



# What's New in Polaris and Leap 6.1

v. 6.1

© 2018



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## Polaris Installation Notes

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### File Path

When the new Polaris release is installed on a workstation, the file path changes from 6.0 to 6.1.

**Examples:**

c:\ProgramData\Polaris\6.1

c:\Program Files\Polaris\6.1

c:\Program Files (x86)\Polaris\6.1

## New and Modified Polaris Administration Settings

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

Setting	Purpose	Default	Level
<b>Policy Tables - Added</b>			
Preferred Vendor Accounts	Specifies the preferred vendor account for cloudLink integration. See <a href="#">"Preferred Vendor Accounts for cloudLibrary Sharing (cloudLink) " on page 20.</a>	N/A	System, Library, Branch
<b>Database Tables - Added</b>			
Patron Name Titles	Provides a common list of patron name titles. See <a href="#">"Patron Titles Now Database Fields" on page 32.</a>	N/A	System, Library, Branch
<b>Permissions - Added</b>			
Modify preferred vendor accounts table: Allow	Enables users to add, modify, or delete rows in the Preferred Vendor Accounts policy table. See <a href="#">"Preferred Vendor Accounts for cloudLibrary Sharing (cloudLink) " on page 20.</a>	Added to the System Administration permission group.	System, Library, Branch
Modify patron name titles table: Allow	Enables users to add, modify, or delete rows in the Patron Name Titles database table. See <a href="#">"Patron Titles Now Database Fields" on page 32.</a>	Added to the System Administration permission group.	System, Library, Branch

## WebAdmin Updates

String Mnemonic	Default Text	Purpose
PACML_RBREGISTER	We're sorry, but your account does not appear to be registered with RBdigital. Please register to borrow RBdigital titles.	Message to patron to register with Recorded Books to check out or place requests.
PACML_RBREGCREATEOPTION	Create an account to borrow RBdigital content	Message to patron to create an account with Recorded Books
PACML_RB_REQUIREDFIELDS	Please enter all required fields.	Message to patron when not all required information is filled in to register for Recorded Books
PACML_SELFREGISTER_1348	Invalid email address	Message to patron who attempts to register for Recorded Books but enters an invalid email address.
PACML_CONTACTRB	Connecting to the RBdigital service. Please wait...	Message to patron when the Recorded Books registration is being processed.
PACML_RBREGSUCCESS	Your RBdigital account has been created successfully.	Message to patron when the Recorded Books registration is complete.
PACML_RBREGFAILURE	We're sorry, but we were unable to complete your registration. Please try again later.	Message informing a patron that their Recorded Books registration was not successful.
PAS_ORSPATRONCHECKOUTSERVICEDATE	Do you want to update the next service date?	Prompt to update the next service date appears if the



String Mnemonic	Default Text	Purpose
PAS_ORSPATRONPRIORCHECKOUTTITLE	Outreach Services Patron	Message box title
PAS_ORSPATRONPRIORCHECKOUTMSG	{0}was previously checked out by this patron on{1}. Do you want to continue?	Message box text when checking out an item to an Outreach Services patron who had borrowed the item in the past.
SW_CI_FILE_CONFIRM_TITLE	Check in processing suspended	Title of message box that appears when check in processing of barcode file is suspended for receipt printing
SW_CI_FILE_CONFIRM_MSG	Check in processing was suspended for receipt printing.	Message that check-in processing of barcode file suspended to print receipts.
SW_CI_FILE_CONFIRM_YES	CONTINUE	Button label on Check in processing suspended message box
SW_CI_ROUTER_BULKCHANGE	Bulk Change	Description on browser tab
SW_CI_ITEMBULKCHANGE_HDR_WRKFM_TITLE	Item Record Bulk Change	Workform title
SW_CI_ITEMBULKCHANGE_HDR_UPDATE	UPDATE ITEMS	Button label on Item Record Bulk Change workform header
SW_CI_BTN_CANCEL	CANCEL	Button label on Item Record Bulk Change workform header
SW_CI_ITEMBULKCHANGE_HDR_BULKCHANGEREPORT	Bulk Change Report	Label for box displaying the bulk change report file name
SW_CI_ITEMBULKCHANGE_HDR_BULKCHANGEREPORTNAME	ItemBulkChangeReport_ [date/time]	Report name

String Mnemonic	Default Text	Purpose
SW_CI_ITEMBULKCHANGE_HDR_ERRORRECORDSET	Error Record Set	Label for the error record set
SW_CI_ITEMBULKCHANGE_HDR_ERRORRECORDSETNAME	Name	Label for check box
SW_CI_ITEMBULKCHANGE_HDR_ERRORRECORDSETOWNER	Owner	Label for error record set owner
SW_CI_ROUTER_BULKCHANGE_IRS_ONLY	This workform can only be accessed from an item record set.	Error message text when attempting to navigate to the bulk change workform from a record set other than an item record set

## Integrated EContent from Recorded Books

**Note:**

This development is in Beta release.

You can now integrate eContent from the Recorded Books service, RBdigital, into Polaris so that patrons can search for, check out, and download these titles from the PAC.

**Note:**

The RBdigital integration does not create item records within Polaris because the RBdigital API provides availability as either True or False instead of providing copy counts.

The following are required for RBdigital eContent integration:

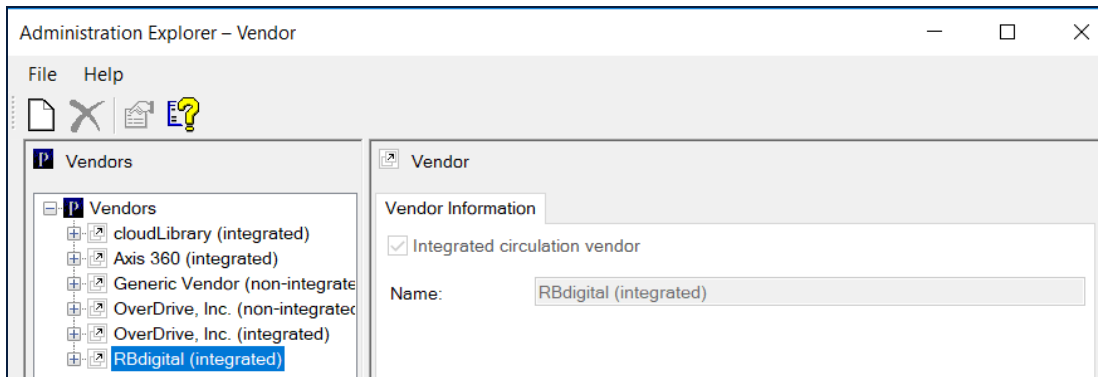
- RBdigital license key - System-only license key with the number of seats corresponding to the number of vendor accounts Innovative needs to create.
- Access to the RBdigital API - The library's firewall must allow access to api.rbdigital.com over port 443.

If your library is interested in implementing integrated eContent with Recorded Books, contact your library's Innovative Interfaces Site Manager.

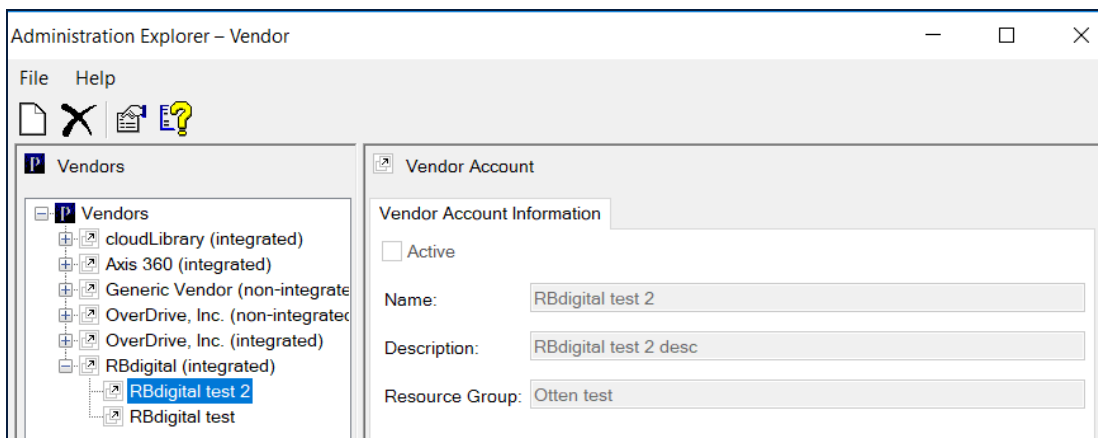
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### RBdigital Vendor Account

A new **RBdigital (integrated)** Vendor node was added in Polaris Administration for Recorded Books. It appears only if your library has a license for RBdigital. RBdigital supports multiple accounts, such as a parent (shared) account and individual child accounts with titles and copies exclusively for patrons registered at specific branches.



After implementing integrated eContent with Recorded Books, the vendor account appears under the RBdigital (integrated) node.



To open the RBdigital account record, double-click the RBdigital account node. The Vendor Account workform appears.

Attribute	Value
Vendor account server name	api.rbdigital.com
Vendor account use SSL	Yes
Vendor account import profile ID	RBdigital test
Library RBdigital URL	http://qapolaristestp.rbdigital.com

The settings for the RBdigital vendor account are as follows:

- Vendor account server name: **api.rbdigital.com**
- Vendor account use SSL: **Yes**
- Vendor account import profile ID: Default is **Integrated eContent bibs (without items)**.
- Library RBdigital URL - The library-specific URL for the RBdigital account.

**Note:**

The firewall needs to allow access to api.rbdigital.com over port 443.

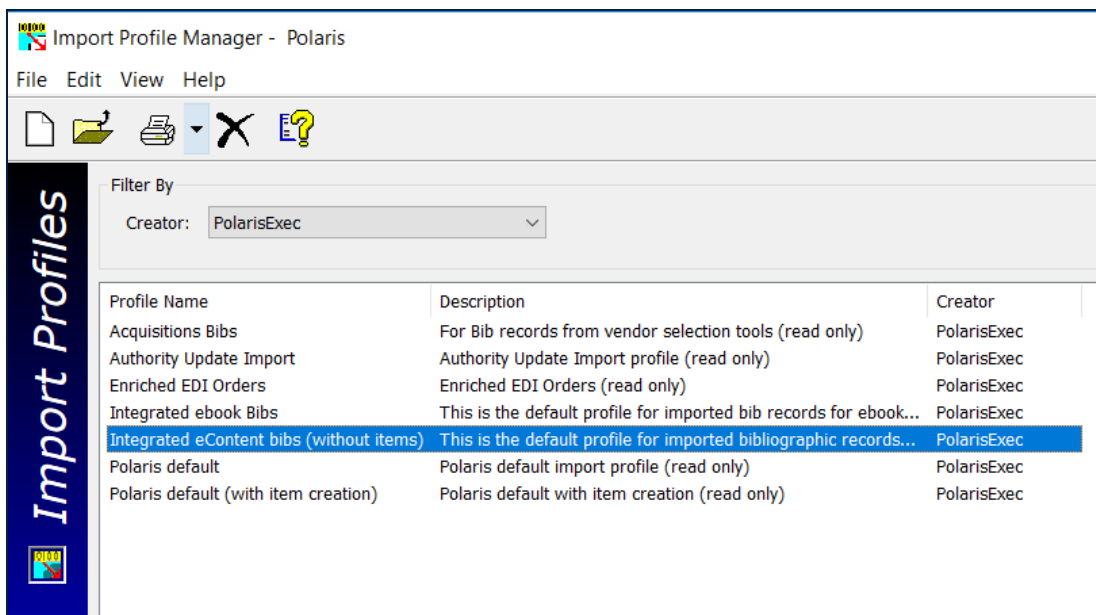
## Bibliographic Records for Initial Record Load

When RBdigital vendor account is activated for the first time, a call goes out to the RBdigital API, which returns all the titles the library currently owns. If the library has multiple vendor accounts, data is returned for each vendor account.

The returned data from RBdigital is transformed into a format that can be consumed by the import process. Then the bibliographic data is imported into Polaris using the predefined import profile, **Integrated eContent bibs (without items)**, specified in the Vendor Account workflow.

## RBdigital Import Profile

A new default import profile was added called **Integrated eContent bibs (without items)**. This profile is listed when you filter by **Creator | PolarisExec**.



