What's New in Polaris

7.7

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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 7.6 to 7.7 as in the following examples:

- C:\ProgramData\Polaris\7.7
- C:\Program Files\Polaris\7.7
- C:\Program Files (x86)\Polaris\7.7

New or Modified Polaris Administrative Settings

The system administration settings below have been added or modified to support the new features in Polaris 7.7.

Setting	Purpose	Level
New Parameters		
NCIP > NCIP uses patron passwords	Controls whether NCIP requires a patron's password. The parameter value can be Yes or No. The default is Yes (require a patron password, current behavior). For more information, see Specifying if NCIP Requires a Password.	System
SelfCheck Unit > Polaris ExpressCheck theme	Specifies which theme the ExpressCheck workstation displays. This parameter controls only the web-based ExpressCheck. For more information, see Web-Based Polaris ExpressCheck in Beta.	System, library, branch, and workstation
New Permissions		
Modify patron block suppression table: Allow	This permission gives users access to the Patron Block Suppression Policy table. For more information, see Suppressing Nonblocking Circulation Notes.	System
Circulation check-in workform > Access Resource Sharing mode	Access a resource-sharing view of the Check-in workform to check in items that were on loan through third-party resource-sharing applications (such as INN-Reach or Rapido). For details, see Checking In	System

Setting	Purpose	Level
	Resource-Sharing Items.	
New Profiles		
PowerPAC > Reading level match string	Specifies the reading level string that appears in PowerPAC search results. If the reading level match string you specify matches the data found in the bibliographic record 521 tag subfield $b, the reading level string appears in search results along with the reading level value specified in the 521 tag subfield $a. For details, see Configuring the Display of Reading Level Information.	System
PowerPAC > Reading level ranges	Defines the reading level ranges that appear in PowerPAC search results if your library has enabled the reading level facet feature. Patrons can select reading level ranges to narrow their search results. For details, see Configuring the Display of Reading Level Information.	System
Staff Client > Web App: Suppress display of non-blocking patron blocks	Specifies whether nonblocking circulation notes are suppressed according to the settings in the Patron Block Suppression policy table. If the profile is set to **No**, Leap does not suppress any nonblocking circulation notes. This is the default value. If the profile is set to **Yes**, Leap suppresses the circulation notes that are configured to be suppressed in the Patron Block Suppression policy table. For more information, see Suppressing Nonblocking Circulation Notes.	System, library, and branch

<table>
<tr><th>Setting</th><th>Purpose</th><th>Level</th></tr>
<tr><td colspan="3">New Database Table</td></tr>
<tr><td>ExpressCheck themes</td><td>Specifies which themes are available for selection in Parameters > SelfCheck Unit > Polaris ExpressCheck theme. Add a custom theme using the Insert feature.

This database table controls only the web-based ExpressCheck.

For more information, see Web-Based Polaris ExpressCheck in Beta.</td><td>System, library, branch, and workstation</td></tr>
<tr><td colspan="3">New Policy Table</td></tr>
<tr><td>Patron Block Suppression</td><td>Works in conjunction with the Web App: Suppress display of non-blocking patron blocks setting to control suppression of the following nonblocking circulation notes:
Money Owed
Held Item
Unread Messages
Accrued Money Owed
If the Web App: Suppress display of non-blocking patron blocks profile is set to Yes, Leap suppresses the circulation notes you specify in this policy table. Suppressed notes don't appear during the checkout process in Leap. Set each circulation block to Yes (suppress) or No (do not suppress). The default value for each circulation block is Yes. For more information, see Suppressing Nonblocking Circulation Notes.</td><td>System, library, and branch</td></tr>
</table>

Polaris API Changes

The following methods have been added:

Method Name	Purpose
ItemCheckinPost	The ItemCheckin endpoint allows you to check in an item as a staff member.

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

Authentication Enhancements

Version 7.7 includes enhancements that allow for simpler and more flexible authentication configurations for your Polaris system.

This section covers the following topics:

- New Centralized Authentication Service for Polaris Web Applications
- Support for Using Multiple Identity Providers

New Centralized Authentication Service for Polaris Web Applications

In previous versions, you had to configure authentication separately for Leap and Polaris Administration (web-based). Leap supported both basic authentication and OAuth 2.0. Polaris Administration (web-based) only supported OAuth 2.0.

Version 7.7 includes a new centralized authentication service that's designed to be used with the following Polaris applications:

- Leap
- Polaris Administration (web-based)
- ExpressCheck (web-based) beta
- Any web-based Polaris applications that are developed in the future

This means that if your library currently uses basic authentication for Leap, you can now begin using Polaris Administration (web-based) with basic authentication. For more information, see New Features in Polaris Administration (Web-Based).

If your library currently uses OAuth 2.0, you can continue using it for authentication for both Leap and Polaris Administration (web-based). However, when you upgrade to version 7.7, you must edit your OAuth 2.0 configuration so that it uses the new centralized authentication service.

> **Important:**
> If your library currently uses single sign-on (SSO) authentication with

> Leap, you must update the allowed redirect URLs that are specified in your identity provider configuration.

If you have bookmarked the Leap URL or the Polaris Administration (web-based) URL in your web browser, please verify that your bookmarks contain only the application URL (and do not contain "/login" in the web address). The application URLs have not changed from previous versions, but bookmarks that contain "/login" will no longer work in version 7.7. The application URLs for Leap and Polaris Administration (web-based) are:

- https://*polaris.library.com*/LeapWebApp/
- https://*polaris.library.com*/PolarisAdmin/

Replace *polaris.library.com* with the fully qualified domain name that matches your Polaris server address.

Contact Innovative for help updating your authentication configuration for version 7.7.

Support for Using Multiple Identity Providers

In previous versions, Polaris required that all organizations in your library's system use the same identity provider for authentication. As of version 7.7, organizations in your system can use different identity providers to sign in to a single instance of Leap or Polaris Administration (web-based).

For example, a consortia system with three member libraries could use the following authentication configurations:

- Library A — OAuth 2.0 with Active Directory and Active Directory Federation Services (AD FS)
- Library B — OAuth 2.0 with Azure Active Directory (Azure AD)
- Library C — Basic OAuth 2.0 with Akamai

Contact Innovative for help with your authentication configuration for version 7.7.

Comparing Bibliographic Records in Leap

In previous versions, you could only view or edit a single bibliographic record at a time in Leap. As of version 7.7, you can now compare and edit up to 20 bibliographic records at the same time on the Compare Records workform.

To access the Compare Records workform, you must have the **Bibliographic records: Modify** permission enabled in Polaris Administration. For more information about cataloging permissions, search for "Cataloging Permissions" in the Polaris staff client help.

This section covers the following topics:

- Comparing and Editing Bibliographic Records
- Using Keyboard Shortcuts on the Compare Records Workform

Comparing and Editing Bibliographic Records

To compare and edit bibliographic records

1. Find the bibliographic record you want to compare to one or more other records, and open it in the Bibliographic Record workform.

   > **Note:**
   > We refer to this record as the *current record* in the workflow below.

2. Select **Actions** > **Compare**.

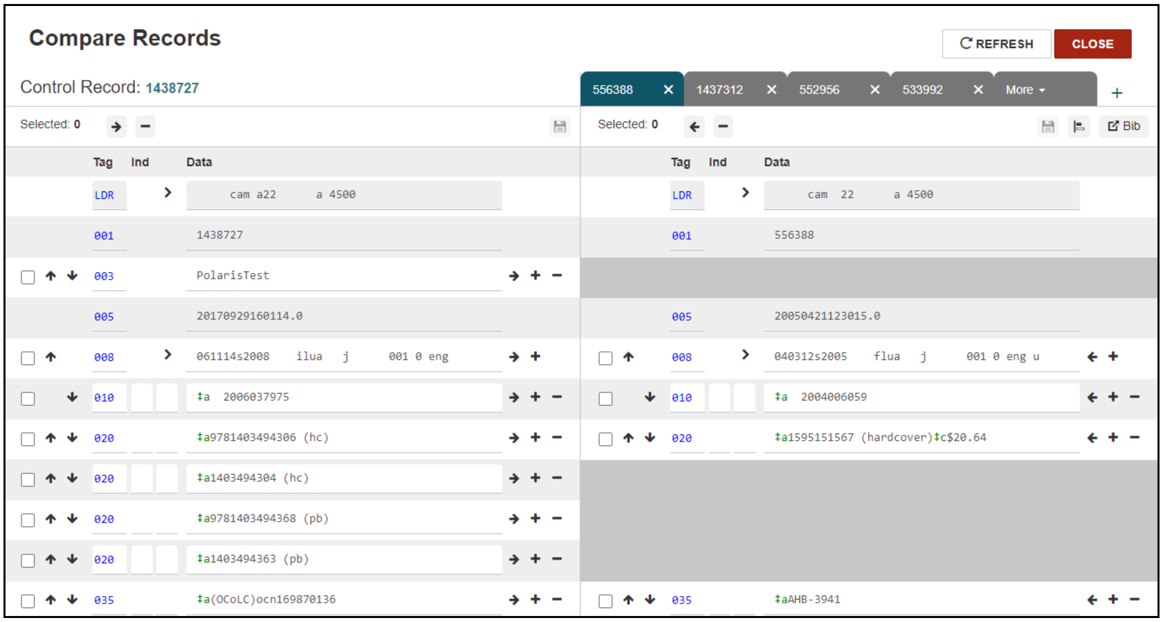
   The bibliographic record Find Tool appears.

