polaris

What's New in Polaris

7.8

innovative
Part of Clarivate

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Legal Notices

Contents

Polaris Installation Notes

Important:
When the new Polaris release is installed on a workstation, the file path changes from 7.7 to 7.8 as in the following examples:

- C:\ProgramData\Polaris\7.8
- C:\Program Files\Polaris\7.8
- C:\Program Files (x86)\Polaris\7.8

New or Modified Polaris Administrative Settings

The system administration settings below have been added or modified to support the new features in Polaris 7.8.

Setting	Purpose	Level
New Settings		
API: Block check-in for status "Claim never had"	Specifies whether a check-in performed using the Polaris API is blocked when the item has a status of Claim Never Had.	System
API: Block check-in for status "Claim returned"	Specifies whether a check-in performed using the Polaris API is blocked when the item has a status of Claim Returned.	System
API: Block the check-in if the item has item blocks	Specifies whether a check-in performed using the Polaris API is blocked when the item record has a block.	System
Import report retention period	Specifies the number of days the system keeps MARC import reports before purging them. Enter a number of days between 1 and 9,999. The default value is 365 days.	System
Polaris ExpressCheck options: Enable > Display numeric-only keypad	Displays a numeric keypad only (instead of a full keyboard) when patrons manually enter a barcode in Polaris ExpressCheck. For more information, see Numeric-Only Keypads for Barcodes and Passwords.	System, Library, Branch
Polaris ExpressCheck options: Enable > Display numeric keypad for patron	Displays a numeric keypad only (instead of a full keyboard) on the password entry screen in Polaris ExpressCheck. To set this option, you must enable the	System, Library, Branch

Setting	Purpose	Level
passwords	**Enable on-screen keypad** option. For more information, see Numeric-Only Keypads for Barcodes and Passwords.	
Polaris ExpressCheck: Patron blocks > Blocking notes	Blocks Polaris ExpressCheck transactions by patrons who have a blocking note on their patron record. For more information, see Support for Patron Blocking Notes.	System, Library, Branch
Rapido: Days spent in transit back to the lending institution	Specifies the shipping time in days when returning an item borrowed on the Rapido Consortial Borrowing platform to the owning institution. Polaris subtracts this value from the due date provided by Rapido to determine the borrowing patron's due date.	System
Rapido: Institutional patron ID	Specifies the patron ID for the institutional patron record that is used for loaning items on the Rapido Consortial Borrowing platform.	System, Library, Branch
Web App: Suppress View: PAC Preview	Indicates whether the PAC preview is suppressed from display in the Leap Bibliographic Record workform.	System, Library, Branch
New Permissions		
Leap printers: Modify	Allows users with this permission to set Direct to Printer options in Leap. This bypasses the browser printing options. For more information, see Using Optional Printing Improvements.	Circulation Subsystem

Polaris API Changes

The following methods have been updated:

Method Name	Purpose
JobsPurchaseOrdersPost	In previous versions, this method used the purchase order line item price found in the 020/024 tag subfield $c of the bibliographic record when creating purchase orders. As of version 7.8, the method now uses the price found in the 970 tag subfield $p instead. If no 970 tag subfield $p is present, the method uses the price from the 020/024 tag subfield $c.

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

Configuring Administrative Settings and Tables in Polaris System Administration (Web-Based)

In previous versions, most Polaris administrative parameters, profiles, and tables could only be configured in the Polaris staff client. In version 7.8, you can configure most administrative settings and many administrative tables on the Settings and Tables page in Polaris System Administration (web-based).

This section covers the following topics:

- Working with Administrative Settings
- Working with Administrative Tables

Working with Administrative Settings

> **Note:**
> In Polaris System Administration (web-based), administrative settings are no longer described as "profiles" or "parameters." We refer to all administrative settings as "settings."

This section covers the following topics:

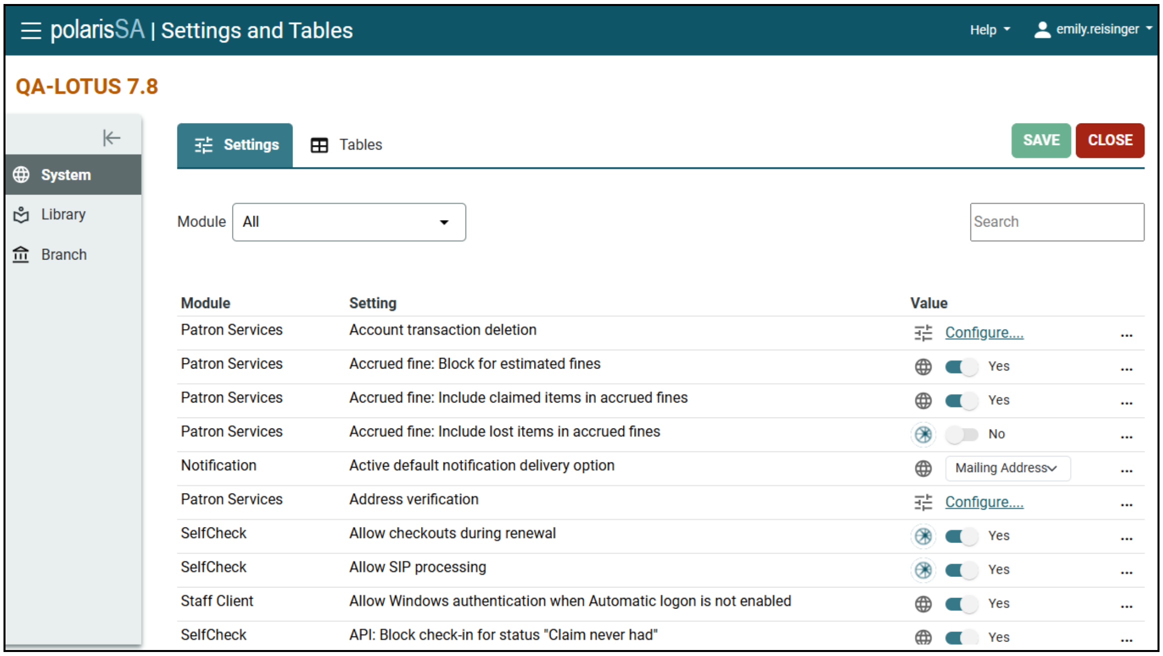
- Accessing Administrative Settings
- Configuring Settings on the Settings and Tables Page
- Accessing Documentation for Polaris Administration (Web-Based) Settings

Accessing Administrative Settings

To access settings in Polaris System Administration (web-based)

- On the Home page, select **Settings and Tables**.

  The Settings and Tables page appears. The system displays the **Settings** tab by default.



Configuring Settings on the Settings and Tables Page

On the **Settings** tab of the Settings and Tables page, you can:

- Configure more than 600 different Polaris administrative settings. Depending on the setting, you can do one of the following:
  - Select or enter the setting value directly on the Settings and Tables page.
  - Select the **Configure** link to open a dialog where you can configure the setting.
- Select an option from the menu on the left side of the screen to view system, library, or branch-level settings.
- Select an option from the **Module** list to limit the list of settings to a particular module. For example, to view only acquisitions settings, select Acquisitions from the **Module** list.
- Search for settings by typing in the **Search** box.

- Use the icons in the **Value** column to understand where each setting is configured. The icons indicate whether each setting is configured at the system, library, or branch level, or is the Polaris default setting.
- Select **Options** ... to access additional options for each setting:
    - **Set to default setting** — Select this option to return a setting to its default value.
    - **Inherit higher level values** — Select this option to inherit a setting value from a higher-level organization.

Accessing Documentation for Polaris Administration (Web-Based) Settings

The Polaris Administration (web-based) documentation now includes the following reference topics, which list every setting that you can configure for your Polaris system:

- Acquisitions Settings Reference
- Cataloging Settings Reference
- Notification Settings Reference
- Patron Services Settings Reference
- Request Settings Reference
- SelfCheck Settings Reference
- Serials Settings Reference
- Staff Client Settings Reference

Additional documentation for settings is available here: https://documentation.iii.com/leap/7.8/Default.htm#LEAP1_0/SystemAdmin/SettingsTables/Settings_tables.htm

Working with Administrative Tables

Note:
In Polaris System Administration (web-based), administrative tables are no longer described as "policy tables," "database tables," or "notification tables." We refer to all administrative tables as "tables."

This section covers the following topics:

- Accessing Administrative Tables
- Configuring Tables on the Settings and Tables Page
- Accessing Documentation for Polaris Administration (Web-Based) Tables

Accessing Administrative Tables

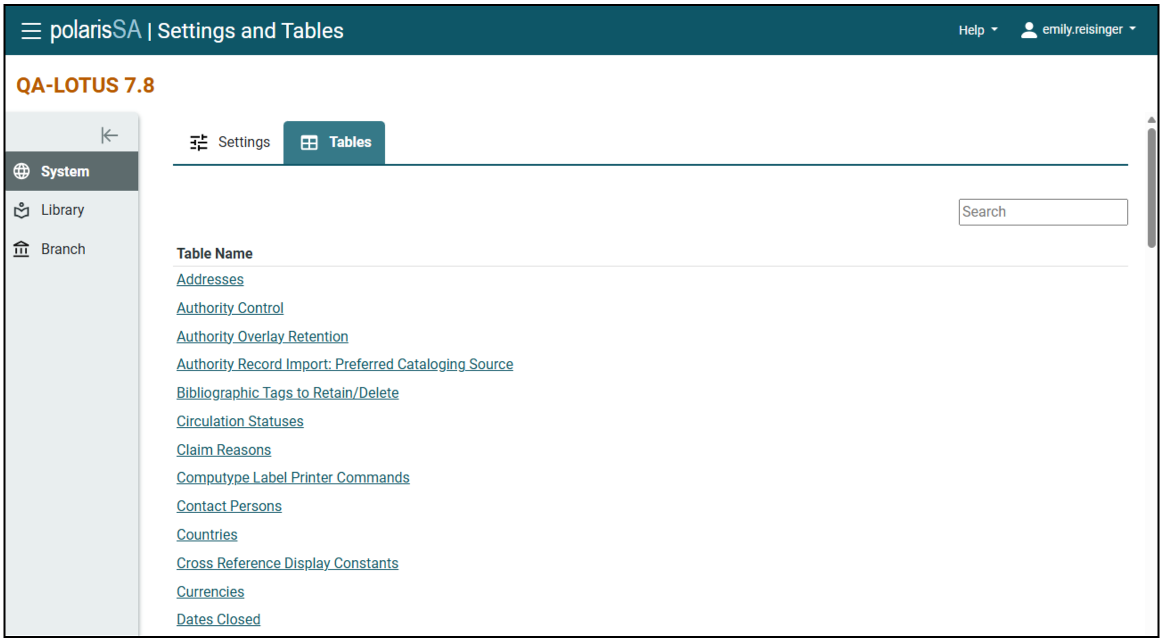
To access settings in Polaris System Administration (web-based)

1. On the Home page, select **Settings and Tables**.

   The Settings and Tables page appears.

2. Select the **Tables** tab.

The system displays a list of all administrative tables.



Configuring Tables on the Settings and Tables Page

On the **Tables** tab of the Settings and Tables page, you can:

- Configure more than 80 different Polaris administrative tables. Select a table to view and configure it.
- Select an option from the menu on the left side of the screen to view system, library, or branch-level tables.
- Search for a table by typing in the **Search** box.

Accessing Documentation for Polaris Administration (Web-Based) Tables

The Polaris Administration (web-based) documentation now includes the following reference topic, which lists every table that you can configure for your Polaris system: Administrative Tables Reference.

Additional documentation for administrative tables is available here: https://documentation.iii.com/leap/7.8/Default.htm#LEAP1_0/SystemAdmin/SettingsTables/Settings_tables.htm

Improvements to Staff Member Management in Polaris System Administration (Web-Based)

Version 7.8 includes the following improvements to the Staff Members workform in Polaris System Administration (web-based):

- Support for Acquiring Permission Groups from Another Staff Member
- New User-Specific Settings

Support for Acquiring Permission Groups from Another Staff Member

Polaris System Administration (web-based) now supports copying all of one staff member's permission groups to another staff member.

To acquire permission groups from another staff member

1. Find the staff member whose permissions you want to configure and open their record in the Staff Members workform.
2. On the **Membership** tab, select **Acquire Permission Groups**.

   The Acquire Permission Groups dialog appears.
3. Find the staff member from whom you want to acquire permission groups. You can filter the list by typing in the **Search** box.
4. Select a staff member.
5. Select **Acquire**.

   The system adds all permission groups from the staff member you selected to the current staff member and closes the Acquire Permission Groups dialog. The permission groups you acquired appear on the **Membership** tab.

New User-Specific Settings

In version 7.8, you can now set a number of new user-specific settings on the **Settings** tab of the Staff Members workform. In previous versions, you could only configure certain settings at the staff member level by signing in to the Polaris staff client. In version 7.8, you can configure all user-specific settings in Polaris System Administration (web-based).

Improvements to Workstation Management in Polaris System Administration (Web-Based)

You can now copy a workstation, or configure workstation-level settings in Polaris System Administration (web-based). When you want to create a new workstation, now you can start by copying an existing workstation. You can now configure settings at the workstation level in the web.

This topic covers the following:

- Copying a Workstation
- Configuring Workstation-Level Settings

Copying a Workstation

When you are creating a new workstation, now you can start by copying an existing workstation. After you copy the existing workstation, you can create a new workstation by changing settings and saving it under a new network name.

To copy a workstation

1. On the Polaris System Administration (web-based) Home page, select **Workstations**.

   The Workstations page appears.

2. To filter the list of workstations, begin typing in the **Search** box. You can enter the workstation's name or organization.
3. In the Actions column, select **Options** ··· and then select **Copy**.

   The workstation record appears.

4. Enter a new network name.
5. (Optional) Change other workstation settings.
6. Select **SAVE**.

Configuring Workstation-Level Settings

Workstation-level setting have been added in Polaris System Administration (web-based). You can now configure settings at the workstation level in the web.

To configure workstation-level settings

1. On the Polaris System Administration (web-based) Home page, select **Workstations**.

   The Workstations page appears.
2. To filter the list of workstations, begin typing in the **Search** box. You can enter the workstation's name or organization.
3. In the Actions column, select **Options** ··· and then select **Edit**.

   The workstation record appears.
4. Configure the workstation-level settings for this workstation. To do this:
   a. Select the **Settings** tab.
   b. Browse settings using the Module list or search for a specific setting by keyword.
   c. Select a setting to change it.

      For detailed instructions, see Configuring Administrative Settings and Tables in Polaris System Administration (Web-Based).
5. Select **SAVE**.

Configuring Permission Groups in Polaris System Administration (Web-Based)

You can now configure permission groups in Polaris Administration (web-based). This means that you can configure all the permissions that control your Polaris system without signing in to the Polaris staff client.

This section covers the following topics:

- Creating a Permission Group
- Copying a Permission Group
- Editing a Permission Group
- Deleting a Permission Group
- Accessing Documentation for Permissions in Polaris Administration (Web-Based)

Creating a Permission Group

Permission groups let you assign a set of permissions to a group that can consist of a combination of staff members, workstations, and organizations. If you add an organization to a permission group, all staff members and workstations linked to that organization have the permissions assigned to the permission group.

