



What's New in Polaris and Leap

7.2

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Polaris Installation Notes

Important:

When the new Polaris release is installed on a workstation, the file path changes from 7.1 to 7.2 as in the following examples:

C:\ProgramData\Polaris\7.2
C:\Program Files\Polaris\7.2
C:\Program Files (x86)\Polaris\7.2

New or Modified Polaris Administrative Settings

Several system administration settings have been modified to facilitate the new features for Polaris Administration (staff client) and Leap in 7.2.

Setting	Purpose	Level
Modified Parameter		
Notification options	In previous versions, Polaris supported exporting notices at the system level only. As of version 7.2, you can now export notices at the system level or the library level.	System and Library
New Profiles		
Staff Client > Web App: Suppress Link: PAC	Specifies whether the PAC link appears under the Links menu in the Leap Bibliographic workform.	System, Library, and Branch
PAC > Patron access options > Patron self-registration block	Specifies whether patrons who self-register using PowerPAC, MobilePAC, or Polaris API receive a system block on their account until staff review the registration. The default is selected (blocked account).	System, Library, and Branch
Staff Client > Barcodes: Patron format definition > Self Registration: On/Off	Specifies which barcode format the system uses for self-registering patrons. For more information, see Custom, Unblocked Barcodes for Self-Registering Patrons	System

Polaris API Changes

The following methods have been added or updated:

Method Name	Purpose
Api	Returns PAPI version information.
MultipartGet	Now returns a list of item barcodes, volumes (non-serial bibliographic items), or designations and volumes (serial issues) when they exist for the specified bibliographic record, patron, and pickup location.
PatronLanguagesGet	Returns a list of all patron languages in the system.
PatronRegistrationUpdate	Now provides the following capabilities: <ul style="list-style-type: none"> • supports patron requests to change their language preference. • supports updating a patron's former barcode.
PatronRegistrationCreate	Now includes the ability to designate a patron's preferred language by ID.
PatronBasicDataGet	Now includes the patron's former barcode and preferred language in the basic data returned.

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

In addition, the KeyedHashAlgorithm has been updated to offer the following options:

- HMACSHA1 - Select to compute a hash-based message authentication code (HMAC) by using the SHA1 hash function.
- HMACSHA256 - Select to compute a hash-based message authentication code (HMAC) by using the SHA256 hash function.

Note:

Anywhere the HMACSHA256 algorithm appears as a choice in the code, you can choose to use it. If you use the HMACSHA256 algorithm, all third parties that connect to your instance of PAPI also must use HMACSHA256.

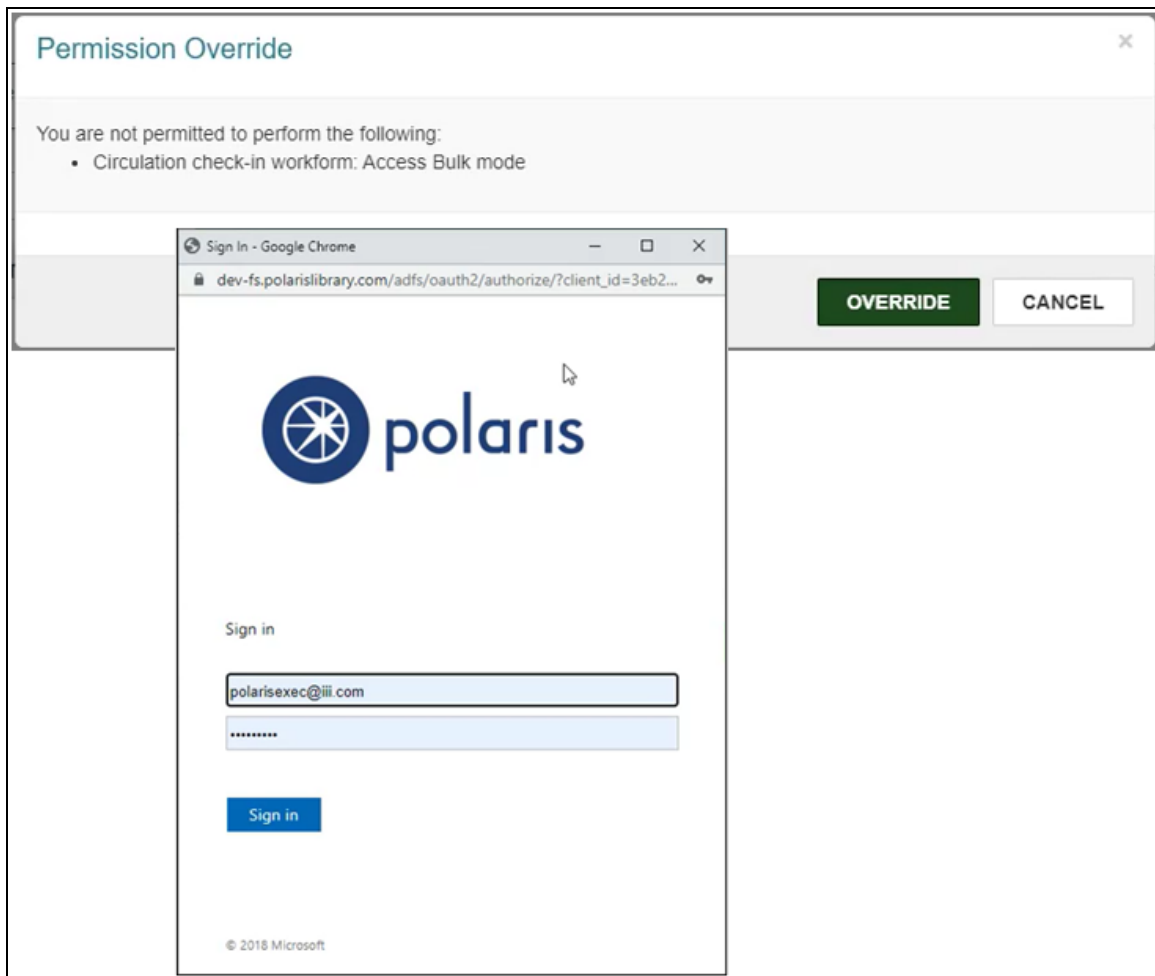
For more information, see the Overview topic > Configuration section in the PAPI documentation.

