

# What's New in Polaris Version 5.0: Summary

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*Pinnacle Library Cooperative*

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## LEAP

Please see “Polaris Leap User Guide”

## Acquisitions

### Close POs automatically

- Setting available at the system, library, and branch levels, so each library can choose whether or not they want POs closed automatically
- SQL job runs at 6:59AM each morning
- PO closed if:
  - All line items have a status of received, cancelled , partly received
  - All segments have a status of cancelled or received
- Set to No by default  
SA>Acquisitions / Serials > Automatically close purchase orders

## Cataloging

### MARC Updates

Changes to the bibliographic and authority validation tables for MARC Update No. 18 (April 2014) and MARC Update No. 19 (October 2014) and Technical Notices from June, July, September and October 2014 are included.

### Lost / Missing / Withdrawn Automatic Process

- Can now set to automatically update the circulation status of lost or missing items based on a specified period of time
- These new patron services parameters are available at the system, library, or branch level
- Lost items transition to either Missing or Withdrawn
- Missing items transition to Withdrawn
- When an item transitions from Lost, the following updates are made to the item record:
  - The circulation status changes from Lost to Missing or Withdrawn
  - The status reflects the date and time of the change
  - The item is removed from the Patron Status work form, Claims view
  - If the item is lost and not paid, the charge remains on the patron’s account
  - If the item is lost and paid, no lost-item-recovery options, such as crediting the patron’s account, are applied.
  - If *Charge accruing overdues* is selected, the charges are added to the patron account
  - The item record history displays: *Circulation status modified via Lost Item Transition processing Automatic status change*
- When an item transitions from Missing to Withdrawn, the following updates are made to the item record:
  - The circulation status changes from Missing or Withdrawn
  - The status reflects the date and time of the change
  - The item record history displays: *Circulation status modified via Missing Item Transition processing Automatic status change*

## Automatic Display in PAC Processing for Bibs

- Ability to suppress or display titles in the PAC & Mobile PAC automatically
- Records excluded:
  - bib records with resource entities for integrated eContent vendors
  - bib records with linked serial holdings records
  - bib records that are constituent records in a bound-with group
- Change made only to records in final status
- Job overwrites what is done by staff

SA>System>Profiles> Cataloging

**Bibliographic records: Automatic Display in PAC processing**

☐ Turn OFF the bibliographic 'Display in PAC':

☐ if there are no final linked item records

☐ if there ARE final linked item records and:

☐ 'Display in PAC' is off on all final linked item records

☐ the circulation status is suppressed on all final linked item records

☐ Turn ON the bibliographic 'Display in PAC' if the conditions above are NOT met.

OK Cancel Help

NOTE: Since Pinnacle has non-integrated eContent titles, we cannot select options: *Turn OFF the bibliographic 'Display in PAC' and if there are no final linked item records.*

## PAC & MobilePAC

### Carousel Toolkit \$

- System level feature
- Libraries can copy a code “snippet” for a content carousel from the Polaris ILS and paste the code into an external web site to display the content carousel
- The Carousel Toolkit provides the code for content carousels from a bibliographic record set or from one of the following system-supplied automatic web parts (dashboard elements):
  - Book Sense best seller lists
  - New Books
  - New Large Print
  - New Sound Recordings
  - New Videos
  - Most Circulated Titles
  - On Order Titles

## Auto Renew

More information in "Patron Services" section

- New fields were added to the Patron account in the PowerPAC and Mobile PAC for patrons to choose which reminder notices they will receive
- Changes made in the PowerPAC or Mobile PAC are reflected in the patron's record in the staff client

**▼ Contact Information and Preferences**

Please verify your contact information.