All options set on the Bibliographic Records and Authority Records tabs are the same as those set in the Integrated ebook Bibs import profile, but the Item Records tab for the new profile has no item-creation options selected because no item records will be built. In addition, the record set names defined on the Record Sets tab of the Integrated eContent bibs (without items) import profile begin with eContent instead of EBook.

Modify Import Profile - Integrated eContent bibs (without items)

Profile Setup Bibliographic Records Item Records Authority Records Record Sets

**Bibliographic Record Set**

**Final**

☒ Save to new record set ☐ Save to existing record set

Name: eContent Import, final Find ☐ Append ☐ Replace

Owner: QA-POLARIS 6.1 (sys)

**Provisional**

☒ Save to new record set ☐ Save to existing record set

Name: eContent Import, provisional Find ☐ Append ☐ Replace

Owner: QA-POLARIS 6.1 (sys)

**Deleted**

☒ Save to new record set ☐ Save to existing record set

Name: eContent Import, deleted Find ☐ Append ☐ Replace

Owner: QA-POLARIS 6.1 (sys)

**Authority Record Set**

**Final**

☐ Save to new record set ☐ Save to existing record set

Name: Find ☐ Append ☐ Replace

Owner:

**Provisional**

☐ Save to new record set ☐ Save to existing record set

Name: Find ☐ Append ☐ Replace

Owner:

**Item Record Set**

**Final**

☐ Save to new record set ☐ Save to existing record set

Name: Find ☐ Append ☐ Replace

Owner:

**Provisional**

☐ Save to new record set ☐ Save to existing record set

Name: Find ☐ Append ☐ Replace

Owner:

Save Close Help

## RBdigital Import Process

When your library has implemented integrated eContent with RBdigital, the following processes occur:

- The Polaris API consumer service overnight process runs and retrieves the data from RBdigital since it last ran.
- The Polaris API consumer service then submits an automatic import job for processing.
- The bibliographic records are imported automatically using the import profile selected in the Vendor Account workflow. The RBdigital import profile is selected by default.
- The automatic import job appears in the Import Jobs Queue, and the import report provides details regarding the automatic import.
- New bibliographic records are saved in the Polaris database.

- A Resource Entity is created for each 856 tag that contains RBdigital vendor account data. The vendor contract ID is in subfield x of the 856 tag. The Resource Entity appears on the Resources view of the Bibliographic Record workform.
- The import synchronization occurs once daily during an overnight process.
- Auto-suggest and facets are updated the following day - PAC auto-suggest and search results facets for these newly imported eContent records are updated after the overnight jobs.

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## RBdigital Titles in the PAC

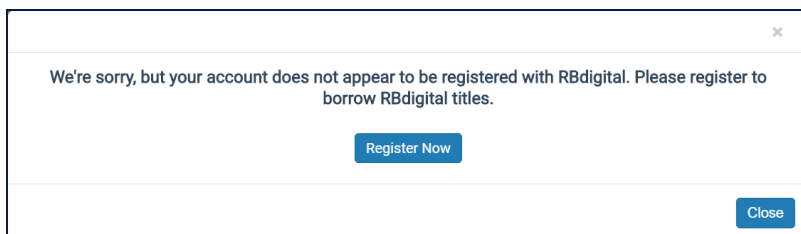
Your patrons can log into the Polaris PowerPAC to search for and access RBdigital eContent titles.

### RBdigital Registration

To comply with the RBdigital requirement that all borrowers of its eContent be registered, a message in Polaris PowerPAC notifies patrons who have not yet registered that they need to register. When a patron clicks a button to check out or place a request for an RBdigital title, a message appears if the patron is not yet registered with RBdigital.

**Note:**

To determine whether the patron is registered, the RBdigital API checks the barcode entered when the patron logged into PowerPAC. The registration message appears only when a patron has not registered with RBdigital.



The patron clicks **Register Now** to go to the library's RBdigital site to access the registration form.



LOGIN INFORMATION	YOUR INFORMATION
USERNAME*	FIRST NAME*
<input type="text"/>	<input type="text"/>
PASSWORD*	LAST NAME*
<input type="text"/>	<input type="text"/>
CONFIRM PASSWORD*	EMAIL*
<input type="text"/>	<input type="text"/>
LIBRARY INFORMATION	
LIBRARY CARD*	CONFIRM EMAIL*
<input type="text"/>	<input type="text"/>
PIN*	POSTAL CODE*
<input type="text"/>	<input type="text"/>
<input type="checkbox"/> I accept the <a href="#">Terms of Service</a> and <a href="#">Privacy Policy</a> . *	
*Required fields	
<input type="button" value="CANCEL"/> <input type="button" value="REGISTER →"/>	

The patron fills out the form and clicks **REGISTER** to register with RBdigital. The patron is then able to check out or request RBdigital from the Polaris PAC.

You can change the text for the Recorded Book messages displayed in the PAC. See ["WebAdmin Updates" on page 3](#).

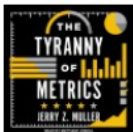
### RBdigital Titles Displayed in the Polaris PowerPAC

**Note:**

RBdigital titles display in the patron's account in the Polaris Mobile PAC, but the patron cannot take any action on Recorded Books titles from Mobile PAC.

RBdigital titles appear in Polaris PowerPAC with the following buttons and banners next to the title:



- **CHECK OUT** button - This button appears if the title is owned by the library and is available. When a patron clicks this button, the check out process begins if the patron is registered with RBdigital and has not reached the checkout limit defined by RBdigital for the type of eContent. When a checkout is successful, a new transaction 6103 is logged, indicating the eContent was checked out without an associated item record. In the patron's account, details regarding the checked out eContent for Recorded Books do not include item record fields, and **Online** appears as the Assigned Branch. See ["Checking Out RBdigital Titles" on page 15](#).




2. **The Tyranny of Metrics [electronic resource]**  
by Muller, Jerry Z.  
Published: 2018


... *Recorded Books* ...  
Publisher, Date: [S.I.] Tantor Media, Inc 2018


Format (Primary): Eaudiobook





2018

 AVAILABILITY

 FULL DISPLAY

 CHECK OUT

 Add to List



- **PLACE HOLD** button - This button appears if the title is owned by the library, but it is not available. When the patron clicks this button, the request process begins if the patron is registered with RB digital and has not reached the hold request limit defined in RBdigital for the type of eContent. See "[Requesting RBdigital Titles](#) " on page 16.




1. **The Disappeared [electronic resource]**  
by Box, C.J.  
Published: 2018


... [S.I.] *Recorded Books* , Inc. 2018 ...  
Publisher, Date: [S.I.] *Recorded Books*, Inc. 2018


Format (Primary): Eaudiobook





2018

 AVAILABILITY

 FULL DISPLAY

 PLACE HOLD

 Add to My List

- **RESTRICTED** - If a resource group has been used to restrict access to the title, but does not have **Honor resource groups** enabled in Polaris Administration, patrons will see **RESTRICTED** for titles they do not have access to.



7. **A Court of Frost and Starlight** [electronic resource]  
by Maas, Sarah J.  
Published: 2018  
... [S.I.] *Recorded Books*, Inc. 2018 ...  
Publisher, Date: [S.I.] *Recorded Books*, Inc. 2018  
Format (Primary): Eaudiobook

2018

☒ AVAILABILITY

☒ FULL DISPLAY

**RESTRICTED**

[Add to List](#)

- **ALL COPIES EXPIRED** - This appears when all copies owned by the library have expired, but the title has not yet been removed from the catalog. If the library orders new copies, the button is updated once those copies become available.



2. **Beyond Danger** [electronic resource]  
by Martin, Kat  
Published: 2018  
... [S.I.] *Recorded Books*, Inc. 2018 ...  
Publisher, Date: [S.I.] *Recorded Books*, Inc. 2018  
Format (Primary): Eaudiobook

2018

☒ AVAILABILITY

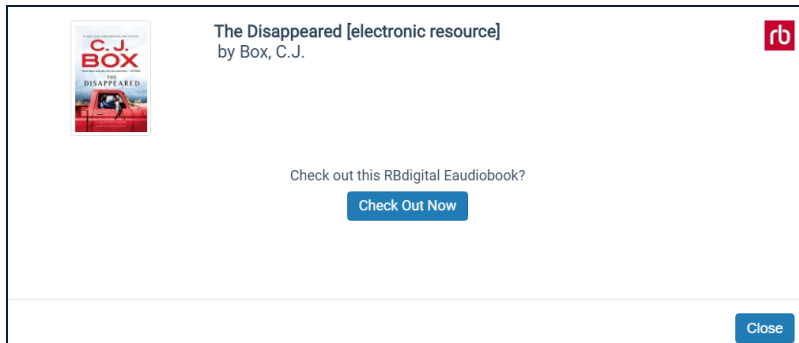
☒ FULL DISPLAY

**ALL COPIES EXPIRED**

[Add to My List](#)

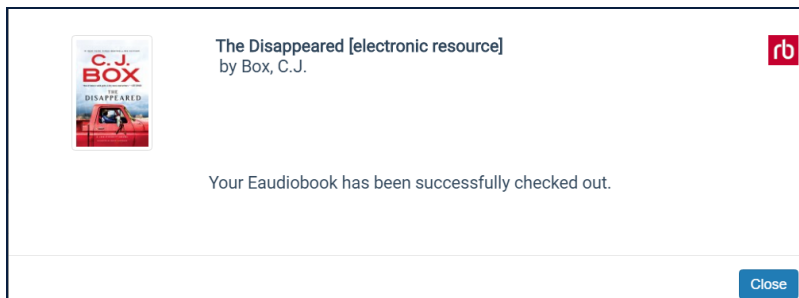
## Checking Out RBdigital Titles

If the RBdigital title is available to the patron who is logged into the Polaris PowerPAC, the **CHECK OUT** button appears. When the patron clicks the **CHECK OUT** button, a confirmation message box appears.

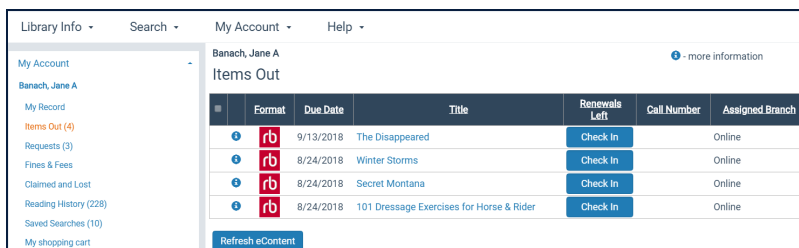


The patron clicks the **Check Out Now** button.

A message appears indicating the check-out was successful.

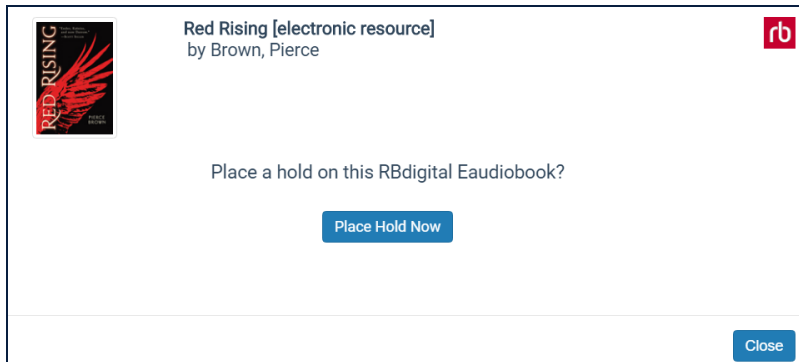


The RBdigital title appears in the patron's Items Out list.