Support for SSO in Leap

Leap now supports single sign-on (SSO) authentication. For hosted libraries, this means that staff users can sign in to Leap using their library domain credentials (instead of using a separate set of Innovative credentials).

When SSO is enabled, Leap uses OAuth 2.0 with Open ID, and authentication is handled by Active Directory and Active Directory Federation Services.

Note that when SSO is enabled, selecting **VERRIDE** on the Permission Override dialog opens a new browser window where a manager or other user can enter override credentials.



Contact Innovative for help getting started with SSO for Leap. For additional information about configuring OAuth and Active Directory Federation Services, see the Polaris OAuth 2.0 Integration with Microsoft AD FS Guide (7.2).

Creating Serial Holdings Records in Leap

In version 7.1, we added support for viewing and editing holdings records in Leap. As of version 7.2, you can also create serial holdings records in Leap.

To create serial holdings records, you must have the **Serial holdings records: Create** permission enabled in Polaris Administration. For more information about serials permissions, search for "Serials Permissions" in the Polaris Administration (staff client) help.

To create a serial holdings record

1. Select **New > Serial Holdings Record**.

The New Serial Holdings Record workflow appears.

New Serial Holdings Record

SAVE
CLOSE

Status:	Destination:	Bib control number:
Serial holdings record ID:	Collection:	Order Type:
Copy no.: 1	Material type:	ISSN/ISBN:

[Details](#)
[Notes](#)
[Orders](#)
[Claims](#)

Status <input type="text" value="On Order"/>	Destination <input type="text" value="Community Library (COB)"/>	Copy no. <input type="text" value="1"/>	Bib control number* <input type="text"/>	<input type="button" value="FIND"/>
Order Type <input type="text" value="Subscription"/>	Collection <input type="text" value="(None)"/>	Material type <input type="text" value="(None)"/>		

Holdings Display

Call Number Scheme <input type="text" value="Dewey Decimal"/>	Prefix <input type="text"/>	Classification <input type="text"/>	Cutter <input type="text"/>	<input checked="" type="checkbox"/> Display in PAC
Completeness Code <input type="text" value="(None)"/>	Retention Designator <input type="text" value="(None)"/>			

2. [Enter serial holdings record details.](#)
3. [Enter notes for library staff or patrons.](#)
4. [Enter purchase order information, subscription details, and membership information.](#)
5. [Enter serial holdings record claims information.](#)
6. Select **SAVE**.

Leap saves the serial holdings record.

Enter Serial Holdings Record Details

To enter holdings record details

1. On the New Serial Holdings Record workform, select the Details view.
2. Select the **Status** for the serial holding. Assigning “Not currently received” as a status disables automatic prediction for this serial holdings record.
3. In the **Destination** list, select the branch that will house the series.
4. In the **Copy no.** box, enter the copy number.
5. Specify the bibliographic record control number:
 - a. Select the **FIND** button beside the **Bib control number** field.
The Bibliographic Record Find Tool opens.
 - b. Search for a title and select it.
 - c. Select **OPEN**.
Leap populates the **Bib control number** field.
6. Select the **Order Type** for the serial holdings record.
7. In the **Collection** list, select the collection where the series will be located.

Note:

The selections available in the Collection list are dependent on the organization you selected for destination branch.

8. In the **Material type** list, select the format of the series.
9. In the Holdings Display section, enter the shelving scheme:
 - a. Select a **Call Number Scheme**.
 - b. Enter a **Prefix**.
 - c. Enter a **Classification**.
 - d. Enter a **Cutter**.
 - e. Select **Display in PAC** if you want this information to appear in PowerPAC and Children's PAC. The display also depends on the retention information you enter. The checked in issues display according to the retention

information. For more information, search the Polaris Administration (staff client) help for "Displaying Serial Titles in the PAC."

Note:

If you leave **Display in PAC** cleared, no serial issues display for the title (unless there are linked item records that are set to display).

10. Select completeness and retention information:

- a. Select a **Completeness Code** that best describes the current state of the series.
- b. Select a **Retention Designator**.

