



What's New in Polaris and Leap

6.4

© 2022

Legal Notices

© Innovative (Part of Clarivate) and/or its affiliates. All rights reserved. All trademarks shown are the property of their respective owners.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

The software and related documentation are provided under an agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of the software, unless required by law for interoperability, is prohibited.

Contents

Polaris Installation Notes	1
Web Admin Updates	2
Polaris API Changes	3
New and Modified Polaris Administrative Settings	4
Obsolete Highlight Column Removed from the Item Availability Display Order Table	7
Google+ References Removed from Polaris	8
Delete Last Borrower Information	9
Phone Formats Based on Default Country	10
New Third Address Line and Euro Currency Format	15
Export Txt Messages to i-tiva	16
BNC Reporting Now Includes New Data and Transmission Method	19
Delete All Instances of a Tag Using Bibliographic Record Bulk Change	21
EContent Integration Consumption of OverDrive Language Metadata	22
Record Set ID Option Added to Find Tool	23
Suspend/Reactivate Holds in Bulk from Patron Account	24
Update the activation date for multiple requests in the Polaris Staff Client:	24
Update the activation date for multiple requests in Leap:	26
Delay Hold Requests X Days Past First Available Date	28
Delayed Holds Setting in Staff Client	28
Delayed Holds Setting in Leap	29
Using New Filters in SimplyReports	30
Patron Status Find Tool Object and Window Title Updated	31
Prevent Staff from Placing Holds on EContent	32
P.V. SUPA Added as an RFID Vendor	33

Action Button Anchor	34
Additional Column Options in Patron Find Tool in Leap	35
Call Number and Shelf Location Added to Leap Inventory View	36
Check In Item from a Record Set in Leap	37
Display Local Items in New Local Items View in Leap	39
Enable or Disable RFID Security on Demand in Leap	41
Enable RFID Security During Check In	41
Disable RFID Security During Check Out	41
End of Term Due Dates in Leap	43
Missing Part Check In and Manual Billing in Leap	44
Check in and Manage Items with Missing Parts	44
Check In and Charge for Missing Parts	46
Manual Billing in Leap	48
New and Updated Permissions to Export Record Sets from Leap	50
Permission to Export a Cataloging Record Set	50
Permission to Export a Patron Record Set	52
Outreach Services (ORS) Added to Leap	55
Enabling Outreach Services for a Patron	55
Adding to a Pick List	58
Working with a Pick List	59
Arranging Delivery of the Pick List Items	59
Rating Returned Pick List Items	60
Patron Registration and Patron Status Read-Only Mode in Leap	62
Patron Registration Workform Read-Only Mode	62
Patron Status Workform Read-Only Mode	62
MobilePAC Updated for ADA Compliance	64

Polaris Installation Notes

Important:

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

C:\ProgramData\Polaris\6.4

C:\Program Files\Polaris\6.4

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

Web Admin Updates

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

PowerPAC Strings

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

Polaris API Changes

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

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

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

New and Modified Polaris Administrative Settings

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

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

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

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

Obsolete Highlight Column Removed from the Item Availability Display Order Table

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

Google+ References Removed from Polaris

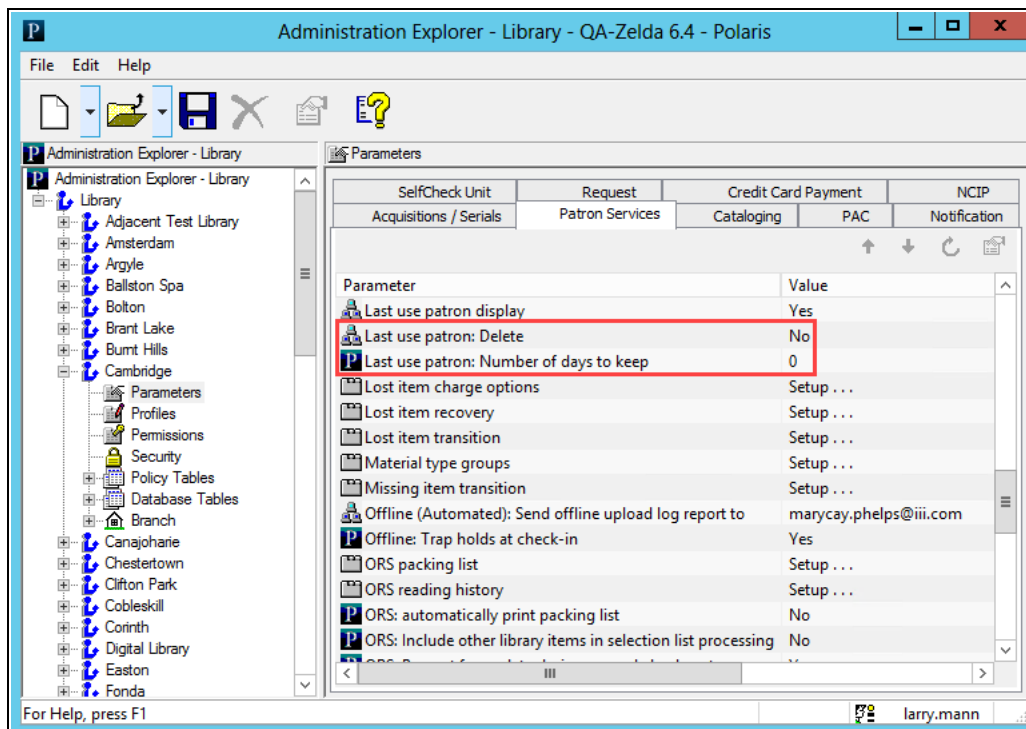
Because Google has discontinued their Google+ social community, the option to share information on Google+ has been removed from the Polaris Staff Client and the PowerPAC. All references to Google+ have been removed from the Staff Client, the PowerPAC, and documentation.

Delete Last Borrower Information

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

Each of these parameters is described below:

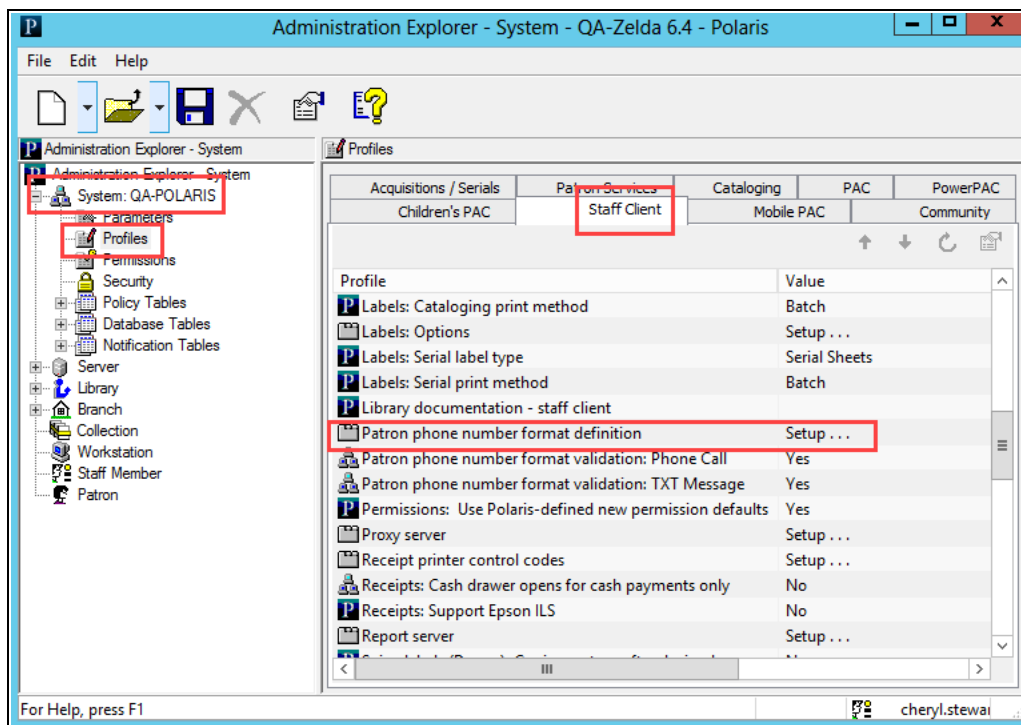
- **Last use patron: Delete:** Determines if the last borrower information is deleted. Default is **Yes**.
- **Last use patron: Number of days to keep:** Sets the number of days the last borrower information is kept. Default is **0**.