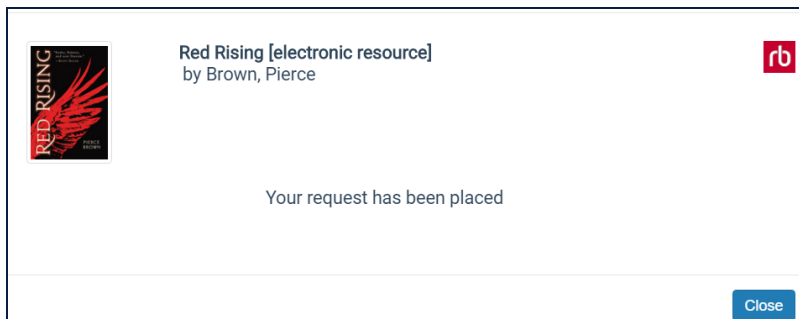


## Requesting RBdigital Titles

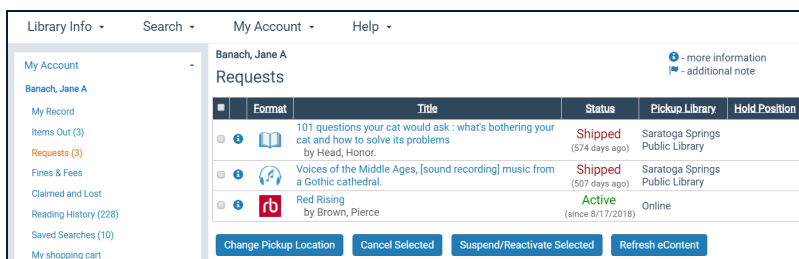
If the RBdigital title is not available for check-out but the logged-in patron can place a hold request on the title, the **PLACE HOLD** button appears. The patron clicks the **PLACE HOLD** button, and a confirmation message box appears.



The patron clicks the **Place Hold Now** button, and a message indicates the hold request was placed.



The hold request appears in the patron's Requests list.



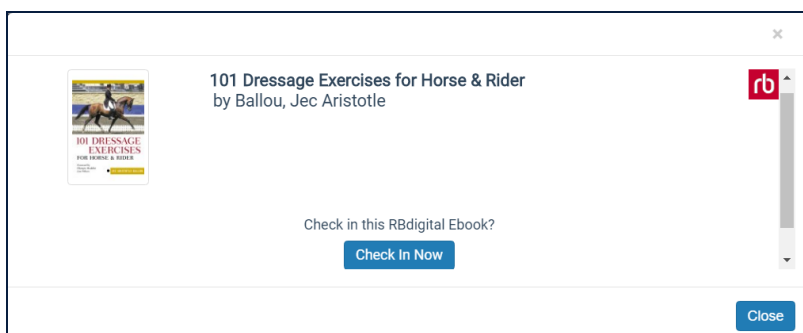
## Checking in RBDigital Titles Before They Expire

From the Patron account | Items out list, the patron clicks **Check In** to check in a Recorded Books title before it expires.

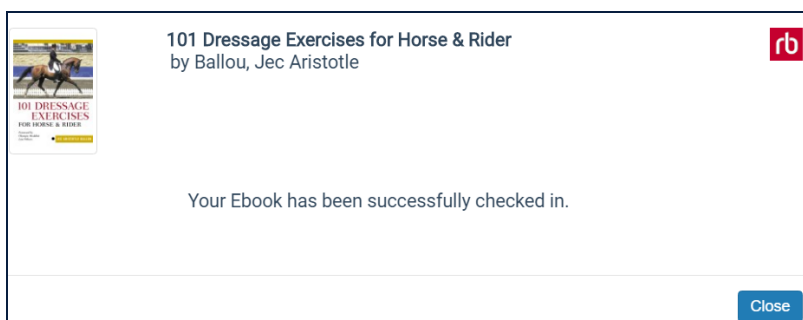
Library Info	Search	My Account	Help
My Account	Banach, Jane A <a href="#">more information</a>		
Banach, Jane A	Items Out		
My Record			
Items Out (4)			
Requests (3)			
Fines & Fees			
Claimed and Lost			
Reading History (228)			
Saved Searches (10)			
My shopping cart			
		Refresh eContent	

#	Format	Due Date	Title	Renewals Left	Call Number	Assigned Branch
1	rb	9/13/2018	The Disappeared	Check In		Online
2	rb	8/24/2018	Winter Storms	Check In		Online
3	rb	8/24/2018	Secret Montana	Check In		Online
4	rb	8/24/2018	101 Dressage Exercises for Horse & Rider	Check In		Online

A confirmation message box appears, and the patron clicks **Check in Now**.



A success message appears.



**Note:**

These messages can be changed in WebAdmin. See "[Integrated EContent from Recorded Books](#)" on page 6.

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## Added or Removed Recorded Books Titles

The Recorded Books API provides nightly deltas of newly added or recently expired titles. The Polaris API Consumer Service uses these deltas to import new titles or identify expired titles during the overnight process.

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## Expired Recorded Books Titles

Library staff can periodically check for Recorded Books titles removed from the library's collection. The expired bibliographic records are gathered in a record set entitled **RBExpiredTitles\_[Date/time]**. Your library can purge or retain the records.

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## Manually Import the Recorded Books Collection

You can manually set the import to run during the next overnight process and import any missing records. This process does not affect expired titles.

To manually import your RBdigital collection:

1. Open the Vendor Account workform for Recorded Books.
2. Select **Tools | Import Titles** or press **CTRL+ALT+T**.

**Note:**

The **Tools** option appears only for RBdigital vendor accounts.

Attribute	Value
Vendor account server name	api.rbdigital.com
Vendor account use SSL	No
Vendor account import profile ID	RBDigital test
Library RBDigital URL	https://qpolaristestc.rbdigital.com

The following message appears: **Warning: This process will review your entire RBDigital collection during overnight processing and import any missing records. Do you want to continue? Ok / Cancel.**

3. Click **Ok**.

When you manually request an import, the system calls out to RBDigital for the most recent snapshot of the library's titles. The system identifies the records that are in the snapshot but not in the Polaris database, and it creates an import job for those missing records.

Then, the job is added to the import jobs queue. When the import runs, the records are imported according to the settings in the new import profile. The vendor account linked to the resource entity must match the vendor account importing titles to be considered a match. Duplicate detection is performed by matching the ISBN in the RB digital record to the ISBN in the Resource Entity in Polaris, and only those records not currently in the Polaris database are imported.

A RBDigital Import Requested transaction is logged. This includes a 300 transaction subtype for the vendor account ID.



## Preferred Vendor Accounts for cloudLibrary Sharing (cloudLink)

**Note:**

This development is in Beta release.

Libraries using the cloudLibrary eContent service can now implement Bibliotheca's cloudLink feature whereby libraries in a cloudLink group can share digital collections across multiple cloudLibrary accounts. Bibliotheca's cloudLink groups are ILS-independent and can be used to connect existing cloudLibrary customers on different systems, usually based on geographic location. The Polaris integration can also support a "self-contained" cloud, where all libraries in the cloudLink group are on the same Polaris server.

To ensure that patron check-outs and requests appear under a single library when resources are being shared in a cloudLink group, the Preferred Vendor Account policy table was implemented. Using this table prevents cloudLink titles from appearing under multiple branches.

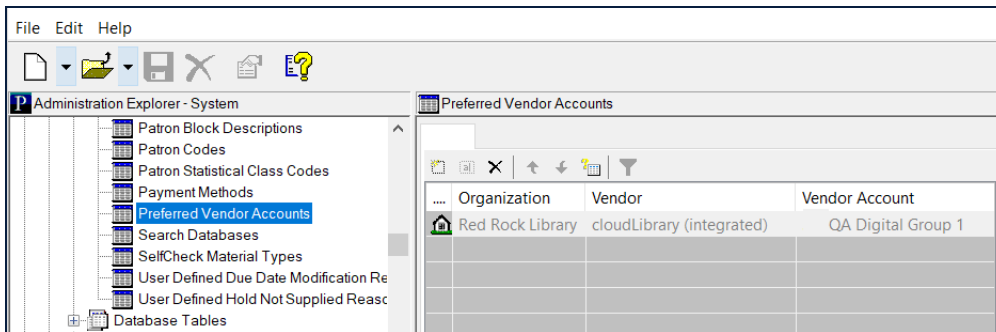
**Note:**

Existing cloudLibrary customers who are not using the cloudLink feature do not need to use the Preferred Vendor Accounts policy table. However, all cloudLink customers should use the policy table to provide the best patron experience.

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### Preferred Vendor Accounts Policy Table

You can access the new Preferred Vendor Accounts policy table at the System, Library, or Branch level in Polaris Administration. The table contains an organization name, a vendor description, and a vendor account name. Only one preferred vendor account can be set for each branch. If a duplicate is found, the following message appears: **An organization can only have one preferred vendor account per vendor.**



**Note:**

To add or delete entries in the table, you must have the new permission **Modify preferred vendor accounts table: Allow**. This permission is added by default to the Administrator permission group.

To add a Preferred Vendor Account to the table:

1. Expand the organization node in the Polaris Administration Explorer.
2. Select **Policy Tables | Preferred Vendor Accounts**.

The Preferred Vendor Accounts policy table appears.

3. Click  to open the Insert: Vendor Accounts dialog box.

The 'Insert: Preferred Vendor Accounts' dialog box is shown with the following fields:

- Organization: QA-POLARIS
- Vendor: cloudLibrary (integrated)
- Vendor Account: (empty)

Buttons: OK, Cancel, Help

4. Select the Vendor Account from the drop-down list, and click **OK**.

The Preferred Vendor Account is set for the organization.

**Note:**

If you delete a cloudLibrary vendor account, the corresponding entry in the Preferred Vendor Accounts policy table is automatically deleted.

---

## Circulation Transactions for cloudLink Titles

When cloudLibrary titles are checked out through the PAC, Polaris uses the Item Library ID returned in the cloudLibrary API to associate the correct item record with the patron. For cloudLink libraries, one of two transaction types can be logged:

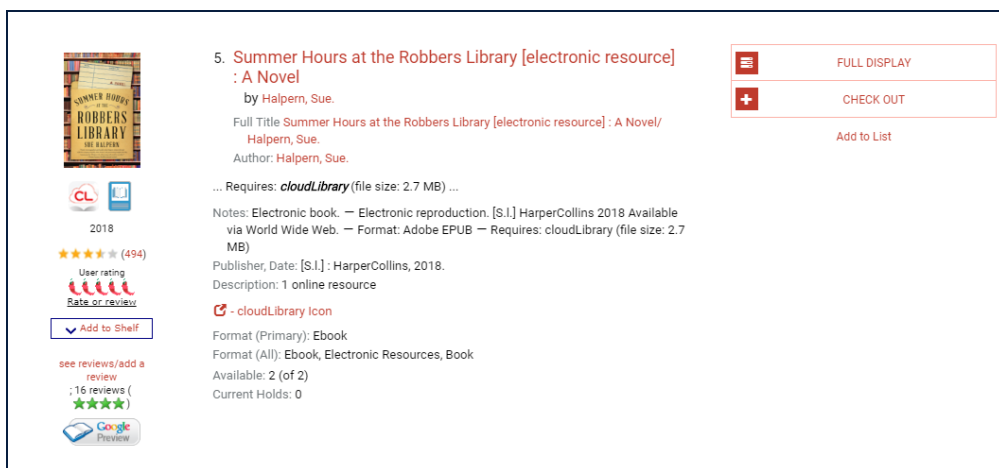
- If the item belongs to a library that exists in the Polaris database, a normal check-out transaction is logged.
- If the item does not belong to a library within the Polaris database, a new eContent check-out (6103) transaction is logged. This is different from a normal check-out transaction because there is no item record associated with the transaction. In addition, the following message appears: **Your ebook has been successfully checked out. To provide faster access, this ebook was borrowed from a partner library. Please use your cloudLibrary reader to download or view this title.**

---

## Shared cloudLink Titles Displayed in the PAC

The cloudLibrary integration creates bibliographic records for titles owned by libraries within the Polaris database. These titles will display in the PAC and use the cloudLibrary API to display availability and holds. For cloudLink libraries, the availability and hold information is based on the entire cloudLink group. If the title within the cloudLink group is not owned by a library in the Polaris database, it will only be available to patrons from the cloudLibrary app.

Resource groups can be used with cloudLibrary integration to suppress eContent titles for different vendor accounts. However, cloudLink customers may want to disable the **Honor Resource Groups in PAC search results** setting because the real-time availability of items in a shared collection may change.



## Hold Requests for cloudLibrary Titles Displayed in the PAC

The real-time holds count displayed for cloudLibrary titles has been updated to consider cloudLink libraries. The previous holds count displayed the total of all requests in the holds queue. With a cloudLink system, this can give patrons an incorrect impression regarding the wait time for a title.

If the vendor account ID (connection branch or patron's branch) being used to view the holds count owns a copy of the title, the count will display only the holds for that library because that is the real wait time for that branch/patron.

If the vendor account ID (connection branch or patron's branch) being used to view the holds count does not own a copy of the title, the count will display the total holds for the cloudLink group.