3. Search for the bibliographic record or records you want to compare to the current record.
4. From the list of search results, select one or more records. You can select up to 19 records.

   > **Note:**
   > We refer to these records as the *compare records* in the workflow below.

5. Select **Open**.

   Leap displays the records in the Compare Records workform. The current record appears on the left side of the screen and the compare record or records appear on the right side of the screen.



6. Do one or more of the following:
   - [View a different compare record]().
   - [Add or edit MARC data]().
   - [Align MARC tags]().
   - [Copy MARC tags from one record to another]().
   - [Delete MARC tags]().
   - [Add a new compare record]().
   - [Close a compare record]().
7. When you're finished comparing and editing records, do one or both of the following:
   - Save your changes to one or more of the records on the Compare Records workform. To do this, select **Save Record** in the header of the records

you want to save.

Leap performs record validation, duplicate detection, and authority control, and then saves the record. For more information, see [Bibliographic Record Validation, Duplicate Checking, and Authority Control]().

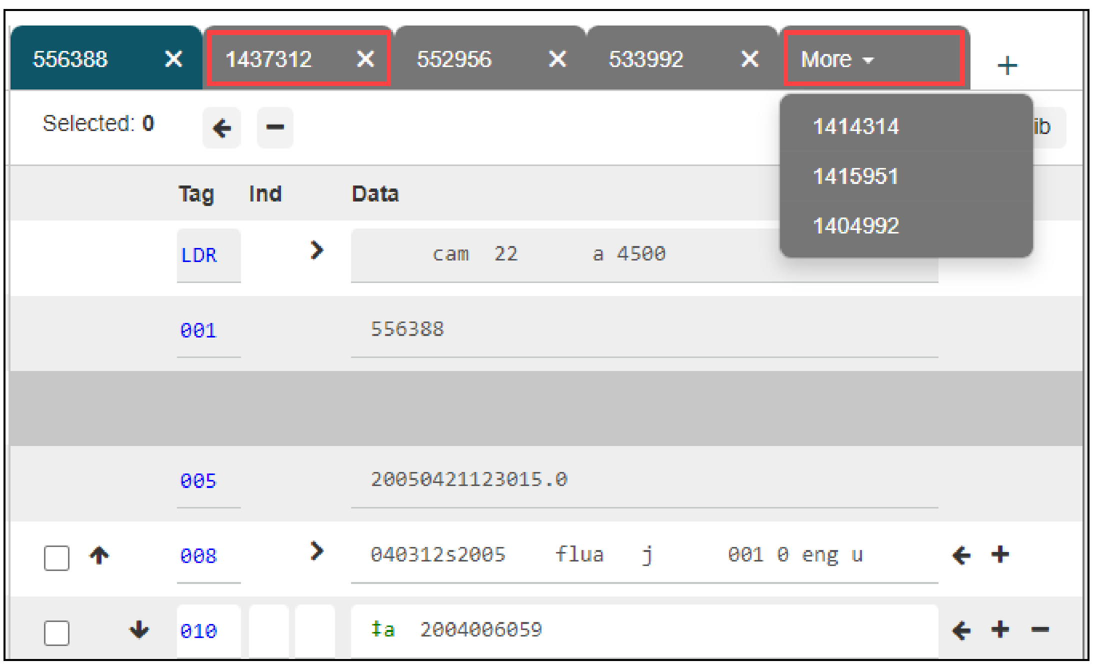
- Select **CLOSE** to close the Compare Records workform.

Viewing a Different Compare Record

If you selected multiple compare records in step 4, the first record you selected appears by default on the Compare Records workform. You can switch between compare records.

To view a different compare record

- Do one of the following:
    - Select the tab with the control number of the record you want to view.
    - Select **More**, then select the control number of the record you want to view.



Leap displays the new compare record on the right side of the Compare Records workform.

Adding or Editing MARC Data

You can add or edit MARC data in one or more of the records displayed in the Compare Records workform. For details on editing bibliographic records, see Edit a Bibliographic Record.

Aligning MARC Tags

If tags appear in a different order in the records you are comparing, you can align the tags.

> **Note:**
> If your library uses automatic MARC tag sorting for bibliographic records, tags displayed on the MARC Compare workform are aligned by default. However, you may still want to use the align tags feature to reorder tags after editing one or more of the records you are comparing. For more information about automatic tag sorting, search for "Turn Automatic MARC Tag Sorting On or Off" in the Polaris staff client help.

To align MARC tags

- In the header of the compare record, select **Align Tags** .

  Leap sorts the tags in the records that appear on screen according to the order specified in the **MARC validation: Bibliographic** profile in Polaris Administration (staff client). For more information, search for "Change the Sort Order of MARC Tags" in the Polaris staff client help.

  > **Note:**
  > The changes to the tag order are temporary unless you save the record or records.

Copying MARC Tags from One Record to Another

You can copy tags between the two records that currently appear on the Compare Records workform.

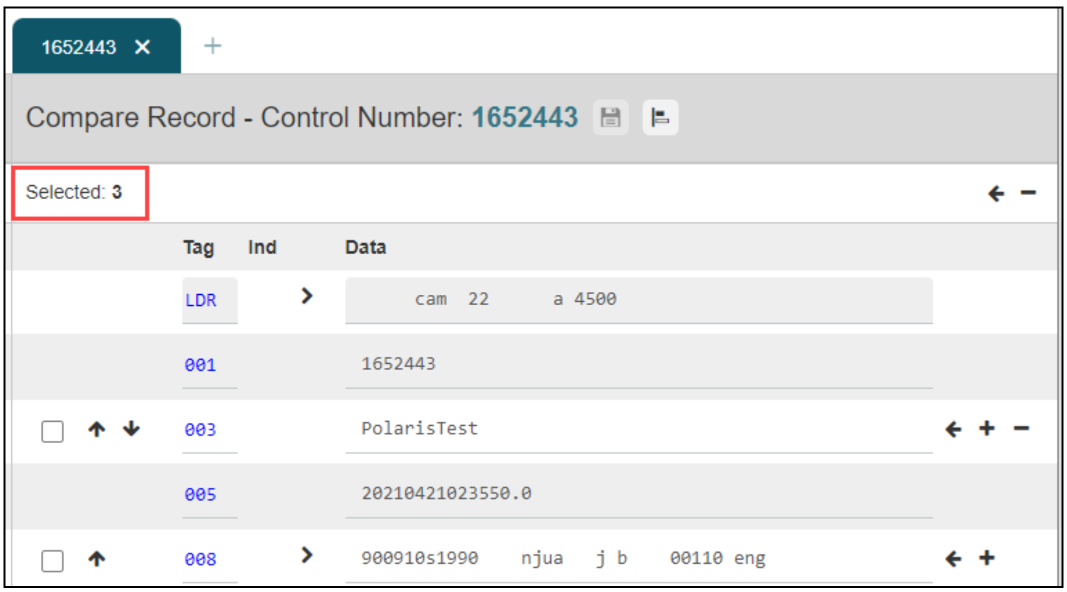
You can't copy the Leader, the 001 tag, or the 005 tag.

To copy tags from one record to another

- Do one of the following:
  - To copy a single tag, select the right arrow or the left arrow next to the tag.

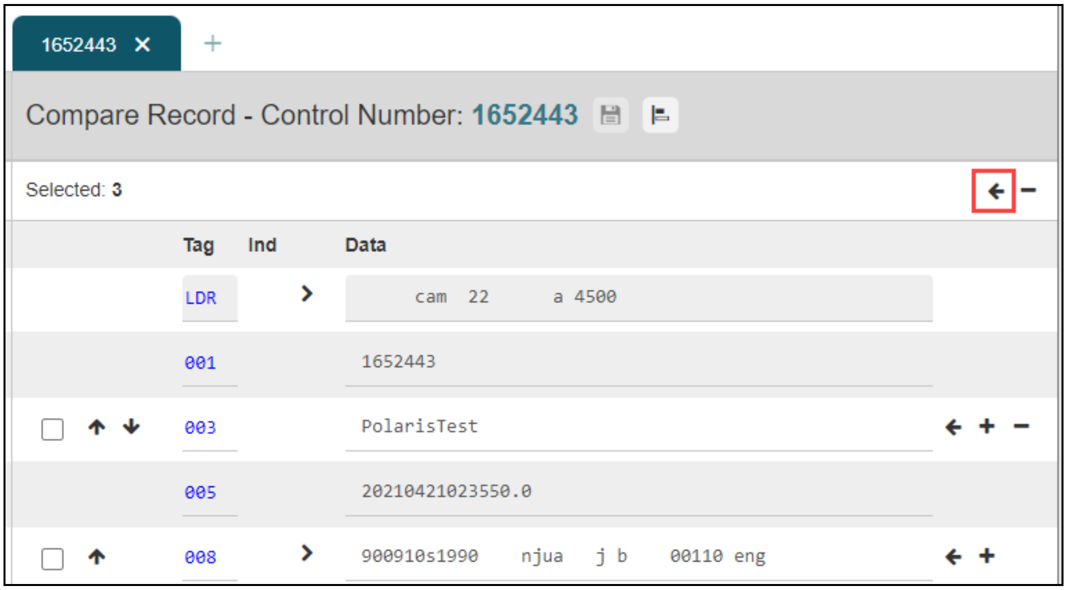
    Leap copies the tag from one record to the other.
  - To copy multiple tags:
    1. Select the tags you want to copy.

       Leap displays the number of tags you selected.