**Address information**

Address Type  
Home

Street one  
101 E. Main Street

City  
SYRACUSE

Postal code  
13210

Zip plus four

County  
ONONDAGA

Street two

State/Province  
NY

Country  
USA

**Contact information**

Email address

Phone 1  
518-222-2222

Phone 3

Alt. E-mail Address

Phone 2

**Preferences:**

My preference for receiving library notices  
TXT Messaging

Language preference  
English

Phone number for TXT messages  
Phone 1

Carrier  
Verizon

☐ Maintain reading list

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

Send e-mail reminder notices:  
☐ Almost overdue/auto-renew reminder notices

## Patron Services

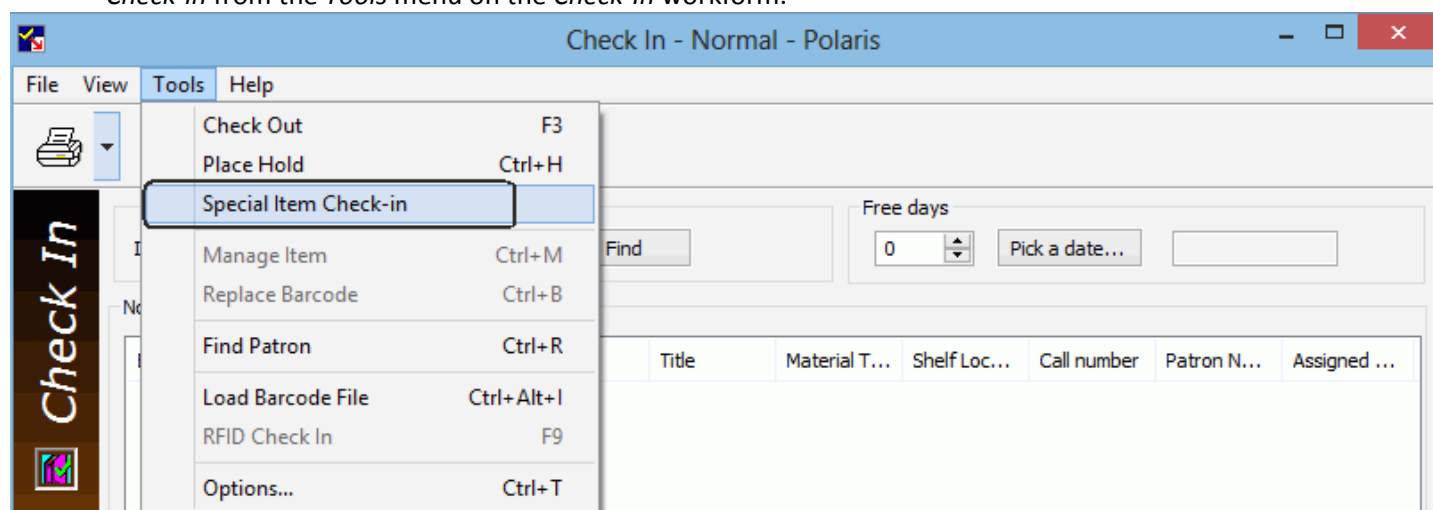
Please see “Lost / Missing / Withdrawn Automatic Porcess” in Cataloging section

### Family Holds Pickup

- Libraries that use associated patron groups can now designate a member (or members) of the group who can pick up items held for other members of the group, and then check out these items using their own library cards
- When the item is picked up and checked out by the designated member of the associated group, the hold is deleted from the account for the patron who placed the hold, and the holds list indicates the item was picked up by another member of the group
- When you add associated patrons to a patron record and check the *Allow me to pick up holds for these patrons* check box, only the primary patron, whose record is displayed in the Patron Status workform, is permitted to pick up held items for the associated patrons
  - To set up associations where patrons can pick up held items for each other, do the following for each member of the group: open the Patron Status workform, add the other associated patrons, and check the *Allow me to pick up holds for these patrons*

### Missing Part Check-In

- New option is included for items with missing parts
- Staff members can manage these items whether the missing parts are discovered before or after the item is checked in
- The Special Item Check-In dialog box, which opens when an authorized staff member selects *Special Item Check-in* from the *Tools* menu on the *Check-In* workform.



Special Item Check-in

Barcode:  Find...