For all cloudLibrary customers, the holds queue position will no longer display for cloudLibrary titles in PowerPAC or Mobile PAC.

## cloudLibrary Titles in Mobile PAC

Due to the integration changes required to support cloudLink, patrons can no longer perform any circulation actions for cloudLibrary titles in Mobile PAC. Patrons can still search for titles, add them to lists, and view check-outs or requests under My Account.

## Updates to Polaris and INN-Reach Integration

The following updates were made in Polaris 6.1 to enhance the integration between Polaris and INN-Reach.

---

### Minimal Field Requirement for Bibliographic Record Contributions

To be contributed to INN-Reach, bibliographic records must have a minimum of an 008 field and a 245 field. The 245 must also contain a subfield (e.g. 245\$a), but the subfield does not need to be valid.

---

### Bibliographic Records with Invalid URLs Cannot Be Contributed

If a bibliographic record has an invalid URL in the 856 tag, the record cannot be contributed. The URLs must adhere to W3C standards.

---

### Virtual Patron Records Excluded From All Patron Notices

The Institutional Patron Template in Polaris Administration is used to generate virtual patron records in the INN-Reach lending library's hold creation workflow. Previously, the virtual patron (v\_patron) record was excluded from almost overdue/renew, patron record expiration, and inactive patron notices. With this release, virtual patron records are also excluded from overdue, hold, and billing notices.

---

### Holds Routing Sequence for Shipping/Receiving Branch

To ensure that INN-Reach item holds are created when the Polaris library is the INN-Reach lending library, the Holds Routing Sequence Primary policy table must be set up for the shipping/receiving branch.

---

## Check Outs to Associated Patrons

When a Polaris borrowing library checks out an INN-Reach ILL item to an associated patron, the hold is now updated with the associated patron's ID at check out so that the auto-return process matches the checked-in item to the associated patron's ID.

---

## Blocking Patrons Over the Maximum Fine Limit

Before this change, patrons were being blocked when they were at or over their fine limit. Now, they are blocked only when their fine amount total is over the limit.

---

## Close Request Checked Out to Another Patron

When an INN-Reach item arrives back at the Polaris lending library, but it is not checked in properly, Polaris automatically sends a **Final Item Check-In** API message if another patron checks out that item. This completes the INN-Reach request cycle.

---

## Reject Hold Cancellation Messages When a Request is Out-to-Patron

If an INN-Reach item is canceled by the borrowing library after the lending library has shipped the item and the hold status is **Out to Patron**, Polaris rejects the cancellation request. The borrowing library can cancel requests with any of the following statuses: **Pending, Active, Located, Held** or **Not Supplied**.

## Menu Classes for PAC Usage Statistics

Library administrators who analyze PAC usage statistics using a third-party analytics tool can now gather data regarding usage of menus in the header. To enable the usage statistics, an individual class was added for each menu and sub-menu option in the headerdata.xml file.

**Note:**

The class was not added to the following menus: **More**, **Language**, and **Branches**.

The class name format is as follows: **menu-[menuID]-[submenuID]**

Example:

```
<li class="nav__item-level-1 dropdown">
  <a href="#" class="nav__link-level-1 menu-1 dropdown-toggle" data-toggle="dropdown" role="button" aria-haspopup="true" aria-
expanded="false">Library Info <span class="caret"></span></a>
  <ul class="nav__list-level-2 dropdown-menu">
    <li class="nav__item-level-2"><a href="http://QA-Polaris.polarislibrary.com/polaris/default.aspx?ctx=90.1033.0.0.2" class="nav__link-
level-2 menu-1-1">Portal</a></li>
    <li class="nav__item-level-2"><a href="http://QA-Polaris.polarislibrary.com/polaris/library/hours.aspx?ctx=90.1033.0.0.2"
class="nav__link-level-2 menu-1-2">Hours</a></li>
    <li class="nav__item-level-2"><a href="http://QA-Polaris.polarislibrary.com/polaris/library/events.aspx?ctx=90.1033.0.0.2"
class="nav__link-level-2 menu-1-3">Events</a></li>
    <li class="nav__item-level-2"><a href="http://QA-Polaris.polarislibrary.com/polaris/library/policies.aspx?ctx=90.1033.0.0.2"
class="nav__link-level-2 menu-1-4">Policies</a></li>
    <li class="nav__item-level-2"><a href="http://QA-Polaris.polarislibrary.com/polaris/library/website.aspx?ctx=90.1033.0.0.2"
class="nav__link-level-2 menu-1-5">Web Site</a></li>
    <li class="nav__item-level-2"><a href="https://QA-Polaris.polarislibrary.com/polaris/library/askus.aspx?ctx=90.1033.0.0.2"
class="nav__link-level-2 menu-1-6">Ask Us</a></li>
  </ul>
</li>
```

These new classes also allow for CSS style customization of individual menu options and sub-options.

## Additional NoveList Features Available for PowerPAC

Additional content display options were added for NoveList titles in Polaris PowerPAC.

The **Enriched Data** PAC profile includes a new **Other Features** subtab on the NoveList tab. The options on this tab are available for selection only when NoveList Select is enabled.

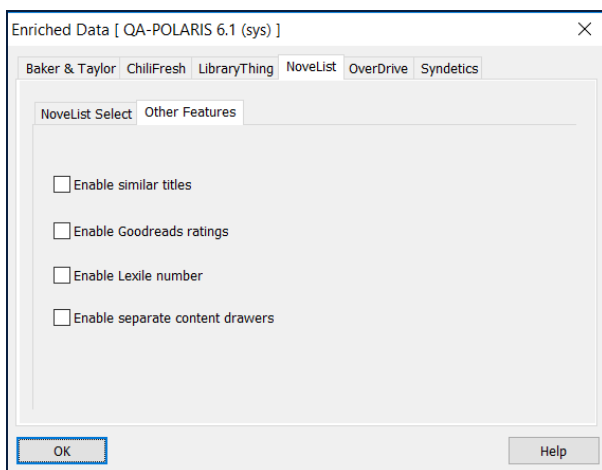
When you click the Other Features tab, the following settings appear:

- Enable similar titles - When the box is checked, similar titles appear on the search results and full display.
- Enable Goodreads ratings - When the box is checked, Goodreads ratings appear on the search results and full display.
- Enable Lexile number - When the box is checked, the Lexile number appears on the search results and full display.
- Enable separate content drawers - When the box is checked, the selected features appear in separate content drawers on the full display.

To enable these features, click the appropriate check boxes. If you also click **Enable separate content drawers**, the selected features appear in separate content drawers.

**Note:**


If your library has upgraded to the 2018 version of NoveList Select, the separate content drawers do not appear even if this option is enabled in Polaris.





## Similar Titles Enabled

When the **Enable similar titles** check box is checked on the NoveList | Other Features tab in the Enriched Data PAC profile, a **Similar Titles Available Now** (or library-defined text) link appears in the PAC under titles for which there are no items currently available, but similar items are found. When you click the link, a content carousel displays a maximum of 50 similar titles that are currently available.



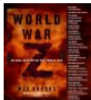
2005

46. [Carrie \[compact audio disc\]](#)  
by [King, Stephen, 1947-](#)

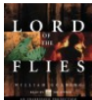
... [King, Stephen, 1947-](#) ...

Publisher, Date: New York, N.Y. : Simon & Schuster Audio, 2005.  
Edition: Unabridged.  
Description: 7 sound discs (7 hrs. 30 min.) ; 4 3/4in.

[Similar Titles Available Now](#) ▾







[World War Z : \[compact audio disc\] an oral hist...](#)  
Brooks, Max.



[Lord of the flies \[compact audio disc\]](#)  
Golding, William, 1911-199...

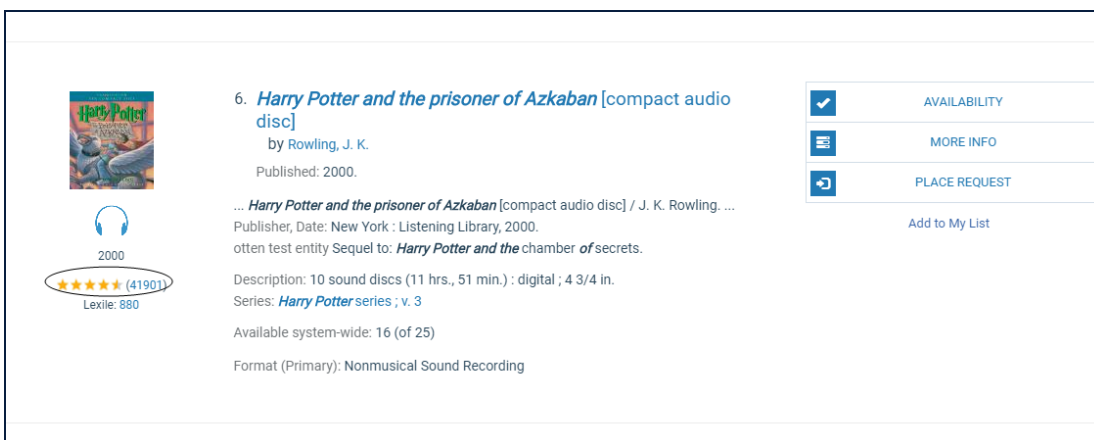
Powered by NoveList

	<a href="#">AVAILABILITY</a>
	<a href="#">FULL DISPLAY</a>
	<a href="#">PLACE REQUEST</a>
	<a href="#">ONE-CLICK REQUEST</a>

[Add to List](#)

## Goodreads Ratings Enabled

When the **Enable Goodreads ratings** check box is checked on the NovelList | Other Features tab in the Enriched Data PAC profile, the Goodreads rating appears under the cover image on the search results and full display pages.



6. *Harry Potter and the prisoner of Azkaban* [compact audio disc]  
by Rowling, J. K.  
Published: 2000.

... *Harry Potter and the prisoner of Azkaban* [compact audio disc] / J. K. Rowling. ...  
Publisher, Date: New York : Listening Library, 2000.  
often test entity Sequel to: *Harry Potter and the chamber of secrets*.

Description: 10 sound discs (11 hrs., 51 min.) : digital ; 4 3/4 in.  
Series: *Harry Potter* series ; v. 3

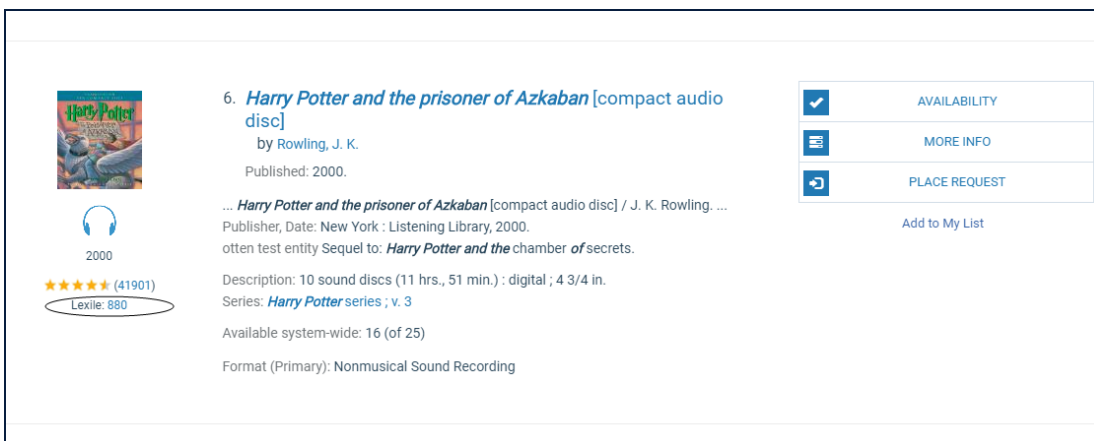
Available system-wide: 16 (of 25)  
Format (Primary): Nonmusical Sound Recording

2000  
★★★★★ (41901)  
Lexile: 880

AVAILABILITY  
MORE INFO  
PLACE REQUEST  
Add to My List

## Lexile Number Enabled

When the **Enable Lexile number** check box is checked on the NovelList | Other Features tab in the Enriched Data PAC profile, the lexile number appears under the cover image on the search results and full display pages.



6. *Harry Potter and the prisoner of Azkaban* [compact audio disc]  
by Rowling, J. K.  
Published: 2000.