Phone Formats Based on Default Country

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

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



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

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

Phone Number Formats for QA-Zelda 6.4

Country: France

Format: 999 999 9999

☒ Phone call ☐ TXT message ☐ Both

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

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

Current formats

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

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

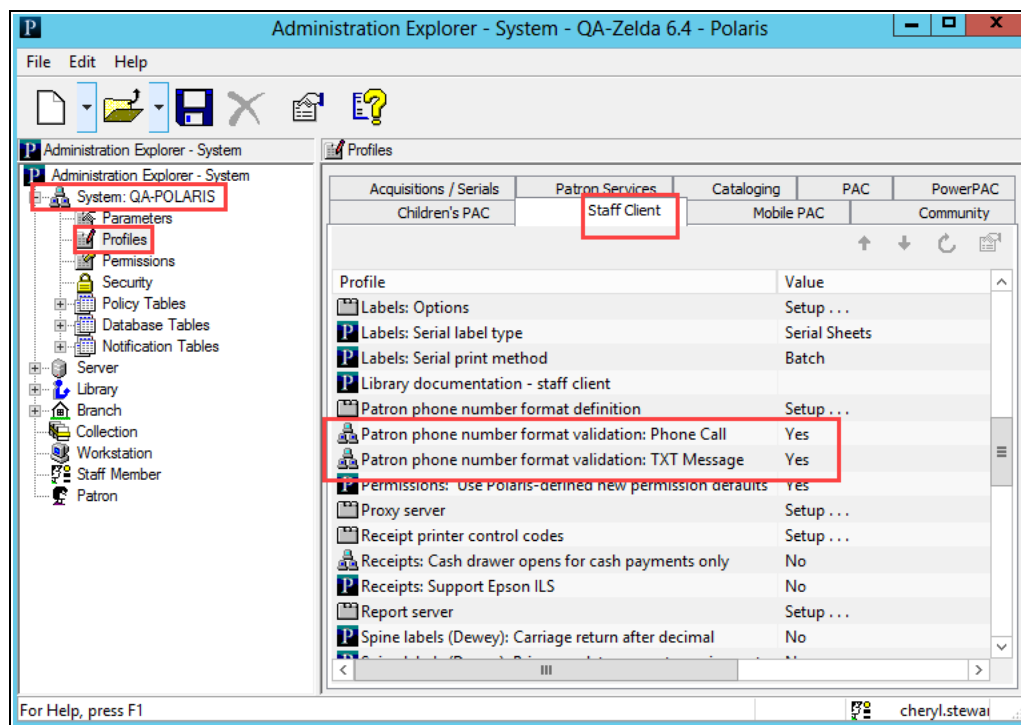
Add Remove

OK Cancel Help

Note:

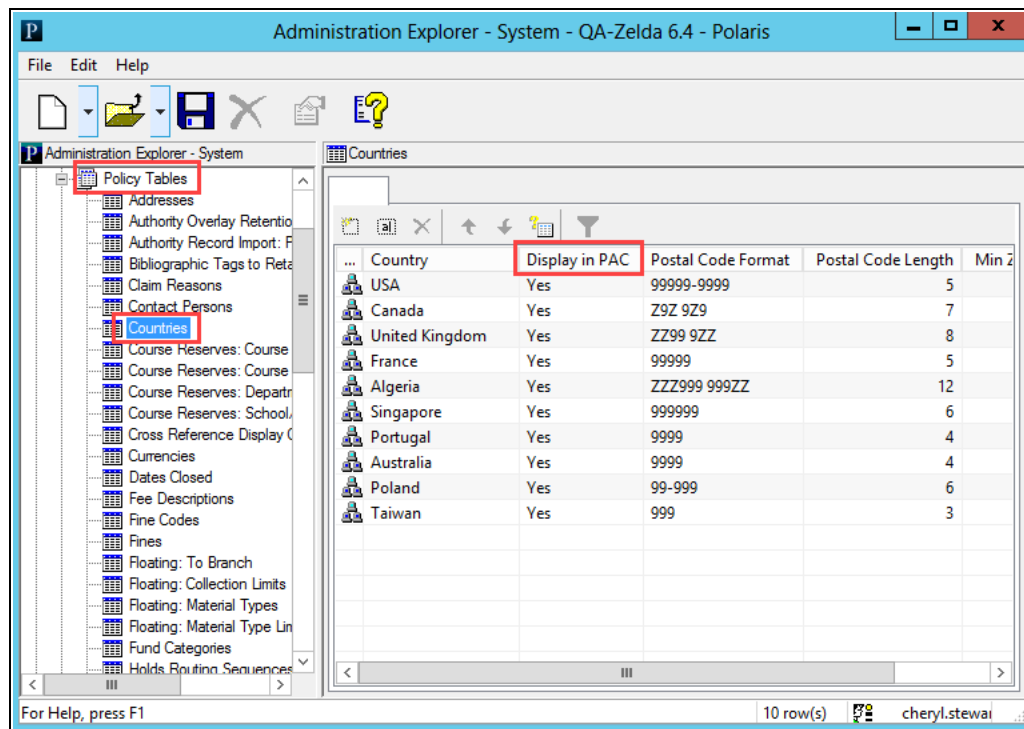
If you have enforced phone number formatting and you want to enable phone number formats from another country, you can add them to your default country phone number formats.

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



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

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



New Third Address Line and Euro Currency Format

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

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

The screenshot shows the 'System - 1 - QA-Zelda 6.4- Polaris - Polaris' window. The 'General' tab is active. The 'Name' field is 'QA-Zelda 6.4' and the 'Abbreviation' is 'QA-POLARIS'. The 'Display Name' is also 'QA-Zelda 6.4'. Under 'Addresses', the 'System' field contains '21 Sheridan Street; PO Box 238; Attn: Thomas D. Train; Argyle; NY; USA; 12809'. The 'Contact Representatives' section shows 'Primary' as 'Carol Clingan; cclingan@mvls.info; 518-355-2010; 518-355-3674' and 'Alternate' as 'Julia Martin; jmartin@sals.edu; 518-695-6641; 518-695-6441'. The 'Phone Numbers' section shows 'Primary' as '518-584-7300', 'Alternate' as an empty field, and 'Fax' as '518-587-5589'. At the bottom, the 'Default Country' is 'USA', 'Default Currency' is 'Euro' (selected from a dropdown menu), 'Default Language' is 'English - United Sts', and 'Error Reporting Email' is an empty field. A red box highlights the 'Euro' option in the 'Default Currency' dropdown menu.

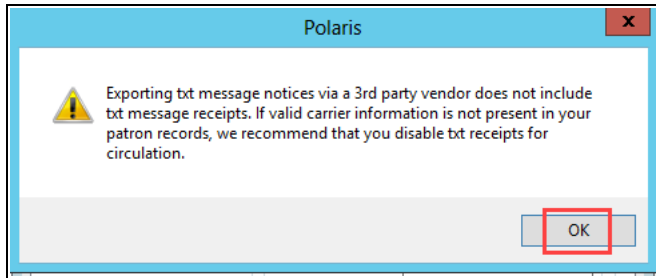
Export Txt Messages to i-tiva

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

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

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

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



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

Preferences:

My preference for receiving library notices
 Email Address ▼

Phone number for TXT messages
 Phone 1 ▼

E-receipts:
 Email ▼

Send e-mail notices in:
☐ Basic, plain text
☒ Full, HTML format

Send e-mail reminder notices:
☒ Almost overdue/auto-renew reminder notices
☒ Patron record expiration reminder notices
☒ Inactive patron reminder notices

Language preference
 English ▼

Carrier
 (Select a carrier) ▼
 (Select a carrier)
 (Unspecified)
 AT&T
 Bell South
 Boost Mobile
 Cellular One
 Cingular (Now AT&T)
 Fido
 Helio
 Iowa Wireless
 MetroPCS
 PLS Library
 PLS Library 1
 Qwest
 Rogers AT&T Wireless
 Rogers Canada
 Southwestern Bell
 Sprint
 Telus
 T-Mobile

Submit Change Request

What's New in Polaris and Leap 6.4

Notification Settings

Notices Address: Home

eReceipt Option: Email Address

Notification Option: Email Address

Additional TXT Notice: ☐

Text Messaging Phone: Phone 1

Wireless Carrier:

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

Preferences

Patron Registration - 357715 - Addresses - Polaris

File Edit View Links Tools Help

Barcode: A12291954

Registered at: Community Library (COB)

