

What's New in Polaris Version 5.0 SP1: Summary

Pinnacle Library Cooperative

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Change Hold Pickup Location – Patrons

- System level setting
- Can allow for patrons to change the pickup locations for hold requests
 - For hold requests only in the following statuses:
 - Active
 - Held
 - Inactive
 - Located
 - Pending
 - Shipped
 - We have control for which hold statuses we can allow this
- The number of days held restarts once the item has been checked into the new pickup location
- Option visible in Requests view of patron's account in PAC and Mobile PAC

LIBRARY INFO ▼ SEARCH ▼ MY ACCOUNT ▼ HELP ▼

My Account

Izquierda, Laura

- 1 request(s) ready for pickup
- 4 items overdue
- \$21.97 owed on your account

My Record

Items Out (4)

Requests (3)

Fines & Fees (\$21.97)

Reading History (20)

Saved Searches

My shopping cart

Community

[Log Out](#)

My Lists

Saved Title Lists

- Books I like (17)

Name: Izquierda, Laura
Barcode: 1954
Username: [None]
Registered at: Community Library
Patron code: Retired
Date of original registration: 10/12/2011
Expiration date: 10/4/2018

[- more information](#)
[- additional note](#)
[Refresh eContent](#)

Requests

<input type="checkbox"/>	i	Format	Title	Pickup Library	Status
<input type="checkbox"/>	i		The invention of wings by Kidd, Sue Monk.	Rerouting from: Community Library to: Amsterdam Free Library	Held (for 14 more days)
<input type="checkbox"/>	i		Harry Potter and the sorcerer's stone by Rowling, J. K.	Amsterdam Free Library	Shipped (7 days ago)
<input type="checkbox"/>	i		Harry Potter and the sorcerer's stone by Rowling, J. K.	Amsterdam Free Library	Pending (as of 1/28/2015)
<input type="checkbox"/>	i		Gravity	Community Library	Out to patron (11/7/2014)

[Change Pickup Location](#) [Cancel Selected](#) [Suspend/Reactivate Selected](#) [Log Out](#)