You can create a permission group if you have the following permissions in Polaris System Administration (web-based):

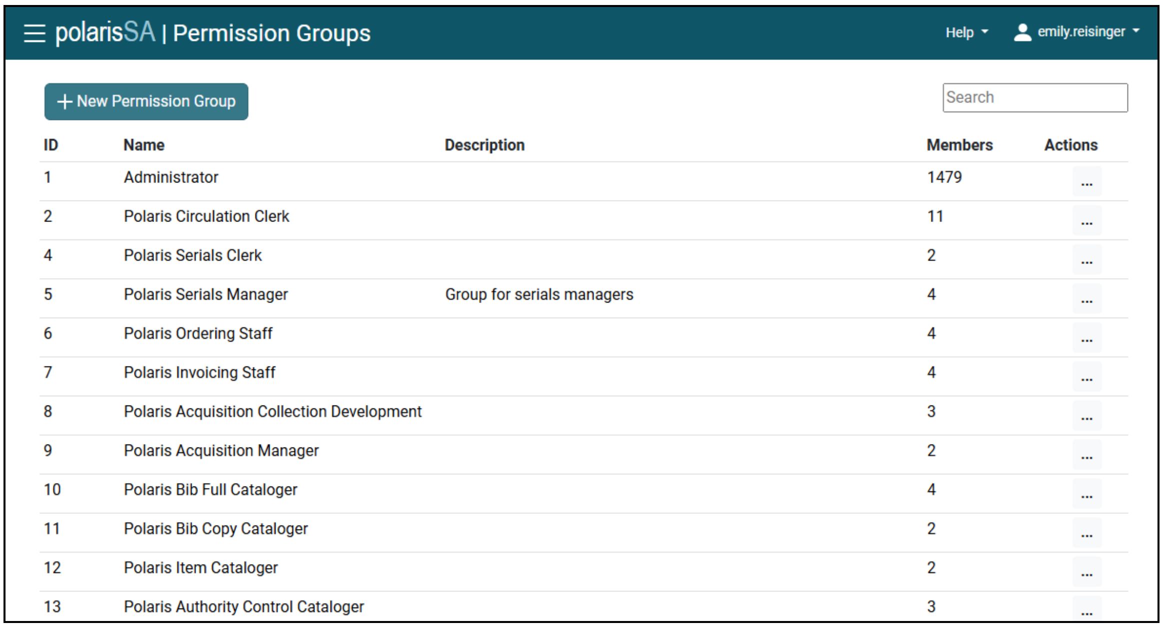
- Access Administration: Allow
- Permission Group: Access
- Permission Group: Create

For more information about system administration permissions, see System Administration Permissions Reference.

To create a permission group

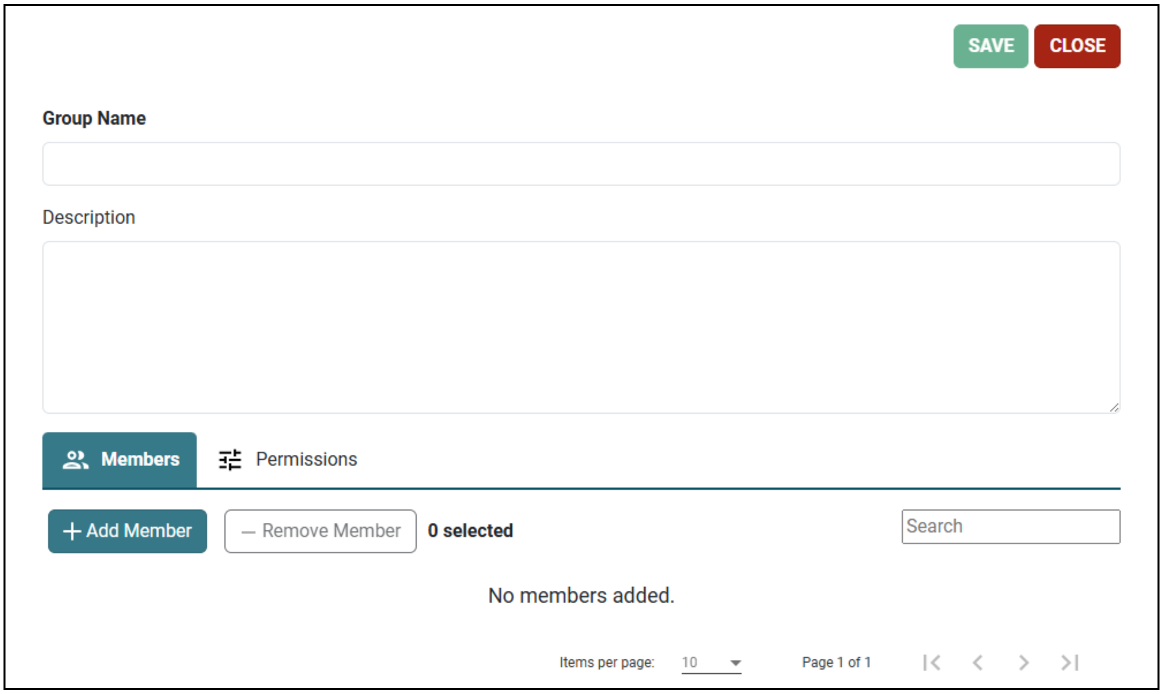
1. On the Polaris System Administration (web-based) Home page, select **Permission Groups**.

   The Permission Groups page appears.



2. Select **New Permission Group**.

   A new permission group workform appears.



3. In the **Group Name** box, enter a unique name for the permission group.
4. (Optional) In the **Description** box, enter a description of the group.
5. Add members to the group. If you add a member by mistake, you can remove the member. For more information, see Adding or Removing Permission Group Members.
6. Add permissions to the group. If you add a permission by mistake, you can remove it. You can also acquire permissions from another permission group or modify the organizations for permissions that require organizations. For more information, see Adding, Modifying, or Removing Permission Group Permissions.
7. Select **SAVE**.

Adding or Removing Permission Group Members

This section covers the following topics:

- Adding members to a permission group
- Removing members from a permission group

To add members to a permission group

1. Select the **Members** tab.
2. Select **Add Member**.

   The Add Member dialog appears.
3. Select one of the following options:
   - **Staff**— Adds one or more staff members to the group.
   - **Workstation**— Adds one or more workstations to the group.
   - **Organization**— Adds one or more organizations to the group.

   > **Note:**
   > If you want to add a combination of staff members, workstations, and organizations to the same permission group, add one type of group member first and then repeat the workflow to add the other types of group members.
4. Find the staff members, workstations, or organizations you want to add to the group. You can filter the list by typing in the **Search** box.
5. Select one or more staff members, workstations, or organizations.
6. Select **Add**.

   The system closes the Add Member dialog. The group members you added appear on the **Members** tab.

To remove members from a permission group

1. Select the **Members** tab.
2. Select the checkbox next to the members you want to remove.
3. Select **Remove Member**.

   The system removes the member from the permission group. Your change is not saved until you save the permission group.

Adding, Modifying, or Removing Permission Group Permissions

This section covers the following topics:

- Adding permissions to a permission group
- Removing permissions from a permission group
- Acquiring permissions from another permission group
- Modifying the organizations for a permission

To add permissions to a permission group

1. Select the **Permissions** tab.
2. Select **Add Permission**.

   The Add Permissions dialog appears.
3. Find the permissions you want to add to the group. You can filter the list by typing in the **Search** box.
4. Select one or more permissions.
5. Select **Next**.

   The Add Permissions dialog lists the permissions you selected. If one or more of the permissions requires an organization, the system prompts you to select an organization for those permissions.
6. Do one or both of the following:
   - Expand the **Unowned Permissions** list to see the unowned permissions you are adding to the permission group. (These permissions have no organization.)
   - Select an organization for each permission that requires it. For each permission, select the down arrow and select one or more organizations.
7. Select **Done**.

   The system closes the Add Permissions dialog. The permissions you added appear on the **Permissions** tab.

To remove permissions from a permission group

1. Select the **Permissions** tab.
2. Select the checkbox next to the permissions you want to remove.
3. Select **Remove Permission**.

   The system removes the permission from the permission group. Your change is not saved until you save the permission group.

To acquire permissions from another permission group

1. Select the **Permissions** tab.
2. Select **Acquire Permissions**.

   The Acquire Permissions dialog appears.
3. Find the permission group you want to acquire permissions from. You can filter the list by typing in the **Search** box.
4. Select a permission group.
5. Select **Acquire**.

   The system adds all permissions from the group you selected to the current permission group and closes the Acquire Permissions dialog. The permissions you acquired appear on the **Permissions** tab.

To modify the organizations for a permission

> **Note:**
> Not all permissions have organizations associated with them.

1. Select the **Permissions** tab.
2. Select the checkbox next to the permission you want to modify.

   The system displays the organizations associated with the permission.
3. Do one or both of the following:
   - Select an organization and select **Remove Organization** to remove it from the list.
   - Select **Add Organization** to add one or more organizations for the permission.

Copying a Permission Group

You can create a new permission group by copying an existing one if you have the following permissions enabled in Polaris System Administration (web-based):

- Access Administration: Allow
- Permission Group: Access
- Permission Group: Create

For more information about system administration permissions, see System Administration Permissions Reference.

To copy a permission group

1. On the Polaris System Administration (web-based) Home page, select **Permission Groups**.

   The Permission Groups page appears.

2. Find the permission group you want to copy. You can filter the list of permission groups by typing in the **Search** box.
3. In the **Actions** column, select **Options** ..., and select **Copy**.

   A copy of the permission group record appears. The copy includes all the permissions and group members configured in the original permission group record.

4. In the **Group Name** box, enter a unique name for the permission group.
5. (Optional) Edit the permission group information. See Creating a Permission Group for more information about permission group fields.
6. Select **SAVE**.

Editing a Permission Group

You can edit a permission group if you have the **Permission Group: Modify** permission enabled in Polaris System Administration (web-based). For more information about system administration permissions, see System Administration Permissions Reference.

To edit a permission group

1. On the Polaris System Administration (web-based) Home page, select **Permission Groups**.

   The Permission Groups page appears.

2. Find the permission group you want to edit. You can filter the list of permission groups by typing in the **Search** box.

3. In the **Actions** column, select **Options**, and select **Edit**.

   The permission group record appears.

4. Edit the permission group information. See Creating a Permission Group for more information about permission group fields.

5. Select **SAVE**.

Deleting a Permission Group

You can delete a permission group if you have the **Permission Group: Delete** permission enabled in Polaris System Administration (web-based). For more information about system administration permissions, see System Administration Permissions Reference.

To delete a permission group

1. On the Polaris System Administration (web-based) Home page, select **Permission Groups**.

   The Permission Groups page appears.

2. Find the permission group you want to delete. You can filter the list of permission groups by typing in the **Search** box.

3. In the **Actions** column, select **Options**, and select **Delete**.

   The system prompts you to confirm that you want to delete the permission group.

4. Select **Continue**.

   The system deletes the permission group and displays a success message.

Accessing Documentation for Permissions in Polaris Administration (Web-Based)

The Polaris Administration (web-based) documentation now includes the following reference topics, which list every permission that you can configure for your Polaris system:

- Acquisitions Permissions Reference
- Cataloging Permissions Reference
- Circulation Permissions Reference
- Leap Permissions Reference
- Serials Permissions Reference
- System Administration Permissions Reference

Additional documentation for permission group workflows is available here: https://documentation.iii.com/leap/7.8/Default.htm#LEAP1_0/SystemAdmin/Permissions/Permissions.htm

Setting up Servers Using Polaris System Administration (Web-Based)

You can now configure servers in Polaris Administration (web-based). This means that you can configure the active servers that connect to your Polaris system without signing in to the Polaris staff client. Server records store connection, database, and web server (WWW) settings for each server. In most cases Innovative sets up SQL servers as part of your system implementation, but you might want to add or edit a search server or a web server later.

This section covers the following topics:

- Adding a Search Server (Z39.50)
- Editing Your Web Server

Adding a Search Server (Z39.50)

To add a search server (Z39.50)

1. Sign in to Polaris System Administration (web-based).
2. From the Home screen, select **Servers**.

   The Servers page opens.
3. Select **+ New Server**.

   The Servers add page opens.
4. Enter the following information :
   a. **Network Name** — Enter a network name for the server. This can be the same as **Display Name**.

      > **Important**:
      > The network name for a remote Z39.50 server cannot contain the single quote character (apostrophe), because it causes

connection problems in PAC searches. For example, use Bowkers Books in Print instead of Bowker’s Books in Print.

  b. **Display Name**— Enter the name that you want to display in the Polaris user interface for this server.

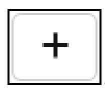
  c. (Optional) **Resource Group** — To restrict server access to a specific resource group, select it from the list. Select **None** if you want every organization to have access (no resource group restriction).

  d. (Optional) **Note** — Type a non-public note (255 characters maximum) describing this server.

  e. Select **Save**

5. Add a connection:

> **Note**:
> Only one connection is allowed per server.

  a. On the **Connections** tab, select **Add** .

     The Define Connection dialog appears.

  b. Select in the **Connection Type** list, select **Search Server**.

  c. Enter a **Connection Name**.

  d. On the **Connections** tab in the dialog, enter the following:

     i. Provider — Select **Z39.50**.

     ii. Host Name — Enter the server's 11-digit IP address.

     iii. Port — Enter **210**.

     iv. Configure the login. Either select the **Anonymous Login** checkbox or enter the **Username** and **Password** required for the connection.

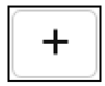
  e. Select **OK**.

     The new connection appears in a row under Connection Type and Connection Name.

6. Test the connection:

   a. Select the search server row.
   b. Select **Test Connection**.
7. Select which databases are available through this search server:

   > **Note**:
   > A server can connect to multiple databases.

   a. On the Databases tab, select Add .

      The Define Database dialog opens.
   b. Enter or select the following:
      i. Database Name — Enter the name of the database.
      ii. Display Name — Enter the name that will display for the database.
      iii. Staff Access Branches — Search and select branches by name. The branches you select are the branches that can search the database through the Remote Database Find Tool in Leap.
   c. Select **OK**.
8. Select **SAVE**.

Editing Your Web Server

You can edit Web Server Settings only if you're connected to that web server. If you are connected to a different server, the options are disabled.

> **Note**:
> Innovative configures a WWW server for most libraries during setup. You need to find and edit the existing server only if there are updates. If you need help configuring a WWW server, contact Innovative.

Importing Student Records Using Leap

Now you can use a simplified process to import patron or student data into Leap using our new .csv template. If you are familiar with using a .trn file, the format generated by the Polaris offline staff client, to import patron or student data into Polaris, you can still do that. Now you can use Leap to import the either .csv or .trn files.

This topic covers the following:

- Importing a .csv File
- Importing a .trn File
- Finding Your Polaris Codes Set

Importing a .csv File

The .csv file maps the data in your registration system to Polaris data fields. You are responsible for creating the file and ensuring that it conforms to the necessary format and content.

Creating a unique patron barcode for each patron is mandatory. If you load the data with just one patron barcode, the system will generate one patron record and continue to overwrite it.

For help filling in the appropriate data, refer to Patron Import Data Dictionary for .csv Files.

To import a .csv file

1. Find the Polaris codes set for your system, or contact your Polaris Site Manager for a list of the Polaris codes set for your system.
2. Download the .csv template.
    a. Sign in to Leap.
    b. Select **Utilities** > **Background Processing**.
       The Background Processing workform opens.
    c. Select the **Patron Import** view.

   d. Select **DOWNLOAD TEMPLATE**.

      Polarisdownloads a .csv template file.

3. Fill the .csv template with patron info.

   In the .csv template, the row under the Database Value is a collection of translation strings. Do not put any patron data in this row. On import, Polaris ignores the translation string row.

   a. Assign a valid transaction code (in the .csv) to each patron's information.
   b. Use the Polaris codes from the first step to fill in the **PatronCodeID** field.
   c. Assign a unique patron barcode to each patron's information and place it in the **PatronBarcode** field.

