the returned date (ascending):

- **Item Location** - The lending library that owns the item (item agency - item location from the API message). If the item location is not in the API message, *Not supplied* appears.
- **Call Number** - The lending library's item call number
- **Item Barcode** - The lending library's item barcode
- **Title** - The lending library's item title
- **Patron Branch** - The branch where the borrowing patron is registered
- **Patron No.** - The borrowing patron's ID
- **Returned Date** - The date the item was returned

INN-Reach Borrowing Returned Too Long
(10 days or more)

Returning Branch: Saratoga Springs Public Library

Item Location	Call Number	Item Barcode	Title	Patron Branch	Patron No.	Returned Date
plag1-Balston Spa Public Library	PA 623.8 Joh	0090800603631	Ship model building.	Community Library	354091	4/1/2016
plag1-Balston Spa Public Library	811 McB	0090800606816	Mist upon the pond / Sandra E. McBride.	Saratoga Springs Public Library	313361	4/5/2016
plag1-Balston Spa Public Library	PA 629.46 Sti	0090800555831	Handbook of model rocketry / G. Harry Stine and Bill Stine.	Saratoga Springs Public Library	356110	6/7/2016
plag1-Balston Spa Public Library		0090800556235	The self-sufficient life and how to live it : the complete back-to-basics guide / John Seymour with Will Sutherland.	Saratoga Springs Public Library	371255	7/7/2016
plag1-Balston Spa Public Library	709.44 Wel	0090800553356	Art Nouveau Bing : Paris style 1900 / Gabriel P. Weisberg.	Saratoga Springs Public Library	356110	7/15/2016
q5aaa-Auburn NonFiction	709.730747 FER	81856577	In memory of my feelings : Frank O'Hara and American art / Russell Ferguson.	Saratoga Springs Public Library	344624	4/29/2016

If **Not Grouped by Returning Branch** is selected, the same columns appear as on the grouped report with an additional **Returning Branch** column on the right. The data is sorted first by the item location and then by the returned date (ascending).

INN-Reach Borrowing Returned Too Long
(10 days or more)

Item Location	Call Number	Item Barcode	Title	Patron Branch	Patron No.	Returned Date	Returning Branch
plag1-Balston Spa Public Library	PA 623.8 Joh	0090800603631	Ship model building.	Community Library	354091	4/1/2016	Saratoga Springs Public Library
plag1-Balston Spa Public Library	811 McB	0090800606816	Mist upon the pond / Sandra E. McBride.	Saratoga Springs Public Library	313361	4/5/2016	Saratoga Springs Public Library
plag1-Balston Spa Public Library	PA 629.46 Sti	0090800555831	Handbook of model rocketry / G. Harry Stine and Bill Stine.	Saratoga Springs Public Library	356110	6/7/2016	Saratoga Springs Public Library
plag1-Balston Spa Public Library		0090800556235	The self-sufficient life and how to live it : the complete back-to-basics guide / John Seymour with Will Sutherland.	Saratoga Springs Public Library	371256	7/7/2016	Saratoga Springs Public Library
plag1-Balston Spa Public Library	709.44 Wel	0090800553356	Art Nouveau Bing : Paris style 1900 / Gabriel P. Weisberg.	Saratoga Springs Public Library	356110	7/15/2016	Saratoga Springs Public Library
q5aaa-Auburn NonFiction	709.730747 FER	81856577	In memory of my feelings : Frank O'Hara and American art / Russell Ferguson.	Saratoga Springs Public Library	344624	4/29/2016	Saratoga Springs Public Library

INN-Reach Lending Institutional Overdues Report

A Polaris library using INN-Reach integration can generate this report to see items that were loaned to another library and remain overdue for a specified number of days past their due date.

To generate the report, set the following parameters and click **Submit**:

- **Organization**: - Select one or more branches or select **<All>** to specify the assigned branches for which you want to see overdue items that were loaned out through INN-Reach.
- **Number of days overdue:** - This is the number of days past the due date or the number of days that the item has been in an overdue status. For example, if you enter 10 days, the report lists the items that have been overdue for 10 days or more.
- **Group option**: - The **Grouped by Item Location** option is the default selection which groups the report in tables by the item's assigned branch. Select **Not Grouped by Item Location** if you do not want the report grouped.