... *Harry Potter and the prisoner of Azkaban* [compact audio disc] / J. K. Rowling. ...  
Publisher, Date: New York : Listening Library, 2000.  
often test entity Sequel to: *Harry Potter and the chamber of secrets*.

Description: 10 sound discs (11 hrs., 51 min.) : digital ; 4 3/4 in.  
Series: *Harry Potter* series ; v. 3

Available system-wide: 16 (of 25)  
Format (Primary): Nonmusical Sound Recording

2000  
★★★★★ (41901)  
Lexile: 880

AVAILABILITY  
MORE INFO  
PLACE REQUEST  
Add to My List

## Separate Content Drawers Enabled

If you selected the **Enable separate content drawers** check box on the NovelList | Other Features tab in the Enriched Data PAC profile, the following elements appear in separate content drawers in the PowerPAC:

**Note:**

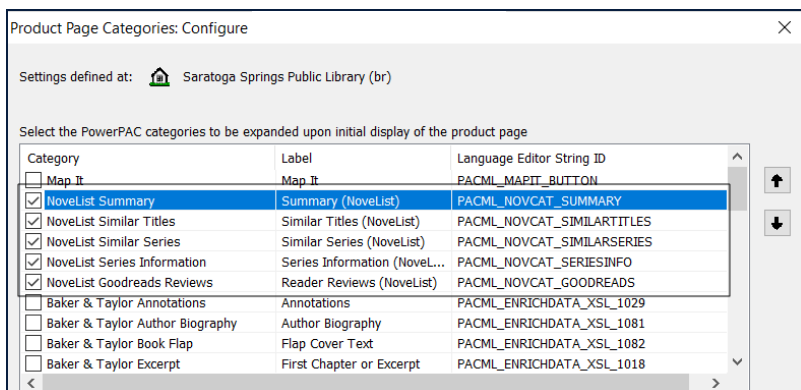
The separate content drawers do not appear if you have upgraded to the latest version of NovelList Select.

- Series Information
- Similar Titles
- Similar Series
- Reader Reviews
- Summaries

**Note:**

Libraries can still manage their content within the NovelList administration portal. The following features will remain in the original content drawer: Lexile, Databases, Related Newsletters, Book Content, Appeal Terms, Events, Relation Promotions, Lists & Articles, Professional Reviews, Recommendations, Similar Authors.

You can use the PowerPAC profile **Product Page Categories: Configure** to specify the order in which the NovelList content drawers appear and whether they are expanded by default.

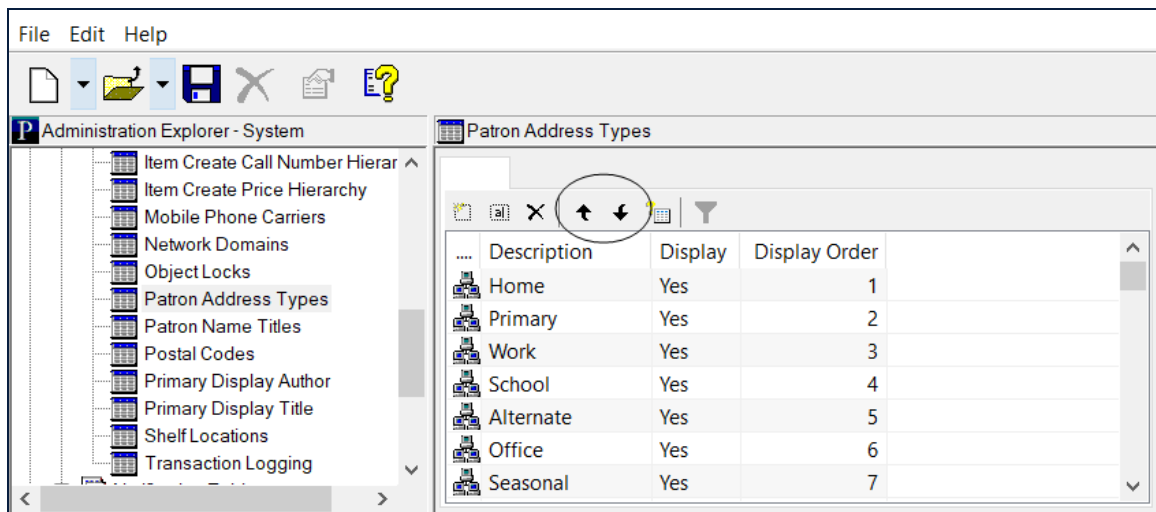


## Change the Order of Address Type Labels

You can now change the display order of the address types in the Patron Address Types database table.

To change the display order of patron address types:

1. Open the Patron Address Types database table.
2. Select an entry in the list of address types.
3. Click the up or down arrow to move the address type up or down.



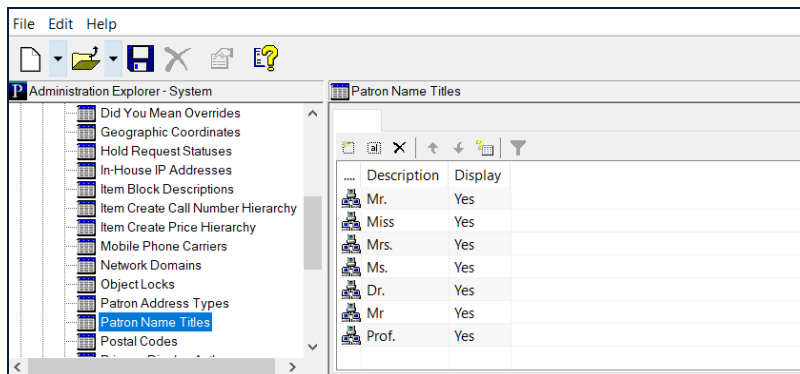
The patron address types list is reordered in Polaris and Leap.

## Patron Titles Now Database Fields

To ensure consistency for the patron titles across the Polaris staff client and Leap, the title field was converted to a database value. Any values for the patron title are defined in the Patron Name Titles database table, and these values are used instead of a string in all Polaris-based applications that display the patron title field. In addition, Polaris reports, PAPI, and NCIP have also been updated to use the Patron Name Titles values.

**Note:**

Any custom patron name titles previously entered as free-text are converted to database values during upgrade.



The column NameTitle in the patronregistration table was changed to NameTitleID.

As part of this development, Innovative Interfaces created a patron record set named **Patron Name Title Cleanup** that contains patron records where the title has been entered as a custom free-text value. You can search for the record set using this name.

## Multiple Comprise Merchant Accounts

You can now set up the Comprise payments gateway for multiple merchant accounts. To enable multiple Comprise merchant accounts, you can now set the following fields at the Branch level in the Polaris Administration parameter, **Credit Card Payment | Online payments: Configure:**

**Note:**

These fields appear when you select **Comprise MSP** as the Payment processing gateway and click **Properties**.

- **Payment page / service URL**
- **Customer Name**
- **Customer ID**

**Comprise MSP** [X]

**Connection**

Payment page/service URL:	com/smartpayapi/websmartpay.dll
Customer Name:	PolarisTest
Customer ID:	8200
User Name:	Polaris
Password:	••••••
Location ID:	PolarisTest
PAC Return URL:	https://qa-polaris.polarislibrary.con
MPAC Return URL:	https://qa-polaris.polarislibrary.con
Donations PAC Return URL:	https://qa-polaris.polarislibrary.con
Donations MPAC Return URL:	https://qa-polaris.polarislibrary.con
Postback URL:	https://qa-polaris.polarislibrary.con
Inactivity timeout:	60 seconds

OK Cancel Help

If your library has only one Comprise account, no Branch-level settings are necessary.

## Implement MARC Technical Notices

The updates specified in the following MARC notices were implemented in Polaris 6.1:

- [MARC 21 Update - January 26, 2018](#)
- [MARC 21 Update - March 9, 2018](#)
- [MARC 21 Update - April 13, 2018](#)
- [MARC 21 Update - April 19, 2018](#)



## New Check In Subtype

To enable library administrators to provide statistics on the average loan length, a new Loan Length in Minutes subtype (subtypeID=323) was added to the Check-In transaction type (6002). The value is calculated from the Original Check-out date to the Check-In date for items going from out to in, in-transit, or transferred. This new subtype is logged for all check-in transactions (with the exception of eContent check-ins) using the Polaris staff client, Leap, SIP, PAPI, or NCIP.

## Return Address Width Increased for Z-Fold Mailers

To ensure that the entire return address is visible in the Z-fold mailer envelope window, the return address field was increased to 80 characters so that long branch names do not wrap to a second line.

## OverDrive Integration Uses Secure Protocol

To ensure that network communication between OverDrive and the Polaris software is secure, all calls to the OverDrive API are now done via HTTPS.

## Leap - Item Record Bulk Change

You can now bulk change item records from an item record set in Leap. When you select the new **Bulk Change** option under the **ACTIONS** menu on the Item Record Set workflow, the Item Record Bulk Change workflow appears. The new Item Record Bulk Change workflow has five tabs where you select options or enter text to change the data in the item records. When you are changing notes or other free-text fields, you can replace the text, add the text to the beginning of the existing text (prepend), or add the text to the end of the existing text (append).

The following Cataloging permissions are required to bulk change item records:

- Access item record bulk change: Allow
- Item records: Bulk Change
- Cataloging Record Sets: Create
- Cataloging: Use 'Own' record sets

To bulk change item records in Leap:

1. Open the Item Record Set workflow for the record set containing the items you want to change.
2. Click **ACTIONS** in the workflow header, and select **Bulk Change**.

**Item Record Set** ⓘ

SAVE ACTIONS ▾ REFRESH RESULTS CLOSE

Name: New York fiction

Note:

Owner: Commu

Record Set ID: 73327

Record Count: 531

Scan or enter barcode ↵ FIND TOOL ACTIONS ▾ Filter Records

	TITLE	ASSIGNED BRANCH	COLLECTION	MATERIAL TYPE	SHELF LOCATION	CALL NO.	VOL.	STATUS	BARCODE	LAST ACTIVITY DATE	RECORD STATUS	CONTROL NUMBER
<input type="checkbox"/>	All-Bright Court	Hamilton Hill Branch - Schenectady County Public L		Book		Fict Por		In-Transit	0000408321370	7/31/2018	Final	571385
<input type="checkbox"/>	All-night visitors	Mohawk Valley Library System		Book		Fict Maj		In-Transit	0000300621455	7/31/2018	Final	274382

The Item Record Bulk Change workflow opens with the Location tab displayed.

## Item Record Bulk Change

UPDATE ITEMS

CANCEL

New York Fiction

Community Library

**Bulk Change Report**

ItemBulkChangeReport\_20180817133743.txt

**Error Record Set**

☐ **Name**

**Owner**

Community Library (br)

Location

Circulation

Call Number

Blocks and Notes

Miscellaneous

**Owning Branch**

(No change)

**Shelf Location**

(No change)

**Assigned Branch**

(No change)

**Home Branch**

(No change)

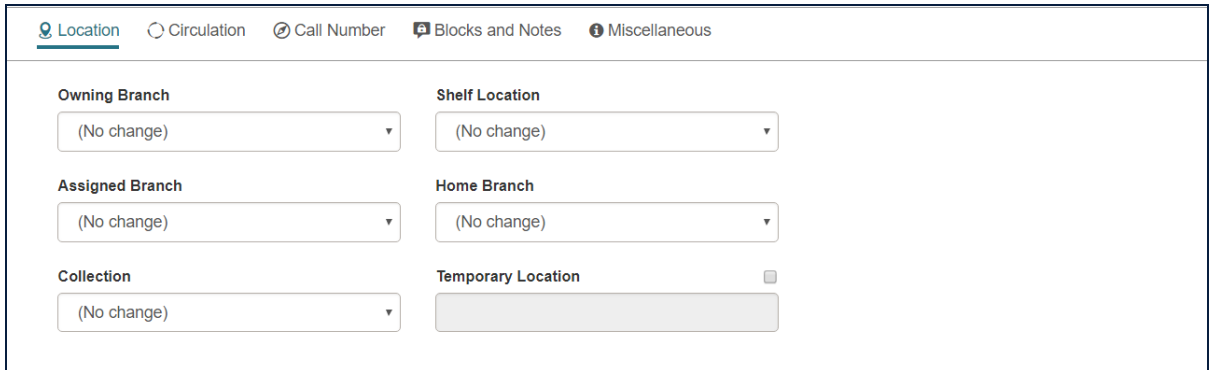
**Collection**

(No change)

**Temporary Location**
☐

3. (Optional) To change the name of the report that appears in the **Bulk Change Report** box, type a different name.
4. (Optional) To create a record set containing any records that could not be changed, do the following:
  - Select the **Name** check box under **Error Record Set**.
  - Type a name for the record set.
  - Select the record set owner in the **Owner** box.
5. To change the location information for the items in the record set, click the **Location** tab (if not already displayed), and do the following:
  - Select an option from one or more of the following drop-down lists:
    - **Owning Branch**
    - **Assigned Branch**
    - **Collection**
    - **Shelf Location**
    - **Home Branch**

- Click the **Temporary Location** check box, and type a temporary location.