    2. Select the **Copy Selected Rows** icon at the top of the record. The icon is a right arrow or a left arrow , depending on whether you are

copying tags from the current record or from the compare record.



Deleting MARC Tags

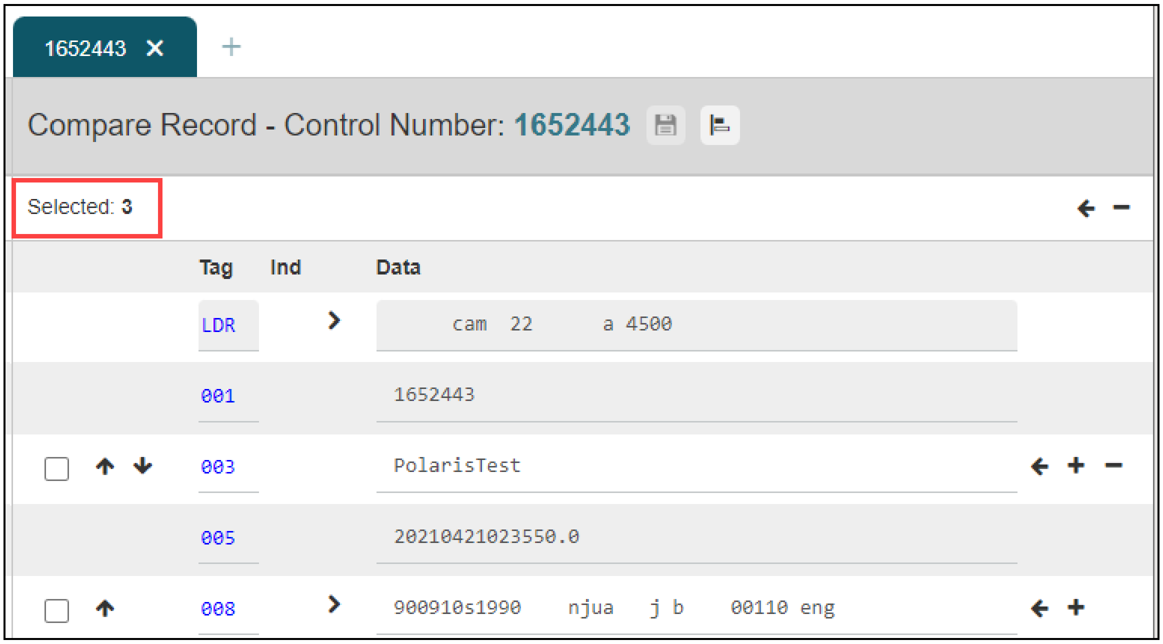
You can delete tags from any record in the Compare Records workform.

You can't delete the 001 tag, the 005 tag, or any tag that your library has defined as a required bibliographic record tag. For more information about required tags, search for "Administering MARC Validation and Display" in the Polaris staff client help.

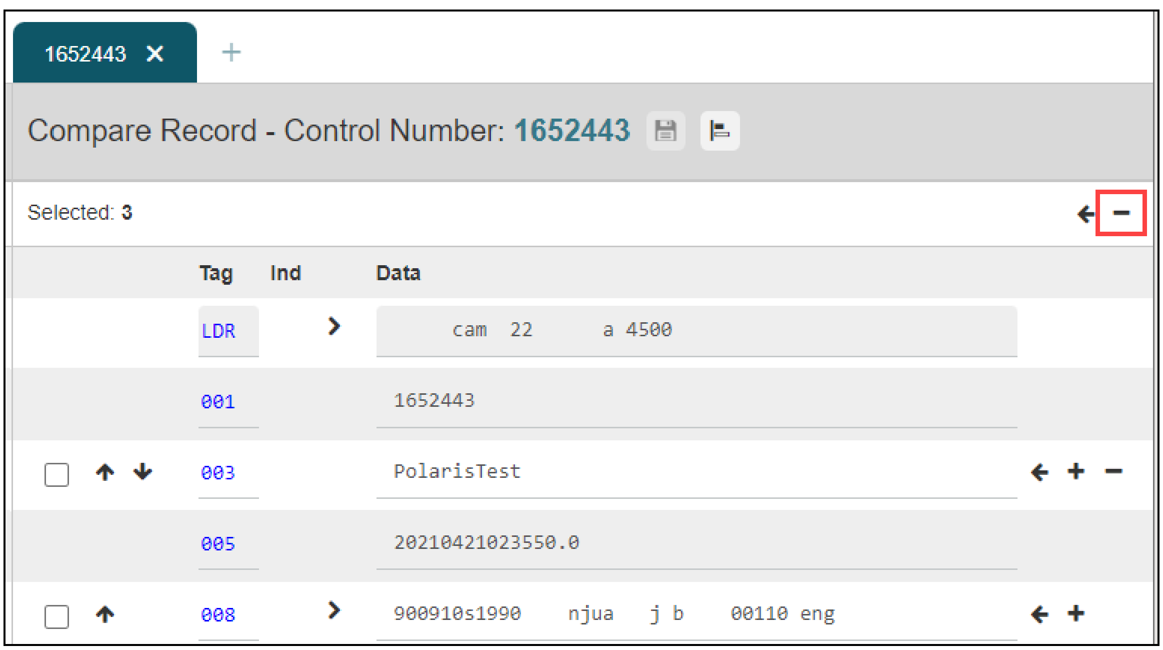
To delete tags

1. Select the tags you want to delete.

   Leap displays the number of tags you selected.



2. At the top of the record, select the delete rows icon ⊟.

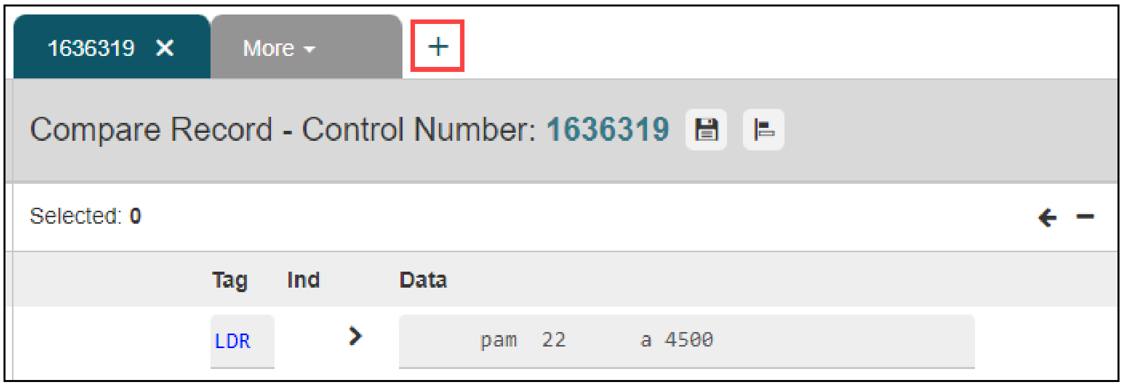


Adding a New Compare Record

You can add a new compare record to the Compare Records workform.

To add a new compare record

1. In the header of the compare record, select the plus sign.



   Leap displays the bibliographic record Find Tool.

2. Search for the record or records you want to compare to the current record.
3. From the list of search results, select one or more records. The Compare Records workform can display up to 19 compare records.
4. Select **Open**.

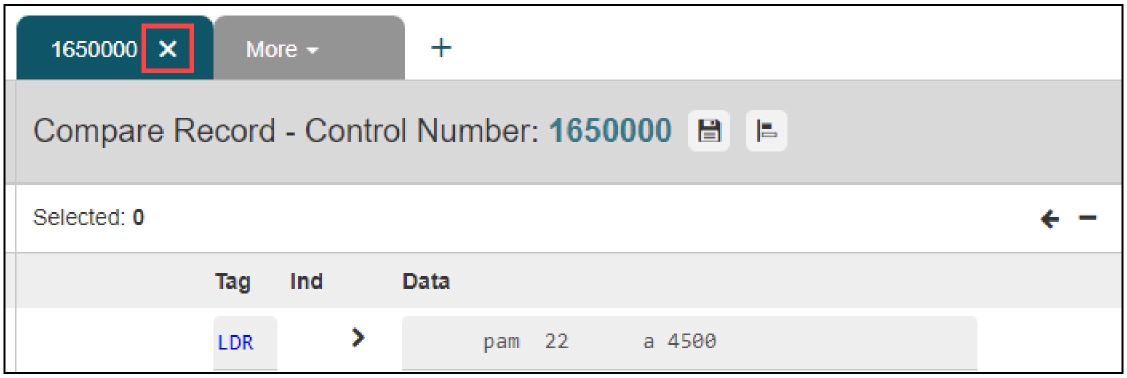
   The new compare record or records appear on the Compare Records workform.

Closing a Compare Record

You can close a compare record to remove it from the Compare Records workform.

To close a compare record

- In the header of the compare record you want to delete, select the close button.



Leap removes the compare record from the Compare Records workform.

Using Keyboard Shortcuts on the Compare Records Workform

Version 7.7 includes the following new keyboard shortcuts, which you can use when editing records on the Compare Records workform. You can also use other cataloging keyboard shortcuts on the Compare Records workform. See Keyboard Shortcuts for a list of all available shortcuts.