Barcode	Status	Title	Material Type	Patron

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

☐ Mark item Unavailable

OK Cancel Help

- Authorized staff members can use this dialog box to scan the item’s barcode or search for the item with the missing part, and then update the item record’s status by selecting one of the following options:
  - *Missing part: block & notify*
    - Selecting this option updates the item’s status to Claim Missing Parts
    - Blocks the item from being circulated
    - Moves the item to the Patron Status workflow Claims view
    - Generates a notice to the patron
    - Includes the special item check-in note (if entered) on the patron notice and the Item Record workflow
    - If the item’s status is still Out, the notice is sent to the current borrower
    - If the item’s status is In, the notice is sent to the last borrower
  - *Mark item Unavailable*
    - Selecting this option updates the item to Unavailable, which prevents the item from being circulated
- Missing parts will appear on the Claims view of the Patron Status workflow
- Staff can select the item with the claim type Claim Missing Parts and charge the patron for the missing parts if the item is salvageable, or declare the item lost if the missing part cannot be recovered and the entire set must be removed from circulation
- When the item is updated using the *Special Item Check-In* dialog box, the item does not go in transit
- Libraries can select “Missing part” notice, where patron will be notified, via their default Notification method, that an item was returned with an missing part

### Check Outs via SIP

- Library organizations can now select the following circulation statuses that will not block patrons from checking out items using an organization’s self-check unit:
  - Bindery
  - Claim Never Had
  - Claim Returned
  - In-Repair
  - In-Transit
  - Missing
  - Unavailable

- Withdrawn

## Auto renew

- Items are eligible for automatic renewal when the item's assigned branch has set turned on
- If the patron has items out that are eligible for auto-renewal, the items are renewed based on the number of days selected in the *Almost overdue/Auto renew \_\_\_ days before an item is overdue* field on the Reminders tab of the Notification options dialog box in SA settings
- The new due date for an automatically renewed item is calculated by taking the current due date and adding the full loan period
- The conditions, such as patron blocks, that prevent manual renewals also prevent automatic renewals
- The item's assigned branch determines if the item is eligible for auto-renewal, and the patron's registered branch determines when the renewal is done and whether a reminder notice is sent
- Automatically renewed items are included in the Almost overdue reminder notice
  - An e-mail will notify the patron that the item was renewed automatically, unless the patron has opted out of receiving this type of reminder notice
- New fields were added to the Patron Registration workform for library staff to indicate if a patron wants to opt out of receiving reminder notices
- E-receipts will not be sent to patrons when items are renewed automatically
- Existing Polaris standard reports that contain renewal counts will include automatic renewals along with manual renewals

## Reminder Notice Opt Out

- Library staff can now specify which e-mail reminders patrons do not want to receive
  - In addition, you can allow patrons to select these opt-out options themselves in PAC
- The Patron Registration workform contains the following Exclude from notices and reminders check boxes:
  - Almost overdue/auto-renew
  - Patron record expiration
  - Inactive patron

Patron Registration - 357715 - General - Polaris

File Edit View Links Tools Help

Barcode: A12291954 Registered at: Community Library (COB)

Last name: Izquierda Patron code: Juvenile

First name: Laura

Middle name:

Title: Ms. Suffix:

Expiration: Term: 0 Date: 10/12/2014

General

Gender: ☐ Male ☒ Female ☐ N/A

Statistical class: (None)

Password: ....

Language: English

Former barcode:

Birth date: ☒ 12/ 1/1955

Date of original registration: ☒ 10/12/2011

Last activity date: 9/8/2014 3:01:06 PM

Exclude from notices and reminders:

☐ Overdue ☐ Almost overdue/auto-renew ☐ Exclude from collection agency

☐ Hold ☐ Patron record expiration ☒ Maintain reading list

☐ Billing ☐ Inactive patron ☐ E-mail notices in plain text

☐ Do not delete patron record

User defined fields

ID Number

Privileges / Restrictions

Voter Registration

CybraryN Use Only (XXX,YYY)

Not Currently In Use

For Help, press F1 NUM