The screenshot shows the 'Location' tab selected in the top navigation bar. Below the navigation bar, there are several dropdown menus and a checkbox. The 'Owning Branch' dropdown is set to '(No change)'. The 'Shelf Location' dropdown is also set to '(No change)'. The 'Assigned Branch' dropdown is set to '(No change)'. The 'Home Branch' dropdown is set to '(No change)'. The 'Collection' dropdown is set to '(No change)'. The 'Temporary Location' checkbox is checked, and there is a text input field below it for entering a temporary location.

6. To change the circulation information for the items in the record set, click the **Circulation** tab and do the following:

**Note:**

Certain circulation statuses cannot be changed using the bulk change process because of automatic processes and the effects these changes may have on linked records. For example, you cannot change the circulation status of **Out** to **In**.

- Select an option from one or more of the following drop-down lists: **Circulation Status, Fine Code, Material Type, Statistical Code** or **Loan Period**.
- Click the **Renewal Limit** check box, and select a number from the list.
- Select **Checked** or **Unchecked** to change the check box settings for the following fields in the item records:
  - **Holdable - Checked** must be selected to change the holds **Limit To** settings.
  - **Pickup At** - Select the check box and select a pickup branch.
  - **Patrons from this branch only**
  - **Patrons from this library and branches**
  - **Preferred borrowers**
  - **Non-circulating**
  - **Do not float**

- **Loanable outside system**
- **Do not mail to patron**

The screenshot displays the 'Circulation' tab in the Polaris interface. At the top, there is a navigation bar with tabs: Location, Circulation (selected), Call Number, Blocks and Notes, and Miscellaneous. Below the navigation bar, the form is organized into several sections:

- Circulation Status:** A dropdown menu set to '(No change)'.
- Fine Code:** A dropdown menu set to '(No change)'.
- Material Type:** A dropdown menu set to '(No change)'.
- Statistical Code:** A dropdown menu set to '(No change)'.
- Loan Period:** A dropdown menu set to '(No change)'.
- Renewal Limit:** A checkbox that is unchecked, with an adjacent input field.
- Holdable:** A dropdown menu set to '(No change)'.
- Limit To:** A container with four sub-sections:
  - Pickup At:** A dropdown menu set to '(No change)'.
  - Patrons from this branch only:** A dropdown menu set to '(No change)'.
  - Patrons from this library and branches:** A dropdown menu set to '(No change)'.
  - Preferred borrowers:** A dropdown menu set to '(No change)'.
- Non-circulating:** A dropdown menu set to '(No change)'.
- Do not float:** A dropdown menu set to '(No change)'.
- Loanable outside system:** A dropdown menu set to '(No change)'.
- Do not mail to patron:** A dropdown menu set to '(No change)'.

- To change the call number information for the item records, click the **Call Number** tab, and do the following:
  - Select an option from the **Call Number Scheme** box.
  - Select the check box for the **Suffix, Prefix, Volume, Classification, Copy,** or **Cutter** field and type the text in the field.
  - To copy the call number fields from the linked bibliographic records, click the **Use call number fields from bib record** check box.

The screenshot shows the 'Call Number' tab selected in the top navigation bar. The main content area contains the following fields and controls:

- Call Number Scheme:** A dropdown menu currently showing '(No change)'.
- Suffix:** A text input field with a small square icon to its right.
- Prefix:** A text input field with a small square icon to its right.
- Volume:** A text input field with a small square icon to its right.
- Classification:** A text input field with a small square icon to its right.
- Copy:** A text input field with a small square icon to its right.
- Cutter:** A text input field with a small square icon to its right.
- Use call number fields from bib record:** A checkbox located below the other fields.

6. To change blocks and notes for the items, click the **Blocks and Notes** tab, and do the following:
  - Select the block from the **Library Assigned Block** drop-down list.
  - Select the check box next to the **Free Text Block**, **Public Note**, **Non-Public Note**, or **Physical Condition** box, type the text, and then select **Replace**, **Append**, or **Prepend**.

The screenshot shows the 'Blocks and Notes' tab selected in the top navigation bar. The main content area contains the following fields and controls:

- Library Assigned Block:** A dropdown menu currently showing '(No change)'.
- Free Text Block:** A text input field with a small square icon to its right and a 'Replace' dropdown menu.
- Public Note:** A text input field with a small square icon to its right and a 'Replace' dropdown menu.
- Non-Public Note:** A text input field with a small square icon to its right and a 'Replace' dropdown menu.
- Physical Condition:** A text input field with a small square icon to its right and a 'Replace' dropdown menu.

7. To change or add miscellaneous information, click the **Miscellaneous** tab, and do the following:
  - Click **FIND** and select a bibliographic record to update the **Bib Control Number**. After the bulk change process is complete, the items are linked to



this new bibliographic record, and the information from the bibliographic record appears in the **Bib Control Number**, **Title**, and **Author** boxes.

- Select **Checked** or **Unchecked** in the **Display in PAC** box to change the setting in the item records.
- Select the check box next to the **Parent Item**, **Name of Piece**, **Funding Source**, or **Price** field, and type the text in the associated box.
- To add barcodes to item records that do not have barcodes, scan or type a barcode in the **Item Barcode** box, press the arrow button, and repeat for each subsequent barcode entry.

**Note:**

If you scan or type the barcodes, they are assigned to the items in the order in which the items are listed in the record set. The number of barcodes appears in the **Barcode Total** box.

The screenshot shows the 'Miscellaneous' tab in the Polaris interface. On the left, there are several input fields: 'Bib Control Number' with a '(No change)' dropdown and a 'FIND' button; 'Title', 'Author', 'Display in PAC' (with a '(No change)' dropdown), 'Parent Item', 'Name of Piece', 'Funding Source', and 'Price'. Each of the last four fields has a small checkbox to its right. On the right side, there is a large 'Item Barcode(s)\*' section with an input field for 'Enter item barcode' and a right-pointing arrow button. Below this is a large empty box for additional barcodes. At the bottom right, a 'Barcode Total:' field shows the number '0'. A footnote at the bottom center states '\* only for records that don't already have barcodes'.

8. Click **UPDATE ITEMS** to initiate the bulk change process.

Error messages appear for any specified updates that cannot be made.

Then, the Summary of Changes dialog box displays the details regarding the changes that will be made to the item records in the record set.

### Summary of Changes

This bulk change process will attempt to change 531 item record(s).

Record set name:	New York Fiction
Record set owner:	Community Library
Bulk change report:	ItemBulkChangeReport_20180817133743.txt
Error record set name:	
Error record set owner:	

Assigned branch: Community Library (COB)

Assigned collection: Adult Fiction (ADF)

Funding source: 'Lockwood'

Once made, these changes cannot automatically be undone.

CONTINUE
CANCEL

- Click **CONTINUE** to start the bulk change process.

When the bulk change process is done, the Item Record Set workform appears, and the report is downloaded to your workstation, where it is available at the bottom of your browser or in the downloads folder.

### Item Record Set ⓘ

SAVE
ACTIONS ▾
↺
📄
CLOSE

Name
New York Fiction

Owner
Community Library (br) ▾

Record Set ID
73327

Note

Record Count
531

↵
FIND TOOL

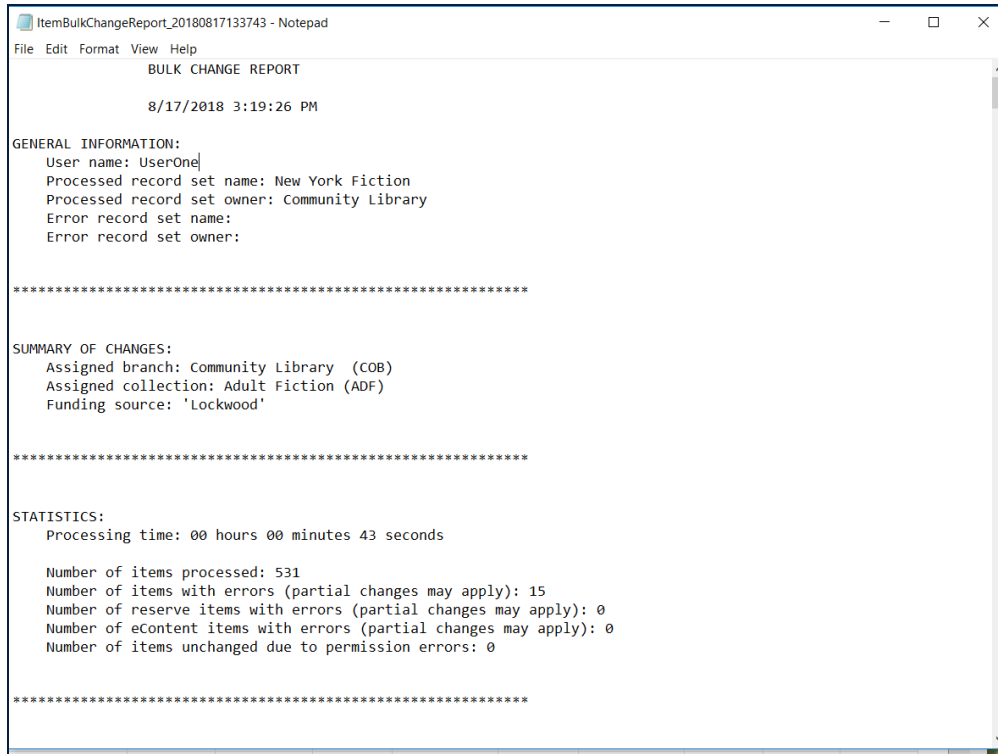
ACTIONS ▾
Filter Records

<input type="checkbox"/>	TITLE	ASSIGNED BRANCH	COLLECTION	MATERIAL TYPE	CALL NO.	STATUS	BARCODE	LAST ACTIVITY DATE	RECORD STATUS	CONTROL NUMBER
<input type="checkbox"/>	All-Bright Court	Community Library	Adult Fiction (ADF)	Book	Fict Por	In-Transit	0000408321370	7/31/2018	Final	571385
<input type="checkbox"/>	All-night visitors	Community Library	Adult Fiction (ADF)	Book	Fict Maj	In-Transit	0000300621455	7/31/2018	Final	274382
<input type="checkbox"/>	The assistant [sound recording]	Community Library	Adult Fiction (ADF)	Audiobook	RC Fict Mal	In-Transit	0000701144875	7/31/2018	Final	1302255
<input type="checkbox"/>	Autobiography of a family photograph : a novel	Community Library	Adult Fiction (ADF)	Book	Fict Woo	In-Transit	0000502696297	7/31/2018	Final	960794

ItemBulkChangeRe...txt
⬆

Show all

10. Click the bulk change report to open it.



The screenshot shows a Notepad window titled "ItemBulkChangeReport\_20180817133743 - Notepad". The menu bar includes "File", "Edit", "Format", "View", and "Help". The text content is as follows:

```
BULK CHANGE REPORT

8/17/2018 3:19:26 PM

GENERAL INFORMATION:
  User name: UserOne|
  Processed record set name: New York Fiction
  Processed record set owner: Community Library
  Error record set name:
  Error record set owner:

*****

SUMMARY OF CHANGES:
  Assigned branch: Community Library (COB)
  Assigned collection: Adult Fiction (ADF)
  Funding source: 'Lockwood'

*****

STATISTICS:
  Processing time: 00 hours 00 minutes 43 seconds

  Number of items processed: 531
  Number of items with errors (partial changes may apply): 15
  Number of reserve items with errors (partial changes may apply): 0
  Number of eContent items with errors (partial changes may apply): 0
  Number of items unchanged due to permission errors: 0

*****
```

## Leap - Reset Passwords for Existing Patrons

You can now reset a password for an existing patron from the Patron Registration workflow in Leap.