If **Grouped by Item Location** is selected, the report is grouped and sorted in tables by the name of the item's assigned branch. Each table is headed by **Item Location: [*branch name*]**, and within each table the data appears in the following columns, sorted first by the patron home library then by the due date (ascending):

- **Patron Home Library** - The borrowing patron's home library. If the patron's home library is not in the API message, *Not Supplied* appears.
- **Patron No.** - The borrowing patron's ID
- **Call Number** - The lending library's item call number
- **Item Barcode** - The lending library's item barcode
- **Title** - The lending library's title
- **Due Date** - The date the item was due

  Note:
  When the Polaris lending library receives the API message that the item was received at the borrowing library, the item is checked out to the virtual patron and the due date is calculated according to the lending library's circulation policy. Since the due date is based on when the item is received at the borrowing library and not when the patron actually picks up the item, the due date may be earlier than expected.

INN-Reach Lending Institutional Overdues
(10 days or more)

Item Location: Saratoga Springs Public Library

Patron Home Library	Patron No.	Call Number	Item Barcode	Title	Due Date
earch-*Not Supplied*	1004461	LT Fict Par	0000203911557	Lost and found [large print]	5/11/2016
earch-*Not Supplied*	1004461	92 Pelzer YA	0000203672829	The lost boy : a foster child's search for the love of a family	5/11/2016
nair1-*Not Supplied*	2184202	Fict Pas YA	0000203701081	Rebel	3/17/2016
plag1-*Not Supplied*	356110	92 H	0000200438059	Aldous Huxley : a biography	5/10/2016
plag1-*Not Supplied*	2803	Fict Mor YA	0000202916508	3 days off	6/7/2016
plag1-*Not Supplied*	2803	J Fict Ang	0000200112746	Secret selves : a novel	6/9/2016
plag1-*Not Supplied*	357627	92 S	0000200448033	My life.	6/28/2016
plag1-*Not Supplied*	359205	92 D	0000200436517	Where the wings grow	6/28/2016

If you selected **Not Grouped by Item Location**, the same columns appear on the report as in the grouped version with an additional **Item Location** column on the right. The report is sorted first by the patron home library, then the due date (ascending).

INN-Reach Lending Institutional Overdues
(10 days or more)

Patron Home Library	Patron No.	Call Number	Item Barcode	Title	Due Date	Item Location
earch-"Not Supplied"	1004461	LT Fict Bis	0000411191901	Fried by Jury / [large print]	3/18/2016	Schenectady Branch - Central
earch-"Not Supplied"	1004461	JP Fict Win	0001900201862	Whooo's haunting the teeny tiny ghost?	4/14/2016	Community Library
earch-"Not Supplied"	1004461	JP Fict Ste	0003300158759	Fried feathers for Thanksgiving	4/15/2016	Stillwater Public Library
earch-"Not Supplied"	1004464	LT Fict Bro	0000410934103	A hard dry road / [large print]	5/4/2016	Schenectady Branch - Central
earch-"Not Supplied"	1004461	J Fict Par	0003300213737	Junie B., first grader : boo!--and I mean it!	5/11/2016	Stillwater Public Library
earch-"Not Supplied"	1004461	LT Fict Par	0000203911557	Lost and found [large print]	5/11/2016	Saratoga Springs Public Library
earch-"Not Supplied"	1004461	92 Pelzer YA	0000203672829	The lost boy : a foster child's search for the love of a family	5/11/2016	Saratoga Springs Public Library
nair1-"Not Supplied"	2184202	Fict Pas YA	0000203701081	Rebel	3/17/2016	Saratoga Springs Public Library
nair1-"Not Supplied"	2184206	LT Fict Cum	0000413946146	A killing on church grounds [large print]	5/25/2016	Schenectady Branch - Central
nair1-"Not Supplied"	2184206	LT Fict Wal	0000412825549	The killing club : [large print] based on a story by Josh Griffith	5/25/2016	Schenectady Branch - Central
plag1-"Not Supplied"	356110	92 H	0000200438059	Aldous Huxley : a biography	5/10/2016	Saratoga Springs Public Library
plag1-"Not Supplied"	2803	Fict Mor YA	0000202916508	3 days off	6/7/2016	Saratoga Springs Public Library
plag1-"Not Supplied"	357348	J Fict Las	0000410106074	6-321	6/9/2016	Schenectady Branch - Central
plag1-"Not Supplied"	2803	J Fict Ang	0000200112746	Secret selves : a novel	6/9/2016	Saratoga Springs Public Library
plag1-"Not Supplied"	357627	J Fict	0000401238050	Treehorn's treasure.	6/10/2016	Schenectady Branch - Central
plag1-"Not Supplied"	357627	LT Fict	0000400850319	Stagecoach station 2: Laredo / [large print]	6/10/2016	Schenectady Branch - Central
plag1-"Not Supplied"	357627	92 S	0000200448033	My life.	6/28/2016	Saratoga Springs Public Library
plag1-"Not Supplied"	359205	92 D	0000200436517	Where the wings grow	6/28/2016	Saratoga Springs Public Library