Action	Keyboard Shortcut
Copy the current tag from one record to the other.	Ctrl + M
Move your cursor from the compare record to the same location in the current record.	Ctrl + Left arrow
Move your cursor from the current record to the same location in the compare record.	Ctrl + Right arrow

Checking for Duplicate Bibliographic Records without Saving

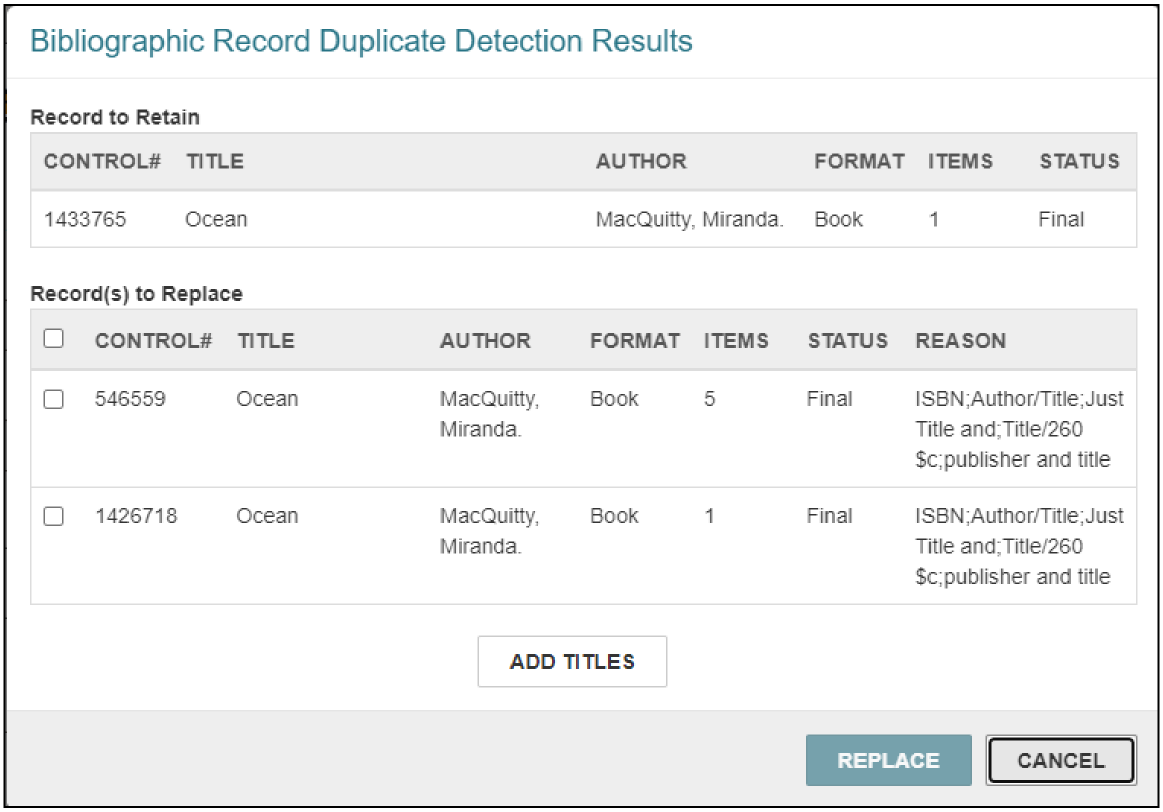
Leap performs duplicate checking when you save a bibliographic record. As of version 7.7, you can also check for duplicate bibliographic records at any time, without changing or saving the bibliographic record.

To check for duplicate bibliographic records without saving

1. Find the bibliographic record you want to edit, and open it in the Bibliographic Record workform.
2. Select **Actions** > **Duplicate Check**.

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

   > **Note:**
   > Leap displays the Bibliographic 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 Bibliographic Record Duplicate Detection Results dialog, do one of the following:

   - Replace one or more duplicate records with the record you are saving. To do this:

     a. (Optional) To manually add a duplicate record that does not already appear in the **Record(s) to Replace** list, do the following:

        i. Select **ADD TITLES**.

        ii. Use the Find Tool to search for a bibliographic record and select it.

        iii. Select **OPEN**.

        The record appears in the **Record(s) to Replace** list.

     b. Select one or more records in the **Record(s) to Replace** list.

     c. Select **REPLACE**.

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

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

Using New Keyboard Shortcuts in Leap

Leap now includes the following keyboard shortcuts.

> **Note**:
> Browser extensions can use the same keyboard shortcuts. If you have a browser extension installed that shares these keyboard shortcuts, you might need to disable the browser extension to use the keyboard shortcuts in Leap.

Action	Keyboard Shortcut
Return to search results.	Ctrl + Shift + K
Open the upper-left hamburger menu.	Ctrl + Shift + D
Print the current workform.	Ctrl + Shift + [
Open the New menu. Use the arrow keys to move up or down in the menu. Highlight your selection, and select **Enter**.	Ctrl + Shift + L
Open the Utilities menu. Use the arrow keys to move up or down in the menu. Highlight your selection, and select **Enter**.	Ctrl + Shift + U
Open the Find Tool.	Ctrl + Shift + '

Suppressing Nonblocking Circulation Notes

Now your library can choose to suppress nonblocking circulation notifications when staff members use Leap to check out an item to a patron. When the feature is configured, you can suppress the following informational circulation notes:

- Money Owed — Patron owes money, but not enough to be blocked
- Held Item — Patron has an item or items on hold
- Unread Messages — Patron has unread messages
- Accrued Money Owed — Patron owes money, but not enough to be blocked

Suppressed notes don't appear during the check out process in Leap.

Suppressing All Four Circulation Notes

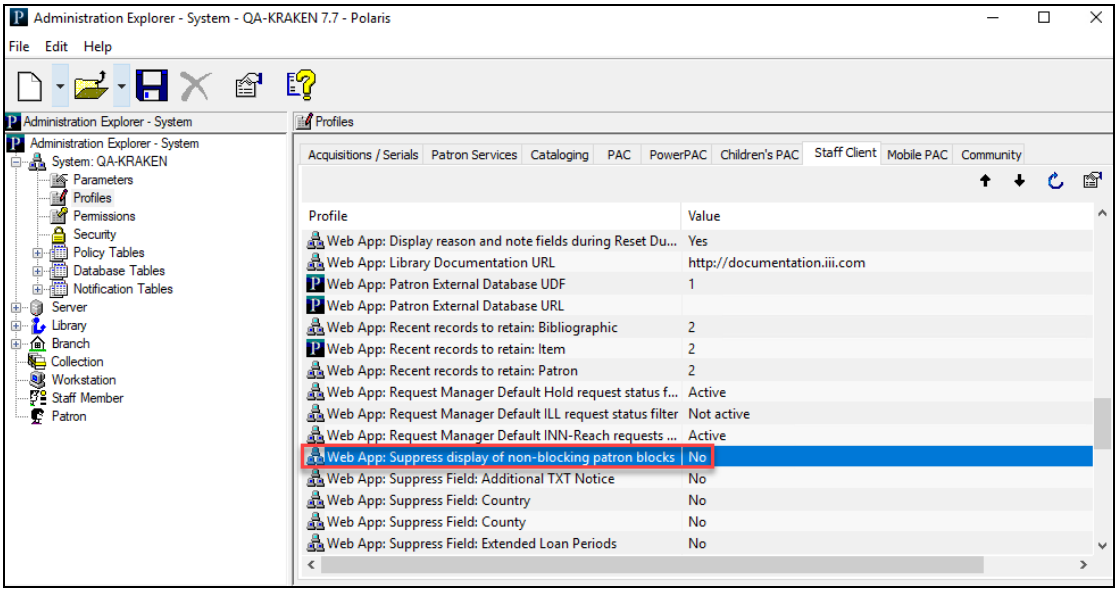
You can suppress informational circulation notes at the system, library, or branch level.

To suppress informational circulation notes at the system level

1. Open Polaris Administration (staff client), and select **Administration** > **Explorer** > **System**.

   The Administration Explorer appears.

2. Select **Profiles** > **Staff Client** > **Web App: Suppress display of nonblocking patron blocks**.



3. Double-click **Web App: Suppress display of nonblocking patron blocks** and select **Yes**.

   The default setting is No, meaning no circulation notes are suppressed.

   Polaris considers the settings in **System** > **Policy Tables** > **Patron Block Suppression**. Because all four circulation notes are suppressed by default, you can stop here if you want to suppress all four circulation notes.

Selecting Circulation Notes to Show

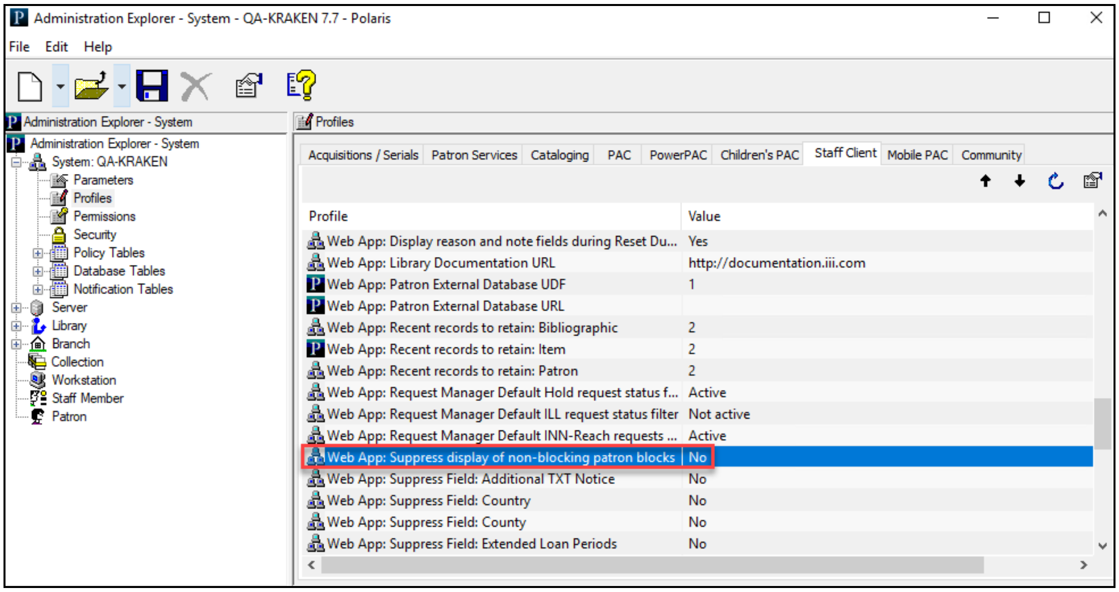
By default, each of the informational circulation notes is set to **Yes** (suppressed). To choose which informational circulation notes to show, you can set each of the notes to **No** (not suppressed) at the system, library, or branch level.