To reset a patron password:

1. Open the Patron Record workflow.
2. Click **REGISTRATION**.

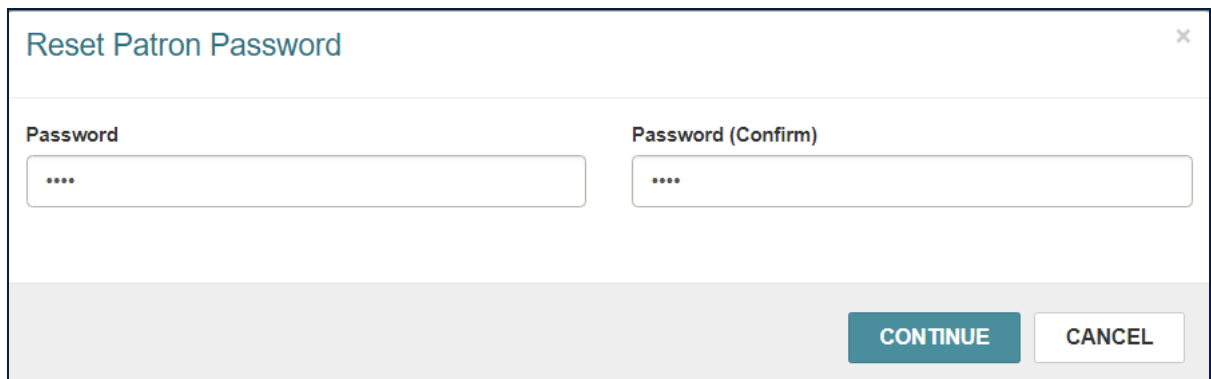
The Patron Registration workflow opens for the existing patron. The new **RESET PASSWORD** button appears under the **RENEW** button.

The screenshot displays the Patron Registration workflow for a patron named NASIR AZIZ. The interface is divided into several sections:

- Header:** Displays the patron's name (NASIR AZIZ), ID (1229195408668), and library (RED ROCK LIBRARY). It includes buttons for REGISTRATION, ACTIONS, a refresh icon, and a CLOSE button.
- Navigation Bar:** Shows various patron status indicators: Check Out (0), Out (1) / Overdue (1), Account (\$0.00), Claims (0) / Lost (0), Holds (2) / Held (1), and ILL (0) / Held (0).
- Left Sidebar:** Contains navigation links for Profile, Attributes, Email, Address, Phone/Fax, Notifications, Preferences, Image, and Misc. Info.
- Profile Card:** A central form with the following fields:
  - Barcode \*: 1229195408668
  - Registered At \*: Red Rock Public Library (dropdown)
  - Former Barcode: 2123121231
  - Patron Code \*: Regular (dropdown)
  - Last Name \*: Aziz
  - Date of Registration: 7/31/2017
- Right Panel:** A vertical stack of action buttons: SAVE, RENEW, RESET PASSWORD (circled), COPY, MERGE, and DELETE.

3. Click the **RESET PASSWORD** button.

The Reset Patron Password dialog box appears. If the password is a required field, an asterisk appears next to the Password label.



The image shows a 'Reset Patron Password' dialog box. It has a title bar with the text 'Reset Patron Password' and a close button (X) in the top right corner. Below the title bar, there are two input fields: 'Password' and 'Password (Confirm)'. Both fields contain four dots, indicating masked text. At the bottom right of the dialog box, there are two buttons: 'CONTINUE' (a teal button) and 'CANCEL' (a white button with a grey border).

4. Type the password in the **Password** and the **Password (Confirm)** boxes.
5. Click **CONTINUE**.

A message confirms the password was updated.

## Leap - Export to Excel from a Record Set

You can now export a list of records in Excel 2007.xlsx format from a record set in Leap. When you export from a Leap record set, the columns in the Excel file include the same columns as in the record set with additional columns for SortTitle (in files exported from bibliographic and item record sets) and SortAuthor (in files exported from bibliographic records).

To export to an Excel file from a record set in Leap:

**Note:**

You must have the permission, **Cataloging Record Sets:Access**.

1. Open the Patron, Item, or Bibliographic Record Set workform.
2. In the workform header, select **ACTIONS | Export**.

The screenshot shows the 'Bibliographic Record Set' workform. At the top, there are buttons for 'SAVE', 'ACTIONS', a refresh icon, a print icon, and 'CLOSE'. The 'ACTIONS' dropdown menu is open, showing options: 'Create Item Record Set', 'Create Authority Record Set', 'Export' (highlighted), and 'Delete'. Below the header, there are input fields for 'Name' (New York), 'Owner' (Lake Pleasant (L)), 'Note' (Fiction New York state setting), 'Set ID' (52), and 'Count' (54). Below this is a search bar with 'Scan or enter barcode' and a 'FIND TOOL' button. To the right of the search bar is another 'ACTIONS' dropdown and a 'Filter Records' input field. Below the search bar is a table with the following data:

	TITLE	AUTHOR	FORMAT	LINKED ITEMS	HOLDS	PUB DATE	CALL NO.	CONTROL NUMBER	STATUS
<input type="checkbox"/>	All-Bright Court	Porter, Connie Rose, 1959-	Book	4	0	2000	Fict Por	449105	Final
<input type="checkbox"/>	All-night visitors	Major, Clarence.	Book	2	0	1998	Fict Maj	401573	Final

The Export dialog box appears with the Excel File Name.

The screenshot shows the 'Export' dialog box. It has a title bar with 'Export' and a close button. Inside, there is a label 'Excel File Name' and a text input field containing 'BibliographicRecordSet\_New York'. At the bottom right, there are two buttons: 'EXPORT' and 'CANCEL'.

- (Optional) To change the Excel file name, type a new name or edit the existing name.
- Click **EXPORT**.

**Note:**

If the number of rows exceeds the Excel limit, the following message appears:

**Record set is too large to export. Exceeds Excel's maximum of approximately 1,000,000 records.**

A message indicates the file is being created.

Then, the Excel file appears.

A	B	C	D	E	F	G	H	I	J	K	L	M	N
Title	Author	Format	Linked Items	Holds	Pub Date	Call No.	Control No.	Status	Sort Title	Sort Author			
All-Bright Court	Porter, Connie Rose, 1959-	Book		4	0 2000	Fict Por	449105	Final	ALL BRIGHT COURT PORTER CONNIE ROSE 04(1959)99				
All-night visitors	Major, Clarence.	Book		2	0 1998	Fict Maj	401573	Final	ALL NIGHT VISITORS MAJOR CLARENCE				
The assistant [sound recording]	Malamud, Bernard.	Nonmusical S		2	0 1999	RC Fict Ma	472667	Final	ASSISTANT SOUND MALAMUD BERNARD				
Autobiography of a family photograph : a	Woodson, Jacqueline.	Book		2	0 1995	Fict Woo	275628	Final	AUTOBIOGRAPHY WOODSON JACQUELINE				
Bell, book, and murder	Edghill, Rosemary.	Book		5	0 1998	Fict Edg	488407	Final	BELL BOOK AND NEDGHILL ROSEMARY				
The bookmakers	Chafets, Ze'ev.	Book		2	0 1995	Fict Cha	277365	Final	BOOKMAKERS CHAFETS ZEEV				
Bridge of sighs	Russo, Richard, 1949-	Book		111	1 2007	Rus	729631	Final	BRIDGE OF SIGHS RUSSO RICHARD 04(1949)99				
The Brooklyn book of the dead : a novel	Stephens, Michael Gregory.	Book		3	0 1994	Fict Ste	260458	Final	BROOKLYN BOOK STEPHENS MICHAEL GREGORY				
Chocolate sangria : a novel	Price-Thompson, Tracy, 1963	Book		1	0 2003	Fict Pri	475880	Final	CHOCOLATE SANGRIA PRICE THOMPSON TRACY 04(1963)99				
The dog who knew too much : a Rachel Al	Benjamin, Carol Lea.	Book		2	0 1998	Fict Ben M	400668	Final	DOG WHO KNEW BENJAMIN CAROL LEA				
Empire Falls	Russo, Richard, 1949-	Book		58	0 2001	Fict Rus	453712	Final	EMPIRE FALLS RUSSO RICHARD 04(1949)99				
Empress of the splendid season [sound rec	Hijuelos, Oscar.	Nonmusical S		4	0 1999	RC Fict Hij	406491	Final	EMPRESS OF THE HIJUELOS OSCAR				
Everybody's fool	Russo, Richard, 1949- author	Book		3	0 2016	813/.54	1361473	Final	EVERYBODY'S FOOL RUSSO RICHARD 04(1949)99 AUTHOR				
Face	Liu, Aimee.	Book		4	0 1994	Fict Liu	269122	Final	FACE LIU AIMEE				
Fear's justice : a novel	Olden, Marc.	Book		7	0 1996	Fict Old	290124	Final	FEARS JUSTICE A NOLDEN MARC				
Five of a kind : the third Nero Wolfe omnib	Stout, Rex, 1886-1975.	Book		1	0 1991	Fict Sto M	248621	Final	FIVE OF A KIND THE STOUT REX 04(1886)99 04(1975)99				
Fun with felt.	Feldman, Annette.	Book		2	0 1980	745.5 F	13646	Final	FUN WITH FELT FELDMAN ANNETTE				
Funnybones	Ahlberg, Janet.	Book		15	1 1980	JP Fict Ahl	13838	Final	FUNNYBONES AHLBERG JANET				
The ghost of Hannah Mendes : a novel	Ragen, Naomi.	Book		13	0 1998	Fict Rag	335222	Final	GHOST OF HANNAH RAGEN NAOMI				
The good husband	Godwin, Gail.	Book		35	0 1994	Fict God	266359	Final	GOOD HUSBAND GODWIN GAIL				

## Leap - Check In Items Using a Barcode File

You can now check in items in Leap by uploading a file of item barcodes. This method can be used in any check-in mode: Normal, Bulk, Inventory, In-House. The barcode file must be in one of the following formats: .txt., .csv, or .xls/.xlsx.

To check in item in Leap using a barcode file:

1. Open the Check In workform in any view: Normal, Bulk, In House, or Inventory.
2. Select **ACTIONS | Load from File**.

The Select File dialog box appears.

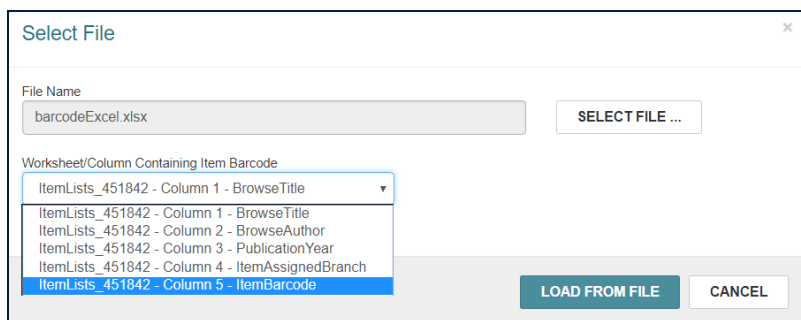
3. Click **SELECT FILE**.

The file explorer window appears where you can browse to find the .txt, .csv, or .xls/.xlsx file.

4. Select the file to load.

If the selected file is in .xls or .xlsx format, the **Worksheet/Column Containing Item Barcode** field appears on the Select File dialog box.





5. If the file is in Excel (.xls or .xlsx) format, select the column that contains the item barcode.
6. Click **LOAD FROM FILE**.

Rows are added as each item is loaded, and a message or dialog box appears for each item that has a condition affecting its check-in. If the item record is not found, a **No matching item record was found. Check the item barcode** error message appears, and the item is skipped. The following types of message and dialog boxes may also appear as you are checking in items:

- Overdue Fine
- Resolve Billed Item
- Item is Withdrawn
- Item is In-Transit
- Item is Blocked

**Note:**

If you upload a file that contains multiple items with conditions that produce a message or dialog box, you must respond to each message or dialog box individually.

In addition, a message box alerts you that check-in processing has been suspended when a receipt or slip needs to be printed. The message title and text can be modified in WebAdmin. See ["WebAdmin Updates" on page 3](#).