Note:

If you select **Retained for a limited period**, then select **Latest retained** or **Previous retained** and the number of editions, issues, months, supplements, weeks or years of this serial title to retain. If you select **Latest retained**, the latest publications are retained, including the current one. If you select **Previous retained**, the previous publications, not including the current ones, are retained.

Enter Notes for Library Staff or Patrons

The Notes view of the Serial Holdings Record workform gives you the ability to leave notes for patrons and library staff, and to read the notes left by other staff members. You can enter the following types of notes in the Notes view:

- [Electronic Access Notes](#)
- [Shared Public Notes](#)
- [Non-Public Notes](#)
- [Non-Public/Warning Notes](#)

Electronic Access Notes

For electronically delivered subscriptions, type a Listserv, URL, or email address used to manage online electronic journal subscriptions or standing orders. Only library staff can read this note.

Shared Public Notes

Enter notes that display in the Polaris PowerPAC. You can type up to 4,000 characters in the Shared public note box. Enter line breaks where you want the text to break in the Polaris PowerPAC. Patrons and library staff can read this note.

For more information, search the Polaris Polaris Administration (staff client) help for "Enter public notes for a serial holdings record."

Non-Public Notes

Enter a free-text note about special processing required for a title in this series. Only library staff can read this note and it appears in the Serials Check In workform.

Non-Public/Warning Notes

Enter a free-text note about special attention that you want given to this title. Only library staff can read this note and it appears in the Serials Check In workform.

Enter Purchase Order Information, Subscription Details, and Membership Information

You can do the following on the Orders tab of the Serial Holdings Record workform:

- [View and Edit Purchase Order Information](#)
- [Set Subscription Details](#)
- [Enter Membership Details](#)

View and Edit Purchase Order Information

To view and edit purchase order information

1. Select an **Owner**.

Standard Address Number (**SAN**) appears automatically when you select an owner organization.

2. Enter **Plan** information.

3. Enter supplier information:

- a. Select the **Find** button beside the **Supplier** field.

The Supplier Find Tool opens.

- b. Search for a supplier and select it.
- c. Select **OPEN**.

Leap populates the **Supplier** and **SAN** fields.

4. To link a purchase order line item to the serial holdings record, do the following:

Note:

Leap requires that you add a link to a purchase order line item before you save a serial holdings record with an order type of Standing Order.

- a. Select the **LINK** button beside the PO Number field.

Leap displays potential matching purchase order line item segments on the PO Line Item Segments dialog.

Note:

A purchase order line item segment is a potential match if the following conditions are true:

- The segment belongs to a purchase order with an order type of Subscription or Standing Order.
- The purchase order has the same bib control number, destination organization, and supplier as the serial holdings record.
- The segment has a status of On Order, Backordered, Out of Print, or Never Published.

- b. Select a segment.
- c. Select **CONTINUE**.

Leap populates the **PO Number**, **PO Line Number**, and **Segment Number** fields.

Set Subscription Details

Use the Subscription Details section to specify the subscription start and duration information.

To enter subscription details

1. Enter a **Start Number**.

Note:
Start Date and **Expiration Date** are only editable for standing order parts.

2. Select (using the calendar) or type the **Intent to Cancel Date**.

Enter Membership Details

To enter membership details

1. Select **Designation** to indicate that the subscription is included in a membership to a professional organization.

Member Name and **Member Organization** become editable.

2. Enter the **Member Name**.
3. Enter the name of the **Member Organization**.

Note:
Member Name and **Member Organization** are visible only in these fields and only to library staff.

Enter Serial Holdings Record Claims Information

Claims can be sent automatically from Leap based on claiming intervals defined in the supplier record you enter in the Polaris Administration (staff client). For more information about entering claiming intervals, search the Polaris Administration (staff client) help for "Serial Holdings Record Workform - Orders View."

To view the claiming intervals for a supplier's subscription number

1. Find the supplier's subscription number printed on claim notices.
2. Enter the supplier's subscription number in the **Subscription ID** field.

The claiming intervals appear in the table.

Working with Publication Patterns

You can now work with publication patterns in Leap. A publication pattern is a pattern you create to predict future serials issues or parts.

This section covers the following topics about publication patterns:

- [View and Edit](#)
- [Close and Reopen](#)
- [Delete](#)

View and Edit

To view the publication pattern workflow

1. Go to **Serial Holdings Record (SHR) workflow > Details View**.
2. Select a row in the Publication Patterns table.

Publication Patterns				
<input type="checkbox"/> CLOSE PATTERN		<input type="checkbox"/> REOPEN PATTERN		<input type="checkbox"/> DELETE
<input type="checkbox"/>	CATEGORY	FREQUENCY	START DESIGNATION	REGULARITY
<input type="checkbox"/>	Basic Bib / 1	Monthly	Vol 21 No. 1 (Mar. 2005)	pm 01,02,03 0
<input type="checkbox"/>	Index / 1	Annual	Vol 1 (2012)	

The Publication Pattern workflow opens.