To select informational circulation notes to show at the system level

1. Open Polaris Administration (staff client), and select **Administration** > **Explorer** > **System**.

   The Administration Explorer appears.

2. Select **Profiles** > **Staff Client** > **Web App: Suppress display of nonblocking patron blocks**.

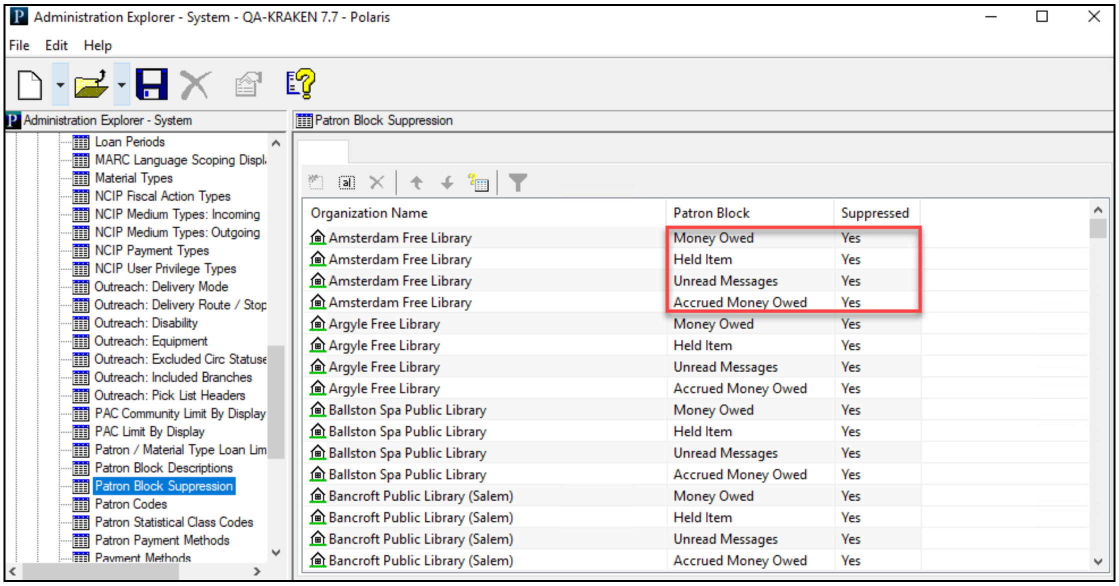


3. Double-click **Web App: Suppress display of nonblocking patron blocks** and select **Yes**.

   The default setting is No, meaning no circulation notes are suppressed.

4. Select **System** > **Policy Tables** > **Patron Block Suppression**.

> **Notes**:
>
> - You must have the permission **Modify patron block suppression table: Allow** to access this policy table.
> - This policy table is considered only if the **Web App: Suppress display of nonblocking patron blocks** profile is set to **Yes**.



All notes are set to **Yes** — suppress (don't show) by default.

5. To change the suppression setting, double-click to name of the circulation note.

   The Modify: Patron Block Suppression dialog appears.

6. Click the arrow to select **No** — don't suppress (show) in the **Suppressed** field.

7. Select **OK**.

Saving Find Tool Filters and Rerunning Recent Searches

Polaris now includes the following enhancements to the Find Tool:

- Saving a Set of Find Tool Filters as Your User Default
- Rerunning Recent Searches

Saving a Set of Find Tool Filters as Your User Default

You can set up a search and save it so that the Find Tool search filters are selected when you open the Find Tool again in Leap.

You can now save filters (for example Assigned Branch, Creator, Record Owner) as a user default.

> **Note**:
> Leap has distinct find tool profiles for specific find tools, so you might need to set defaults in each one. Find tools with distinct profiles include:
>
> - Item Record find tool launched from a Weeding record set
> - Bibliographic records find tool launched from a purchase order

To save a set of filters

1. Open the Find Tool.
2. Select the record type or record set.
3. Select the search mode (Basic, Power, or SQL).
4. Select the search qualifier (access point or search by) option.
5. Select the search relation (such as Keyword or Phrase).
6. To include specific columns for search results in your user default, set up the columns. See Specify columns for search results.

7. Select the star icon.

   A dialog opens.

8. Select **Save the current search, column and filter settings as the user's default**.

   To see the changes that will be made when you save the current search and column settings, select **Show pending changes**.

9. Select **SAVE**.

   The dialog closes and the star icon appears in yellow, indicating your user defaults are saved.

   To return to the system defaults, select the star icon again and select **Revert to system default search, column and filter settings**.

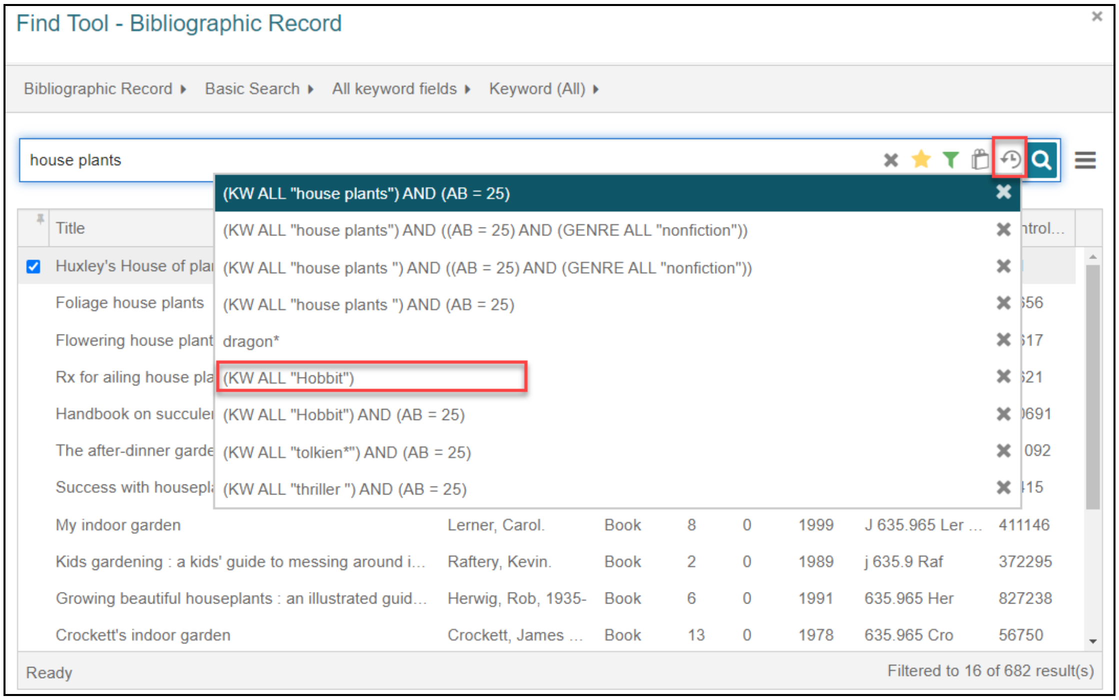
Rerunning Recent Searches

Leap now saves up to 100 searches during one session. The list is sorted by most recent search first. Each search appears in CQL, so you can see the search terms and the filters in the list. Once you end your session, Leap clears your recent searches. If you want to save a search for a later session, see Save a Set of Find Tool Search Options as Your User Default or Save a Power Search.

To rerun the recent searches for your session

1. Use the Find Tool to Do a Basic Search or Do a Power Search.
2. Do several searches.
3. Select the Recent icon in the action bar.

   A dropdown list appears with your previous searches.