INN-Reach Lending Paged Too Long Report

A Polaris lending library can use this report to identify items that are linked to pending INN-Reach requests but have not been pulled from the shelves and shipped out to the borrowing library.

To generate the report, specify the following parameters and click **Submit**.

- **Organization**: - The organization is the item's assigned branch. Select one or more branches or select **<All>**.
- **Number of days paged**: - This is the number of days since the date on which the linked hold request was "paged" or updated to Pending. For example, if you enter 10 days, the report will include items linked to INN-Reach requests that were updated to a Pending status at least 10 days ago, but the items have not been shipped out to the borrowing library.

The data in the INN-Reach Paged Too Long report is grouped and sorted in tables by the item location. Each table is headed by **Item Location: [*assigned branch name*]**, and within each table the data appears in the following columns, sorted by the paged date (ascending):

- **Item Number** - The item record ID from the INN-Reach request
- **Call Number** - The lending library's item call number
- **Item Barcode** - The lending library's item barcode
- **Title** - The lending library's item title
- **Patron Home Library** - This column displays the agency code and the patron home library name. *Not Supplied* appears if the patron home library is not in the API message.
- **Paged Date** - The date the INN-Reach hold request was updated to a *Pending* status.

<div align="center">

INN-Reach Paged Too Long
(more than 10 days)

</div>

Item Location: plag3-Community Library

Item Number	Call Number	Item Barcode	Title	Patron Home Library	Paged Date
1627088	jP Fict Com	0001900076827	Losing things at Mr. Mudd's	plag3-*Not Supplied*	3/1/2016
2649120	Wee	0001900275189	The marathon runner	plag1-*Not Supplied*	3/3/2016
1626300	J Fict Hon	0001900067461	Don't pat the wombat!	plag2-*Not Supplied*	3/3/2016
1639118	J Fict McK	0001900225291	The stone fey	plag2-*Not Supplied*	3/10/2016
1626746	jP Fict Jen	0001900072560	Brave little fox	earch-*Not Supplied*	3/25/2016

New ILL Report and Find Tool SQL Search for Unclaimed ILL Items

Libraries using either INN-Reach integration or regular Polaris ILL processing can run a new report to list all held ILL items that have exceeded their *Held Until* date and need to be returned unclaimed to the lending library. In addition, two sets of SQL search criteria are provided for finding only the INN-Reach unclaimed ILL items or any ILL items.