      For help filling in the appropriate data, refer to Patron Import Data Dictionary for .csv Files.

4. Import the filled-in .csv file into Leap.

   a. Sign in to Leap.
   b. Select **Utilities** > **Background Processing**.

      The Background Processing workform opens.

   c. Select the **Patron Import** view.
   d. Select **IMPORT FILE**.

      The Select File dialog appears.

   e. Click the **SELECT FILE** button to browse to your filled-in .csv file.
   f. (Optional) Select the **Suppress Verify Patron Data Block** checkbox to skip adding a **verify patron data block** to each imported patron file. If this checkbox is left deselected, Polaris adds a block to every imported patron file so library staff members can verify the patron information manually before they lift the block.
   g. Select **IMPORT FROM FILE**.

      The system imports the data using a background process. A report appears in the table when the processing is complete.

5. (Optional) Select a table row to see the corresponding Patron Import Report.

If Polaris finds potential duplicate patron records in the database, it lists the potential duplicates in the upload report. You can use the report to find duplicate patron records so you can merge or delete them.

6. (Optional) Delete the patron import report.
   a. Select the checkboxes beside the file names you want to delete.
   b. Select **DELETE**.

      This also deletes the file on the server.

Importing a .trn File

The .trn file maps the data in your registration system to Polaris data fields. You are responsible for creating the file and ensuring that it conforms to the necessary format and content.

Creating a unique patron barcode for each patron is mandatory. If you load the data with just one patron barcode, the system will generate one patron record and continue to overwrite it.

For help filling in the appropriate data, refer to Patron Import Data Dictionary for .trn Files.

To import a .trn file

1. Find the Polaris codes set for your system, or contact your Polaris Site Manager for a list of the Polaris codes set for your system.
2. Check your .trn file to make sure you've done the following:
   a. Assign a valid record code (for the .trn file) to each patron’s information.
   b. Use the Polaris codes from the first step to fill in the **Patron Code ID** field.
   c. Assign a unique patron barcode to each patron’s information and place it in the **Patron Barcode** field.

      For help filling in the appropriate data, refer to Patron Import Data Dictionary for .trn Files.
3. Import the existing .trn file into Leap.

   a. Sign in to Leap.
   b. Select **Utilities** > **Background Processing**.

      The Background Processing workform opens.
   c. Select the **Patron Import** view.
   d. Select **IMPORT FILE**.

      The Select File dialog appears.
   e. Click the **SELECT FILE** button to browse to your .trn file.
   f. (Optional) Select the **Suppress Verify Patron Data Block** checkbox to skip adding a **verify patron data block** to each imported patron file. If this checkbox is left deselected, Polaris adds a block to every imported patron file so library staff members can verify the patron information manually before they lift the block.
   g. Select **IMPORT FROM FILE**.

      The system imports the data using a background process. A report appears in the table when the processing is complete.
4. (Optional) Select a table row to see the corresponding Patron Import Report.

   If Polaris finds potential duplicate patron records in the database, it lists the potential duplicates in the upload report. You can use the report to find duplicate patron records so you can merge or delete them.
5. (Optional) Delete the patron import report.
   a. Select the checkboxes beside the file names you want to delete.
   b. Select **DELETE**.

      This also deletes the file on the server.

Finding Your Polaris Codes Set

You can find the Polaris Patron Codes for yourself in Polaris System Administration (web-based).

To find the Polaris codes set for your system

1. Sign in to Polaris System Administration (web-based)
2. From the home screen, select **Settings and Tables**.
3. At the **System Level**, select **Tables**.
4. Navigate to the **Patron Codes** table.
5. Use the numbers in the **ID** column to signify the type of patron in the description column.

Creating and Managing MARC Import Profiles

In previous versions, you could only create and manage MARC import profiles in the Polaris staff client. In version 7.8, you can perform these workflows in Leap, with no need to sign in to the staff client.

This section covers the following topics:

- Creating Import Profiles
- Editing Import Profiles
- Copying Import Profiles
- Deleting Import Profiles

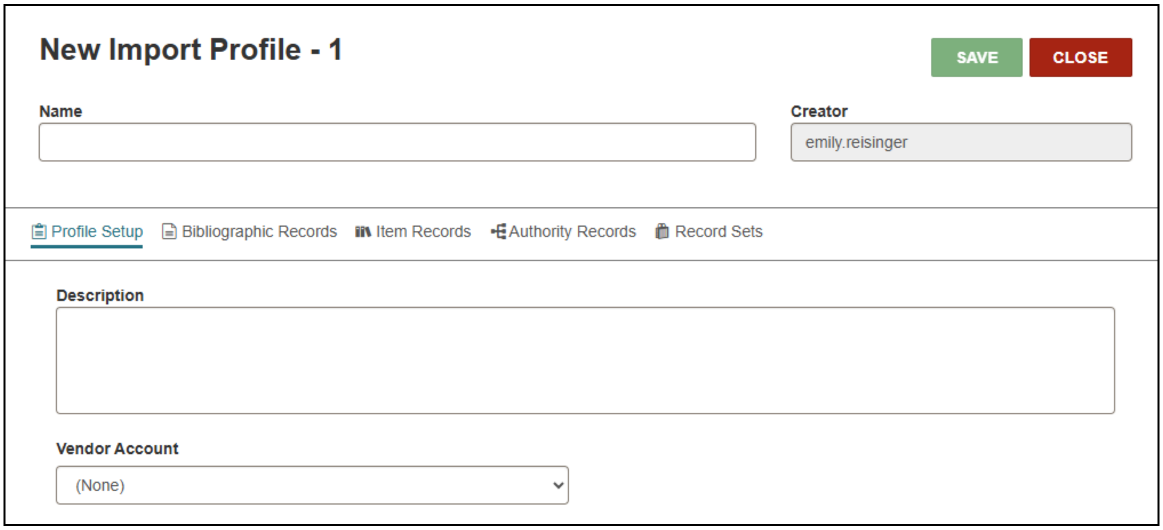
Creating Import Profiles

You can create import profiles in Leap if you have the **Import profiles: Create** permission in Polaris System Administration (web-based). For more information about cataloging permissions, see Cataloging Permissions Reference.

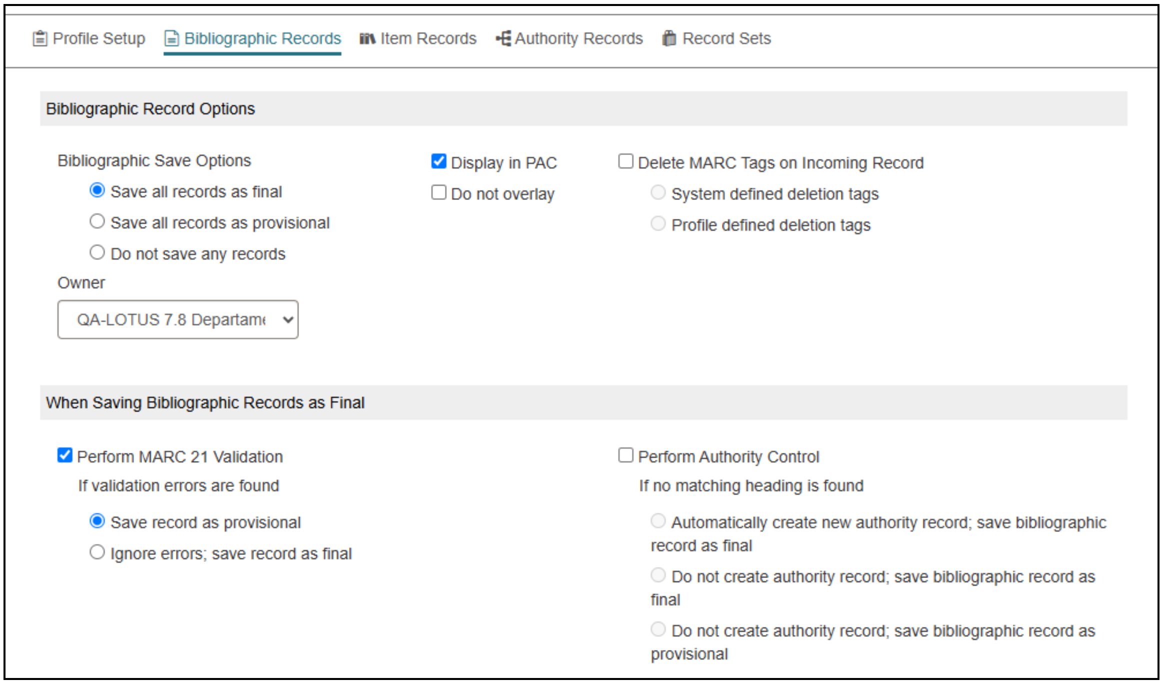
To create an import profile

1. Select **New** > **Import Profile**.

   A New Import Profile workform appears.



2. In the **Name** box, enter a unique name for the import profile.
3. In the **Description** box, enter a description of the import profile.
4. If you're setting up a profile for an ebook vendor, select a vendor from the **Vendor Account** list. Otherwise, leave this setting set to **(None)**.
5. Do one or more of the following:
    - Select the **Bibliographic Records** tab to set import options for bibliographic records.



- Select the **Item Records** tab to set import options for item records.
- Select the **Authority Records** tab to set import options for authority records.
- Select the **Record Sets** tab to set import options for record sets.

6. Select **SAVE**.

Editing Import Profiles

You can edit import profiles in Leap if you have the **Import profiles: Modify** permission in Polaris System Administration (web-based). For more information about cataloging permissions, see Cataloging Permissions Reference.

> **Note:**
> You cannot edit default import profiles. For more information about default profiles, see About Default Import Profiles.

To edit an import profile

1. Find the import profile you want to edit, and open it.
2. Edit import profile options. You can do one or more of the following:
   - In the **Name** box, edit the name of the import profile.
   - In the **Description** box, edit or enter a description of the import profile.
   - If you're setting up a profile for an ebook vendor, select a vendor from the **Vendor Account** list. Otherwise, leave this setting set to **(None)**.
   - Set import options for bibliographic records.
   - Set import options for item records.
   - Set import options for authority records.
   - Set import options for record sets.
3. Select **SAVE**.

Copying Import Profiles

You can create a new import profile by copying an existing one. For example, if you have an import profile that you use with a particular vendor, you can make a copy of it to use with a different vendor.

Leap offers default import profiles that are designed for specific types of import processing. You cannot change default import profiles, but you can copy them and customize them for your own purposes. For more information, see About Default Import Profiles.

You can copy import profiles in Leap if you have the **Import profiles: Create** permission in Polaris System Administration (web-based). For more information about cataloging permissions, see Cataloging Permissions Reference.

To copy an import profile

1. Find the import profile you want to copy, and open it.
2. Select **ACTIONS** > **Copy**.

The New Import Profile workform appears. Leap populates the workform fields with the import profile settings from the profile you are copying.

3. In the **Name** box, enter a unique name for the import profile.
4. Edit import profile options. See Creating Import Profiles for more information about import profile options.
5. Select **SAVE**.

Deleting Import Profiles

You can delete import profiles in Leap if you have the **Import profiles: Delete** permission in Polaris System Administration (web-based). For more information about cataloging permissions, see Cataloging Permissions Reference.

To delete an import profile

1. Find the import profile you want to delete, and open it.
2. Select **ACTIONS** > **Delete**.

   Leap prompts you to confirm the deletion.
3. Select **CONTINUE**.

   Leap deletes the import profile.

Searching Remote Databases for Authority Records

Leap's Find Tool now offers the ability to search both local and remote databases for authority records. For step by step information on searching remote databases, see Copy Cataloging.

Checking for and Fixing Unlinked Authority Headings in Leap

In previous versions, Leap displayed the Check Headings Assistant dialog when you saved a bibliographic record that contained authority headings with no matching authority record. The Check Headings Assistant dialog displayed read-only information about the unlinked headings. To fix the unlinked headings, you had to make a note of each and manually edit the appropriate bibliographic record or authority record to fix each heading.

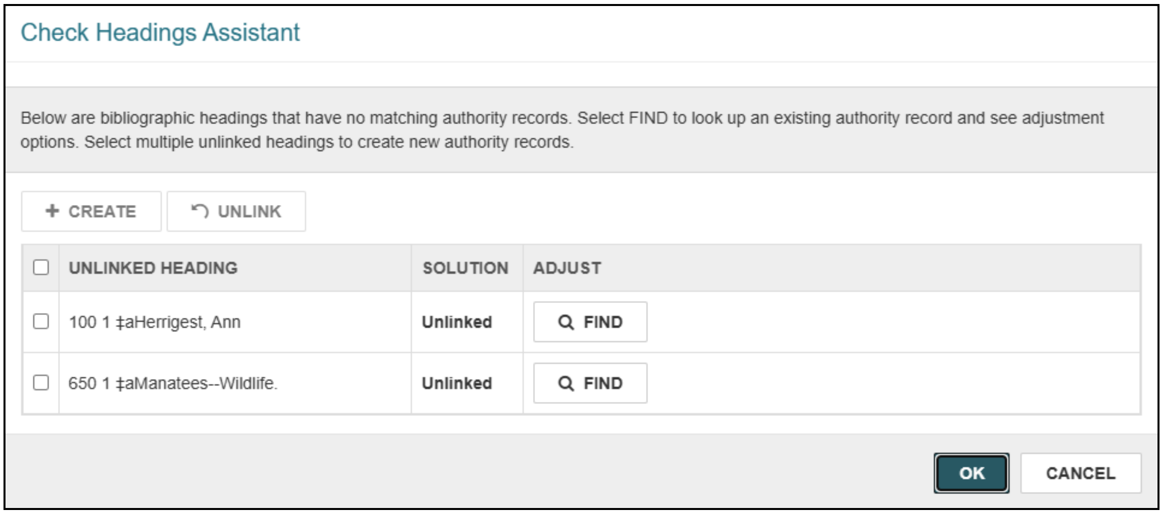
In version 7.8, Leap includes a new Check Headings feature that lets you check for unlinked headings and fix them without manually editing multiple bibliographic or authority records.

You can fix unlinked authority headings if you have the **Authority records: Create** and **Authority records: Modify** permissions in Polaris System Administration (web-based). For more information about cataloging permissions, see Cataloging Permissions Reference.

To check for and fix unlinked authority headings

1. Find the bibliographic record you want to check for unlinked authority headings, and open it in the Bibliographic Record workform.
2. Select **Actions** > **Check Headings**.

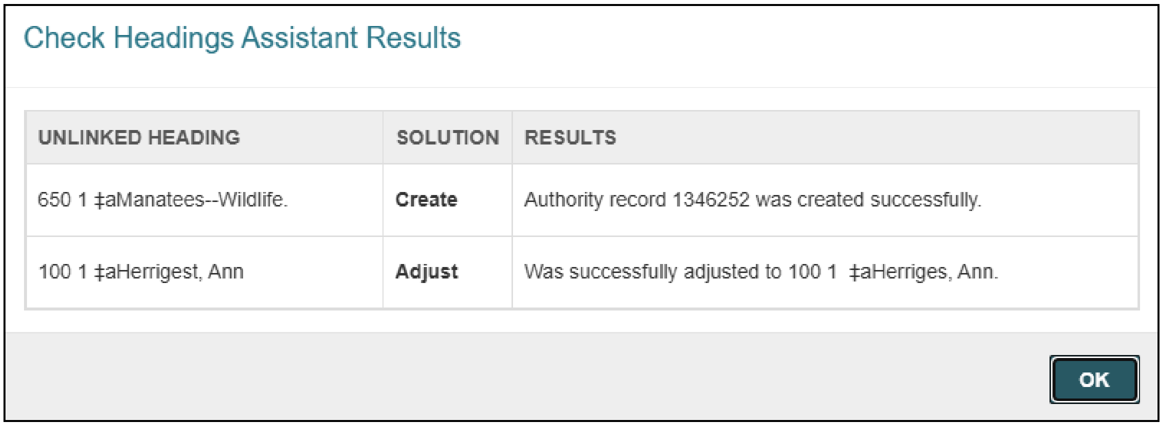
   Leap displays the Check Headings Assistant dialog, which lists all unlinked headings for the bibliographic record.