To edit information in the publication pattern workflow

1. Open the Publication Pattern workflow.
2. Make changes to the following publication pattern record views:

- Details
 - **Arrival Pattern** – Enter the number of days, then select **Before** or **After** publication.
 - **Issues to Predict** – Enter the number of issues. When Leap predicts issues at serials check in, it uses this value.
 - **Unit Price** – Enter the price of the items created from the issues. When the system generates items from checked-in issues, they will contain the unit price.
 - **Generate Items at Check In** – Select if you want to generate item records when you check in an item.
 - **Prompt for Barcode** – Select if you want the system to prompt you to scan the barcode of the item when you check it in.
 - **Type of Supplement or Index** – Select the type of item if it is a supplement or index.
 - **Textual Holdings Note** – Enter more information if necessary to describe the holdings.
 - **Textual Holdings Public Note** – Enter a note that will display withholdings information to patrons in PAC.
 - **Textual Holdings Non-Public Note** – Enter a note that displays to library staff only.
- Designation
 - **Frequency** – View the publication frequency.
 - **Start Date** and **End Date** – Select the date the publication starts and then select the date the publication ends.
 - **Starting Designation** – View the starting enumeration and chronology based on the selected enumeration and chronology values and the start date.
 - Chronology **Setup** – View a preset setup.
 - Enumeration **Setup** – View a preset setup.

Note:
 You can create these presets in the Polaris Administration (staff client). For more information, search the Polaris Administration (staff client) help for "Pattern Options Window."

- Regularity Pattern

All fields in this view are read only. You can edit these fields in the Polaris Administration (staff client). For more information, search the Polaris Administration (staff client) help for "Pattern Options Window."

3. Select **SAVE**.

Close and Reopen

To close a publication pattern

1. Go to the **Serial Holdings Record (SHR) workform > Details View**.
2. Select the checkbox beside a row in the Publication Patterns table.
 Publication patterns must have a status of Open before they can be closed.
3. Select **CLOSE PATTERN** above the table.

Publication Patterns						
<input checked="" type="checkbox"/> CLOSE PATTERN <input type="checkbox"/> REOPEN PATTERN <input type="checkbox"/> DELETE						
<input type="checkbox"/>	CATEGORY	FREQUENCY	START DESIGNATION	REGULARITY PATTERN	CALENDAR CHANGE	STATUS
<input type="checkbox"/>	Basic Bib / 1	Monthly	(May 2008)	pm 01,02,03,04,05,06,07,08,09,10,11,12		Open
<input type="checkbox"/>	Basic Bib / 2	Annual	(2022)			Open
<input checked="" type="checkbox"/>	Basic Bib / 3	Weekly	(12th Wk 1999 (Mar.))	cw 20/21 ow 15 pd su		Open
<input type="checkbox"/>	Index / 1	Annual	(2022)			Open

A Pattern Date dialog opens.

4. Ensure the start and end dates are correct.
5. Select **CONTINUE**.

The system deletes any issues that are linked to the pattern, with a status of Expected, and a chronology date later than the end date.

To reopen a publication pattern

1. Go to the **Serial Holdings Record (SHR) workform > Details View**.
2. Select the checkbox beside a row in the Publication Patterns table.
Publication patterns must have a status of Closed before they can be reopened.
3. Select **REOPEN PATTERN** above the table.

Publication Patterns						
<input type="checkbox"/> CLOSE PATTERN <input checked="" type="checkbox"/> REOPEN PATTERN <input type="checkbox"/> DELETE						
<input type="checkbox"/>	CATEGORY	FREQUENCY	START DESIGNATION	REGULARITY PATTERN	CALENDAR CHANGE	STATUS
<input type="checkbox"/>	Basic Bib / 1	Monthly	(May 2008)	pm 01,02,03,04,05,06,07,08,09,10,11,12		Open
<input type="checkbox"/>	Basic Bib / 2	Annual	(2022)			Open
<input checked="" type="checkbox"/>	Basic Bib / 3	Weekly	(12th Wk 1999 (Mar.))	cw 20/21 ow 15 pd su		Closed
<input type="checkbox"/>	Index / 1	Annual	(2022)			Open

A Reopen Publication Pattern dialog opens.

4. Ensure the start and end dates are correct.
5. Select **CONTINUE**.

The pattern's status changes to Open.

Delete

To delete a publication pattern

1. Go to **Serial Holdings Record (SHR) workform > Details View**.
2. Select the checkbox beside a row in the Publication Patterns table.
3. Select **DELETE** above the table.

Publication Patterns

CLOSE PATTERN REOPEN PATTERN DELETE

<input type="checkbox"/>	CATEGORY	FREQUENCY	START DESIGNATION	REGULARITY PATTERN	CALENDAR CHANGE	STATUS
<input type="checkbox"/>	Basic Bib / 1	Monthly	(May 2008)	pm 01,02,03,04,05,06,07,08,09,10,11,12		Open
<input type="checkbox"/>	Basic Bib / 2	Annual	(2022)			Open
<input checked="" type="checkbox"/>	Basic Bib / 3	Weekly	(12th Wk 1999 (Mar.))	cw 20/21 ow 15 pd su		Open
<input type="checkbox"/>	Index / 1	Annual	(2022)			Open

A Do You Want To Continue dialog opens.

4. Select **CONTINUE**.

Crediting Invoices in Leap

You can now credit an invoice or invoice line item in Leap.