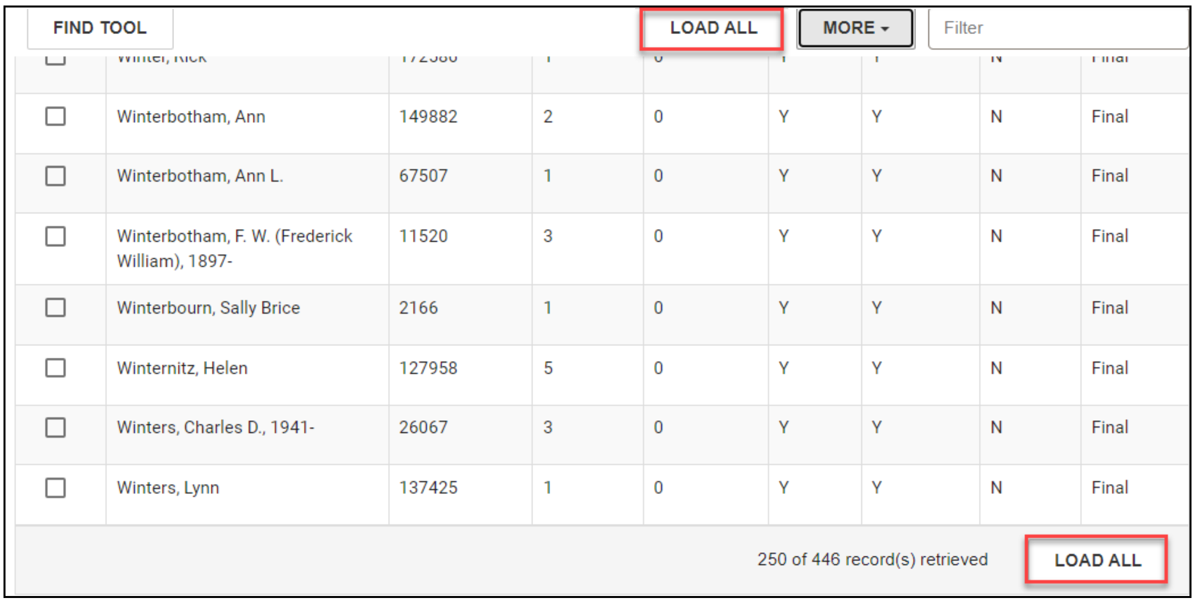
4. Select a recent search to see the results.
5. (Optional) Select the **X** icon beside a recent search to remove it from the list.

Selecting a Range of Records Using Shift + Click

In Leap you can now use the key combination **Shift + click** to select a range of records in the Find Tool and in record set workform tables. You can use **Shift + click** more than once to select multiple ranges of records in one record list. You can use this key combination whenever a keyboard is available, but not on kiosks without a keyboard.

Support for Loading All Records in a Record Set

In version 7.7, Leap loads all records when you view a record set. For sets over 250 records, use the **LOAD ALL** option at the top or bottom of the table.



Leap loads all the records into the browser.

Additionally, you can now use an RFID pad to scan items into Weeding Record Sets if your workstation supports RFID.

Creating Record Sets from Saved or Scheduled Reports

In previous versions, you could create record sets from report output in SimplyReports by previewing the report output and selecting the **Create *[record type]* record set from report results** checkbox.

In version 7.7, SimplyReports also supports creating record sets from the report output of saved and scheduled reports. You can configure SimplyReports to create a record set each time you run a saved report or each time the system runs a scheduled report.

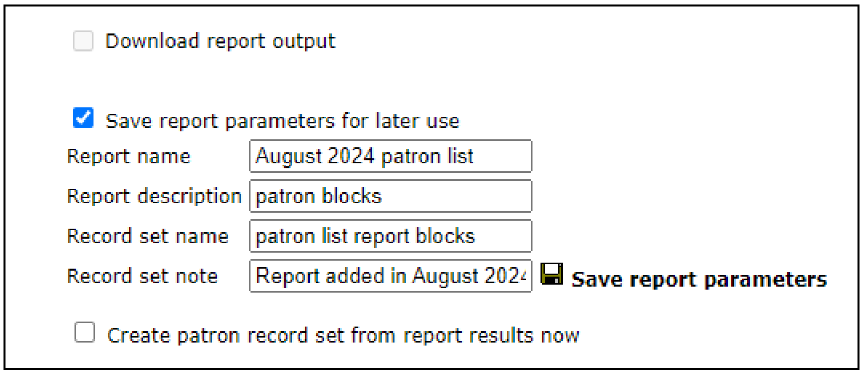
> **Note:**
> You can still create a record set from the report preview screen of a saved or scheduled report without running the report. To do this, select the **Create *[record type]* record set from report results now** checkbox.

The table below lists the types of reports that support this new feature and the type of record set the system creates for each report.

Report type	Type of record set created
• Patron list report • Patron account list report • Holds list report	Patron record set
• Bib list report • Invoice list report • Purchase order list report	Bibliographic record set
Item list report	Item record set
Authority list report	Authority record set

To configure SimplyReports to create record sets when a saved or scheduled report runs

1. Create a new report, or edit an existing saved report.
2. Configure report parameters and select **Continue** to view the report preview screen.



3. Do one of the following:
   - If you are creating a new report:
     a. Select the **Save report parameters for later use** checkbox.
     b. In the **Report name** box, enter a name for the report.
     c. In the **Report description** box, enter a description of the report.
   - If you are editing a saved report:
     a. Verify that the **Save report parameters for later use** checkbox is selected.
     b. (Optional) Edit the report name or report description.
4. In the **Record set name** box, enter a name for the record set that the system creates when the report runs.

Notes:

- If you don't specify a record set name, the system does not create a record set when the report runs.
- When the system creates the new record set, it appends a date and time stamp to the record set name you provide. This

ensures that each time the report runs, the record set that the system creates has a unique name.

5. (Optional) In the **Record set note** box, enter note text. The note is saved in the new record set.
6. Select **Save report parameters**.

   SimplyReports saves the report configuration. The system creates a record set each time the report is run, whether you manually run the saved report or the report runs automatically based on a schedule you configure. For information about scheduling saved reports to run automatically, see Schedule saved reports in the SimplyReports help.

Receiving EDI Orders that use ASN

Leap now supports receiving EDI orders that use an advanced shipping notice (ASN). If a supplier provides an ASN with shipment information, you can receive materials by scanning the tracking barcode on the outside of the carton.

Version 7.7 includes a new EDI Processing workform where you can receive ASN shipments and print purchase order line item workslips after receiving a shipment.

To access the EDI Processing workform, you must have the **Access Acquisitions: Allow** and the **Receive ASN Shipments: Allow** permissions enabled in Polaris Administration (staff client). For more information about acquisitions permissions, search for "Acquisitions Permissions" in the Polaris staff client help.

This section covers the following topics:

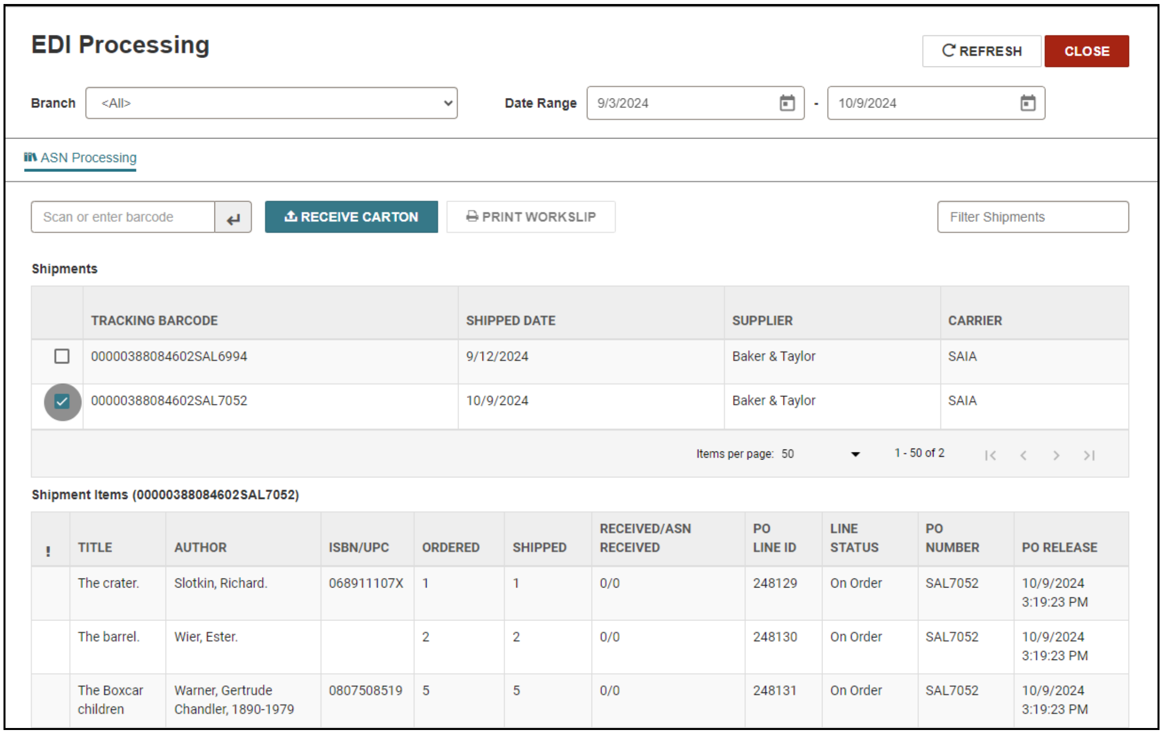
- Receiving an ASN Shipment
- Printing Workslips for an ASN Shipment

Receiving an ASN Shipment

To receive an ASN shipment

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

   The EDI Processing workform appears. ASN shipments appear on the **ASN Processing** view.



2. Select the shipment you want to receive. You can find a shipment by doing one or more of the following:
   - Select a branch from the **Branch** list to see only the shipments for a single branch.
   - Enter a date range to see only shipments that were shipped during a particular time period.
   - Scan or enter the shipment's tracking barcode in the **Scan or enter barcode** field.
   - Type in the **Filter Shipments** box to filter the list of shipments by any value that appears in the **Shipments** table.

   When you select a shipment, Leap displays the contents of the shipment in the **Shipment Items** table.
3. Select **RECEIVE CARTON**.