Last name: Izquierda

Patron code: Retired

First name: Laura

Middle name:

Title: Suffix:

Expiration:

Term: 0 Date: 11/15/2022

☐ Instructor

Addresses, Phone Numbers

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

Address Check

Term: 0 Date: 8/28/2020

Add... Edit... Remove Mailing Label

Notices address: Home

Notification option: Email Address

Additional TXT notice: ☐

eReceipt option: Email Address

Email address: rhonda.rucker@iii.com

Alt Email address: cheryl.stewart@iii.com

Phone 1: 315-512-5555

Phone 2:

Phone 3:

FAX number:

Wireless Carrier:

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

For Help, press F1

BNC Reporting Now Includes New Data and Transmission Method

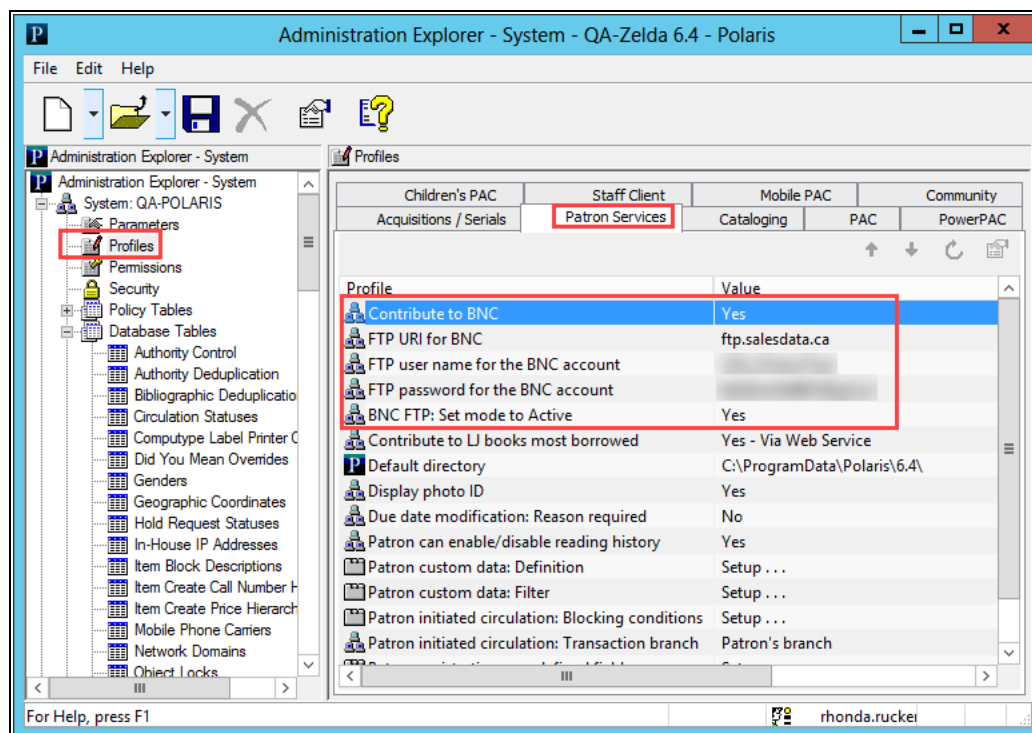
Three new data elements have been added for libraries that participate in BookNet Canada's (BNC) Sales Data Analysis (SDA) program. Each participating library can now configure automatic data extraction and schedule automatic FTP transmission of weekly data files. The two data files contain library information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

- Copies
- Copies out
- Copies on order

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

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

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



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

Delete All Instances of a Tag Using Bibliographic Record Bulk Change

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

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

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

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

EContent Integration Consumption of OverDrive Language Metadata

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

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

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

Record Set ID Option Added to Find Tool

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

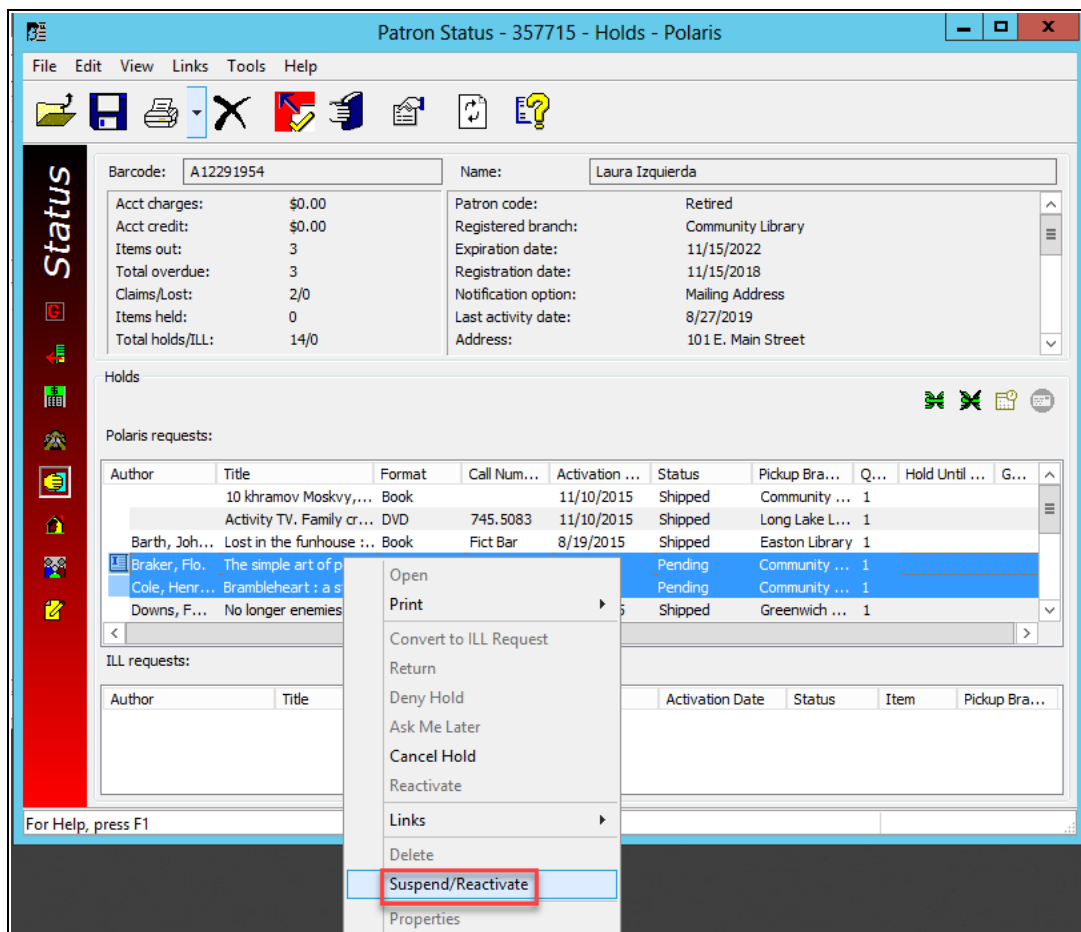
- You can search by record set ID to recall all the bibliographic records or item records in a particular record set.
- When placing multiple hold requests, you can search by record set ID to place a hold on every item in a record set.

Suspend/Reactivate Holds in Bulk from Patron Account

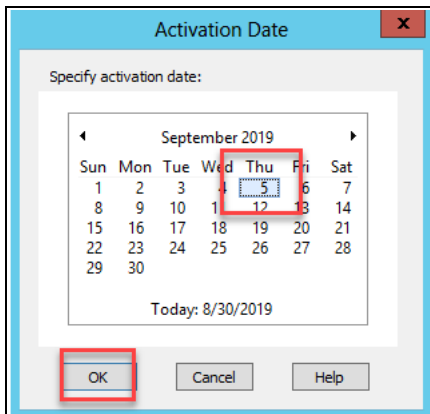
You can now update the activation date for multiple requests at one time from the patron record in Polaris. This option is enabled when all selected holds are in a status of Active, Inactive, or Pending/Located.