3. Fix each unlinked heading by doing one of the following.
    - Link a heading to an existing authority record.
    - Create a new authority record for an unlinked heading.
4. (Optional) If you need to undo a change you made in step 3 (for example, if you linked a heading to the wrong authority record by mistake), do the following:
    a. Select one or more headings.
    b. Select **UNLINK**.

       Leap discards your changes for the selected headings and updates the Check Headings Assistant dialog. The **SOLUTION** column displays a status of **Unlinked** for the headings you selected. You can link the headings to different authority records.
5. Select **OK** to close the Check Headings Assistant dialog.

   Leap displays the Check Headings Assistant Results dialog, which shows a summary of your changes to the unlinked headings.



Check Headings Assistant Results

UNLINKED HEADING	SOLUTION	RESULTS
650 1 ‡aManatees--Wildlife.	**Create**	Authority record 1346252 was created successfully.
100 1 ‡aHerrigest, Ann	**Adjust**	Was successfully adjusted to 100 1 ‡aHerriges, Ann.

OK

6. Select **OK** to close the Check Headings Assistant Results dialog.

   Leap displays a notification to confirm that your changes were made successfully.

7. Save the bibliographic record.

   Leap saves your changes to fix unlinked authority headings and updates the Headings view of the Bibliographic Record workform to reflect your changes.

Linking a Heading to an Existing Authority Record

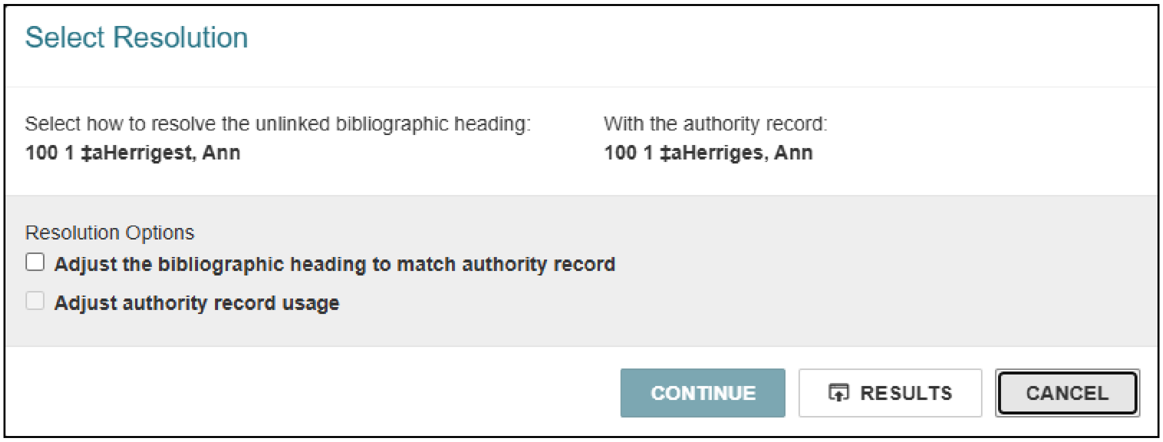
To link a heading to an existing authority record

1. Select a heading and then select **FIND**. You can select more than one heading.

   Leap displays the authority record Find Tool.

2. Search for an existing authority record and select it.
3. Select **OPEN**.

   Leap displays the Select Resolution dialog.



4. Select one or both of the following resolution options:
   - **Adjust the bibliographic heading to match authority record** — Updates the bibliographic record heading to match the heading from the authority record.
   - **Adjust authority record usage** — Updates the authority record usage to match the heading from the bibliographic record.

   > **Note:**
   > Resolution options are disabled if you are not allowed to perform the specified action with the selected authority record. If neither resolution option is enabled, the system displays a notification. In this situation, you can select **Results** to return to the authority record search results and select a different authority record.

5. Select **CONTINUE**.

   Leap closes the Select Resolution dialog and updates the Check Headings Assistant dialog. The **SOLUTION** column displays a status of **Adjust** for the headings you selected. The **ADJUST** column displays a summary of the changes that Leap will make when you select **OK**.

   > **Note:**
   > Changes to the bibliographic record are not saved until you select **OK** to close the Check Headings Assistant dialog and then save the bibliographic record. Changes to authority records are not saved until you select **OK** to close the Check Headings Assistant dialog.

Creating a New Authority Record for an Unlinked Heading

To create a new authority record for an unlinked heading

1. Select an unlinked heading. You can select more than one heading.
2. Select **CREATE**.

   Leap updates the Check Headings Assistant dialog. The **SOLUTION** column displays a status of **Create** for the headings you selected.

   > **Note:**
   > Leap does not create the new authority record until you select **OK** on the Check Headings Assistant dialog. When you select **OK**, Leap creates an authority record based on the bibliographic record heading and links the new authority record to the heading.

Checking for Duplicate Authority Records without Saving

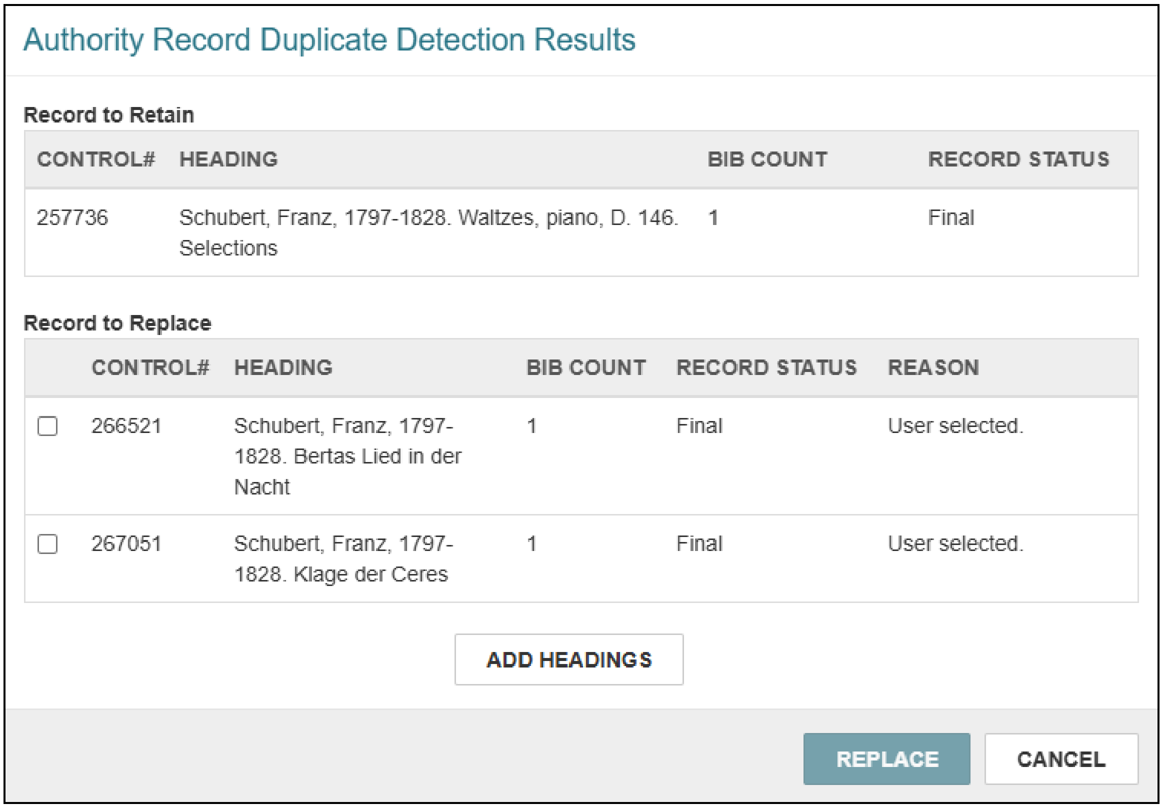
Leap performs duplicate checking when you save an authority record. As of version 7.8, you can also check for duplicate authority records at any time without changing or saving the authority record.

To check for duplicate authority records without saving

1. Find the authority record you want to check, and open it in the Authority Record workform.
2. Select **Actions** > **Duplicate Check**.

   Leap performs the duplicate check and displays results on the Authority Record Duplicate Detection Results dialog.

   > **Note:**
   > Leap displays the Authority Record Duplicate Detection Results dialog regardless of whether the system finds potential duplicate records using your library's duplicate detection rules. If the duplicate check finds no potential duplicates, you can still manually add duplicate records as described below.



3. On the Authority Record Duplicate Detection Results dialog, do one of the following:
   - Replace a duplicate record with the current record. To do this:
     a. (Optional) To manually add a duplicate record that does not already appear in the **Record to Replace** list, do the following:
        i. Select **ADD HEADINGS**.
        ii. Use the Find Tool to search for an authority record and select it.
        iii. Select **OPEN**.

        The record appears in the **Record to Replace** list.
     b. Select a record in the **Record to Replace**list.
     c. Select **REPLACE**.

Leap deletes the selected record, moves the linked bibliographic records to the authority record that will be retained, and saves the record that will be retained.

- Select **CANCEL** to return to the authority record without making any changes.

New Views in Leap Workforms

Now you can navigate between workforms using the added views in several Leap workforms. From the following workforms, you can do the following using new views:

- Bibliographic Record workform — You can now view and open the following:
  - Purchase order records
  - Invoice records
- Item Record workform — You can now view and open the following:
  - Purchase order line item records
  - Invoice line item records
- Invoice Line Item workform — You can now view and open the following:
  - Item records
- Purchase Order Line Item workform — You can now view and open the following:
  - Item records

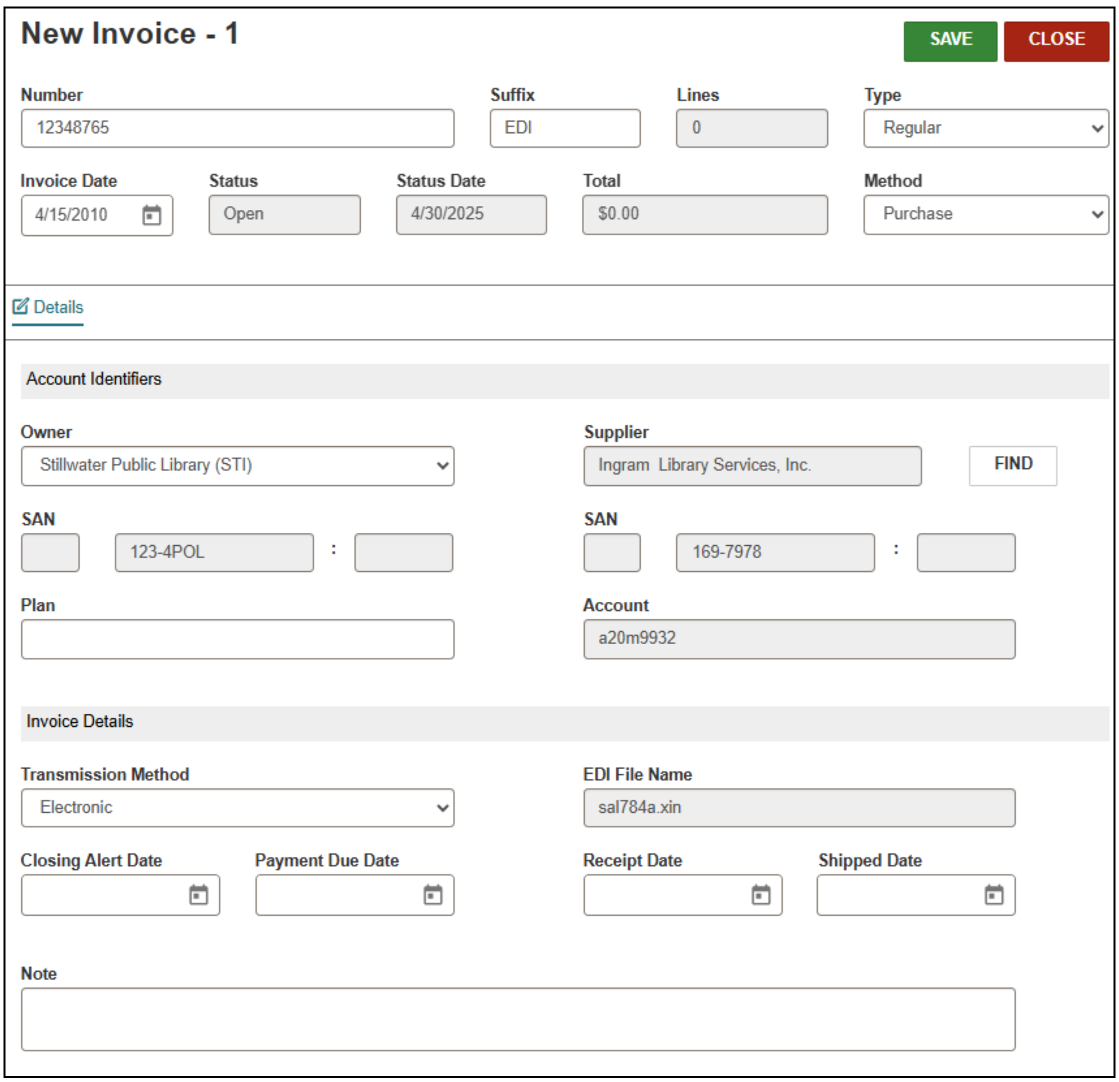
Copying an Invoice

You can now copy an invoice in Leap if you have the **Invoices: Create** permission enabled in Polaris Administration.

To copy an invoice

1. Find the invoice you want to copy, and open it in the Invoice workform.
2. Select **ACTIONS** > **Copy**.

   The New Invoice workform appears with the values from the original invoice.



3. Change at least one of the following values:
   - Number
   - Suffix
   - Type
   - Supplier
4. (Optional) Change values in the other fields.
5. Select **SAVE**.

   Leap opens the Invoice Workform for the invoice you just created.