   Leap prompts you to confirm that you want to receive all items in the carton.
4. Select **YES**.

Leap does the following:

- Receives the purchase order line items in the shipment.
- Depending on your library's configuration, Leap displays a notification if any of the purchase order line items have been requested.

  Note:
  Your library can configure Polaris to display a warning when you receive an item that would satisfy a hold request. For more information, search for the **Receiving line items: Warn if linked hold requests** setting in the Polaris staff client help.

- Displays a message to confirm that the purchase order line items were received successfully.
- Clears the shipment from the list on the **ASN Processing** view.

Printing Workslips for an ASN Shipment

After you receive an ASN shipment, you can print workslips for the purchase order line items that were received. You can print workslips if both of the following conditions are true:

- Your library's configuration allows you to print workslips during ASN receiving.

  Note:
  Your library can enable or disable printing workslips during ASN receiving. For more information, search for the **PO line item workslips: Batch print during ASN receiving** setting in the Polaris staff client help.

- You have the **Purchase orders: Print workslips** permission enabled in Polaris Administration (staff client)

You must print workslips before you close the EDI Processing workform. If you receive an ASN shipment and attempt to close the workform without printing workslips, Leap displays warning message.

To print workslips for an ASN shipment

- Select **PRINT WORKSLIP**.

  Leap prints workslips for the ASN shipments that you received during your session on the EDI Processing workform. The following conditions apply:

  - If you received more than one ASN shipment during your session, Leap prints a single file that contains the workslips for all shipments.
  - If you received multiple copies of the same title in separate shipments, Leap prints one workslip for the title.

Distributing Taxes, Charges, or Credits across Invoice Line Items

Now library staff members can distribute taxes, charges, or credits across multiple line items and segments in an invoice using Leap. This functionality is particularly beneficial for libraries that operate without a centralized fund for invoice payments. For example, the supplier might charge one amount for shipping the entire order, but each branch has its own fund to pay for shipping charges. You can distribute the shipping charges equally among all the line items' segments within the invoice. You can also apply a discount or credit to all the invoice line items' segments.

> **Note**:
> If you have more than one of these actions to perform in a single invoice, you must distribute taxes last.

This topic covers distributing the following:

- Charges
- Credits or Discounts
- Taxes

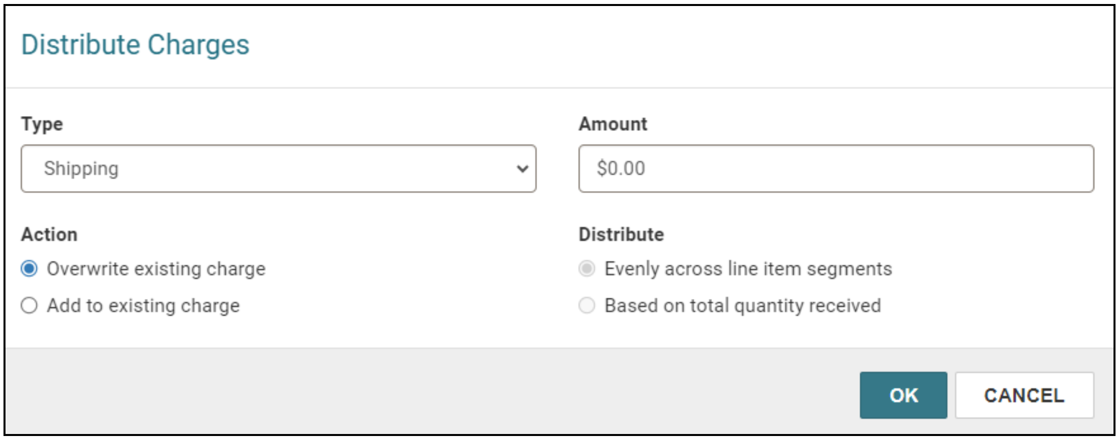
Distributing Charges

Charges must be distributed one type at a time.

To distribute charges on an open invoice

1. Find the invoice you want to edit, and open it in the Invoice workform.
2. Select **ACTIONS** > **DistributeCharges** from the menu bar.

   The Distribute Charges dialog appears.



3. Select one of the following charge types:
    - Cataloging services
    - Special handling
    - Service
    - Shipping
    - Binding format
4. Select one of the following under Action:
    - **Overwrite existing charge** — replace the charge already entered in the line item. Also select this option if no charge was previously entered.
    - **Add to existing charge** — add the charge to the charges already entered.
5. Select one of the following under Distribute:
    - **Evenly across line item segments** — distribute the same charge amount to all the line segments for the invoice.
    - **Based on total quantity received** — apply the charges based on the quantity received in each segment.
6. Enter the amount to distribute in **Amount**.
7. Select **OK**.

To manually adjust distributed charges, go to the Invoice Line Item workform > Segments view > Charges table, and edit a row. For more information, see Edit an Invoice Line Item.

Distributing Credits or Discounts

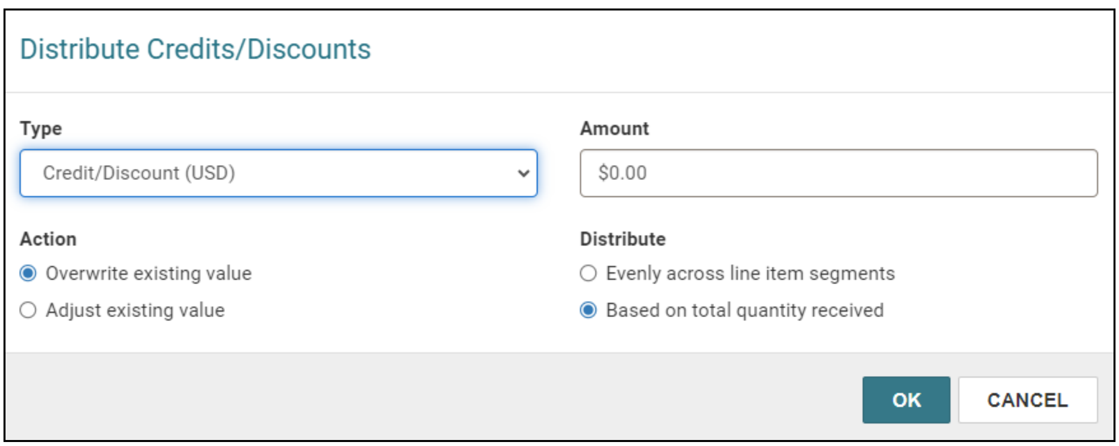
You can distribute credit or discount amounts among invoice line item segments, or you can distribute discount rates (percentages) among invoice line items. If you enter a credit or discount amount, you can specify whether you want it equally distributed across all segments or distributed according to the quantity received in each segment. If you enter a discount rate, this percentage is applied to all line items equally.

> **Note:**
> Credits and discounts must be distributed one at a time.

To distribute credits or discounts among the line item segments on an open invoice

1. Find the invoice you want to edit, and open it in the Invoice workform.
2. Select **ACTIONS** > **Distribute Credits/Discounts**.

   The Distribute Credits/Discounts dialog appears.



3. Select one of the following credit or discount types:
   - **Credit/Discount (USD)** to distribute a credit or discount amount, and go to step four.
   - **Discount (%)** to distribute a discount rate across all line item segments equally. Then, go to step seven.

   > **Note:**
   > If you select **Discount (%)**, the options under Action and

> Distribute are disabled. Simply type the percentage amount, and click **OK**.

4. If you selected **Credit/Discount (USD)** in the previous step, select one of the following under Action:
   - **Overwrite existing value**— replace the existing credit or discount.
   - **Adjust existing value**— add the amount to the existing credit or discount.
5. Select one of the following under Distribute:
   - **Evenly across line item segments**— distribute the credit or discount evenly across all line item segments.
   - **Based on total quantity received**— apply the credits or discounts based on the total quantity in the segments.
6. Type the credit/discount amount or the discount percentage to distribute in the **Amount** box.
7. Select **OK**.

To manually adjust credits or discounts, go to the Invoice Line Item workform > Segments view > Totals table, and edit a row. For more information, see Edit an Invoice Line Item.

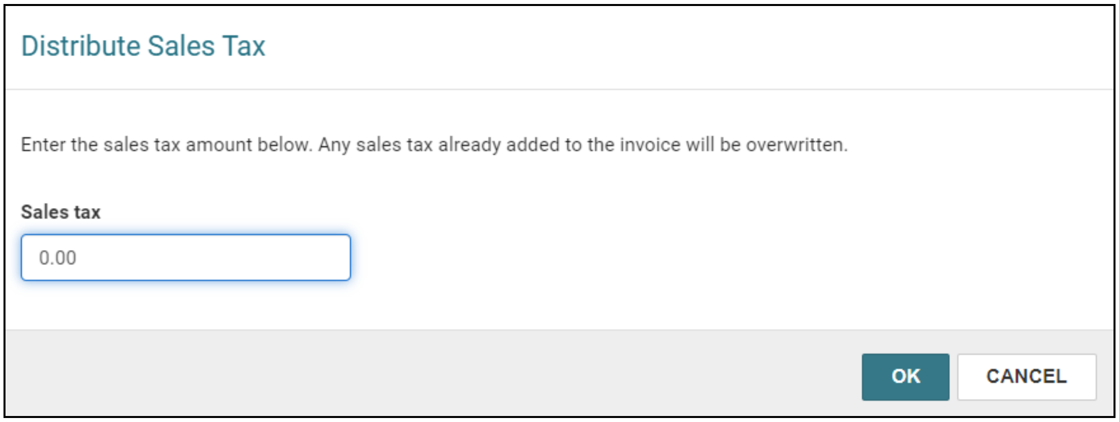
Distributing Sales Tax

All segments on the invoice must be received before you can enter a tax amount for the invoice. Also, any charges, credits, or discounts must be distributed before you distribute the tax.