This section covers the following topics:

- [Credit an Invoice](#)
- [Credit a Line Item](#)

Credit an Invoice

You can credit an invoice if the following conditions are true:

- You have the **Invoices: Pay, Undo payment, Credit permission** enabled in Polaris Administration. For more information about acquisitions permissions, search for "Acquisitions Permissions" in the Polaris Administration (staff client) help.
- If the invoice type is Miscellaneous and the invoice has line items:
 - All line items have a payment status of Paid or Open.
 - All segments are received.
- If the invoice type is Miscellaneous and the invoice has header charges but no line items:
 - The invoice status is Paid or Open.
- For all other types of invoices:
 - All line items have a payment status of Paid or Prepaid, and
 - All segments are received.

Note:

You cannot credit an invoice with a payment method of Free.

To credit an invoice

1. Use the Find Tool to find and open the invoice.

Invoice ⓘ

SAVE ACTIONS ▾ REFRESH RESULTS CLOSE

Number: 9559223 sus Suffix: EDI Lines: 22 Type: Regular

Invoice Date: 10/23/2007 Status: Paid Status Date: 10/23/2007 Total: \$355.10 Method: Purchase

Details | Line Items | Charges | Payment History

Account Identifiers

Owner: Southern Adirondack Library System (SAL) Supplier: B&T BOOKS - L358576 FIND

SAN: 354-1266 : SAN: 155-6150 :

2. Select **ACTIONS > Credit**.

The Check / Voucher dialog appears.

Check / Voucher

Amount: \$355.10

Number: Payment Type: Check Voucher

Date: 4/20/2022

CREDIT CANCEL

3. Select a **Payment Type** of Check or Voucher.
4. In the **Number** box, enter the check or voucher number.

5. Select the payment date in the **Date** box.
6. Select **OK**.

Leap credits the invoice. The transaction appears in the Payment History view.

Credit an Invoice Line Item

You can credit an invoice line item if the following conditions are true:

- You have the **Invoices: Pay, Undo payment, Credit permission** enabled in Polaris Administration. For more information about acquisitions permissions, search for "Acquisitions Permissions" in the Polaris Administration (staff client) help.
- The line item has a status of Paid or Prepaid.
- All segments are received.

Note:

You cannot credit individual line items in Miscellaneous invoices. You also cannot credit line items in invoices with a payment method of Free.

To credit an invoice line item

1. Use the Find Tool to find and open the invoice.
2. Select the Line Items view.

Invoice ⓘ

Number 9559223 sus **Suffix** EDI **Lines** 22 **Type** Regular ▾

Invoice Date 10/23/2007 📅 **Status** Paid **Status Date** 10/23/2007 **Total** \$355.10 **Method** Purchase ▾

Details **Line Items** Charges Payment History

<input type="checkbox"/>	LINE	!	TITLE	AUTHOR	ISBN/ISSN	AMOUNT	RECEIVED	PAID	PO NO.	FUND	STATUS
<input checked="" type="checkbox"/>	1		How to cook everything vegetarian : simple meatless recipes for great food	Bittman, Mark.	9780764524837 (cloth)	\$20.88	1	1	GLC594	ACBA	Paid
<input type="checkbox"/>	2		Pup and Hound hatch an egg	Hood, Susan, 1954-	1553379748 :	\$9.35	1	1	RDL203	Book	Paid

3. (Optional) Enter text in the **Filter** box to filter the list of line items.
4. Select the line item or items you want to credit.
5. Select **Credit**.

The Check / Voucher dialog appears.

Check / Voucher

Amount

\$355.10

Number

Payment Type

Check Voucher

Date

4/20/2022 📅

6. Select a **Payment Type** of Check or Voucher.

7. In the **Number** box, enter the check or voucher number.
8. Select the payment date in the **Date** box.
9. Select **OK**.

Leap credits the line item or items. The transaction appears in the Payment History view.

Purchase Order and Line Item Actions

In Leap, the Purchase Order workflow now allows you to modify PO line item status and delete a PO line item from the table in the Line Item view.

To modify the status of a line item

1. Use the **Find Tool** to find the purchase order record you want to edit, and open it in the Purchase Order workflow.
2. Select the **Line Item** view.
3. Select the checkbox beside the row in the Line Item table you want to modify.
4. Select one of the following:
 - **CANCEL** – Changes a line item with a status of **Received** or **Closed** to **Canceled**.
 - **UNDO RECEIPT** – Changes a line item with a status of **Received** to **On Order**.

You can [modify more line item statuses](#) in the Purchase Order Line Item workflow.

Changing Purchase Order Line Item Status

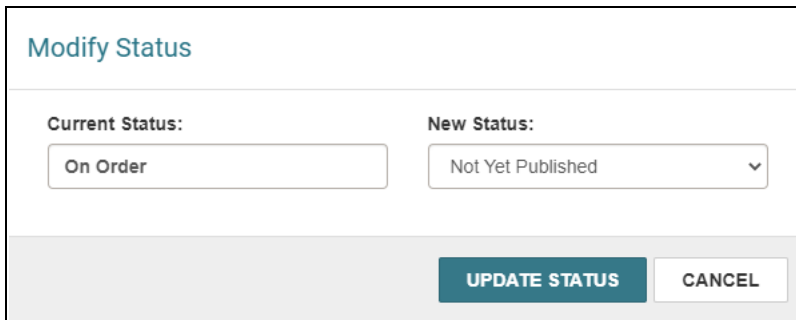
In Leap, you can now use an Action menu link in the Purchase Order Line Item workflow to modify the Purchase Order Line Item status.