Checking for Duplicate Segments in Purchase Orders

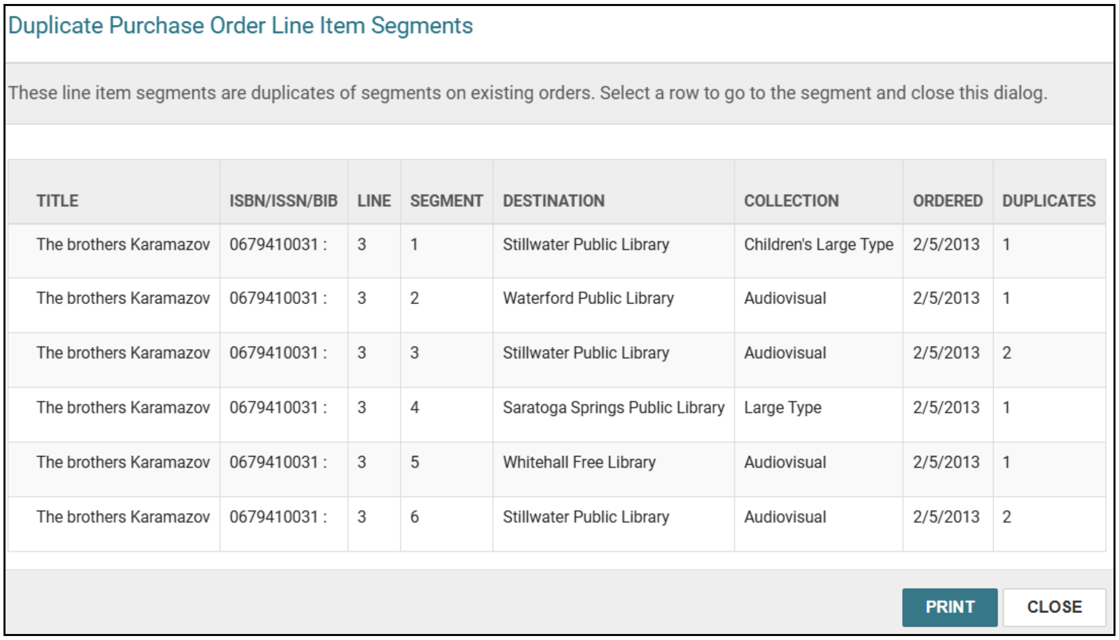
Using the Purchase Order (PO) workform, you can now detect possible duplicate PO line item segments in other purchase orders. Leap identifies potential duplicate records based on the rules your library has configured in the Purchase Order Deduplication table. For more information, search for "Change bibliographic or authority deduplication tables" in the Polaris staff client help.

> **Note**:
> Leap allows you to check for duplicates only if the PO has a status of **Pending**.

To check for duplicate purchase order records

1. Find the purchase order record you want to check, and open it in the Purchase Order workform.
2. Select **Actions** > **Duplicate Check**.

   Leap performs the duplicate check and displays results on the Purchase Order Duplicate Detection Results dialog.



Duplicate Purchase Order Line Item Segments

These line item segments are duplicates of segments on existing orders. Select a row to go to the segment and close this dialog.

TITLE	ISBN/ISSN/BIB	LINE	SEGMENT	DESTINATION	COLLECTION	ORDERED	DUPLICATES
The brothers Karamazov	0679410031 :	3	1	Stillwater Public Library	Children's Large Type	2/5/2013	1
The brothers Karamazov	0679410031 :	3	2	Waterford Public Library	Audiovisual	2/5/2013	1
The brothers Karamazov	0679410031 :	3	3	Stillwater Public Library	Audiovisual	2/5/2013	2
The brothers Karamazov	0679410031 :	3	4	Saratoga Springs Public Library	Large Type	2/5/2013	1
The brothers Karamazov	0679410031 :	3	5	Whitehall Free Library	Audiovisual	2/5/2013	1
The brothers Karamazov	0679410031 :	3	6	Stillwater Public Library	Audiovisual	2/5/2013	2

3. Do one of the following:
    - Select a row in the list to go to the Purchase Order Line Item workform.
    - Select **PRINT** to print a report that lists the duplicates in the dialog.
    - Select **CANCEL** to return to the purchase order record.

New Process EDI Invoices Workform in Leap

In version 7.8, you can now manually process EDI invoices in Leap.

In some situations, the system does not automatically create EDI invoices. You can now view and manage unprocessed EDI invoices on the **Process Invoices** view of the EDI Processing workform. You can select one or more unprocessed invoices and generate a partial shipment invoice for it.

To access the **Process Invoices** view of the EDI Processing workform, you must have the **Access Acquisitions: Allow** and the **Process EDI Invoices: Allow** permissions in Polaris System Administration (web-based). For more information about acquisitions permissions, see Acquisitions Permissions Reference.

To generate an invoice for an EDI shipment

1. Select **Utilities** > **EDI Processing**.

   The EDI Processing workform appears.

2. Select the **Process Invoices** view.

   Leap displays a list of the unprocessed EDI invoices for your current branch. To find an unprocessed EDI invoice, do one or more of the following:

   - Select a branch from the **Branch** list to see only the unprocessed invoices for that branch.
   - Enter a date range to see only unprocessed invoices that were created during a particular time period.
   - Type in the **Filter Invoices** box to filter the list of unprocessed invoices by any value that appears in the Unprocessed Invoices table.

3. (Optional) To view the purchase order line items that are linked to an unprocessed EDI invoice, do the following:

   a. Select an unprocessed invoice.

   b. Select **VIEW PO LINE ITEMS**.

If the unprocessed invoice has only one linked purchase order line item, Leap displays it in the Purchase Order Line Item workform. If it has multiple linked purchase order line items, Leap prompts to you select a line item and then displays it in the Purchase Order Line Item workform.

4. Select the unprocessed invoices that you want to generate invoices for.
5. Select **GENERATE INVOICE**.

   Leap prompts you to confirm that you want to generate invoices.
6. Select **YES**.

   Leap generates the invoices and displays a success message.

New EDI Integrations

Polaris now supports EDI ordering and invoicing for two new suppliers:

- MDM Entertainment
- Ulverscroft

Using Optional Printing Improvements

Now, in Polaris, library administrators and staff members can use several optional printing improvements after the library implements the Direct to Printer feature for receipt and label printing.

> **Important**:
> Using the Direct to Printer feature is optional. Libraries can use this feature for a more seamless printing experience, but it is not required. If you prefer, you can still use your browser’s built-in print functionality instead to print receipts and labels.

Some of the advantages to using the Direct to Printer feature are the following:

- After the library implements the Direct to Printer feature for receipt and label printing, as a library administrator, you can update receipt-printer settings for a workstation through Polaris System Administration (web-based) instead of having to drive to the branch to change them directly.
- Settings are stored in the database, allowing Leap to bypass the browser print dialog and send the receipt or label print job directly to the configured printer.
- The settings stored in the database are visible and configurable in Polaris System Administration (web-based).
- Without the **Leap printers: Modify** permission, staff can't change workstation printer configurations in Leap, but can still view the settings and help with troubleshooting.
- Print settings stay with the workstation and organization (not the user).

> **Note**:
> Once Direct to Printer is enabled for a user, that user cannot print receipts and labels using the browser. To enable browser printing for receipts and labels, you must deselect **Direct to Printer** in Leap.

This topic covers the following:

- Creating a Printer Certificate on the Server
- Installing Printing Software and Importing the Certificate on the Workstation

- Configure Printing in Polaris System Administration (web-based)
- Configure Printing in Leap

Creating a Printer Certificate on the Server

Before installing and configuring the receipt printer software, you must create a printer certificate. Certificates are valid for three years. You can use the same printer certificate for Leap and ExpressCheck. If you've already created a printer certificate for ExpressCheck, you can skip to Installing Printing Software and Importing the Certificate on the Workstation.

> **Note**:
> If you are a hosted library, contact your Polaris Site Manager to complete this procedure.

To create a printer certificate

1. Connect to the desktop of the Windows server that is running Leap.
2. Open a PowerShell window, and run it with administrator privileges.
3. Navigate to the following folder:

   C:\Program Files\Polaris\7.8\Polaris.ApplicationServices

4. Run the **createPrinterCertificate.ps1** script by entering:

   ```
   .\createPrinterCertificate.ps1 -dnsName "<certificate_name>"
   ```

   Replace `<certificate_name>` with the DNS name your library wants to use for the certificate. For example:

   ```
   .\createPrinterCertificate.ps1 -dnsName "printer.polarislibrary.com"
   ```

   When run, this script creates two new files in the root of the **\Polaris.ApplicationServices** folder:

   - printer-cert.pem
   - printer-key.pem

5. Copy the **printer-cert.pem** file to the **App_Data\Certificates** folder.
6. Copy the **printer-key.pem** file to the **App_Data\Keys** folder.
7. Make a second copy of these files to a backup location. The backup is needed if the Leap API is re-installed or upgraded.
8. Delete the files from the root of the **\Polaris.ApplicationServices** folder.

Installing Printing Software and Importing the Certificate on the Workstation

Leap uses third-party software called QZ Tray to manage access to your library's printers. After creating a printer certificate, install QZ Tray and import the certificate.

> **Important**:
> If you encounter problems setting up QZ Tray, contact our **Polaris support team** for assistance. We can help identify whether the issue is related to Leap or QZ Tray and provide guidance accordingly.

To install and configure QZ Tray

1. On the workstation running Leap, navigate to the following URL:

   https://qz.io/download/

2. Download QZ Tray v2.2.4.
3. Once the download is complete, run the .exe file.
4. In the QZ Tray Setup dialog, select your installation options, and select **Install**.

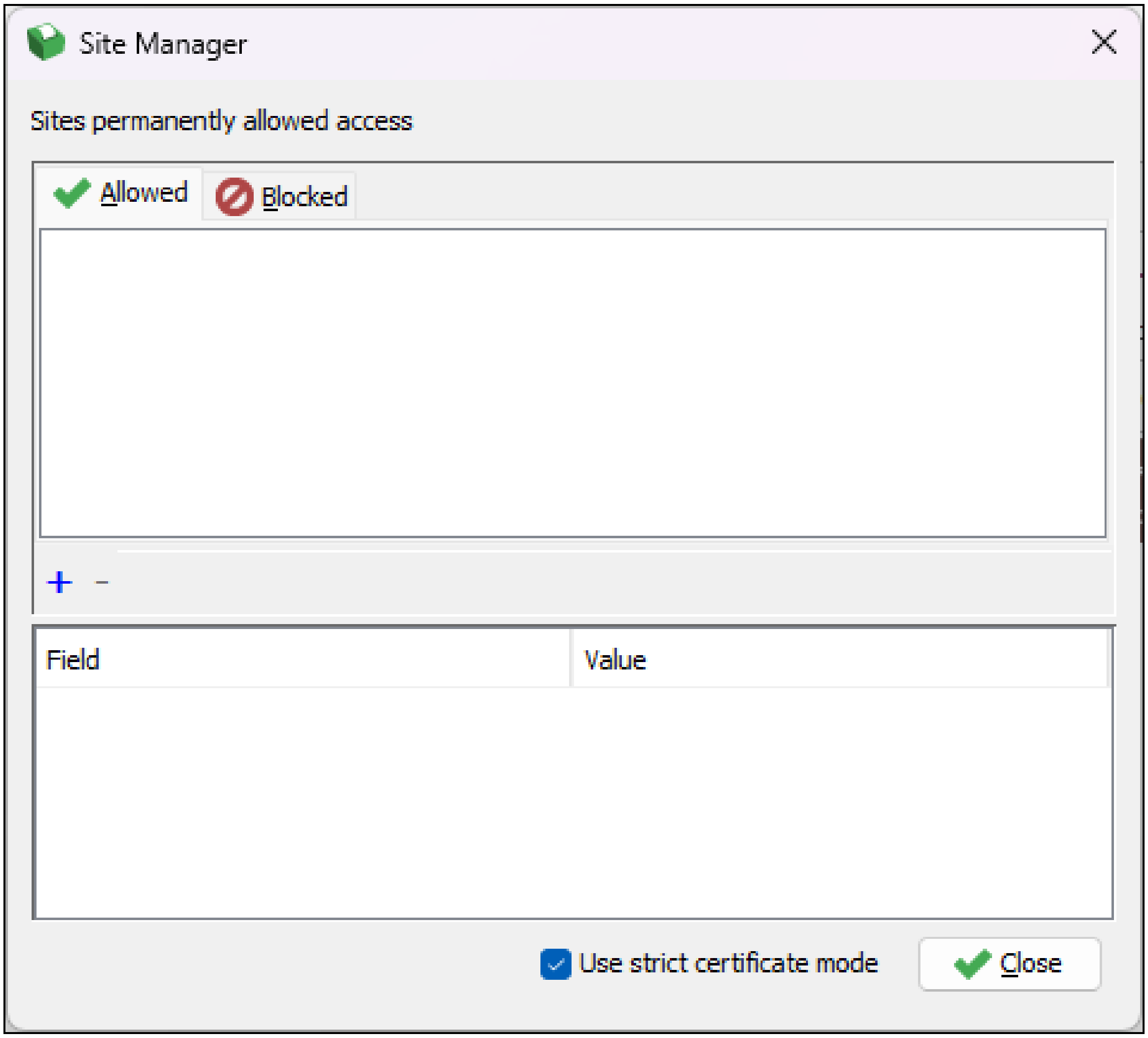
   The QZ Tray application installs on the workstation.

5. When the installation is complete, select **Close**.

   The QZ Tray application is running in the Windows system tray.

6. Open the Windows system tray, and right-click the QZ Tray icon.
7. Select **Advanced** > **Site Manager**.

   The Site Manager window opens.



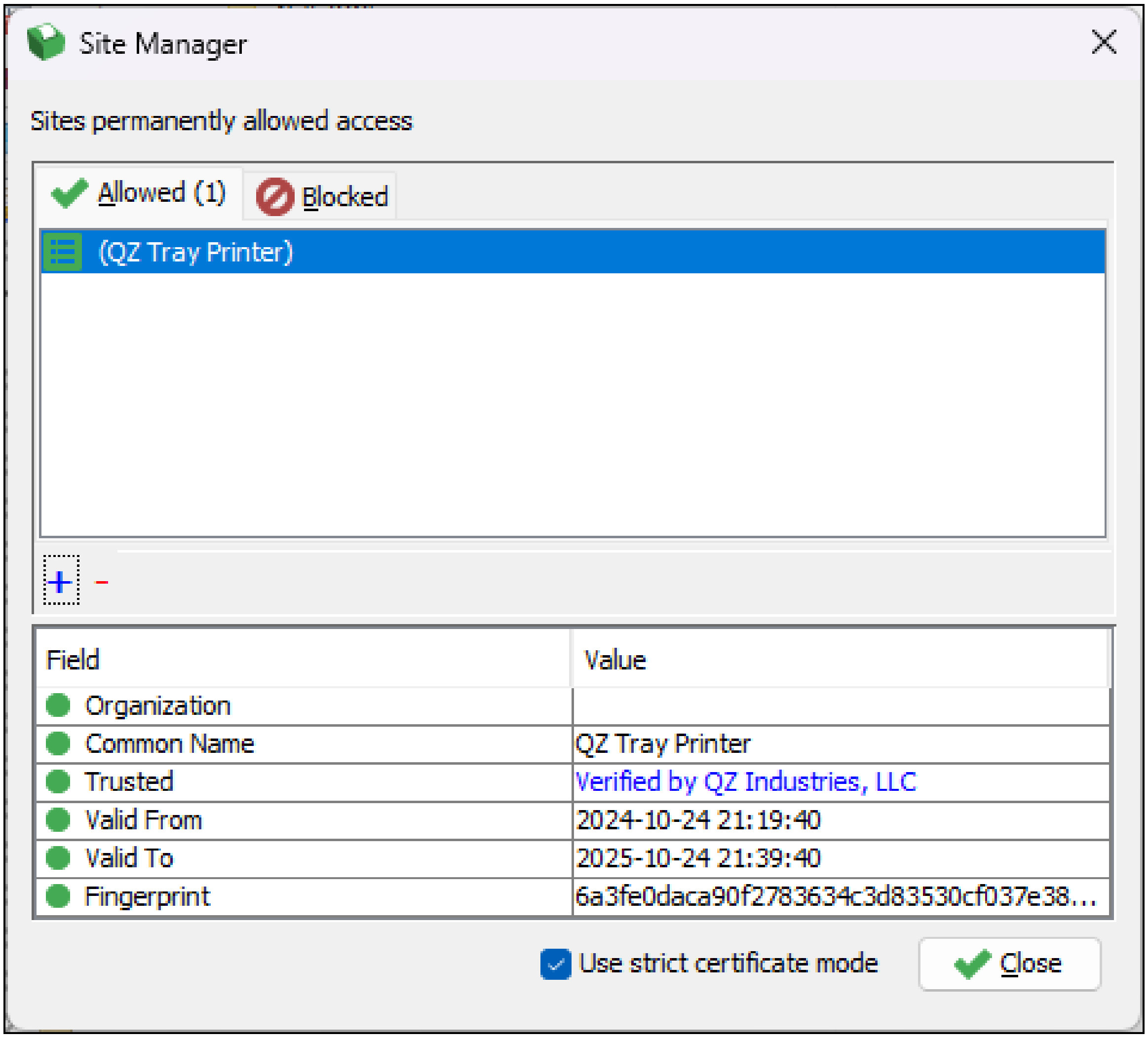
8. On the **Allowed** tab, select the plus (+) icon, and select **Browse**.