New Unclaimed ILL Report

The Unclaimed ILL Items report is available to all Polaris customers under Utilities | Reports and Notices | Circulation | ILL. It lists the unclaimed ILL items with a **HoldTillDate** less than the date on which the report was generated.
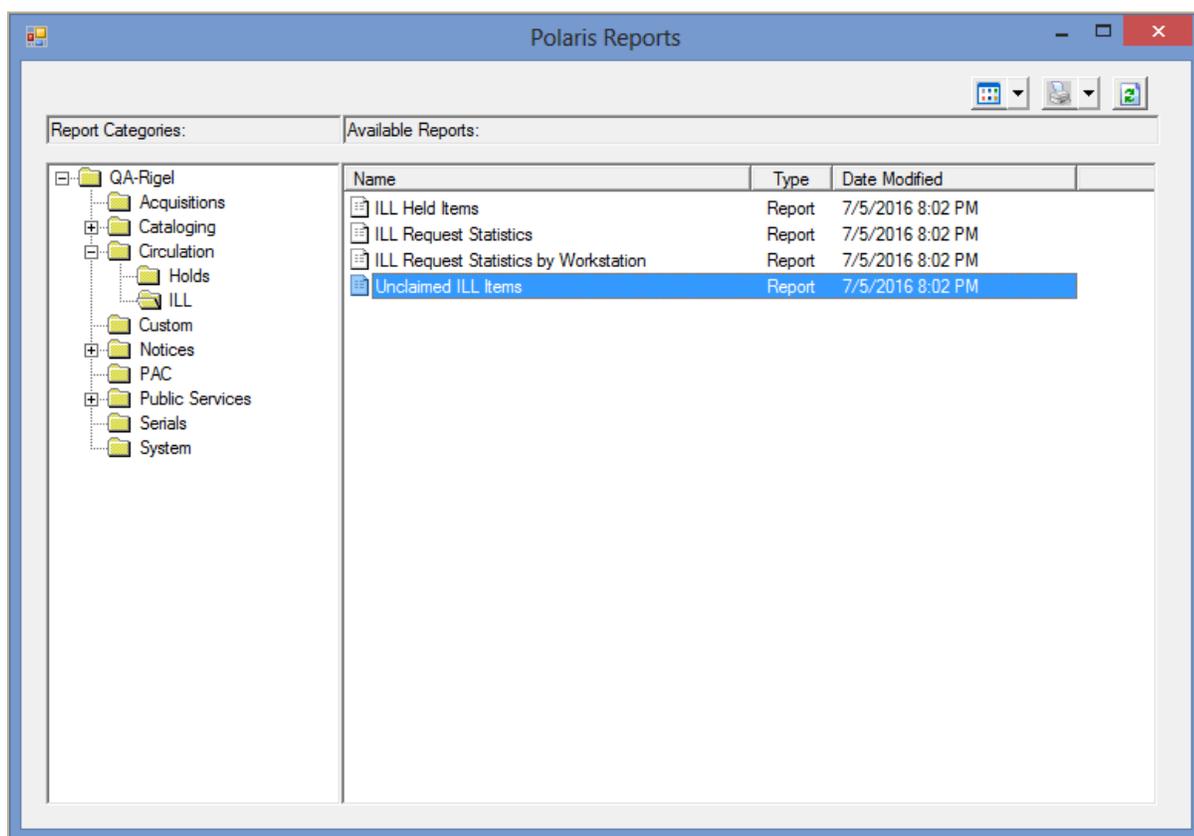
To generate the report, select one or more branches or select **<All>** from the **Organizations** drop-down list, and click **Submit**.

The report is sorted and grouped in tables by the pickup branch. Each table is headed by **Pickup Branch:** [*branch name*], and within each table the data appears in the following columns, sorted by the patron name:

- **Patron Name**
- **Call Number**
- **Title**
- **Patron Address**
- **Patron Phone**
- **Held Date**
- **Held Until**