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

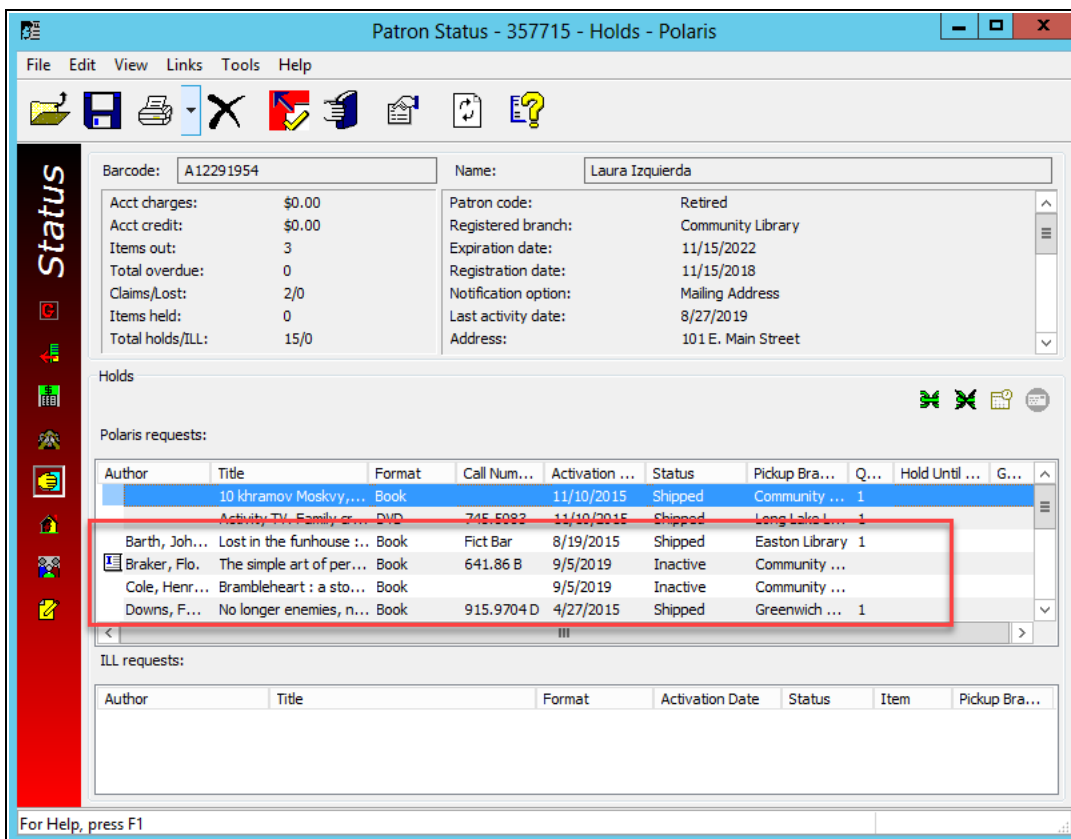
1. Right-click one or more holds from the Patron Holds View, and select **Suspend/Reactivate**.



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



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



Note:

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

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

Update the activation date for multiple requests in Leap:

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

LAURA IZQUIERDA ⓘ
A12291954
COMMUNITY LIBRARY

REGISTRATION ACTIONS REFRESH RESULTS CLOSE

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

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

	AUTHOR ▾	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS	PICKUP BRANCH	QUEUE	HOLD UNTIL	GROUP
<input type="checkbox"/>		10 khramov Moskvyy, khranilishchikh chudotvornye ikony : putevoditel.	Book		11/10/2015	Shipped	Fort Hunter Free Library	1		
<input type="checkbox"/>		Activity TV. Family crafts and gifts [videorecording]	DVD	745.5083	11/10/2015	Shipped	Long Lake Library	1		
<input type="checkbox"/>	Barth, John, 1930-	Lost in the funhouse : fiction for print, tape, live voice.	Book	Fict Bar	8/19/2015	Shipped	Easton Library	1		
<input checked="" type="checkbox"/>	Braker, Flo.	The simple art of perfect baking	Book	641.86 B	8/21/2019	Pending	Community Library	1		
<input checked="" type="checkbox"/>	Cole, Henry, 1955-author, illustrator.	Brambleheart : a story about finding treasure and the unexpected magic of friendship	Book		8/21/2019	Pending	Community Library	1		
<input type="checkbox"/>	Davies, Frederick	No longer anemias : not yet friends : an American soldier	Book	015.0704	1/27/2015	Shipped	Greenwich	1		

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

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

Aug 2019

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

UPDATE ACTIVATION DATE CANCEL

	AUTHOR ▾	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS	PICKUP BRANCH	QUEUE	HOLD UNTIL	GROUP
<input type="checkbox"/>										

The activation date for the selected holds is updated, and the Patron Holds view is

refreshed. Holds that are now inactive will display that status. Holds that may now be pending/located will display that status.

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

Note:

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

Delay Hold Requests X Days Past First Available Date

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

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

To delay holds and view hold reports:

[Delayed Holds Setting in Staff Client](#)

[Delayed Holds Setting in Leap](#)

[Using New Filters in SimplyReports](#)

Delayed Holds Setting in Staff Client

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

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

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

The screenshot shows the 'New Item Template 1 - Cataloging - Polaris' window. The 'Request' section on the right has the 'Holdable' checkbox checked and highlighted with a red box. Below it, the 'Patrons from this library and branches' checkbox is also checked and highlighted with a red box. The 'Limit to:' dropdown is set to '30 days past first available'.

Delayed Holds Setting in Leap

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

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

The screenshot shows the 'Hold Limited To:' section in the Leap interface. The 'Patrons from this library and branches' checkbox is checked and highlighted with a red box. Below it, the 'days past first available' option is selected, and the value '30' is entered in the adjacent field.

Using New Filters in SimplyReports

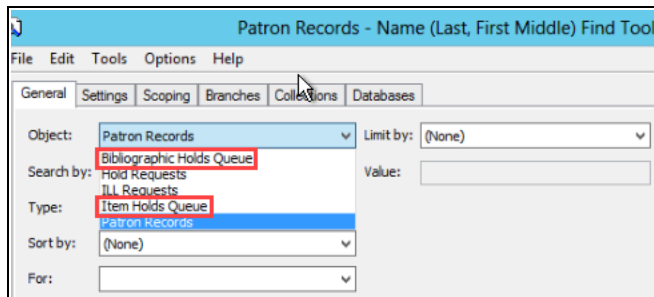
Library staff can now use SimplyReports to view reports on holds placed where the only available item will be delayed from satisfying the hold.

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

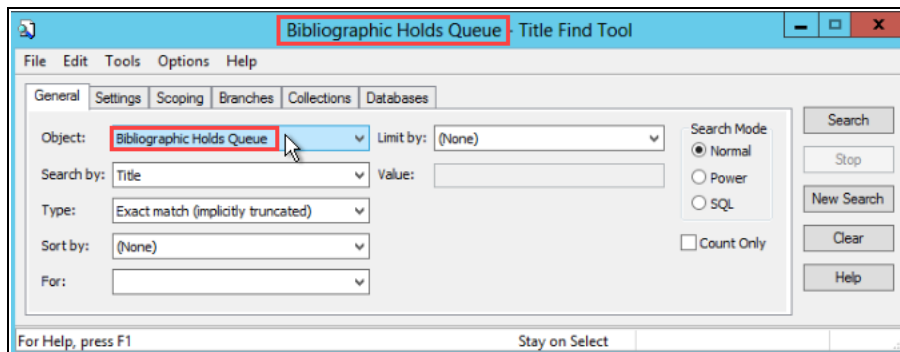
- In the Item List and Count reports use the following new options:
 - In **Report output columns**, you can select **Item delayed holds enabled**, and **Item number of days delayed**.
 - In the Item circulation filters, you can select **Days past first available** and use the drop down list to define: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

Patron Status Find Tool Object and Window Title Updated

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



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



Prevent Staff from Placing Holds on EContent

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

P.V. SUPA Added as an RFID Vendor

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

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

Action Button Anchor

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

Authority Record Set ⓘ

SAVE

ACTIONS ▾

REFRESH

CLOSE

Name

Owner
 ▾

Record Set ID

Note

Record Status

Record Count

FIND TOOL

ACTIONS ▾

Filter Records

<input type="checkbox"/>	HEADING	CONTROL NUMBER	BIB COUNT	SEE ALSO COUNT	NAME	SUBJECT	SERIES	STATUS
<input type="checkbox"/>	Oregon -- History -- 1859- -- Fiction.	1162377	1	0	N	Y	N	Final
<input type="checkbox"/>	Oregon Territory -- History.	1160767	1	0	N	Y	N	Final
<input type="checkbox"/>	Oregon Territory -- History -- Fiction.	1159837	1	0	N	Y	N	Final
<input type="checkbox"/>	Oregon National Historic Trail -- Fiction.	1148114	13	0	N	Y	N	Final
<input type="checkbox"/>	Oregon -- Social life and customs -- Juvenile literature.	1144645	1	0	N	Y	N	Final
<input type="checkbox"/>	Oregon -- Fiction.	1143861	16	0	N	Y	N	Final
<input type="checkbox"/>	Oregon National Historic Trail.	1142996	7	0	N	Y	N	Final
<input type="checkbox"/>	Oregon--Fiction	699146	194	0	N	Y	N	Final