To modify the purchase order line item status

1. Use the **Find Tool** to find the purchase order record you want to edit, and open it in the Purchase Order workflow.
2. Select the **Line Item** view.
3. Select a row in the line Item table.

The Purchase Order Line Item workflow opens.

4. Select **Actions > Modify Status**.



Modify Status

Current Status:

New Status:

The Modify Status dialog opens.

5. Select a status from the New Status list.
6. Select **UPDATE STATUS**.

New EDI Integrations

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

- James Bennett
- Blackstone (replaces Recorded Books)

Note:




Neither supplier currently supports sending purchase order acknowledgments via EDI.

PAC Hold Until Date

Held items in PowerPAC and MobilePAC now show the date instead of a count down.

Quell, Sebastian
[i - more information](#)
[📌 - additional note](#)

Requests

<input type="checkbox"/>	Title	Status	Pickup Library	Format
<input type="checkbox"/>	 The shining by King, Stephen, 1947-	On Hold Shelf! (until 3/5/2022)	Otten test (仙逆)	i
<input type="checkbox"/>	 Pugs by Barnes, Nico.	Shipped (449 days ago)	Quell Test Branch	i
<input type="checkbox"/>	The stand by King, Stephen, 1947-	Shipped (449 days ago)	Otten test two	i
<input type="checkbox"/>	Rolling stone. April 6, 2006	Active (since 1/6/2022)	Quell Test Branch	i
<input type="checkbox"/>	 Black mad wheel by Malerman, Josh, author.	Active (since 1/8/2022)	Quell Test Branch	i

Creating Custom, Unblocked Barcodes for Self-Registering Patrons

You can now set up the Polaris Administration (staff client) so that patrons who self-register using PowerPAC, MobilePAC, or Polaris API can receive a custom barcode format (not PACREG). You can also choose to allow patrons to self-register without assigning a system block for staff to verify the patron data.

To configure self-registration barcodes to be unblocked

1. Open the Polaris Administration Explorer, and select **Profiles > PAC > Patron access options**.

The Patron Access Options dialog opens.

Patron Access Options [QA-FALCON 7.2 (sys)]

Self-registration Defaults Log In Contact Info Preferences Ask us

Patron can self-register

E-mail to: Add Delete

Name	Branch
JoAnne.Zukowski	Saratoga Springs Public Library

Self-registration warning message enabled

Self-registration Instruction, Acknowledgement, and COPPA messages are defined on the Display Names and Message Text dialog box (Double-click 'Multiple language strings').

UDF Display Custom Field Display

User defined fields to display

<input checked="" type="checkbox"/> ID Number	<input type="checkbox"/> Required
<input checked="" type="checkbox"/> Privileges / Restrictions	<input type="checkbox"/> Required
<input type="checkbox"/> Voter Registration	<input type="checkbox"/> Required
<input type="checkbox"/> CybraryN Use Only (XXX,YYY)	<input type="checkbox"/> Required
<input type="checkbox"/> Not Currently in Use	<input type="checkbox"/> Required

Birth date required Patron self-registration block

Suppress gender selection

Save Cancel Apply Help

2. Clear **Patron self-registration block**.
3. Select **Save**.

To configure self-registration barcodes to use a custom format

Note:

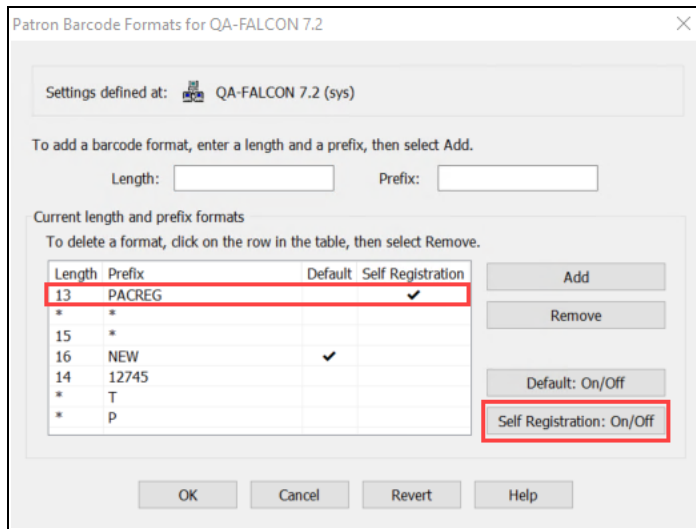
If you choose not to set a custom format, then the system assigns the default PACREG format.

1. Open the Polaris Administration Explorer, and select **Profiles > Staff Client > Barcodes: Patron format definition**.
2. Create a new barcode format:
 - a. Length - Enter a number from 1 through 20.
 - b. Prefix - We suggest you enter a 1-5 character prefix.
 - c. Select **Add**.