Unclaimed ILL Items

Pickup Branch: Saratoga Springs Public Library

Patron Name	Call Number	Title	Patron Address	Patron Phone	Held Date	Held Until
Duggan, Marirose M		Memories of Inlet / Letty Kirch Haynes.	255B Burke Dr DACULA, GA 30019-	315-634-1234	3/9/2016	3/23/2016
Duggan, Marirose M	Sar Lib 200 Sar Lib 200 Sar Lib 200 Sar Lib 200	The William S. Paley collection / William Rubin, Matthew Armstrong.	255B Burke Dr DACULA, GA 30019-	315-634-1234	3/9/2016	3/23/2016
Duggan, Marirose M	Sar Branch 200 Sar Branch 200 Sar Branch 200 Sar Branch 200	One hundred famous views of Edo / Hiroshige ; introductory essays by Henry D. Smith II and Amy G. Poster ; commentaries on the plates by Henry D. Smith ; preface by Robert Buck.	255B Burke Dr DACULA, GA 30019-	315-634-1234	3/9/2016	3/23/2016
Duggan, Marirose M		Textiles and ornaments of India; a selection of designs, edited, with a foreword, by Monroe Wheeler [director of the exhibition] Texts by Pupul Jayakar and John Irwin.	255B Burke Dr DACULA, GA 30019-	315-634-1234	3/9/2016	3/23/2016
Leary, Rebecca L	ILL	The sweet escape [compact audio disc]	37 Charlton Road KIAWAH ISLAND, SC 29455-	315-634-1234	4/22/2016	5/6/2016
Quail, Carol V	ILL	Evolution after Darwin : the University of Chicago centennial	951 Riverview Road KIAWAH ISLAND, SC 29455-	315-634-1234	4/22/2016	5/6/2016
Quail, Carol V	ILL Temp class Temp cutter Temp suffix	Joyful noise : poems for two voices	951 Riverview Road KIAWAH ISLAND, SC 29455-	315-634-1234	4/22/2016	5/6/2016
Quail, Carol V	ILL prefix, class, cutter, suffix, vol, copy Temp cutter Temp suffix	Celebration of fools [electronic resource] : an inside look at the rise and fall of JCPenney	951 Riverview Road KIAWAH ISLAND, SC 29455-	315-634-1234	4/22/2016	5/6/2016
Reid, Christopher J		Comeback / Dave Dravecky, with Tim Stafford.	271 Meadowlark Dr LAKE WALES, FL 33859	315-634-1234	4/20/2016	5/4/2016
Shaw, Ann	706.23 Stl	The ADD answer : how to help your child now / Frank Lawlis.	141 Lilac St. SYRACUSE, NY 13208	3156344531	6/6/2016	6/18/2016
Zhang, TestCopy	ILL	China from the 1911 revolution to liberation	PO Nob 483 HILTON HEAD ISLAND, SC 29938	315-634-1234	2/14/2012	2/28/2012

Find Tool SQL Search Criteria

You can copy and paste SQL search criteria to find INN-Reach ILL items or all ILL items that remain unclaimed past their Held Until date.

To see a list of the unclaimed ILL items in the Find Tool search results:

1. Select Cataloging | Item Records.

   The Find Tool opens with **Item Records** selected in the **Object** box.

2. Select **SQL** under **Search Mode**.

3. Select and copy one of the following sets of SQL search criteria depending on whether you want to see just unclaimed INN-Reach ILL items or all unclaimed ILL items:

   - SQL search criteria to find only unclaimed INN-Reach ILL items:

     select

     ill.illrequestid

     from

     polaris.illrequests ill with (nolock)

     inner join polaris.innreachrequests inr with (nolock)

     on ill.illrequestid = inr.ILLRequestID

     where

     illstatusid = 10

     and HoldTillDate < getdate()

   - SQL search criteria to find all unclaimed ILL items:

     select

     ill.illrequestid

     from

     polaris.illrequests ill with (nolock)

     where

     illstatusid = 10

     and HoldTillDate < getdate()

4. Paste the copied text in the **SQL Search Criteria** box in the Find Tool.

5. Click **Search**.

   The search results include the ILL items with a HoldTillDate less than the date on which the search was performed.

Leap - Customization Options for Patron Registration

> **Note:**
> In addition to the options for suppressing certain views and fields in the Patron Registration workform, you can now use the Polaris Web Admin tool to customize most language strings that appear in the Leap user interface. See"Leap (Staff Web Client) Language Strings Added to Web Admin" on page 56

Libraries using Leap now have options in Polaris Administration for customizing the Patron Registration workform so that specific fields and views do not appear. When a view is suppressed, the link to that view does not appear in the **More** menu on the Patron Registration workform.
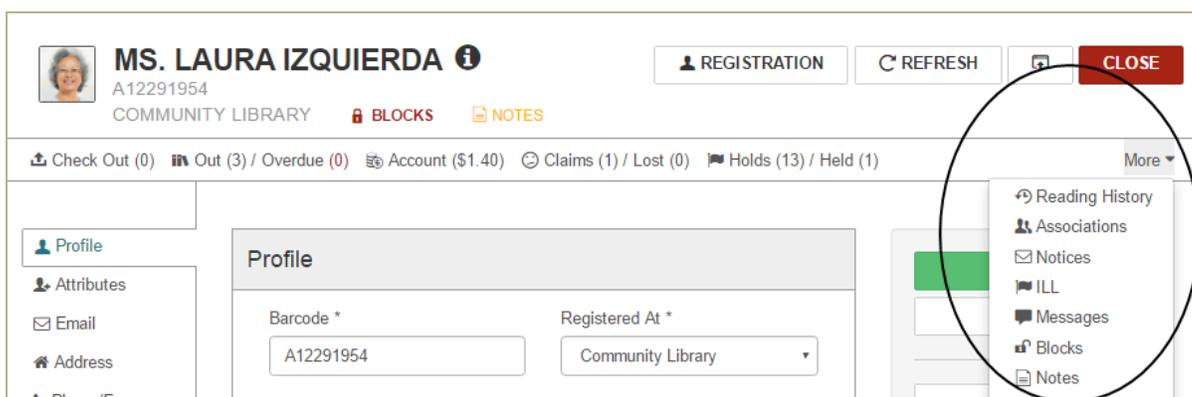
Suppressing Patron Registration Fields and Views