Additional Column Options in Patron Find Tool in Leap

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

Find Tool - Patron

Column Settings

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

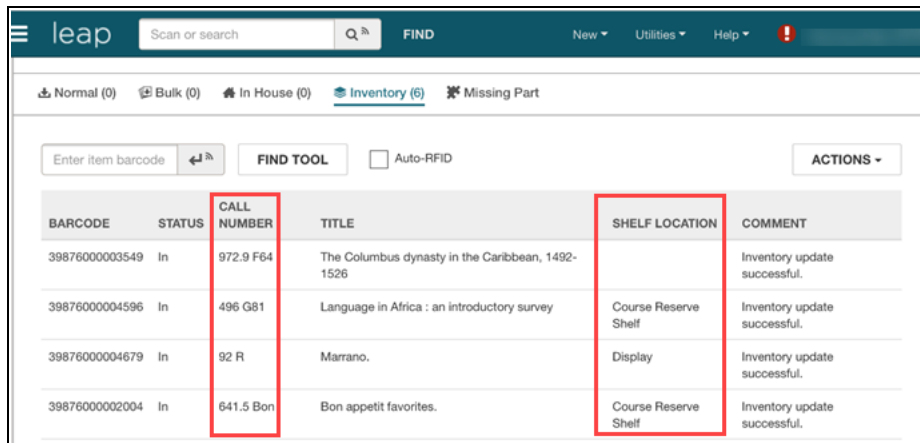
Display Position 1
Folded False
Name Secured
Pinned False
Visible True
Width 2.493

Display Position
The order of the column in the display.

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

Call Number and Shelf Location Added to Leap Inventory View

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



The screenshot shows the Leap Inventory View interface. At the top, there is a search bar with the text "Scan or search" and a "FIND" button. Below the search bar, there are tabs for "Normal (0)", "Bulk (0)", "In House (0)", "Inventory (6)", and "Missing Part". The "Inventory (6)" tab is selected. Below the tabs, there is a "FIND TOOL" section with a "Enter item barcode" input field, a "FIND TOOL" button, and an "Auto-RFID" checkbox. To the right of the "FIND TOOL" section is an "ACTIONS" dropdown menu. Below the "FIND TOOL" section is a table with the following columns: "BARCODE", "STATUS", "CALL NUMBER", "TITLE", "SHELF LOCATION", and "COMMENT". The "CALL NUMBER" and "SHELF LOCATION" columns are highlighted with red boxes. The table contains four rows of data:

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

Check In Item from a Record Set in Leap

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

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

Item Record Set ⓘ

SAVE ACTIONS REFRESH CLOSE

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

Note: Record Status: Final Record Count: 3

Scan or enter barcode FIND TOOL

TITLE	ASSIGNED BRANCH	COLLECTION	MATERIAL TYPE	SHELF LOCATION	CALL NO.	VOL.	STATUS	BARCODE	CONTROL NUMBER
Mickey Mantle	Glenville Branch - Schenectady County Public Libra	Children's Nonfiction (JNF)	Book		J.B Mantle Gal		In	0000405916008	583
Murderers' row	Saratoga Springs Public Library	Adult Nonfiction (ANF)	Book		796.357 F		In	0000200363869	12/2/1998 Final 59434
Why not us? : the 96-year journey of the Boston Red Sox fans from unparalleled suffering to the promised land of the 2004 World Series	Red Rock Library	Adult Nonfiction (ANF)	Book		796.357 Mon		In	0000504286931	12/26/2007 Final 1070180

3 of 3 record(s) retrieved

ACTIONS - Filter Records

- Ad Hoc Bulk Change
- Add from File
- Add to New Record Set
- Add to Existing Record Set
- Check in**
- Remove Selected Records
- Delete Selected Records

A confirmation message displays with the item status.

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

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

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

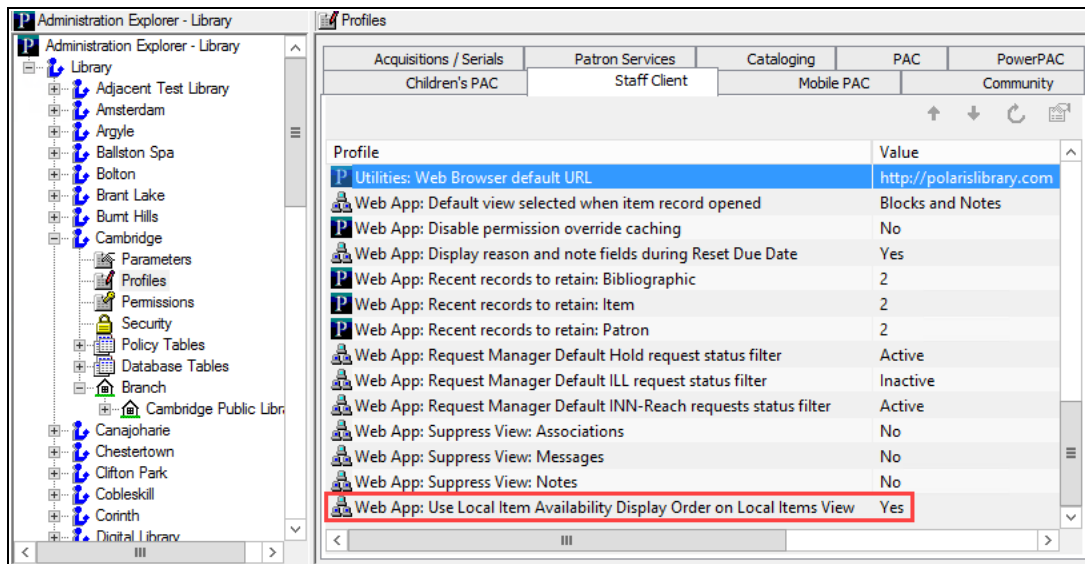
- Missing
- On Order
- Out
- Routed
- Transferred
- Unavailable

Note:

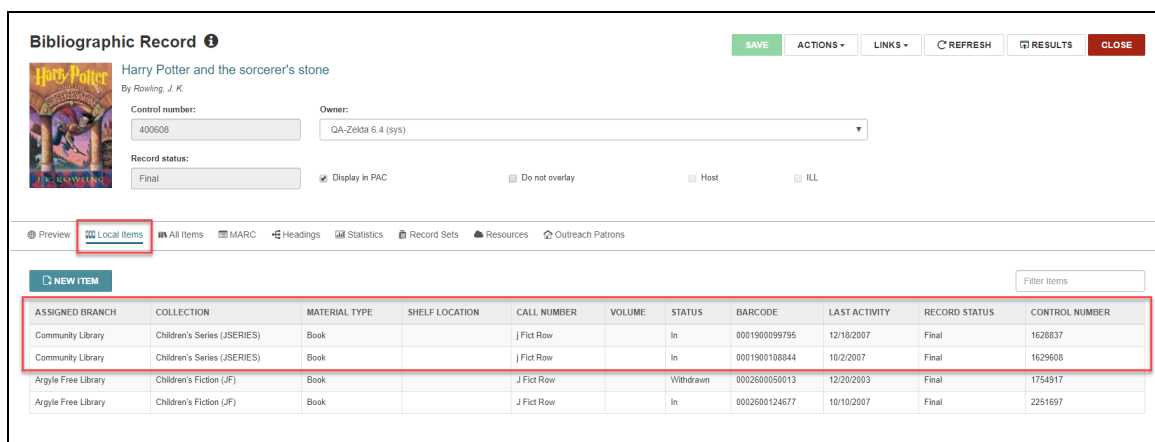
Check in is available when the record set is locked by another user.

Display Local Items in New Local Items View in Leap

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



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



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

Bibliographic Record ⓘ

Harry Potter and the sorcerer's stone
By Rowling, J. K.