Note:

The barcode's total character limit, prefix included, is 20 characters. The system appends the patron ID to the prefix to create a barcode. To give the system enough characters to generate a number of barcodes, we suggest you limit the number of prefix characters. The more you expand the prefix length, the more you limit the number of patrons that can self-register.

3. Designate your new barcode as a self-registration barcode:
 - a. Select the row in the "Current length and prefix formats" table.
 - b. Select **Self Registration: On/Off**.



A check appears in the Self Registration column of the "Current length and prefix formats" table.

4. (Optional) Select **Revert** to undo the changes.
5. Select **OK** to save your changes.

The system begins to calculate self-registration barcodes using the defined prefix, length, and the registering patron's patronID.

Note:

Please note that the Significant Digits feature doesn't work with this configuration, so these patrons must enter their full barcode when they sign in to PowerPAC.

Exporting Notices at the Library Level

In previous versions, Polaris supported exporting notices at the system level only. As of version 7.2, you can now export notices at the system level or the library level.

This new feature allows consortia to configure separate export accounts for individual libraries or to export notices for some libraries but not others.

You can configure the following types of notice export settings in the Notification Options parameter in Polaris Administration (staff client):

- General
- Overdue & Bill
- Hold Request & Cancellation
- Fine

Notification options

General Overdue & Bill Hold Request & Cancellation Fine Reminder Serial

Notification method

- Print
 - Export
 - Available in PAC
- E-mail
 - Available in PAC
- Phone
 - Export
 - Available in PAC
- TXT Message
 - Export
 - Include with phone
 - Available in PAC

[Languages...](#)

E-mail notice

From: [Redacted]

Reply-to: [Redacted]

E-mail address to use: Use both E-mail and Alt

Send report for e-mail notice processing

Export

Print

FTP Server URI: ftp://ftp.polarislibrary.com

Logon name: Polarisexec@ftpsecure.pola

Password: [Redacted]

Phone

FTP Server URI: ftp://ftp.polarislibrary.com

Logon name: Polarisexec@ftpsecure.pola

Password: [Redacted]

Txt Message

FTP Server URI: ftp://ftp.polarislibrary.com

Logon name: Polarisexec@ftpsecure.pola

Password: [Redacted]

Save a local copy

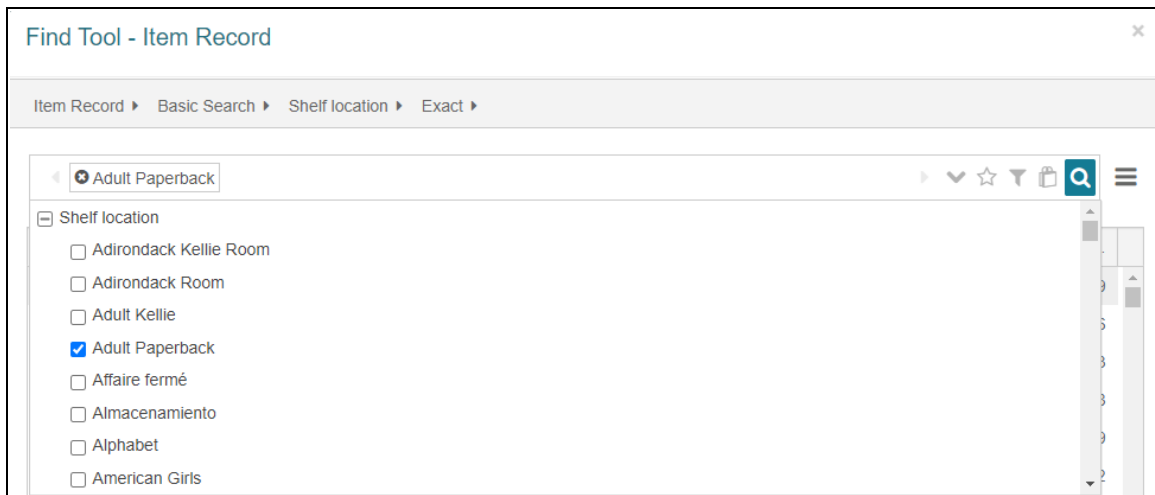
Save Cancel Apply Help

Important:

- Contact your Polaris Site Manager if you plan to switch from exporting notices at the system level to exporting at the library level.
- If you enable library-level exporting, Polaris generates library-level export files instead of a single system-level export file.