   A file explorer window opens.

9. Locate the **printer-cert.pem** file, select it, and select **Open**.

10. If the Unrecognized Certificate window appears, select **Yes** to continue.

    The Site Manager window displays a message similar to the following:



11. Select **Close**.

Configuring Printing in Polaris System Administration (web-based)

You can set Leap to use QZ Tray printing using the the **Web App: Direct to printer defaults** setting, which is available at the System, Library, and Branch levels to give you flexibility in configuring printing options. You can set it for the whole system and let the system set the default for child levels. Alternatively, you can control printing at the branch level, so each branch can choose their own printing options.

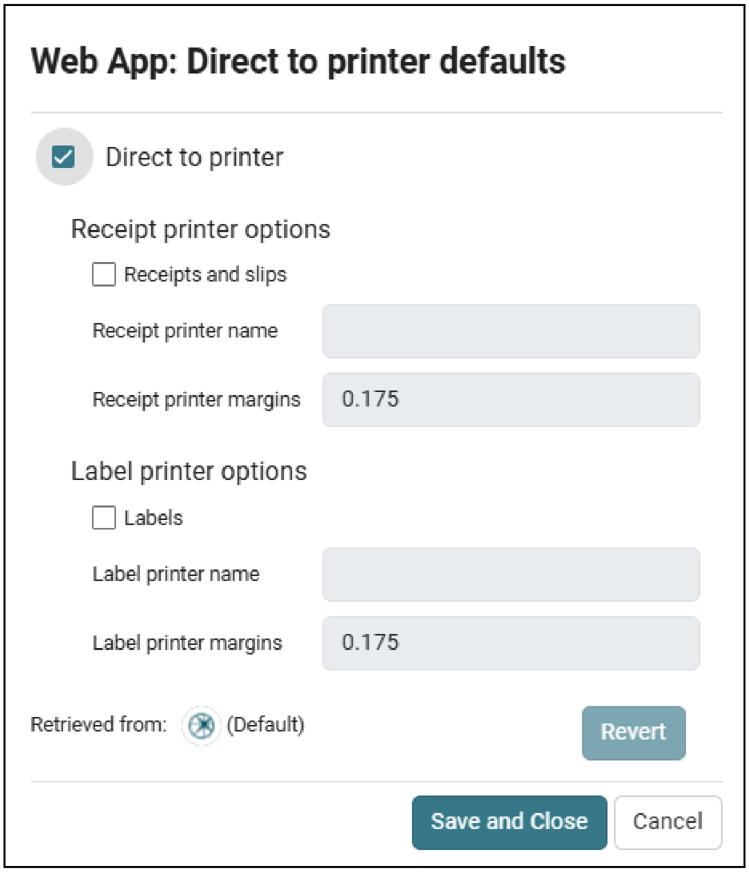
Important:
QZ Tray is a third-party tool used by Polaris Leap to enable the **Direct to Printer** feature for receipt and label printing. If you encounter problems configuring Leap to use QZ Tray, contact our **Polaris support team** for assistance. We can help identify whether the issue is related to Leap or QZ Tray and provide guidance accordingly.

Note:
You must install the printing software and import the certification on the workstation before you can configure printing in Polaris System Administration (web-based).

To set Leap to use QZ Tray printing on the branch level

1. Use the **Web App: Direct to printer defaults** dialog to configure the printer.
   a. Select **Settings and Tables**.
   b. At the **Branch** level, select **Settings**.
   c. From the **Module** list, select **Staff Client**.
   d. In the list, search for **Print** and select **Web App: Direct to printer defaults** > **Configure**.

      The Web App: Direct to printer defaults dialog opens.



e. Select **Direct to printer**.

f. To enable a receipt printer, select **Receipts and slips**.

   i. Enter a **Receipt printer name**.

   ii. (Optional) Change **Receipt printer margins** to a value in inches.

g. To enable a label printer, select **Labels**.

   i. Enter a **Label printer name**.

   ii. (Optional) Change **Labels printer margins** to a value in inches.

h. Select **Save and Close**.

   The receipt printer name and label printer name are available in Leap.

Configuring Printing in Leap

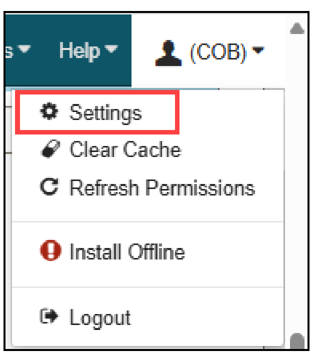
The Leap user must enable the **Direct to printer** setting in Leap and choose a printer to use this functionality.

> **Important**:
> Using the Direct to Printer feature is optional. Libraries can use this feature for a more seamless printing experience, but it is not required. If you prefer, you can still use your browser's built-in print functionality instead to print receipts and labels.

> **Note**:
> Once **Direct to Printer** is enabled for a user, that user cannot print receipts and labels using the browser. To enable browser printing, you must deselect **Direct to Printer** in Leap.

To enable the Direct to printer setting and choose a printer in Leap

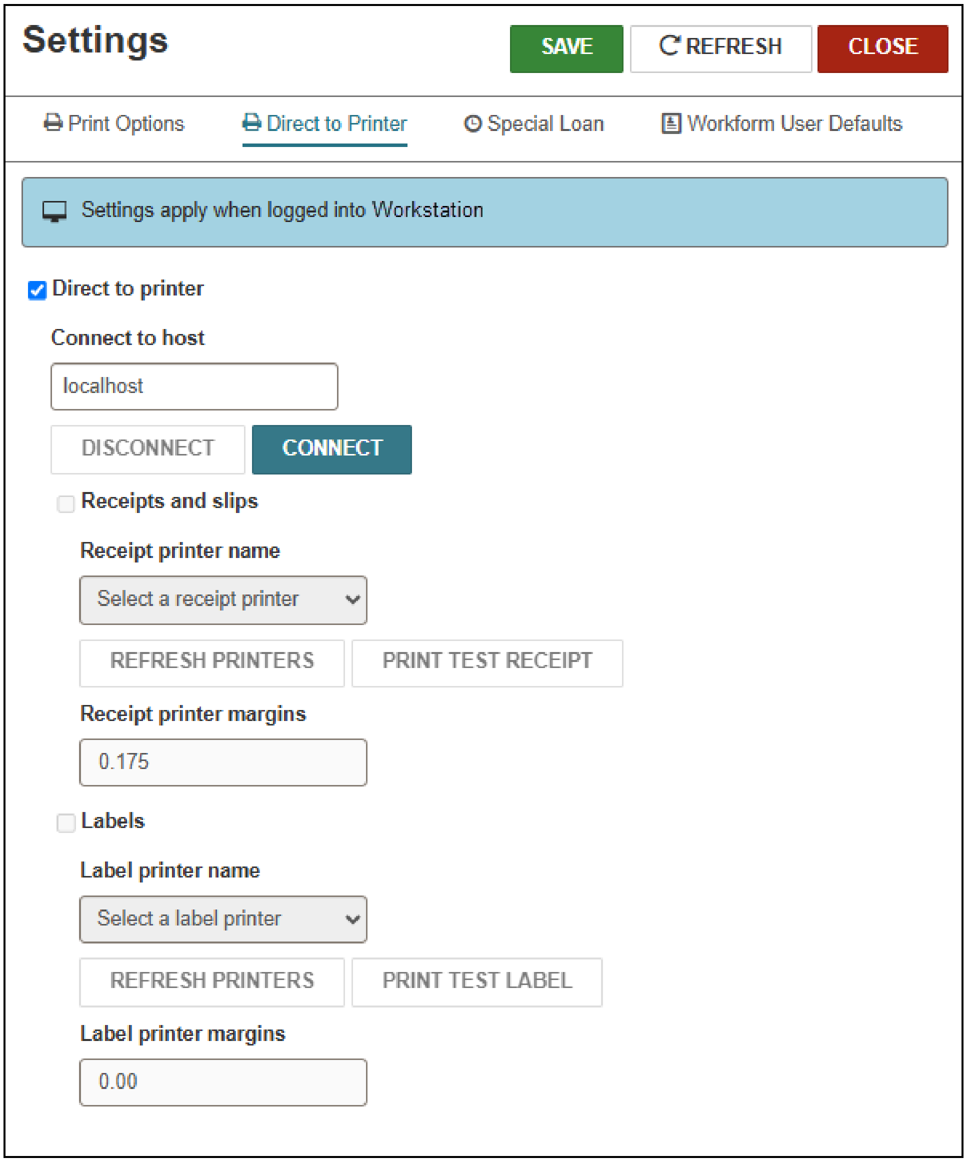
1. Sign in to Leap.
2. Select your user profile (the avatar in the top right) > **Settings**.



   The Settings workform opens.

3. Select the **Direct to Printer** view > **Direct to Printer** checkbox.

   The Direct to Printer view with Connect to host fields opens.



4. Select **CONNECT** to test your connection to the QZ Tray Printer.

> **Note**:
> This troubleshooting step doesn't require the **Leap printers: Modify** permission.

5. To connect to a receipt printer, select **Receipts and slips**.

   a. Select a **Receipt printer name** from the list.
   b. (Optional) Change **Receipt printer margins** to a value in inches.
6. To enable a label printer, select **Labels**.
   a. Select a **Label printer name** from the list.
   b. (Optional) Change **Labels printer margins** to a value in inches.
7. (Optional) Select **PRINT TEST RECEIPT** or **PRINT TEST LABEL** to print a sample receipt or label to the QZ Tray Printer. Each sample is preconfigured and doesn't recognize your library's system settings. These buttons verify that the workstation, the connection, and the printer are working together properly, do not use these samples to test receipt or label formatting.

> **Note**:
> This troubleshooting step doesn't require the **Leap printers: Modify** permission.

New Statistics for Renewal Counts in Leap and SimplyReports

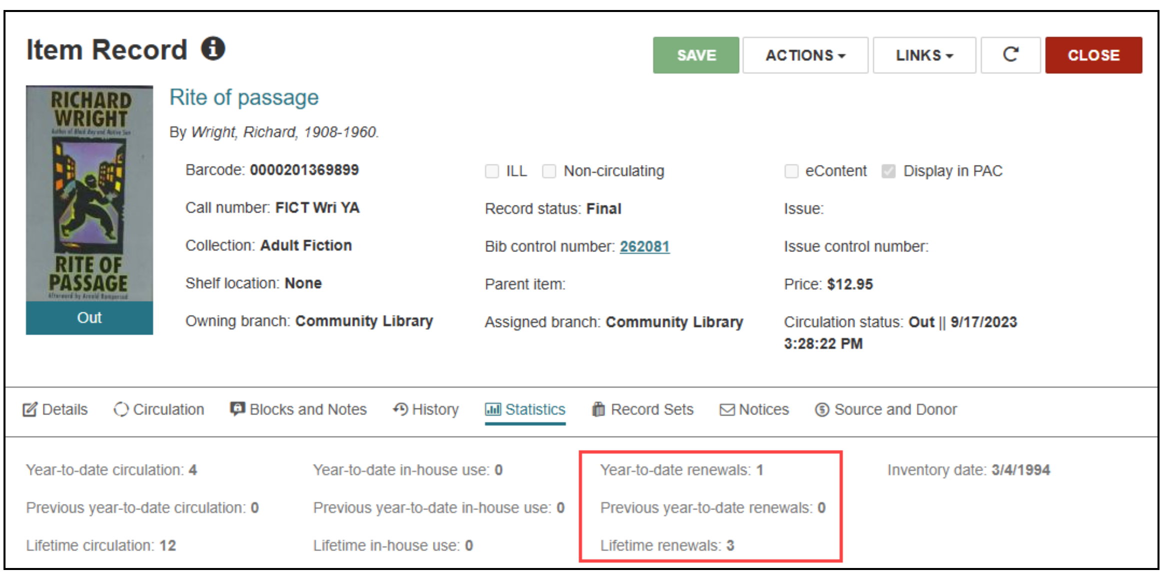
Leap and SimplyReports now include new ways to see statistics about renewals:

- Renewal Count Statistics in Leap
- New Filters in SimplyReports
- New Output Columns in SimplyReports

Renewal Count Statistics in Leap

The Item Record workform and the Bibliographic Record workform now display renewal count statistics. On each workform, the Statistics view now includes the following statistics for the item or bibliographic record:

- Year-to-date renewals
- Previous year-to-date renewals
- Lifetime renewals

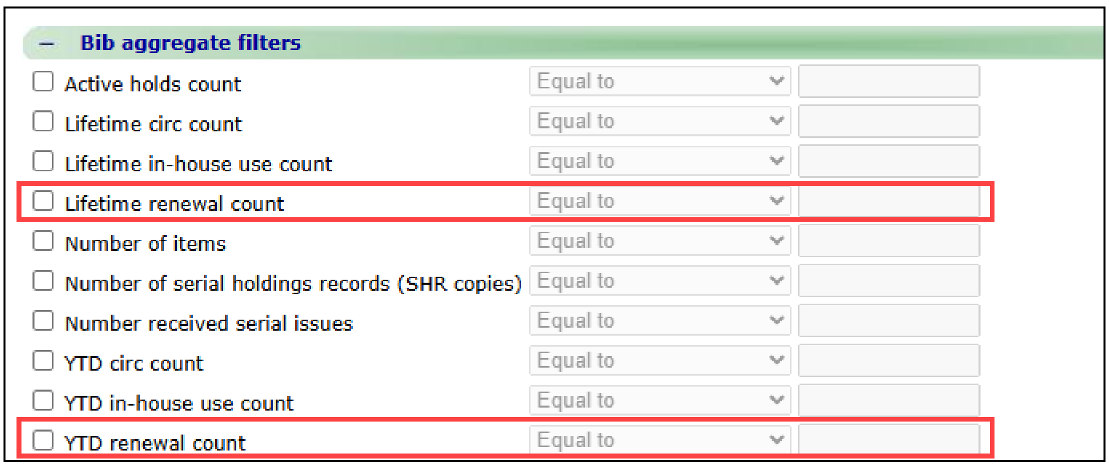


New Filters in SimplyReports

You can now set filters in SimplyReports to limit report output by renewal count.

Bib list reports and bib count reports now include two new bib aggregate filters:

- Lifetime renewal count — Limits report output to bibliographic records with lifetime renewal counts that match the criteria you specify.
- YTD renewal count — Limits report output to bibliographic records with YTD renewal counts that match the criteria you specify.



Item list reports and item count reports now include two new item circulation filters:

- Lifetime renewals — Limits report output to item records with lifetime renewal counts that match the criteria you specify.
- YTD renewals — Limits report output to item records with YTD renewal counts that match the criteria you specify.