Control number: 400608 Owner: QA-Zelda 6.4 (sys)

Record status: Final ☒ Display in PAC ☐ Do not overlay ☐ Host ☐ ILL

Preview Local Items **All Items** MARC Headings Statistics Record Sets Resources Outreach Patrons

NEW ITEM Filter Items

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

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

Bibliographic Record ⓘ

Harry Potter and the Order of the Phoenix
By Rowling

Control number: 625470 Owner: QA-Zelda 6.4 (sys)

Record status: Final ☒ Display in PAC ☐ Do not overlay ☐ Host ☐ ILL

Preview **Items** MARC Headings Statistics Record Sets Resources Outreach Patrons

NEW ITEM Filter Items

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

Enable or Disable RFID Security on Demand in Leap

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

Enable RFID Security During Check In

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

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

Disable RFID Security During Check Out

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

What's New in Polaris and Leap 6.4

LAURA IZQUIERDA ⓘ

A12291954
COMMUNITY LIBRARY

BLOCKS
NOTES

REGISTRATION
ACTIONS ▾
REFRESH
COMPLETE

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

Enter item barcode
Find Tool
☐ Auto-RFID

Disable RFID Security
Reset Due Date
Special Loan

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

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

LAURA IZQUIERDA ⓘ

A12291954
COMMUNITY LIBRARY

BLOCKS
NOTES

REGISTRATION
ACTIONS ▾
REFRESH
COMPLETE

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

Enter item barcode
Find Tool
☐ Auto-RFID

ACTIONS ▾
Special Loan

Reset Due Date
Disable RFID Security

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

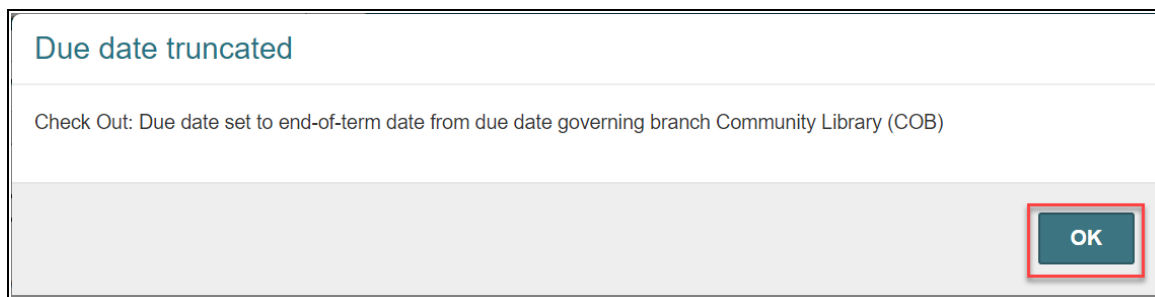
End of Term Due Dates in Leap

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

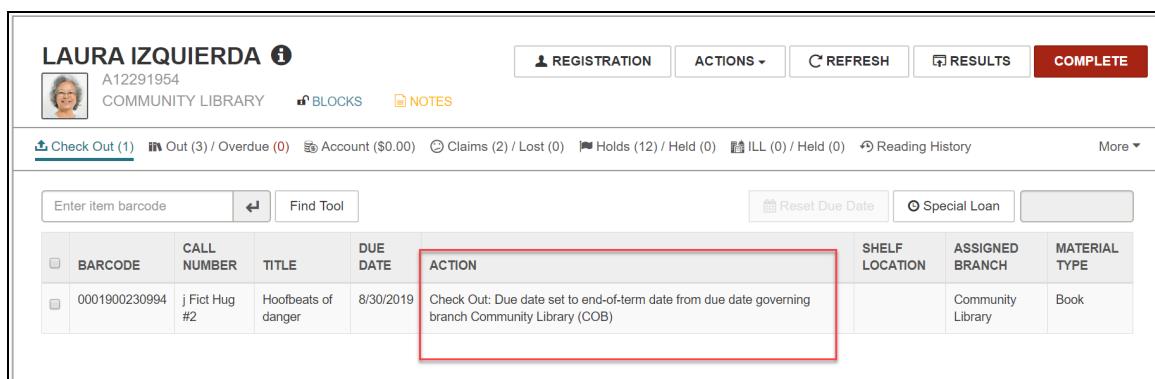
The following Polaris staff client system administration Patron Services parameters apply:

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

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



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



Missing Part Check In and Manual Billing in Leap

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

Check in and Manage Items with Missing Parts

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

The following permissions are required:

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

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

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

The screenshot shows the 'Check In' workflow interface. At the top, there is a 'Check In' header with a 'CLOSE' button. Below the header, there is a navigation bar with several tabs: 'Normal (1)', 'Bulk (0)', 'In House (0)', 'Inventory (0)', and 'Missing Part'. The 'Missing Part' tab is selected and highlighted with a red box. Below the navigation bar, there is a search area with a text input field containing the barcode '0000202968764', a search icon, and a 'FIND TOOL' button. The search area is also highlighted with a red box. To the right of the search area is an 'ACTIONS -' button. Below the search area is a table with the following columns: 'BARCODE', 'STATUS', 'TITLE', 'MATERIAL TYPE', and 'PATRON NAME'.

Note:

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

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

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

Manage Missing Parts

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

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

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

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

☐ **Make item unavailable**

OK

CANCEL

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

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

Check In

CLOSE

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

Free Days:

BARCODE	DUE DATE	STATUS	COMMENT	TITLE	MATERIAL TYPE	SHELF LOCATION	CALL NUMBER	PATRON NAME	ASSIGNED	ACTIONS
<input checked="" type="checkbox"/> 0000202968764		In -> In	Item was not Out	Chicken soup for the traveler's soul : stories of adventure, inspiration and insight to celebrate the spirit of travel	Book		910 Chi		Com (C)	<div> <div>Clear List</div> <div>Manage Item Record</div> <div>Replace Barcode</div> <div>Manage Missing Parts</div> <div>Print List</div> <div>Load from File</div> </div>

Note:

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

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

Manage Missing Parts

Barcode: 0000202968764

Material Type: Book

Status: In

Patron: Laura Izquierda

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

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

☐ Make item unavailable

OK

CANCEL

Note:

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

Check In and Charge for Missing Parts

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

The following permissions are required:

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

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

The screenshot shows the Polaris user interface for a patron named Laura Izquierda. The top navigation bar includes buttons for REGISTRATION, ACTIONS, REFRESH, RESULTS, and CLOSE. Below this, a summary bar shows various account statistics like Check Out, Out, Overdue, Account, Claims, Lost, Holds, ILL, and Reader Services. A secondary bar contains buttons for Reset Claim Count, Estimate Fines, Notification History, Declare Lost, and Check In / Charge Missing Parts (highlighted with a red box). Below this is a table of claims with columns for Barcode, Title, Claim Date, Description, and Due Date. The first claim is selected, showing a barcode of 0000202968764 and a description of 'Chicken soup for the traveler's soul'.

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

The screenshot shows the 'Check in and charge for missing item' dialog box. It has a title bar with a close button. The main area contains several fields: 'Amount' (set to \$0.00), 'Fee Reason' (set to Missing Parts), 'Item Barcode' (set to 0000202968764), and 'Notes (for internal use)' (empty). There is a checkbox for 'Send a bill' which is unchecked. At the bottom right, there are two buttons: 'CHECK IN / CHARGE' (highlighted with a red box) and 'CANCEL'.

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

Manual Billing in Leap

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

The following permissions are required:

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

Manual Billing When Adding a Charge

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

Amount: 1.00

Fee Reason: Check Out Charge

Item Barcode: 0001900003425 **FIND TOOL**

Notes (for internal use):

☒ Send a bill

Added message (appears on bill): Your library account has been billed for this charge