## Leap - Print a List of Patron's Fines and Fees

You can now print a list of the patron's current fines and fees from the Patron Record | Account view in Leap. The list is printed in the language selected in the System workflow. The list is similar to the Print List receipt that is currently available from the Patron Account Transaction Summary in the Polaris staff client.

When you view the Patron Record on a wide monitor, the **Print List** button appears in the button bar. On an iPad or other tablet with a narrower screen, the **Print List** button appears under the **More** menu. To click or tap the **Print List** button, at least one row must be selected.

**MR. EUGENE J MUJICA** ⓘ  
1000201318127  
COMMUNITY LIBRARY

REGISTRATION ACTIONS ▾ REFRESH RESULTS CLOSE

Check Out (0) Out (4) / Overdue (4) Account (\$15.00) Claims (0) / Lost (0) Holds (0) / Held (0) ILL (3) / Held (0) More ▾

Pay Waive Charge Add Charge Create Credit Refund Credit **Print List** More ▾ Filter Charges

Charges: \$15.00 Deposits: \$0.00 Credits: \$0.00 Balance: \$15.00 View: Account Summary ▾

✓	TYPE	DATE	BARCODE	TITLE	REASON	ORGANIZATION	NOTE	BILLED	AMOUNT	BALANCE
✓	Charge	1/23/2018	122919540003	Panic in a suitcase : a novel	Overdue Item	Community Library			\$5.00	\$5.00
✓	Charge	1/23/2018	5122919543	The orchard of lost souls	Overdue Item	Community Library			\$5.00	\$5.00
✓	Charge	1/23/2018	3364100000032224	Andrew's brain : a novel	Overdue Item	Community Library			\$5.00	\$5.00
										\$15.00

When you select one or more rows and click **Print List**, the following details are printed for each selected row:

- Date
- Type
- Reason
- Title
- Barcode
- Amount
- Note

4/20/2018	Patron - 1509 - fees
Date: 01/23/2018 2:37:26 PM	
Type: Charge	
Reason: Overdue Item	
Title: Panic in a suitcase : a novel	
Barcode: 122919540003	
Amount: \$5.00	
Note:	
Date: 01/23/2018 2:34:27 PM	
Type: Charge	
Reason: Overdue Item	
Title: The orchard of lost souls	
Barcode: 5122919543	
Amount: \$5.00	
Note:	
Date: 01/23/2018 2:32:47 PM	
Type: Charge	
Reason: Overdue Item	
Title: Andrew's brain : a novel	
Barcode: 3364100000032224	
Amount: \$5.00	
Note:	

## Leap - Credit Card Refunds with Comprise Payments Gateway

To refund credit card payments that were made through the Comprise payments gateway, the following are required:

- The Comprise SmartPAY credit card payments gateway is configured in Polaris Administration.
- Staff members who refund payments have the permission, **Circulation/Fines: Allow refunds**.
- The library has a license for integrated credit card payments through Comprise.
- A SmartTerminal is connected to the workstation.

---

### Refunding Credit Card Payments Made Using the Comprise Payment Gateway

To refund one or more payments made through Comprise:

1. Open the Patron Record workform for the patron to whom you are refunding the credit card payment.
2. Click the **Account** tab.
3. On the Account tab, select **View | Transaction Summary**.  
The Transaction Summary view appears.
4. Select the check boxes next to the Comprise credit card payments you want to refund.

**BERNIE PHELPS** ⓘ  
357577  
SCHENECTADY BRANCH - CENTRAL

REGISTRATION ACTIONS ↕ ↻ CLOSE

BLOCKS NOTES

Check Out (0) Out (0) / Overdue (0) Account (\$1.28) Claims (0) / Lost (0) Holds (2) / Held (0) More ▾

History Properties Credit Refund Print List Filter Transactions

View: Transaction Summary ▾

	DATE	TYPE	REASON	TITLE	BARCODE	AMOUNT	NOTE
<input checked="" type="checkbox"/>	5/16/2018 11:36:04 AM	Pay	Overdue Item	Cooking to beat the clock : inspired meals in fifteen minutes / Sam Gugino ; photographs by Dawn Smith.	ILLNNR2	\$0.08	Payment made via PAC
<input checked="" type="checkbox"/>	5/16/2018 11:36:04 AM	Pay	Overdue Item	Fives, sixes and sevens	39876000006419	\$0.32	Payment made via PAC

- Click the **Refund** button.

The area below the button bar expands.

**BERNIE PHELPS** ⓘ  
357577  
SCHENECTADY BRANCH - CENTRAL

REGISTRATION ACTIONS ↕ ↻ REFRESH CLOSE

BLOCKS NOTES

Check Out (0) Out (0) / Overdue (0) Account (\$1.28) Claims (0) / Lost (0) Holds (2) / Held (0) ILL (0) / Held (0) Reading History More ▾

History Properties Credit Refund Print List Filter Transactions

Balance: **\$0.40**

Amount to refund:

Note:

**REFUND** CANCEL

View: Transaction Summary ▾

	DATE	TYPE	REASON	TITLE	BARCODE	AMOUNT	NOTE
<input checked="" type="checkbox"/>	5/16/2018 11:36:04 AM	Pay	Overdue Item	Cooking to beat the clock : inspired meals in fifteen minutes / Sam Gugino ; photographs by Dawn Smith.	ILLNNR2	\$0.08	Payment made via PAC
<input checked="" type="checkbox"/>	5/16/2018 11:36:04 AM	Pay	Overdue Item	Fives, sixes and sevens	39876000006419	\$0.32	Payment made via PAC

- If you are refunding a single credit card payment, you can enter an amount less than the amount paid to issue a partial refund.

**Note:**

When refunding multiple payments, you cannot change the amount to refund.

- (Optional) Type a note about the refund transaction in the **Note** field. If a note is entered in this field, it appears in the ILSStoreOrder.
- Click **REFUND**.

9. The Credit Card Refund Message box appears with the following message: **Patron's card has been credited and account is updated successfully.**
10. Click **OK** to close the message box.

When the refund is complete, a 6083 Patron Accounting refund transaction is recorded, and the transaction appears in the Transaction Summary view. To see the transaction, refresh the Transaction Summary view.

## Leap - Request Manager Updates

The Leap Request Manager now includes the INN-Reach view where you can see a list of the INN-Reach requests for which your branch is the lending library. You can select options from the **Branch**, **Status**, and **By** drop-down lists to filter the list. The **By** option specifies whether the selected branch is the item branch or the pickup branch. In addition, you can filter the list by typing in the **Filter Holds** box above the list.

Request Manager

↺

CLOSE

Branch Canajoharie Library (CAN) Status Shipped By Pickup

Holds ILL INN-Reach

Delete Properties

Filter Holds

Total items | 1 total

	AUTHOR	TITLE	FORMAT	PATRON NAME	INN-REACH PICKUP BRANCH	BARCODE	ITEM	SHIPPED DATE
<input type="checkbox"/>	Bell, Thomas, 1903-1961.	Out of this furnace	Book	INNREACH, p2184251@nair1	nair1 Print	0001000007425	Held	6/11/2018

In addition, you can view an INN-Reach request's properties from the Request Manager without opening the request.

To view an INN-Reach hold request's properties from the Request Manager:

1. Select **Utilities | Request Manager**.
2. Click **INN-Reach** to go to the INN-Reach view.
3. Click the check box next to the INN-Reach request for which you want to view more information.

The Properties button becomes enabled.

**Request Manager** ↻ CLOSE

Branch: Canajoharie Library (CAN) Status: Shipped By: Item

[Holds](#) [ILL](#) [INN-Reach](#)

🗑️ Delete **🔍 Properties** Filter Holds

Total items | 1 total

	COLLECTION	SHELF LOCATION	CALL NUMBER	AUTHOR	TITLE	FORMAT	PATRON NAME	PICKUP BRANCH	BARCODE	ITEM	SHIPPED DATE
<input checked="" type="checkbox"/>	HISTF		Fict Bel	Bell, Thomas, 1903-1961.	Out of this furnace	Book	INNREACH, p2184251@nair1	nair1 Print	0001000007425	Held	6/11/2018

4. Click the **Properties** button.

The Hold Properties dialog box appears. The initial tabbed view is the Hold Request view. You can click the link to view the patron record.

**Hold Properties** ✕

Hold Request Item About

Hold Status: Shipped  
 Status Date: 6/11/2018 2:34:17 PM  
 Activation Date: 6/11/2018  
 Expiration Date: 6/11/2028  
 Patron: [INNREACH, p2184251@nair1](#)  
 Registered At: Canajoharie Library  
 Pickup Branch: Canajoharie Library

CLOSE

The Item tabbed view displays information about the item record. You can click the link to view the item record.



Hold Properties

Hold Request

Item

About

Title:

Barcode:

Assigned Branch:

Material Type:

Routing Sequence:

Out of this furnace

0001000007425

Canajoharie Library

Book

Primary (custom)

CLOSE

The About view displays creation and modification information about the INN-Reach request.

Hold Properties

Hold Request

Item

About

Request ID:

Created by:

Date created:

Modified by:

Date modified:

888530

PolarisExec

6/11/2018 2:33:07 PM

CLOSE

## Leap - De-select a Row in the Find Tool

When you do a search using the Find Tool, you can now un-select the first entry in the results list by clicking on the check box before clicking on a column to sort the list.

Find Tool - Bibliographic Record

Bibliographic Record ▶ Basic Search ▶ Type of material ▶ Exact ▶

◀ Blu-ray Disc (brd) ▶ ▼ ☆ 🔍 ☰

	Title	Author	Format	Lin...	Hol...	Publication Date	Call Number	Con
<input type="checkbox"/>	Along came Polly [DVD]		Blu-ray...	13	0	2004	DVD ALON	5
	Chicka chicka boom boom : [DVD] ...and lots more...		Blu-ray...	20	0	2001	CHIC	5
	Wall-E	Burt, Ben	Blu-ray...	330	0			7
	The nightmare before Christmas [videorecording]	Elfman, Danny	Blu-ray...	330	0	2008	791.43/34	7
	Nim's island [videorecording]	Foster, Jodie	Blu-ray...	330	0	2008	791.43/72	7
	Speed Racer [videorecording (DVD)]		Blu-ray...	2	0	2008	791.43/72	7
	Forgetting Sarah Marshall [videorecording (DVD)]		Blu-ray...	2	0	2008		7
	The nightmare before Christmas [videorecording]	Elfman, Danny	Blu-ray...	330	0	2008	791.43/34	7

Ready 318 result(s)

☐ Count Only

ADD TO RECORD SET ▼ OPEN CANCEL

## Leap - Drop-Down Lists for Workform User Defaults

On the Settings workform, the Workform User Defaults tab now has drop-down lists from which you can select your defaults for displaying Leap workforms. In addition, the default English label **Workforms: Default view** can be modified using the following language string:

**SW\_CI\_SETTINGS\_WORKFORMS\_DEFAULT\_VIEW\_HEADER**

Settings			SAVE	REFRESH	CLOSE
<div>Print Options   Special Loan   <u>Workform User Defaults</u></div>					
Workforms: Default view		Request manager: Default status		Workform tracker: Recent records	
Check in	Normal ▼	Holds	Active ▼	Patron	10
Item record	Circulation ▼	ILL	Inactive ▼	Bibliographic	10
		INN-Reach	Active ▼	Item	10

## Leap - Restrict Setting Items to Missing in Picklist

With this release, the option to set an item to a circulation status of Missing is available only if you have the required permissions to change the item's circulation status, and the item's assigned branch is the same as the branch you selected at log-in.

## Leap - Alert When Item Was Checked Out to Outreach Services Patron

When you check out an item for an Outreach Services patron from Leap, an alert message appears if the patron already borrowed this item.

### Outreach Services Patron

The Girl with the dragon tattoo was previously checked out by this patron on 9/30/2015 2:45:01 PM. Do you want to continue?

<input type="button" value="CONTINUE"/>	<input type="button" value="CANCEL"/>
---	---------------------------------------

You can continue to check out the item by clicking **CONTINUE**.

If the Patron Services parameter, **ORS: Prompt for update during normal check-out** is set to **Yes** in Polaris Administration, another message asks if you want to update the Next Service Date. When you click **Yes**, the **Last Service** and **Next Service** dates are updated in the patron record, based on the Outreach Services delivery schedule set for that patron.

You can change the text for the messages in WebAdmin. See ["WebAdmin Updates" on page 3](#).