New Output Columns in SimplyReports

You can now choose to include statistics about renewals in the report output for the following types of reports:

- Item list reports
- Item count reports
- Bib list reports
- Bib count reports

The table below lists the new report output columns for each report type.

Report type	New report output columns
Item list report	• Item lifetime renewal count • Item prev year renewal count • Item ytd renewal count
Item count report	• Sum item lifetime renewal count • Sum prev year renewal count • Sum item ytd renewal count
Bib list report	• Bib lifetime renewal count • Bib ytd renewal count
Bib count report	• Sum bib lifetime renewal count

Report type	New report output columns
	• Sum bib ytd renewal count

Exporting Reminder Notices

Your library can now export reminder notices to third-party vendors. Using Leap and Polaris System Administration (web-based), you can export the following reminder notice types:

- Almost Overdue/Auto-Renew Reminder
- Expired Patron Reminder
- Inactive Patron Reminder

This topic covers the following:

- Export Reminder Notices Using the Enhanced Profile
- Access Notification Settings
- Read Notification Topics in Leap

Export Reminder Notices Using the Enhanced Profile

The enhanced profile provides extra information for outside vendors to send in phone or text (SMS) notices. To export notices using the enhanced profile, you must enable settings in Polaris System Administration (web-based). To do this, go to your administration URL, and select **Settings and Tables** > **Notification** > **Notification options: Export** and select the following checkboxes:

- **Enhanced profile**
- **Reminder**, under **Notices to include in export**

For more information about how to access this setting, see Access Notification Settings.

Selecting the **Enhanced Profile** and then **Reminder** in the Polaris System Administration (web-based) notification options, adds extra columns to the basic export file. The enhanced profile is exported for phone and text (SMS) notices only, it is not exported for the print notice file.

The **NoticeType** information in the enhanced profile now includes the following possible values:

- 5 — Almost Overdue/Auto-Renew Reminder
- 6 — Expired Patron Reminder
- 7 — Inactive Patron Reminder

Access Notification Settings

Polaris System Administration (web-based) now includes Notification settings in the Settings and Tables section.

To get to Notification settings

1. Sign in to Polaris System Administration (web-based).

   > **Note**:
   > This requires administrative-level permissions.

2. Select **Settings and Tables**.
3. On the left-hand side, select one of the following levels:
   - **System**
   - **Library** > Select the library you want to configure
   - **Branch** > Select the branch you want to configure
4. In the Module list, select **Notification**.

   A list of notification settings appears.
5. Select a setting to modify it.

For a full list of notification settings, see the Notification Settings Reference topic.

Read Notification Topics in Leap

Because the functionality to manage notifications has moved into Leap and Polaris System Administration (web-based), so has the documentation. Now you can read about managing notifications using our web-based applications in the Leap Help; you can start here: Manage Notifications.

Using Tertiary Request to Fill (RTF)

Request to Fill (RTF) is a process in Polaris that searches for eligible items to fill patron requests. Eligible items appear on the hold picklist for staff. The Holds Routing Sequences tables in Polaris System Administration determine the order Polaris uses to check branches for eligible items.

Previous versions of Polaris supported two routing sequences (primary and secondary), so libraries could define a list of local branches. By defining primary and secondary routing sequences, libraries could attempt to fill requests locally before checking the entire system. This release introduces a third routing sequence (tertiary). By defining primary, secondary, and tertiary routing sequences, libraries can define local branches and regional branches to attempt to fill requests before checking the entire system.

For more information on the recommended use of these three sequences, See Using Primary, Secondary, and Tertiary RTF Sequences.

This topic covers the following:

- Setting Up Tertiary RTF
- Setting Up the RTF Holds Routing Tables
- Setting Up or Stopping the RTF Cycle
- Using Primary, Secondary, and Tertiary RTF Sequences

Setting Up Tertiary RTF

In Polaris, the specified pickup branch for a hold request (not the patron’s registered branch) is the requester branch for the purposes of RTF routing. Each branch can specify the RTF routing sequences that the system uses when that branch is the pickup branch.

To set up tertiary RTF

1. Set up the Primary, Secondary and Tertiary RTF Sequence tables. See Accessing and Modifying Holds Routing Tables.

2. In Hold Options: RTF dialog, designate the total number of days in each RTF cycle. See Designate the Total Number of Days in Each RTF Cycle.
3. In Hold Options: RTF dialog, select the checkboxes that can change the cycle. See Change the Basic RTF Cycle.

Setting Up the RTF Holds Routing Tables

To modify Holds Routing tables in Polaris System Administration (web-based)

> **Note**:
> This requires administrative-level permissions.

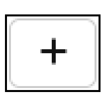
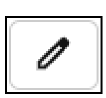
1. On the Home page, select **Settings and Tables**.

   The Settings and Tables page appears. The system displays the **Settings** tab by default.
2. Select the **Tables** tab.
3. In the Search box in the upper right corner, type "Routing".

   A list of routing tables appears.
4. Select a table you want to modify.

   The **Holds Routing Sequences** page for that table.

To insert or edit a Holds Routing branch

1. Open the **Holds Routing Sequences** page for the table.
2. Select one of the following:
   - **Insert**  — The Insert - Holds Routing Sequences dialog for the routing sequence opens.
   - **Edit**  — The Edit - Holds Routing Sequences dialog for the routing sequence opens.
3. Select the requester branch from the **Requester Branch** list.

The requester branch is the pickup branch for the hold request.

4. Select a branch from the **Responder Branch**list.

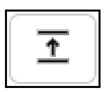
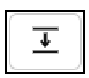
   The responder branch is a branch that will be checked for an eligible item to fill the request.

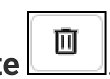
5. In the **Days at Branch** field, enter the number of days the request will stay on the RTF list for the responder branch.

   The request stays on the RTF list for the responder branch until one of the following happens:

   - The responder branch fills the request
   - The responder branch denies the request or selects **Ask Me Later**
   - The set number of days at branch has passed

6. Select **OK**.
7. (Optional) To position the new branch in the correct sequence, select the branch, and then select one of the following:

   - Move Item Up 
   - Move Item Down 

8. (Optional) To delete a branch, select the branch, and select **Delete** .
9. Select **SAVE**.

Setting Up or Stopping the RTF Cycle

After you set up the RTF Holds Routing tables, you can use the settings in the Holds options: RTF dialog to set up or stop the RTF cycle at each of the following levels: System, Library, Branch.

To access the Holds options: RTF dialog in Polaris System Administration (web-based)

Note:
This requires administrative-level permissions.

1. On the Home page, select **Settings and Tables**.

   The Settings and Tables page appears. The system displays the **Settings** tab by default.

2. On the left-hand side, select one of the following levels:

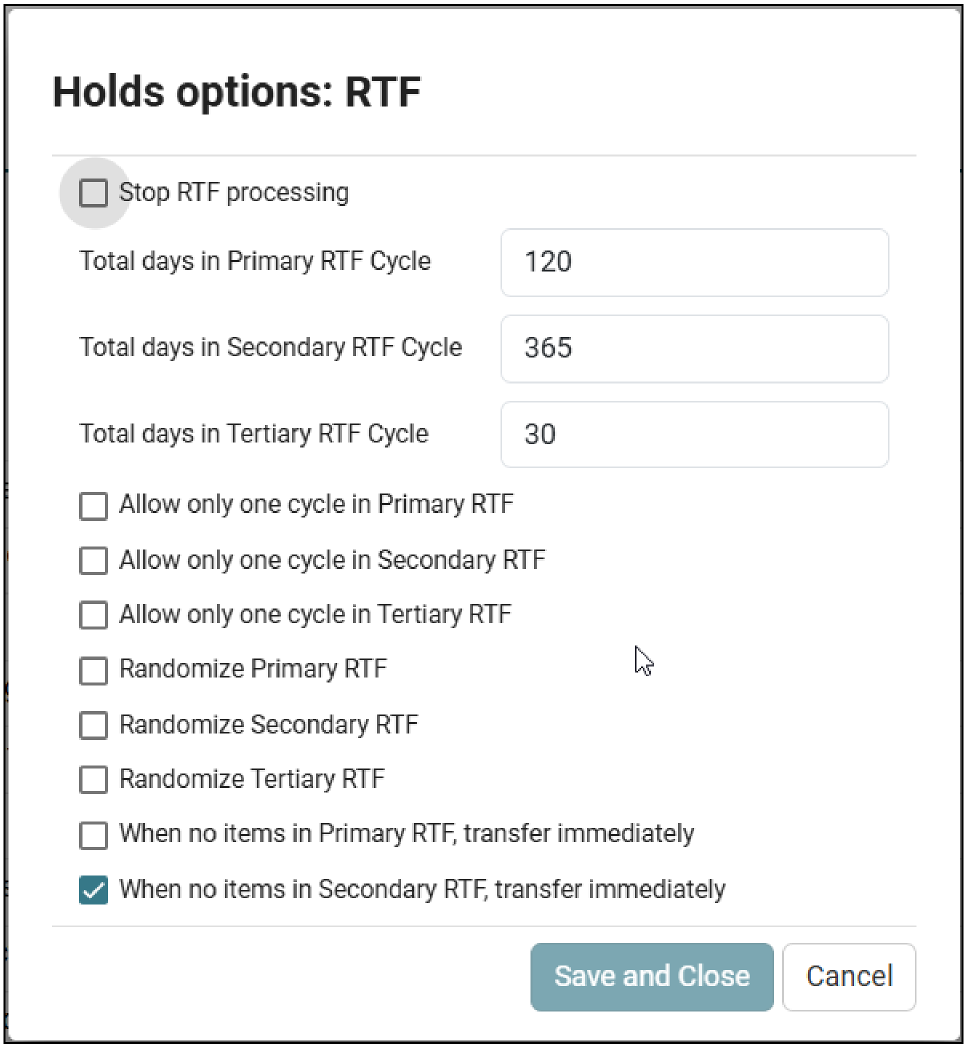
   - **System**
   - **Library** > Select the library you want to configure.
   - **Branch** > Select the branch you want to configure.

3. In the Module list, select **Request**.

   A list of Request settings appears.

4. Select **Hold options: RTF** > **Configure**.

   The Holds options: RTF dialog appears.



In the Holds options: RTF dialog, you can do the following to manage the RTF cycle:

- Stop RTF Processing
- Designate the Number of Days in Each RTF Cycle
- Change the Basic RTF Cycle

Stop RTF Processing

- Select **Stop RTF processing** to remove the selected organization from consideration in the RTF cycles. This setting can be configured at the system, library, or branch level. Any request pending for items at the selected location will be set back to a status of **Active**.

Designate the Total Number of Days in Each RTF Cycle

Designating the total number of days in each RTF cycle allows you to manage the basic RTF cycle of Polaris.

1. **Total Days in Primary RTF Cycle** — Enter the number of days Polaris searches the primary RTF sequence as set up in the Holds Routing Sequences Primary table.

   The system searches the sequence from top to bottom, then moves to searching the branches in the secondary RTF sequence after the set number of days in **Total Days in Primary RTF Cycle**.
2. **Total Days in Secondary RTF Cycle** — Enter the number of days Polaris searches secondary RTF sequence as set up in the Holds Routing Sequences Secondary table.

   The system searches the secondary sequence from top to bottom. After it completes the set amount of days cycling through the secondary sequence (**Total Days in Secondary RTF Cycle**), the system moves to searching the tertiary sequence of branches.
3. **Total Days in Tertiary RTF Cycle** — Enter the number of days Polaris searches the tertiary RTF sequence as set up in the Holds Routing Sequences Tertiary table.

   The system searches the tertiary sequence from top to bottom. After it completes the set number of days cycling the tertiary sequence (**Total Days in Tertiary RTF Cycle**), Polaris stops searching sequences. The request status becomes Active so an item can be trapped at check-in, but the request no longer appears on the responder libraries’ RTF picklists.

This is the basic cycle, but you can Change the Basic RTF Cycle using the checkboxes in the Hold Options: RTF dialog.

Change the Basic RTF Cycle

You can manage the RTF cycle by changing the basic cycle in the following ways:

- You can limit the number of times the system searches each RTF list by selecting one of the following checkboxes:
  - **Allow only one Cycle in Primary RTF** — Select this checkbox to ensure that when all responder branches in the primary routing table deny or ignore the request, Polaris searches the Primary RTF sequence only once. Polaris then moves to the Secondary RTF sequence.
  - **Allow only one Cycle in Secondary RTF** — Select this checkbox to ensure the system searches the Secondary RTF sequence only once before it moves to the Tertiary RTF sequence.
  - **Allow only one Cycle in Tertiary RTF** — Select this checkbox to ensure the system searches the Tertiary RTF sequence only once before the item stops appearing on responder branch picklists.
- Polaris searches each list from top to bottom, but you can randomize the starting branch for the list by selecting one of the following checkboxes:
  - **Randomize Primary RTF**— Select this checkbox to tell Polaris to start with a different branch in the Primary RTF list for each new request.
  - **Randomize Secondary RTF**— Select this checkbox to tell Polaris to start with a different branch in the Secondary RTF list for each new request.
  - **Randomize Tertiary RTF**— Select this checkbox to tell Polaris to start with a different branch in the Tertiary RTF list for each new request.
- Polaris cycles through the same list until it completes the set amount of days. If you want to bypass the **Total Days in RTF Cycle** setting when there are no eligible items, you can use the following checkboxes:
  - **When no items in Primary RTF, transfer immediately**— Select this checkbox to transfer immediately to the Secondary RTF list if Polaris doesn’t find an item to fill the request.
  - **When no items in Secondary RTF, transfer immediately**— Select this checkbox to tell Polaris to transfer immediately to the Tertiary RTF list if it doesn’t find an item to fill the request.

Using Primary, Secondary, and Tertiary RTF Sequences

When you set up a routing sequence for a requester branch, you are effectively defining the branches that the requester branch can share filling hold requests with, whether items are taken off the shelf as part of RTF processing or trapped at circulation. When you are considering what branches to include in your RTF sequences, also consider the following:

- **Aligned Policies**: Include branches that have similar holds policies to the requesting library so that the item can be loaned without confusion.
- **Agreements**: Include branches that the requesting library has already contacted to secure an RTF agreement.

The recommended use of the three sequences is dependent on your goal.

1. **Fill Request as Fast as Possible**— Define only Primary RTF Sequence

   In a system where libraries are geographically close and have similar lending policies, a branch might define only a primary group of RTF branches. The library might place itself with a few geographically close or politically allied branches in the primary group. This setup allows a request to pass from one branch to the other in a preferred order. If you leave a branch out of a routing cycle, that prevents your items from filling requests at that branch.

2. **Fill Holds while Balancing Cost Savings**— Define two or three RTF Sequences

   RTF Sequences allow a library to establish levels of priority in filling hold requests. If the concern is to balance cost, policies, and agreements, the library might create the primary group and secondary or tertiary groups. Then the library has a choice to prioritize branches into three groups.

   To save cost, include in the secondary group, branches that are local to the requesting library so that the item can be shipped at a low cost. An example could be the branches that are on a certain route that the mobile library or courier service already travels. The tertiary group might include branches that are regional to the requesting library. An example might be all branches left in the region of the requesting library that are not already in a sequence.

Rapido Consortial Borrowing

Polaris now integrates with the Rapido Consortial Borrowing (Rapido CB) platform, allowing libraries to efficiently share resources with other participating institutions. Libraries can process Rapido CB items in Polaris using the same workflows used for INN-Reach items. However, the Rapido CB integration differs in key ways from INN-Reach. For more information, see the topics below.

- Patron Requesting
- Item Circulation
- Record Contribution

Patron Requesting

Rapido consumes the Polaris API endpoints to get real-time item status information when looking for eligible items to fill a request.