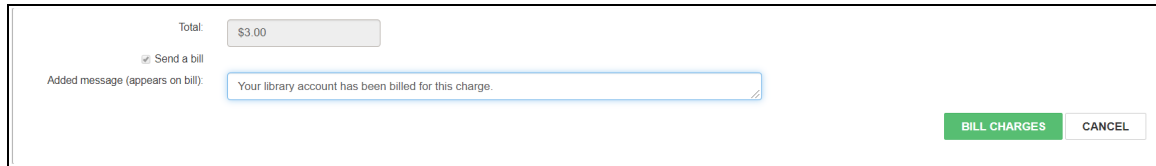
ADD CHARGE CANCEL

Manual Billing from Patron Account View

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

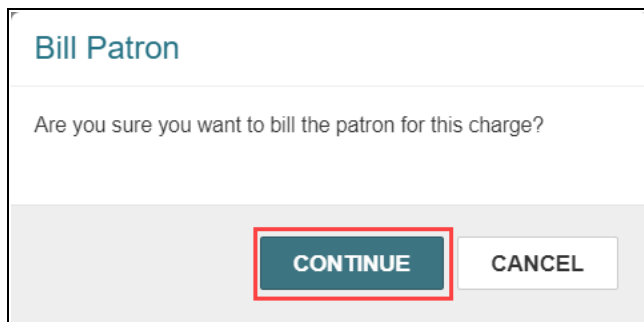
Charges: \$21.00		Deposits: \$0.00		Credits: \$0.00		Balance: \$21.00		View: Account Summary	
TYPE	DATE	BARCODE	TITLE	REASON	ORGANIZATION	NOTE	BILLED	AMOUNT	BALANCE
Charge	10/22/2019	0001900003425	Dawn Land : a novel	Check Out Charge	Community Library		Pending	\$1.00	\$1.00
Charge	10/22/2019	0000203555255	Unforgettable places to see before you die	Missing Parts	Community Library	Bill for item's missing part	Pending	\$10.00	\$10.00
<input checked="" type="checkbox"/> Charge	10/22/2019	0000202968764	Chicken soup for the traveler's soul : stories of adventure, inspiration and insight to celebrate the spirit of travel	Missing Parts	Community Library			\$10.00	\$10.00
									\$21.00

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



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

A confirmation message is displayed before a bill is sent.



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

New and Updated Permissions to Export Record Sets from Leap

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

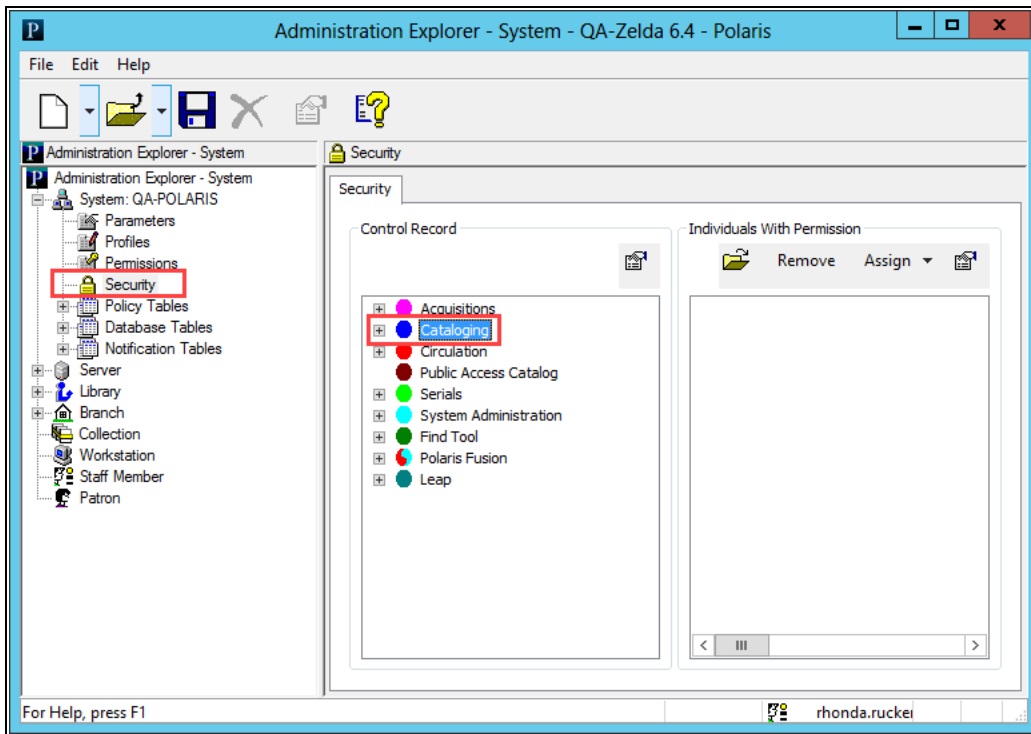
Note:

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

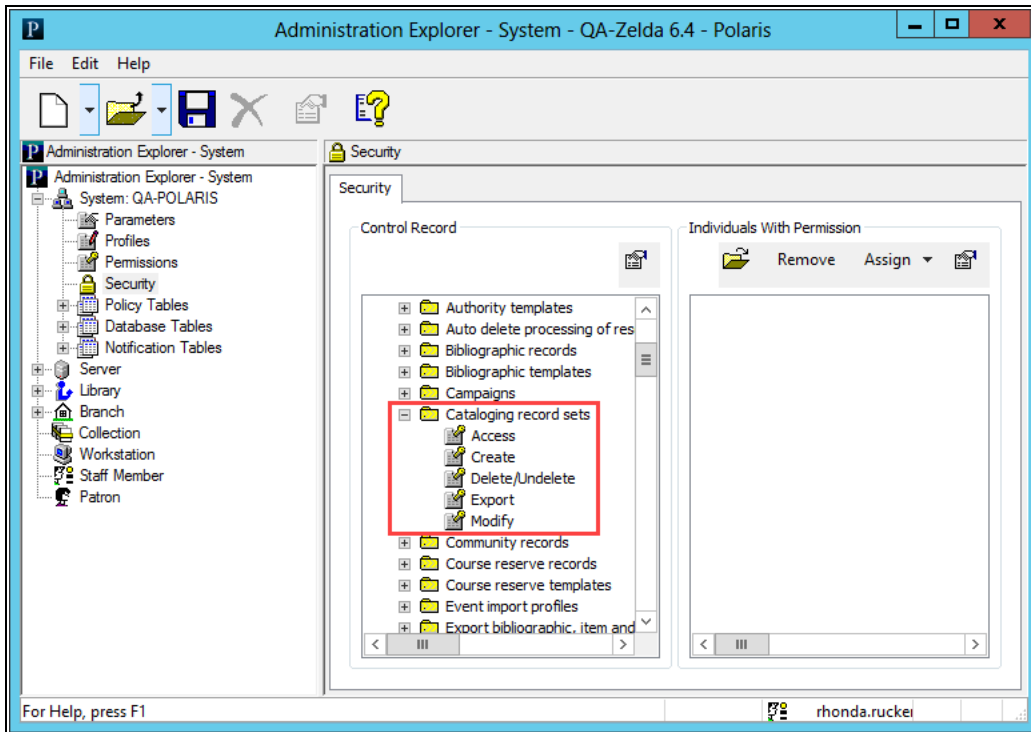
Permission to Export a Cataloging Record Set