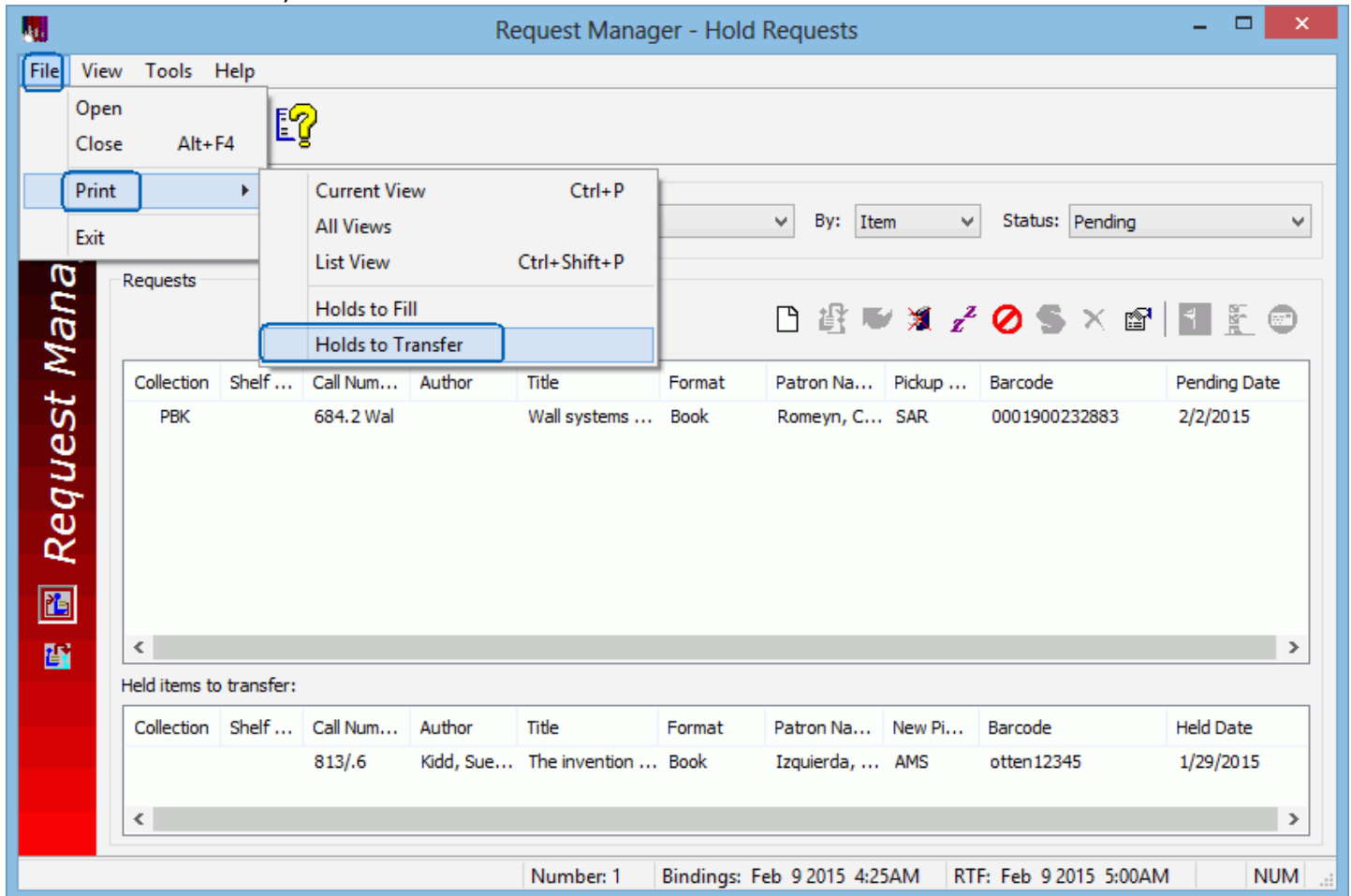
Updates to PowerPAC Requests View

- The Cancel All button replaced with Cancel Selected
- The Suspend/Reactivate All button replaced with Suspend/Reactivate Selected button
- A new check box was added to the header in the left column

Change Hold Pickup Location – Staff

- Staff must have necessary permissions to change hold pickup location
- Staff members can change the pickup location of hold requests with any of these statuses:
 - Active
 - Pending
 - Located
 - Inactive
 - Held
 - Shipped

- Location is changed from Hold Request worform by selecting a new location from the “Pickup Library” drop-down list
- In the Request Manager, new Held items to transfer list view displays held items that need to be transferred to a new pickup location
 - The Holds to Transfer report can be printed from the Request Manager or from the canned reports menu (Utilities > Reports and Notices > Circulation > Holds > Hold Requests to transfer)



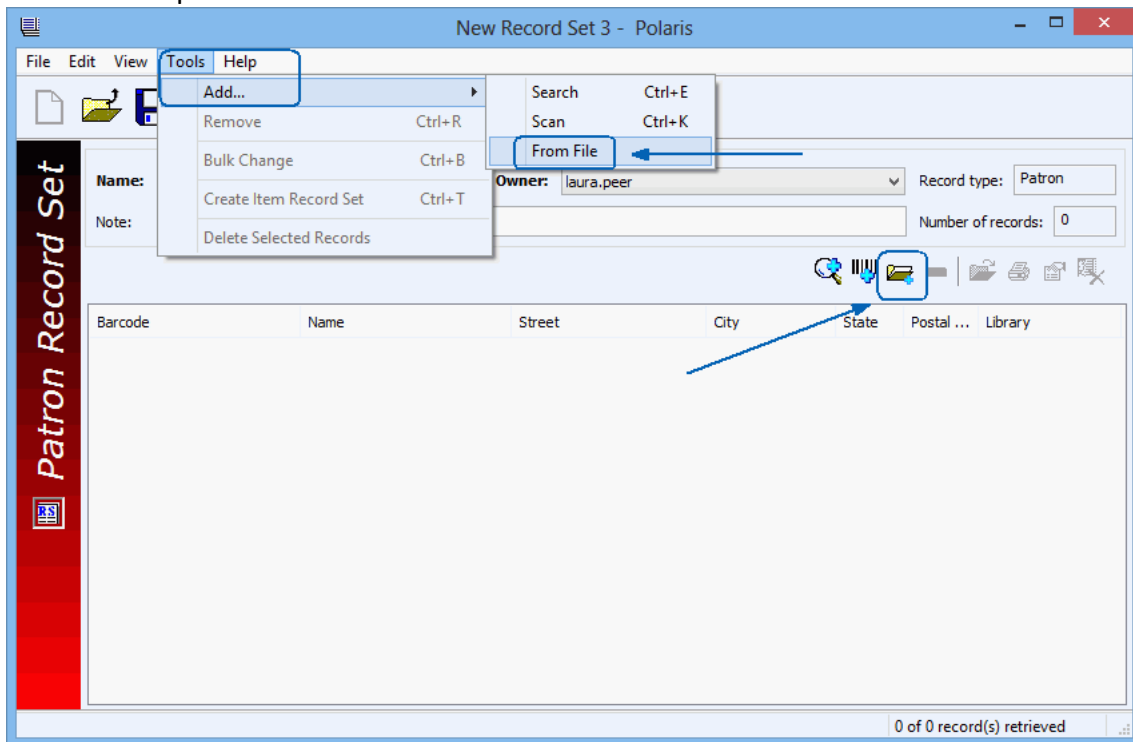
Second Level Collection Agency Management

- Libraries are able to report accounts to the second collection agency

Add Patron Records to a Record Set Using a File


- Patron record set can be populated by Patron IDs from a column in an Excel file
- Add from file feature on the Patron Record Set workform

- No data is imported!!!