The following existing Administration profile and parameter settings are now also applied to the Patron Registration workform in Leap:

- **Display photo ID** (Patron Services profile) - If this profile is set to **Yes**, the **Image** section of the Patron Registration workform is displayed. If it is set to **No**, the **Image** section does not appear in the Patron Registration workform in Leap.

- **Reading history** (Patron Services parameter) - If the **Enable reading history** check box is selected in the Reading History Setup dialog box, the **Reading History** link appears in the **More** menu on the Patron Registration workform in Leap. If the check box is not selected, the link does not appear.

- **ILL options** (Request parameter) - If either or both of the **PAC requests, Enable** or **Staff requests, Enable** check boxes are selected, the **ILL** option appears in the **More** menu in Leap. If both **Enable** check boxes are unchecked, the option does not appear.

The following new Staff Client profiles, available at the System, Library, or Branch levels, can be used to suppress certain views from displaying for the Patron Registration workform in Leap:

- **Web App: Suppress View: Associations**
- **Web App: Suppress View: Messages**
- **Web App: Suppress View: Notes**

The following new Staff Client profiles, available at the System level only, enable libraries to suppress specific fields from display in the Patron Registration workform in Leap:

- **Web App:Suppress Field: Additional TXT Notice**
- **Web App:Suppress Field: Country**
- **Web App:Suppress Field: Fax**
- **Web App:Suppress Field: Former Barcode**
- **Web App:Suppress Field: Phone 3**
- **Web App:Suppress Field: Statistical Class**
- **Web App:Suppress Field: Text Messaging Phone** (When set to **Yes**, the Wireless Carrier field is also suppressed from display.)
- **Web App:Suppress Field: Title**
- **Web App:Suppress Field: UDF 1**
- **Web App:Suppress Field: UDF 2**
- **Web App:Suppress Field: UDF 3**
- **Web App:Suppress Field: UDF 4**
- **Web App:Suppress Field: UDF 5**
- **Web App:Suppress Field: Zip + 4**

Leap (Staff Web Client) Language Strings Added to Web Admin

You can now use the Polaris Web Admin language editor tool to customize the button and field labels and messages that appear in the Leap application. These labels and message strings can be edited at the System, Library, or Branch level. When the strings are edited, the new labels and messages appear after the user logs out and then back in to Leap. For more information, see the *Polaris Web Admin Tool Guide*.
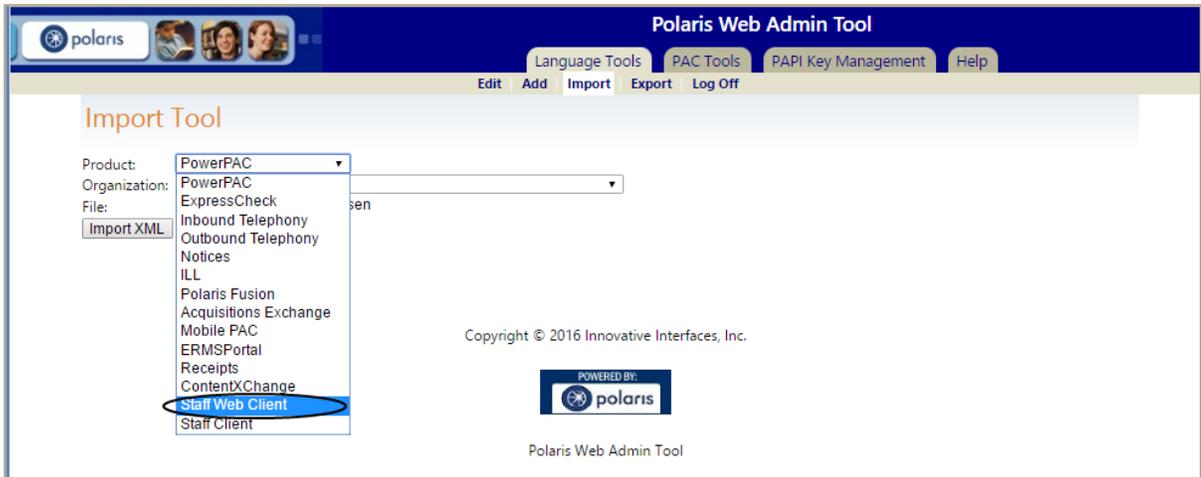
Leap - SA Settings Cached in Browser's Local Storage