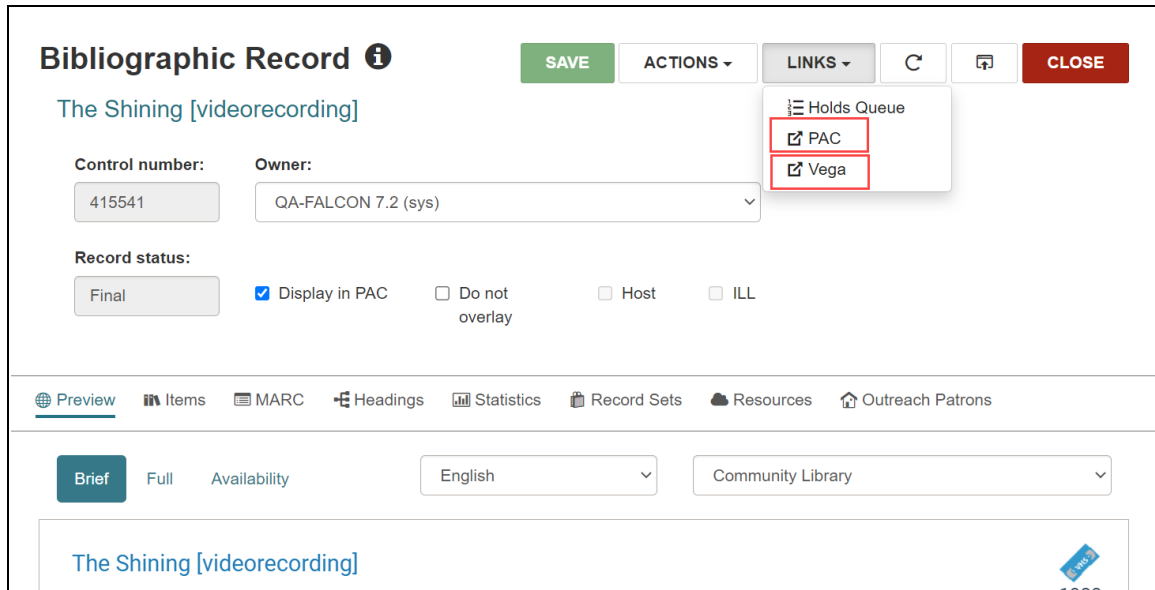
Improved Searching for Item Records By Shelf Location

In previous versions, when you searched for an item record at a particular shelf location, you had to type the exact name of the shelf location in the Item Record Find Tool. In 7.2, the Item Record Find Tool has been improved so that you can select a shelf location from a list instead of typing the location name.



Adding Vega and Hiding PowerPAC Links

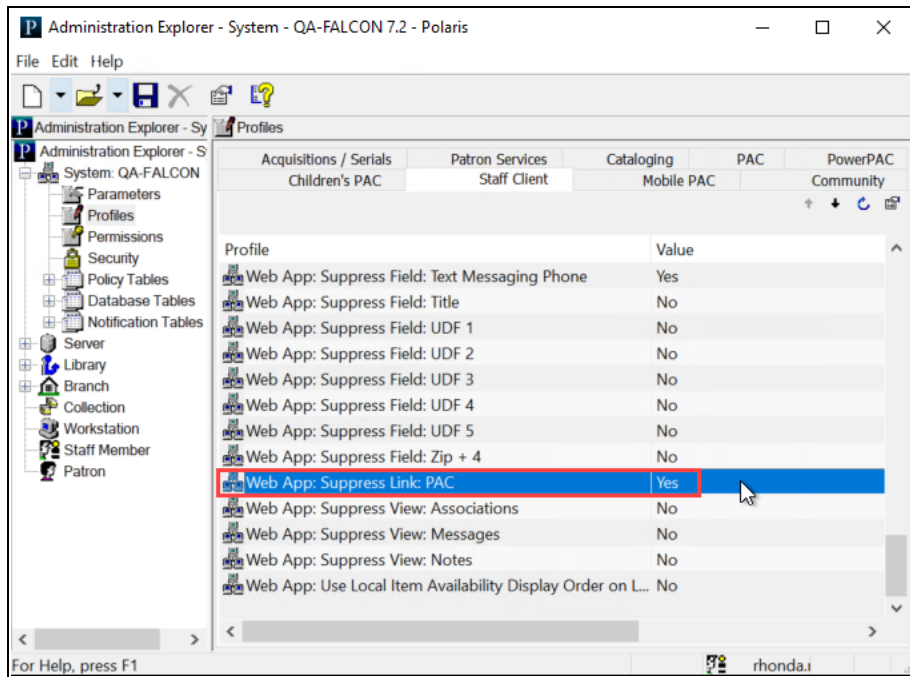
If you are licensed for Vega, you can now provide your library staff a link to Vega from Leap's bibliographic workform. You can ask to add Vega to the Link menu in the workform header. Contact your Innovative Site Manager if you want to add the Vega link.



Libraries that don't use PowerPAC can now hide the PAC link on Leap's bibliographic workform.

To hide the PAC link

1. Go to the Polaris Administration (staff client) > **Administration**.
2. Select **Explorer > System**.
3. Select **Profiles > Staff Client > Web App: Suppress Link: PAC**.



4. Select **Yes**.

MARC Technical Updates in Polaris 7.2

The updates specified in the following links were implemented in Polaris 7.2.

- [MARC Update Number 30, May, 2020](#)
- [MARC Update Number 31, December, 2020](#)
- [MARC Technical Notice April 13, 2020](#)
- [MARC Technical Notice May 1, 2020](#)
- [MARC Technical Notice May 19, 2020](#)
- [MARC Technical Notice June 26, 2020](#)
- [MARC Technical Notice July 28, 2020](#)
- [MARC Technical Notice September 11, 2020](#)
- [MARC Technical Notice September 16, 2020](#)
- [MARC Technical Notice October 23, 2020](#)
- [MARC Technical Notice November 13, 2020](#)
- [MARC Technical Notice November 24, 2020](#)
- [MARC Technical Notice December 14, 2020](#)