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

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



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

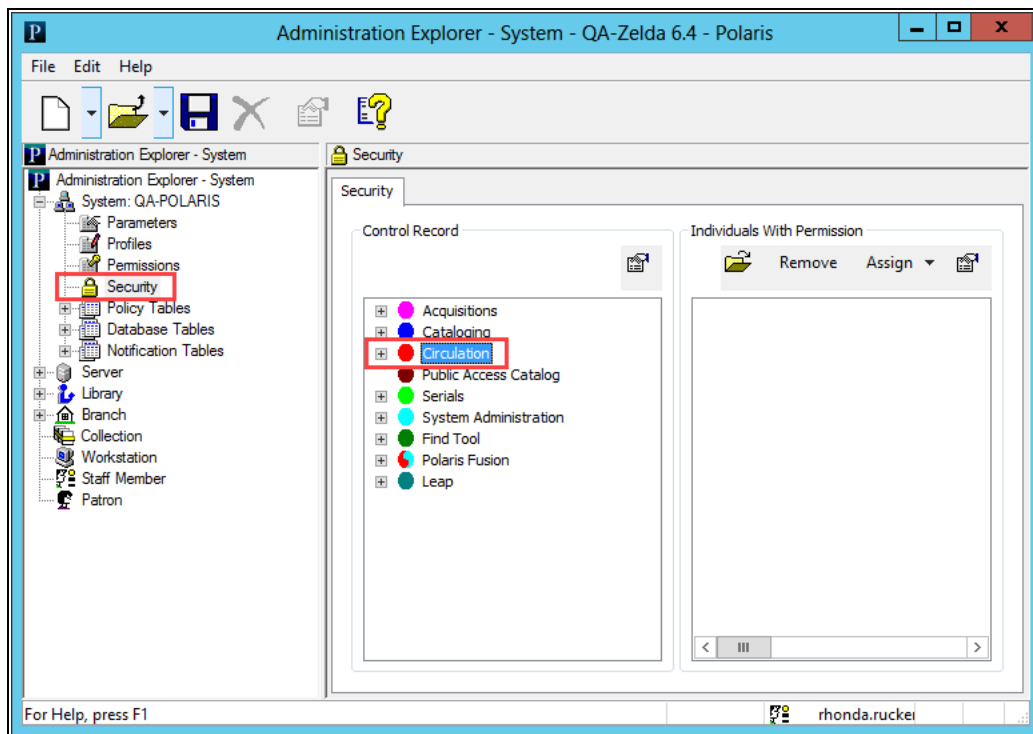


4. Assign the Export permission to a Permission Group, Workstation, or Staff Member.

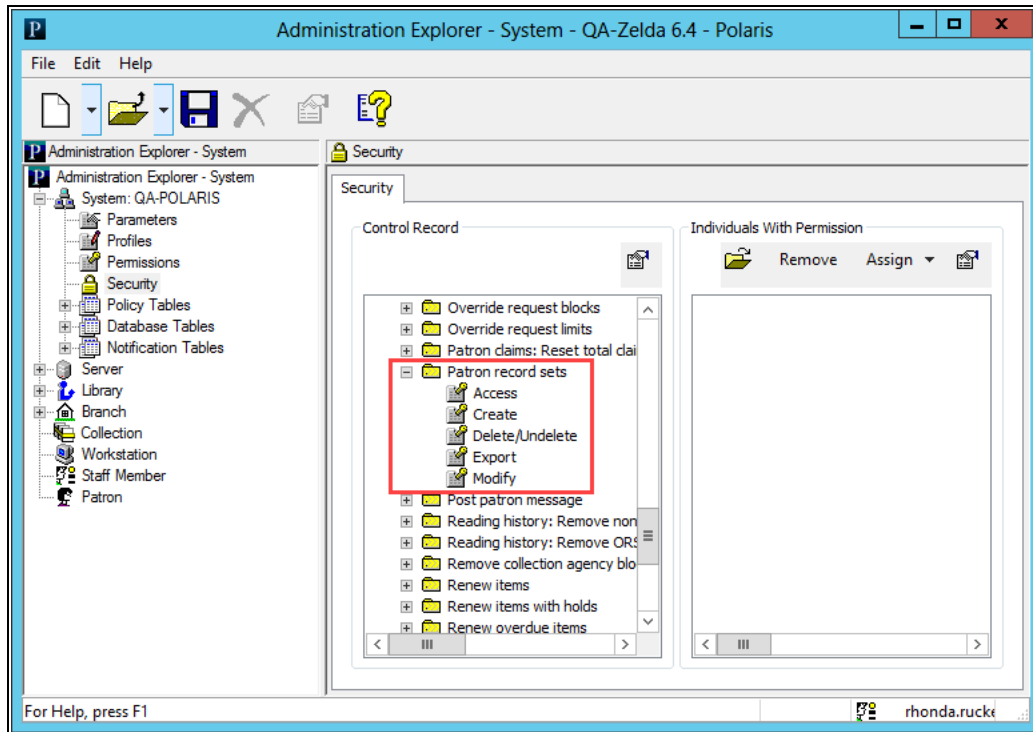
Permission to Export a Patron Record Set

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

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



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



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

Outreach Services (ORS) Added to Leap

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

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

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

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

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

Enabling Outreach Services for a Patron

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

The screenshot shows the 'Reader Services' view for a patron named LAURA IZQUIERDA (A12291054). The interface includes a top navigation bar with links like REGISTRATION, ACTIONS, REFRESH, RESULTS, and CLOSE. Below this is a status bar showing various account metrics. The main section is titled 'Outreach Services' and contains several input fields and checkboxes. A red box highlights the 'Outreach Enabled' checkbox and the 'Save' button. The 'Outreach Services' section includes fields for Status (Active), Reactivate date (9/18/2013), Last Service, Next Service, Number of items to Send (0), and a checkbox for 'Patron Selection Only'. There is also a checkbox for 'Allow previous items to be resent' and a 'Months to Wait' field (120). The 'Delivery Options' section includes fields for Mode (None), Route (None), Stop (None), Schedule (None), and a frequency field (Every 1 day(s)). There are also fields for Pickup Person and a Note.

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

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

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

ORS Selection List

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

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

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

Build List (highlighted)

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

23 record(s) found!

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

BRANCH	COLLECTION	MATERIAL TYPE	CALL NUMBER	STATUS	BARCODE	SHELF LOCATION
Amsterdam Free Library		Book	J 523.8 B82s	In	0004300103746	

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

Create a Pick List from a Selection List

To create a pick list from a selection list:

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

Adding to a Pick List

Add to a Pick List from Holds

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

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

Add to a Pick List Using Barcodes

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

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

Add to a Pick List Using RFID

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

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

Add to a Pick List Using Find Tool

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

Working with a Pick List

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

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

- Place Hold
- Remove items

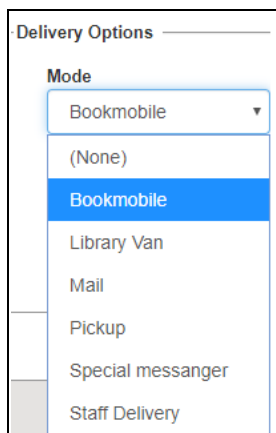
Arranging Delivery of the Pick List Items

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

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

Select and Schedule a Delivery

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



The screenshot shows a 'Delivery Options' section with a 'Mode' dropdown menu. The dropdown is open, displaying a list of delivery methods. 'Bookmobile' is currently selected and highlighted in blue. Other options include '(None)', 'Library Van', 'Mail', 'Pickup', 'Special messenger', and 'Staff Delivery'.

Mode
Bookmobile
(None)
Bookmobile
Library Van
Mail
Pickup
Special messenger
Staff Delivery

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

A screenshot of a web application's dropdown menu for selecting a schedule frequency. The menu is open, showing a list of options: (None), Exact Date, Daily (highlighted in blue), Weekly, Biweekly, Monthly, Bimonthly, Quarterly, Semiannually, and Annually. Below the list, the word 'Daily' is displayed next to a small downward-pointing arrow, indicating the current selection.


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

Rating Returned Pick List Items

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

Enter a Rating

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

<div> 👍 Add/Modify Rating 🗑️ Remove </div>		
<input checked="" type="checkbox"/>	FORMAT	CHECKOUT DATE ▲
<input checked="" type="checkbox"/>	 Book	12/9/2019 3:06:21 PM

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

Note:

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

Patron Registration and Patron Status Read-Only Mode in Leap

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

Patron Registration Workform Read-Only Mode

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

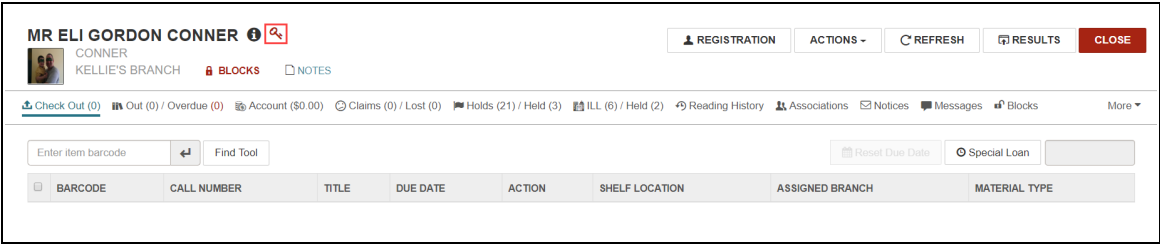
The Add to Record Set functions remain enabled. All Registration actions, except for Copy, are disabled.

The screenshot shows the Patron Registration Workform for Laura Izquierda (A12291954) in read-only mode. The patron name is followed by a red key icon. The form displays various fields including Barcode, Former Barcode, Last Name, First Name, Registered At, Patron Code, Date of Registration, and Expiration Date. A sidebar on the left contains navigation links for Profile, Attributes, Email, Address, Phone/Fax, Notifications, Preferences, Image, and Misc. Info. The top navigation bar includes links for Check Out, Out, Overdue, Account, Claims, Holds, ILL, Reader Services, Reading History, Associations, Notices, and More. The right sidebar contains buttons for SAVE, RENEW, RESET PASSWORD, COPY, MERGE, DELETE, and SECURE.

Patron Status Workform Read-Only Mode

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

What's New in Polaris and Leap 6.4



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

The Add to Record Set actions remain enabled.

MobilePAC Updated for ADA Compliance

MobilePAC is updated to ADA compliance level AA.