Patrons are authenticated against the Polaris database using the NISO Circulation Interchange Protocol (NCIP) standard. The process is as follows:

- Rapido CB passes a LookupUser NCIP message requesting patron verification.
- Polaris responds with a LookupUserResponse NCIP message stating whether the patron is successfully authenticated or whether they are blocked from requesting.

Item Circulation

Polaris uses Rapido's circulation APIs to manage requests. These APIs function the same as INN-Reach APIs in Polaris. You can view these API transactions in the INN-Reach Admin Tool for troubleshooting purposes.

Processing Lending Requests

On the lending side, requests appear in Polaris in the same way as INN-Reach requests. However, Rapido does not provide information about the borrowing patron.

Consequently, lending side requests are associated with Rapido institutional patron records instead of virtual patron records.

You can set up institutional patron records at the System, Library, or Branch level, depending on how the lending institution wants to group its loaned items. While creating the institutional patron records, make a note of the patron ID. To complete the institutional patron record setup, you must enter the patron ID in the **Rapido: Institutional patron ID** setting in Polaris System Administration (web-based).

Processing Borrowing Requests

To process borrowing requests, member libraries must set up a new item template named "RAPIDO Item *<Rapido_ID>*" (Innovative provides the *<Rapido_ID>* during implementation). Polaris uses this template to create virtual item records when loaning items. Your institution must define a separate template for each branch that wants to process borrowing requests.

Rapido CB does not specify the format of the item that the patron is borrowing, so Polaris uses the same template for different material types. When receiving an item, however, library staff can adjust the material type of the virtual item.

When an item ships from the lending institution, Rapido CB includes a due date value specifying the date by which the item is due back. To account for shipping time, you can specify the average number of days needed to return an item to the owning institution using the **Rapido: Days spent in transit back to the lending institution** setting in Polaris System Administration (web-based). Polaris subtracts this value from the due date to determine the borrowing patron's due date. Consequently, the due date that the patron sees on the borrowing side is different than the due date that library staff see on the lending side.

Processing Renewals

When a borrowing patron renews an item, Polaris uses the loan rules set up at the borrowing institution to calculate the new due date and sends it to the lending institution. Rapido CB sends an Owner Approved Renewal message back to the borrowing institution.

During this exchange, Rapido CB might calculate a different due date. Polaris updates the due date on the borrowing side.

Record Contribution

Polaris contributes bibliographic and item information to Rapido pods for titles that are eligible for resource sharing. Rapido harvests MARC data from Polaris using an OAI-PMH harvesting service. This service is not installed by default; Innovative installs it while setting up the Rapido CB integration. Profiling in Polaris OAI-PMH and Rapido determine which bibliographic and item records are included in Rapido for requesting.

For more information on the harvesting service, see Harvesting Bibliographic Record Data with OAI-PMH in the Leap help.

To learn more about OAI-PMH, see Open Archives Initiative Protocol for Metadata Harvesting.

Polaris ExpressCheck Enhancements

The web-based version of Polaris ExpressCheck is now generally available in Release 7.8. This version of ExpressCheck includes enhancements to the user interface, as well as the following enhancements:

- RFID Support
- Receipt Printing Enhancements
- Numeric-Only Keypads for Barcodes and Passwords
- Support for Patron Blocking Notes

RFID Support

Polaris ExpressCheck now supports checking out items using RFID.

Using RFID in ExpressCheck

After authenticating, patrons can check out items by placing them on the RFID pad. The **Allow Multiple RFID Items on Tray** option controls whether patrons can check out multiple items on the RFID tray simultaneously or must check out one item at a time.

ExpressCheck displays a message on the status bar stating whether the system was able to turn off the security for the item. ExpressCheck also displays a dialog with a warning message when a transaction fails to turn the security off for an item.

Setting Up RFID Circulation in ExpressCheck

Setting up RFID in ExpressCheck involves the following:

1. Registering the workstation
2. Configuring Security Manager
3. Setting RFID options in ExpressCheck

> **Note**:
> Prior to completing this procedure, you must install Security Manager on

> your workstation and acquire an ExpressCheck RFID Polaris license. Contact your Polaris Site Manager for assistance.

Registering the Workstation

If you haven't done so already, register the workstation that you are connecting your RFID equipment to. Make sure the **RFID: Use local security manager** setting is set to **Yes**.

See Registering ExpressCheck Workstations in the Leap help for more information.

Configuring Security Manager

Polaris ExpressCheck uses Security Manager to enable RFID at the workstation level. You can configure Security Manager from the Preferences screen in ExpressCheck.

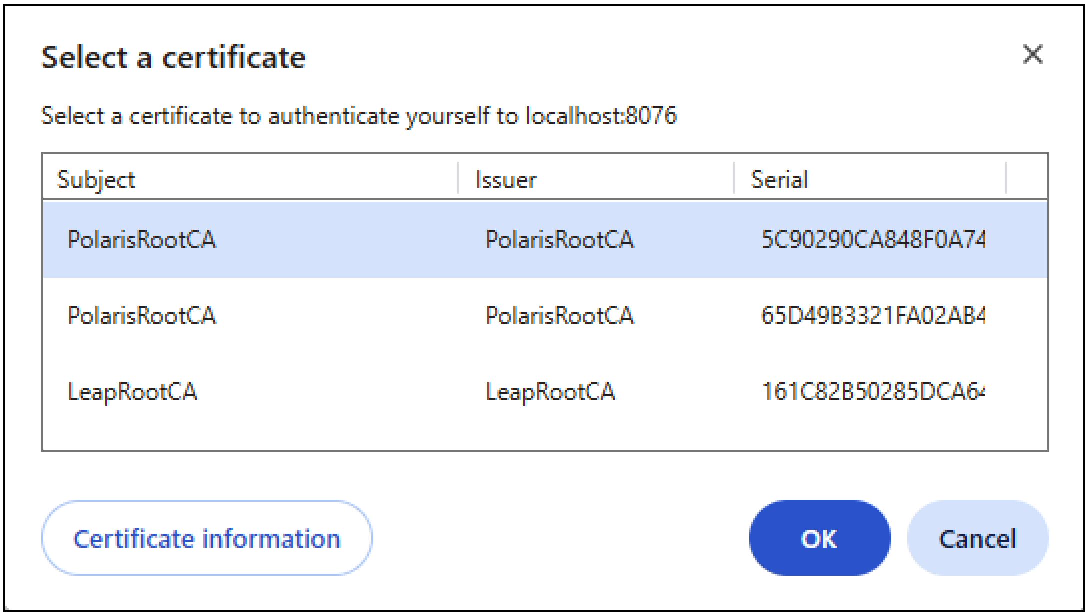
To configure Security Manager

1. Start the ExpressCheck application, and sign in.

   If you are starting ExpressCheck for the first time, the Preferences screen appears. Otherwise, the Welcome screen appears.

2. If the Welcome screen appears, press Ctrl+Alt+S to access the Preferences screen.
3. In the **Security Options** section, select **Use Security Manager**.
4. Select **Configure** to display the Security Manager settings.
5. In the **Computer Name** box, enter the host name of your workstation. The host name can be a maximum of 100 characters and can contain letters (both uppercase and lowercase), numbers, periods (.), and hyphens (-), but the value cannot start with a period. The default value is "COMPUTERNAME".
6. In the **Port number** box, enter **8076**.
7. Select **Test Security Manager** to test the connection. ExpressCheck displays whether it connected successfully to Security Manager.

   If you are testing Security Manager for the first time, ExpressCheck might prompt you to select a web certificate. For example:



8. If prompted, select a web certificate, and select **OK**.

When you have finished setting up the Security Manager, set the RFID options below.

Setting RFID Options in ExpressCheck

After configuring Security Manager, you can set the RFID options on the Preferences screen.

To set RFID options

1. From the Preferences screen, locate the **Security Options** section.
2. To display a barcode scanner warning to patrons, select **Display Barcode Scanner Warning**. This options works as follows:
    - If **Allow Barcode Scans for Item Checkouts** is enabled, ExpressCheck alerts the patron about RFID security. The default message is:

      > This unit uses RFID to read item labels. Using the barcode scanner may not turn off security. Are you sure you want to continue using the barcode scanner?

      The patron can select **Yes** to proceed with the checkout or **No** to cancel the transaction.

- If **Allow Barcode Scans for Item Checkouts** is disabled, ExpressCheck informs the patron that only RFID scanners are supported for item checkout. The default message is:

  This unit uses RFID to read item labels. Please reposition item on ExpressCheck tray. When you are ready select OK.

3. To allow item checkout from a barcode scanner in addition to RFID, select **Allow Barcode Scans for Item Checkouts**.
4. To allow patrons to check out multiple items on the RFID tray simultaneously, select **Allow Multiple RFID Items on Tray**. If this option is not selected, patrons must check out items one at a time. ExpressCheck displays an error message if patrons place more than one item on the RFID tray.
5. Select **Save**.

Receipt Printing Enhancements

Polaris ExpressCheck now supports printing receipts while doing the following:

- **Renewing items** — If receipt printing is enabled on the workstation, patrons can print a receipt listing the renewed items from the renewal summary screen by tapping **Print Receipt**.If your ExpressCheck workstation has the **Print receipt on timeout** option enabled, a receipt automatically prints when the session times out.
- **Viewing checked-out items** — Patrons can print a list of items they currently have checked out by tapping **Print Items Out** on the **Items Out** tab.

Numeric-Only Keypads for Barcodes and Passwords

Polaris ExpressCheck now supports displaying numeric-only keypads on the barcode and password entry screens. Two new options control this behavior:

- **Polaris ExpressCheck options: Enable > Display numeric-only keypad** — Displays a numeric keypad only (instead of a full keyboard) when patrons manually enter a barcode in Polaris ExpressCheck. The **Enable on-screen keypad** option must be enabled to set this option.

- **Polaris ExpressCheck options: Enable > Display numeric keypad for patron passwords** — Displays a numeric keypad only (instead of a full keyboard) on the password entry screen in Polaris ExpressCheck.

Your organization can set each option individually at the System, Library, or Branch level.

Support for Patron Blocking Notes

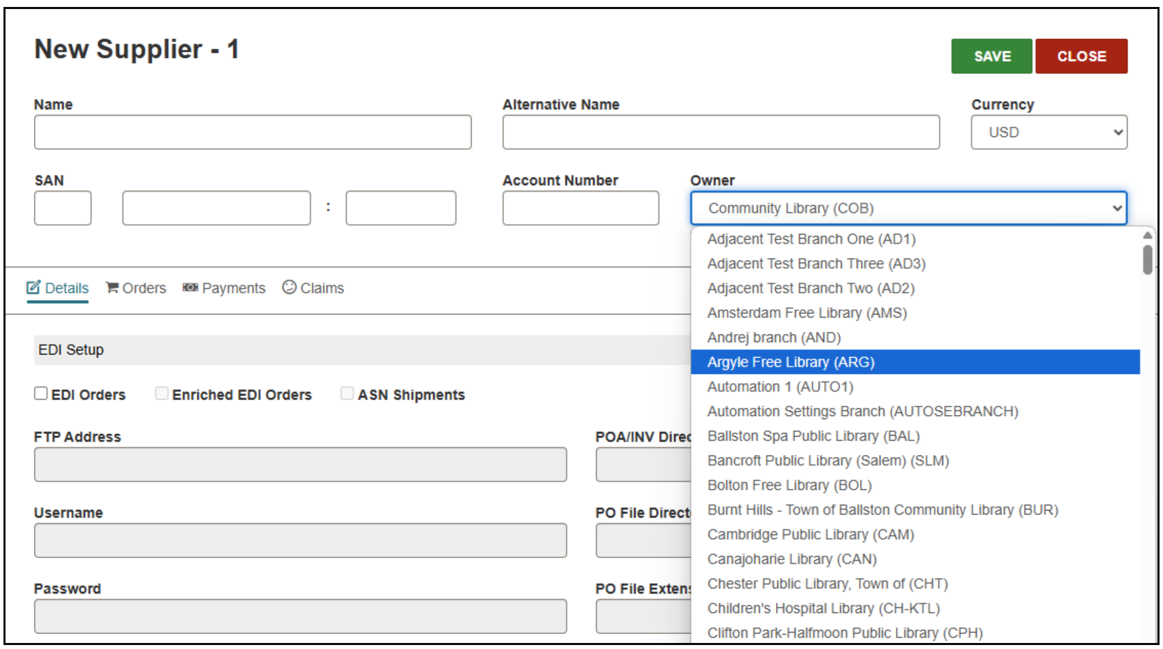
Polaris ExpressCheck now supports patron blocking notes. When enabled, the new **Polaris ExpressCheck: Patron blocks > Blocking notes** option blocks patrons from checking out items if they have a blocking note on their patron account. Blocked patrons see the message "Please contact a librarian for assistance" when they tap **View Blocks** on the checkout screen.

Your organization can set this option at the System, Library, or Branch level.

Owner Fields are Filtered Based on User Permissions

In previous versions, some Owner fields in Leap displayed a list of every branch in the system, while others were filtered based on your permissions.

In version 7.8, Leap filters all Owner fields based on your permissions. For example, if you are creating or modifying a supplier, the Owner list now contains only the organizations for which you have the **Suppliers: Modify** permission.



New Language Strings for Translation

Version 7.8 includes over 1,000 new language strings that you can translate using the Polaris Web Admin Tool (Language Editor).

The new language strings make it possible for you to translate text that appears in:

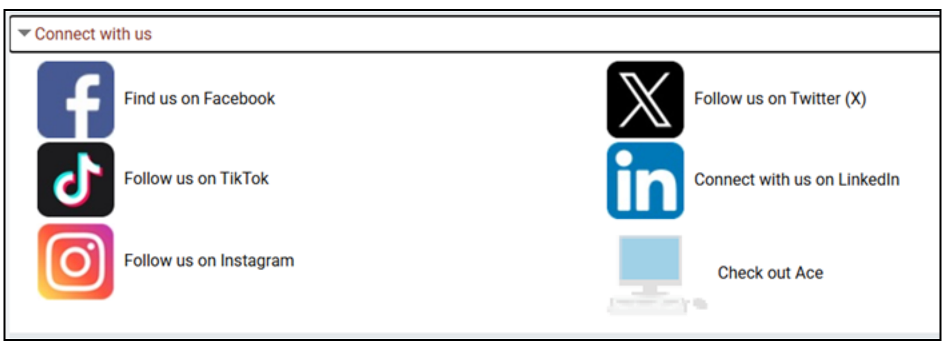
- The Polaris System Administration (web-based) user interface
- Portions of the Leap user interface that were not previously translatable

Updated Social Media Platforms in Community Records

Polaris has updated the social media platforms supported in Community Records. These social media platforms now include:

- Facebook
- Twitter (X)
- TikTok
- LinkedIn
- Instagram

The links you configure in Community Records appear in the **Connect with us** section of PAC displays and on personal pages created using ContentXChange. For example:



MARC Technical Updates in Polaris 7.8

The updates specified in the following links were implemented in Polaris 7.8.

- MARC Update Number 38 (June 2024)
  - Bibliographic format updates
  - Authority format updates
- MARC Technical Notice (May 14, 2024)
- MARC Technical Notice (May 21, 2024)
- MARC Technical Notice (June 11, 2024)
- MARC Technical Notice (June 18, 2024)
- MARC Technical Notice (July 16, 2024)
- MARC Technical Notice (July 30, 2024)
- MARC Technical Notice (September 04, 2024)
- MARC Technical Notice (October 02, 2024)
- MARC Technical Notice (October 17, 2024)