To minimize the number of times Leap checks Polaris Administration settings, the following organization, workstation, and staff user settings are cached in the browser's local storage:

> **Note:**
> As new features are added to Leap, additional Administration values may be cached.

- Patron Services parameter settings for the organization
  - **Free days (normal)**
  - **Free days (bulk)**
  - **Distributed waives**
  - **Credit for overpayment**
  - **Check-out Receipt Options - Prompt for eReceipt configuration in Leap**
  - **Last use patron display**
- Cataloging parameter settings for the organization
  - **Item record history display assigned branch**
  - **Item record history display patron ID**
  - **Bibliographic record do not overlay feature enabled**
- Leap parameter setting for the workstation
  - **RFID: Use local security manager**
- Default view of the Check In workform set by the staff user in either Leap or the Polaris staff client
  - *Username* **| Settings | Workform User Default** - Leap user setting
  - **View | Save Current View as User Default** - Check In workform setting in the staff client

The cache is cleared when a user logs in.

If necessary, you can manually clear the cache by selecting the new **Clear Cache** option under your user name.

Leap - Combined Overdue and Checkout Charges

If your library has set up the **Check-Out: Charge Options** parameter in Patron Services Administration to charge for renewals and prompt for these charges in the Polaris staff client, a single **Renew chargeable overdue item** dialog now appears in Leap when you renew an item for which overdue fines are also owed.

> **Note:**
> If your library charges for renewals but has not selected the **Prompt in the Staff Client** check box on the Check-Out: Charge Options dialog box, the overdue fine dialog box appears and the renewal amount is applied to the patron's account.

You can select **Pay** from the **Actions** drop-down list for each charge and enter an amount equal to or less than the charge in the **Amount** box. Then, click **CONTINUE** to record the payment and print a receipt.

> **Note:**
> If you enter an amount less than the total charge, the amount is added to the patron's account.

When the payment receipt is printed, it displays **Checkout Charge/Overdue** in the **Reason** field, the total charges, the total amount paid, and the patron's remaining account balance.

Leap - Item Record Blocks and Notes Icon

The Blocks and Notes view bar icon appears in red if blocks or notes are present in the record.
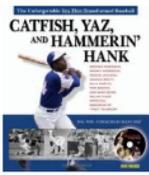
Leap - Alert When Patron Receives Only EReceipts

If eReceipts are enabled for the branch, the patron is set up to receive only eReceipts, and the workform is set to print receipts only if no eReceipt is sent, an alert message appears in Leap when checking in, checking out, or paying fines for that patron. This informs the staff member that there is no need to wait for a receipt to be printed for that patron.

When paying a fine from the Check In, Check Out, or Patron Status workform, the following message appears if the patron receives only eReceipts: **EReceipt submitted for fine payment**.

When checking out an item to a patron from the Check Out or Patron Status workform, the following message appears if the patron receives only eReceipts: **EReceipt submitted for check out / renewal**.

Leap - Identify Terminal Server Workstation

A new **Terminal Server** check box was added to the Polaris Workstation workform so that libraries running Leap inside a terminal server session can identify the terminal server. When the terminal server is identified by selecting this new check box, a staff member logging into Leap from a terminal server session can select their login workstation from a list of the Leap-enabled workstations for their branch.

Before this change, the terminal server was automatically selected as the login workstation, which meant that all Leap transactions were attributed to the terminal server. With the terminal server identified, staff members can log into their workstation so that transactions are attributed to the workstation itself and not the terminal server.

> **Note:**
> If the branch has only one workstation that is Leap enabled, it will be the default workstation and the user will not be able to change it.