What's New in Polaris Version 4.1 Build 807

Contents

e-Book Integration

- Will have an ability to limit access to ebooks from non-integrated vendors, such as Overdrive

- Will be able to integrate 3M ebooks with Polaris PAC[1]:
    o Will be able to check-in 3M ebooks from PAC
    o Will be able to check-out 3M ebooks from PAC
    o Will be able to manage 3M ebooks holds from PAC

To download the 3M Cloud App, visit ebook.3m.com
- iOS app
- Android app
- PC app
- Nook app
- MAC app

Compatible devices:

iOS App
iPad®
iPhone®
iPod touch®

Android App
Android™ Phones
Android™ Devices

PC/Mac App
Windows®/Mac OS X
NOOK® eReader
Kobo™ eReader
Kindle Fire

Nook Apps
NOOK® Tablets

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[1] On *Polaris Town* there are 2 webinars that discuss e-book integration: *3M e-books* webinar & *What's new in Polaris 4.1 PAC* webinar

Placing a Hold on 3M Ebook

1. Log in to your account
2. Locate a book
3. Click **Place Hold** button
4. Click **Place Hold Now** button on the pop-up box that appears
5. To close the pop-up box, click the **X** button

Cancelling a Hold on 3M Ebook

1. Log in and access your account
2. Select **Requests**
   a. If a request does not appear on your list, click **Refresh eContent** button
3. To cancel a request, click the checkbox next to the title
4. Select **Cancel Request** button
5. Click **Yes** to confirm that you do want to cancel the request

Checking Out a 3M Ebook

1. Log in to your account
2. Locate a book
   a. 3M Ebooks, in addition to the Ebook icon, will also have a 3M Cloud Library icon underneath the buttons, to the right of the item's description
3. Click the **Check Out** button
4. On the pop-up box that appears, select **Check Out Now**
5. To close the pop-up box, click the **X**

Checking In a 3M Ebook

1. Log in and access your account
2. Select **Items Out**
3. To check in an item click the blue **Check In** button next to that item
4. Select **Check In Now** on the pop-up box to confirm that you do want to check in this 3M Ebook
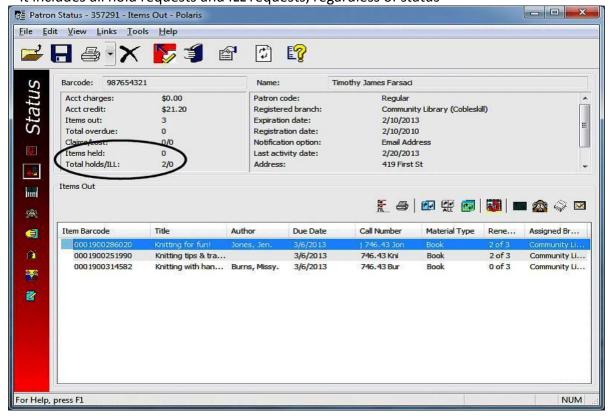5. A confirmation message appears, click **X** to close the pop-up box

Acquisitions

- Orders view of the Supplier Record workform will have an External ID field

- POs with numbers greater than 10 characters will be blocked when trying to link them to Midwest Library Service's supplier record

- POs with numbers greater than 20 characters will be blocked when trying to link them to Brodart's supplier record

- Will be able import MARCXML authority files, as well as, export them as MARCXML

- Will be able to export bibliographic files in MARCXML format

- New Reports will be available:
    - Expenditures by Fund and Material Type – Report is grouped by fund and sorted by material type
    - Expenditures by Material Type and Fund – Report is grouped by material type and sorted by fund

- EDI service can be establish with the following vendors:
    - Midwest Library Service
    - Findaway World
    - Scholastic Library Publishing

- Electronic Invoice Report was redesigned:
    - Margins were reduced and orientation was changed to landscape
    - Details will now be grouped by POLI and displayed in single row

- Purchase Order Acknowledgment Report was redesigned:
    - Margins were reduced and orientation was changed to landscape
    - Details will now display in single row and will be grouped by the line item status
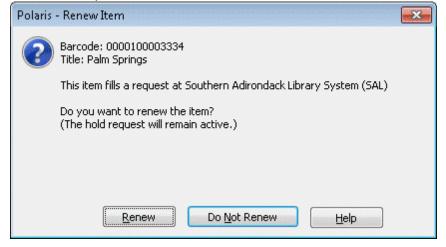   - Each confirmed PO will begin on a new page

Cataloging

- Item find tool keyboard shortcut was changed to **CTRL+ALT+F9**

- PAC view on the Bibliographic Record workform has been modified - once browse link, dashboard link, or a third-party link is clicked a new browser window will open with the actual PAC

Circulation / Patron Services

- Patron's total hold and ILL request count will be displayed in the Patron Status Summary workform – it includes all hold requests and ILL requests, regardless of status

- Can make the following message, which appears when staff tries to renew an item with a hold from staff client, optional:

- If enabled, patrons will receive an e-mail acknowledgment message when they submit a request to change account information via PAC

- Option to validate patron phone numbers will be available

- Gender field can be made a required field on Patron Registration workform

- Icon to Waive All fees can be enabled or disabled for use in the Account view of the Patron Status workform

Circulation Reports

- New reports will be available:
    - Circulation by Postal Code report
    - Hourly Circulation report – counts checkouts & renewal transactions for selected date range by day of the week & by the hour
    - Top Circulating Titles by Collection report
    - Fines by Amount report– list of patrons with account charges in a specified range of amounts

- When Collection Agency Synchronization report is run, it will be automatically transmitted to the collection agency

- The following reports will now include the "Failed Since" column and exact time of the failure, in addition to the date:
    - Email Delivery Failure report
    - Telephony Delivery Failure report
    - TXT Delivery Failure report

Community Profiles

- Events information in the new build can be imported from Evanced Solutions or Plymouth Rocket

Mobile PAC

- How many more days the request will be held for pickup will be shown in the Patron Account > Hold Requests view

Power PAC

- New Popularity facets added: High, Medium, Low

- Users will be able to "pin" PAC searches

- Modifications have been made to how records for remote resources are set up and organized in PAC

- Deep link by control number for local titles will be supported in PAC

- Modifications have been made to how saved searches are processed:
  - If maximum number of search result is exceeded, patron will receive an email message with the following text: *Your search found more than the maximum allowed for inclusion in a saved search email. To see the entire result set, follow this link: <link >*
  - The result count displayed in the PAC patron account will now shows the total number of new records found in all weekly and/or monthly runs

Telephony

- Modifications were made to the service to reduce the chances that Telephony will shut-down when it is unable to connect to SQL Server