Create an Item Record Set from a Patron Record Set



- A new option -  - on Patron Record Set workform - allows staff to generate an Item Record Set from the patron record set

Secure and Release Patron Records

Not supported in LEAP, for now

- Staff needs necessary permission to secure patron record
- Patron records can be now secured by using a new Tools option on Patron Status workform
- All circulation and payment activity is prevented in staff client and in PAC:
 - No fine notices are send
 - No checking out items or logging into an account from a self-check unit
 - Can't delete patron record
 - No outreach services
 - Cannot place holds
 - Cannot checkout eContent
 - Can't make payments
 - Can't update their account
- Patrons whose records are secured can do the following:
 - Search the Polaris PACs
 - Log in and view their library accounts in Polaris PACs

- Red exclamation point by patron's record in the Find Tool results list means patron record is secured

Display Associated Patron Accounts in PAC

- Library settings
- Libraries can choose if display the following in a patron's PAC account when the patron is linked to other patrons through associations
 - "Block me" – information whether a patron is blocked when their associated accounts are blocked
 - "Allow me" – information whether a patron is permitted to pick up and check out held items for their associations

The screenshot shows a web interface for a Community Library. At the top, there are navigation links: LANGUAGE, LARGE TEXT, KID'S CATALOG, MOBILE SITE, MY SHOPPING CART, and a dropdown for switching branches. Below this is a header with a book icon and the text "Community Library". A secondary navigation bar includes LIBRARY INFO, SEARCH, COMMUNITY, MY ACCOUNT, and HELP. The main content area is divided into a left sidebar and a main panel. The sidebar has sections for "My Account" (with a sub-section for "Acosta, Sarah R" containing links like My Record, Items Out, Requests, Fines & Fees, Saved Searches, My shopping cart, and Log Out) and "My Lists" (with a sub-section for "Saved Title Lists" containing a link to "Create new saved list..." and a "Help" button). The main panel displays the user's profile information for "Acosta, Sarah R", including a barcode (4202), username ([None]), registration details, and a last activity date. Below this is a "Messages" section showing "No messages". The "Contact Information and Preferences" section is expanded, showing a table of "Associated Patrons (3)".

Name	Blocks on this patron also block me	I can pick up holds
Falotico, Rebekah E	No	Yes
Ozolins, Genie R	Yes	Yes
Surento, Brandon S	No	Yes

Three Levels of Holds Fulfillment

- New hold options for libraries that have set up trapping preference groups
- Fountaindale, Joliet, & Shorewood:
 - Have selected "Prefer my location" – item's assigned branch matches the pickup branch of any request in the queue
 - Option to select "in Preference group"

- Hold requests where the pickup branch is in the preference group, and that branch matches the item's assigned branch will be filled first
- Lemont, Plainfield, & White Oak:**
 - Have selected "prefer my patron" – item's assigned branch matches a patron's registered branch of any request in the queue
 - Option to select "in Preference Group"
 - Hold requests where the patron's registered branch is in the preference group, and that branch matches the item's assigned branch are filled first

Does not impact us, since libraries selected all of their branches in their preference groups

Suppress EContent Availability Display in PAC

Done by Jolanta at the system level

- Availability information (Find It button and Find It drawer) can be suppressed for integrated eContent titles in PACs

Require Format for Integrated EContent Check Outs in PAC

- Libraries can require patrons to select a format when they check out integrated eContent titles from the PACs
- The format list defaults to Please select, and the patron must select a format from the list to check out the eContent
 - Currently it defaults to the first one on the list

Display Claimed and Lost Items in Patron Accounts in PAC

- Ability to display Claimed and Lost items to patrons in PACs
- System, Library, or Branch setting

The screenshot shows a library patron account page. At the top, there are navigation tabs: LIBRARY INFO, SEARCH, MY ACCOUNT, and HELP. The left sidebar contains a 'My Account' section with a dropdown menu showing 'Izquierda, Laura'. Below this, there are links for '1 request(s) ready for pickup', '3 items overdue', '\$82.94 owed on your account', 'My Record', 'Items Out (3)', 'Requests (4)', 'Fines & Fees (\$82.94)', 'Claimed and Lost (2)', 'Reading History (20)', 'Saved Searches', 'My shopping cart', and 'Community'. The main content area displays account details for 'Izquierda, Laura', including a barcode, username, registered at, patron code, date of original registration, and expiration date. Below this, there is a section titled 'Claimed and Lost' with a table of items.

i	Format	Title	Due Date	Claim/Lost Type	Claim/Lost Date	Note
		Danny and the dinosaur [sound recording]	1/9/2015	Claim Missing Parts	12/26/2014	CDMissing
		The once and future king	10/7/2014	Lost/Unpaid	2/24/2015	

At the bottom of the 'Claimed and Lost' section, there are two buttons: 'Estimate Overdue Fines' and 'Log Out'.

Saved Title Lists in Merged Patron Records

- When patron records are merged, saved title list from the second (deleted) record is moved to the first record