To enter an amount for the tax on the invoice

1. Find the invoice you want to edit, and open it in the Invoice workform.
2. Select **ACTIONS** > **Distribute Sales Tax**.

   The Distribute Sales Tax dialog appears.



3. Enter the sales tax amount to add to the invoice.

   The amount is converted to a rate (percentage), any other tax rate or amount is overwritten, and the rate is applied to all the items.

4. Select **OK**.

To manually adjust taxes, go to the Invoice Line Item workform > Segments view > Totals table, and edit a row. For more information, see [Edit an Invoice Line Item](#).

Support for Subfunds and Manually Adjusting Fund Balances

You can now add and manage subfunds in Leap. You can create an unlimited number of funds and subfunds. Subfunds inherit the parent fund type.

A new Subfunds view on the Fund workform allows you to see associated subfunds and quickly check spending within your materials budget. New options in the Adjust Fund Balances dialog allow you to manually adjust balances for funds and subfunds.

To get to the Fund workform for a subfund

- Create a New Subfund.

  OR

- Use the Find Tool to search for the name of the subfund you want to edit, and open it in the Fund workform.

You can use the Fund workform to manage the fund and its subfunds, view the transaction history, and manage donors and balances.

> **Note**:
> To view and edit subfunds in the Fund workform, you need the following permissions:
>
> - **Access Acquisitions: Allow**
> - **Funds: Access, Modify**

This section covers the following topics:

- Viewing a Subfund Record
- Creating a Subfund
- Editing a Subfund
- Manually Adjusting Fund or Subfund Balances

Viewing a Subfund Record

To get to the Fund workform for a subfund

- Use the Find Tool to search for the name of the subfund you want to edit, and open it in the Fund workform.

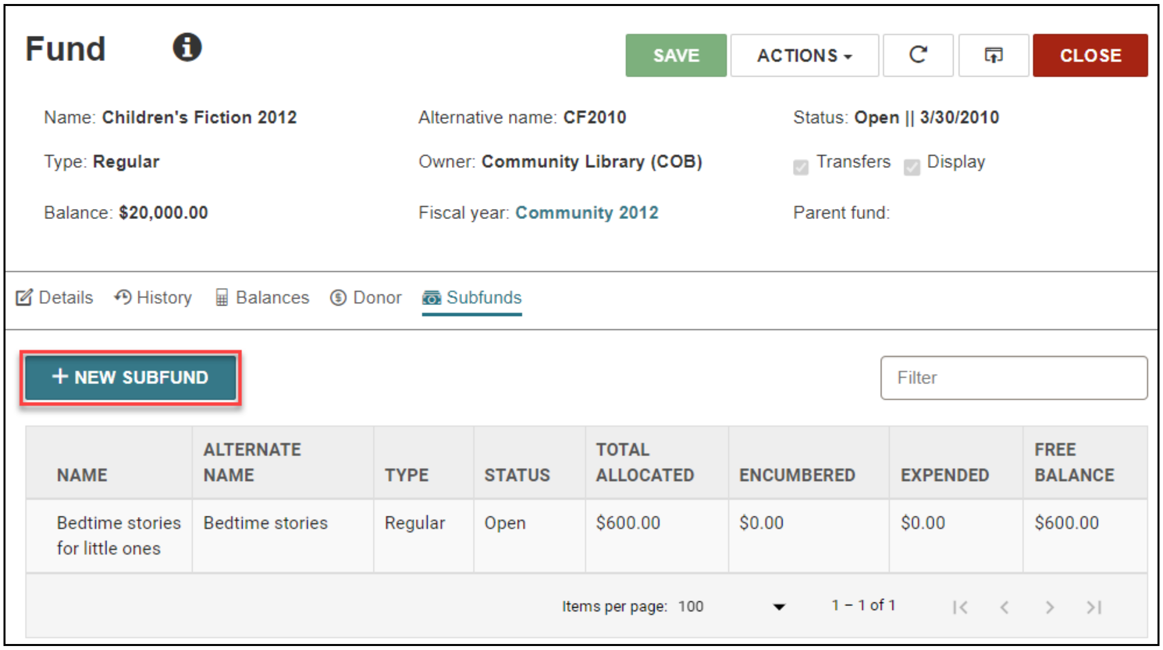
The subfund opens in a Fund workform with the fiscal year and the parent fund linked in the header.

Creating a Subfund

> **Note**:
> To create a new subfund, you need the permission **Funds: Create**.

To create a subfund from the Fund workform

1. View a Subfund Record.
2. Select the **Subfunds** view.
3. Select **+New Subfund**.



The New Fund workform opens.

4. Enter information as described in Edit a Subfund.
5. Select **SAVE**.

   Leap displays a success message and the filled-in Subfund workform opens.

Editing a Subfund

To edit subfund information

1. View a Subfund Record.
2. View or edit information in the subfund header view.

   The subfund workform starts with header information. From the subfund header, you can select the fiscal year name to open the Fiscal Year workform and you can select the parent fund name to open its Fund workform. You can view fund properties by hovering your cursor over the **i**.

   You can use the **Actions** menu in the header to do the following:

- Manually Adjust Subfund Balances
- Transfer money — Funds and subfunds share the Fund workform, so you can transfer money the same way you do for Funds. For step-by-step information, see Transfer Money.
- Delete a subfund — Funds and subfunds share the Fund workform, so you can delete a subfund the same way you delete a Fund. For step-by-step information, see Delete a Fund or Subfund.

3. Enter or edit information in the subfund Details, History, Balances, and Donor views.

   Funds and subfunds share the Fund workform, so you can edit these views the same way you edit Fund views. For step-by-step information, see View or Edit a Fund or Subfund.

4. Enter or edit information in the new Subfunds view.

   Funds and subfunds share the Fund workform, so you can view subfunds linked to a fund or a subfund. The subfunds in the view are editable only if the fund status is Open. You can select a row to open a subfund.

   Leap displays the subfunds in a table that you can sort and filter. The table has controls on the bottom row that allow you to select how Leap displays the table.

   To interact with the subfunds table

   - Filter the items in the table — Use the **Filter** field to limit the number of rows of subfunds that you see in the table.

     > **Note**:
     > When you filter items, you filter the entire table, not just the page you see.

   - Sort the table by column heading — Use the arrow in the header line of each column to sort rows in ascending or descending order.

     > **Note**:
     > When you sort items in the table, you sort the entire table, not just the page you see.

- Select the number of items per page — Use the **Items per page** list at the bottom of the table to select the number of subfunds to display in each page.
- Navigate through pages — Select the arrows beside the **Items per page** list at the bottom of the table to navigate forward and backward in the pages of the table.

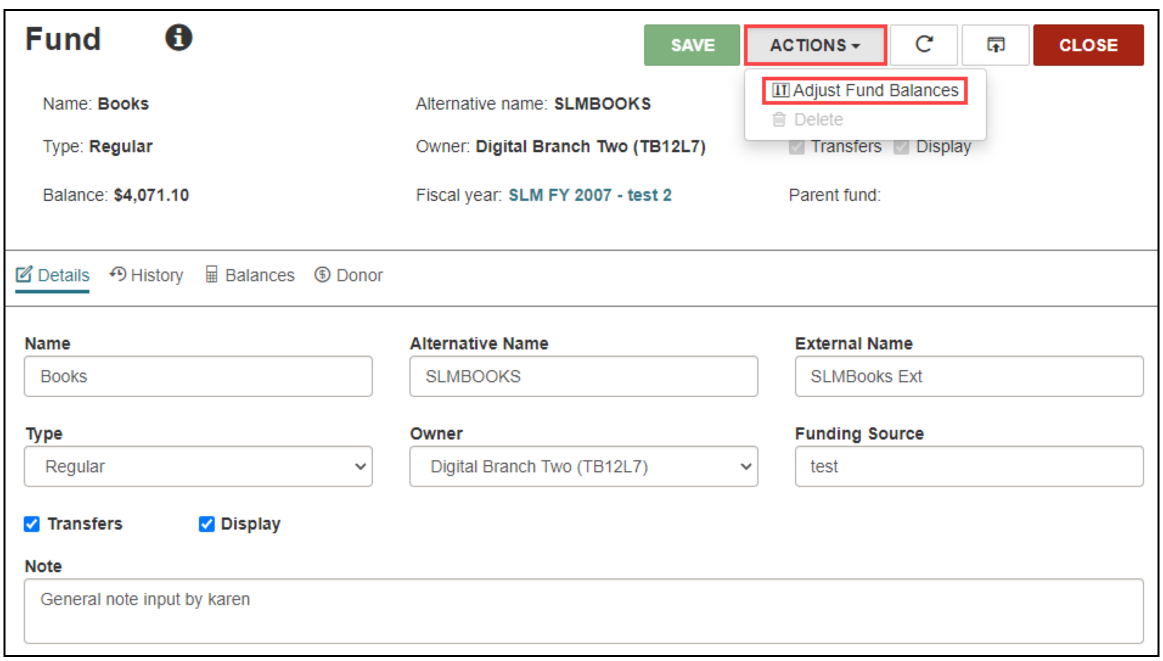
5. Select **SAVE**.

Manually Adjusting Fund or Subfund Balances

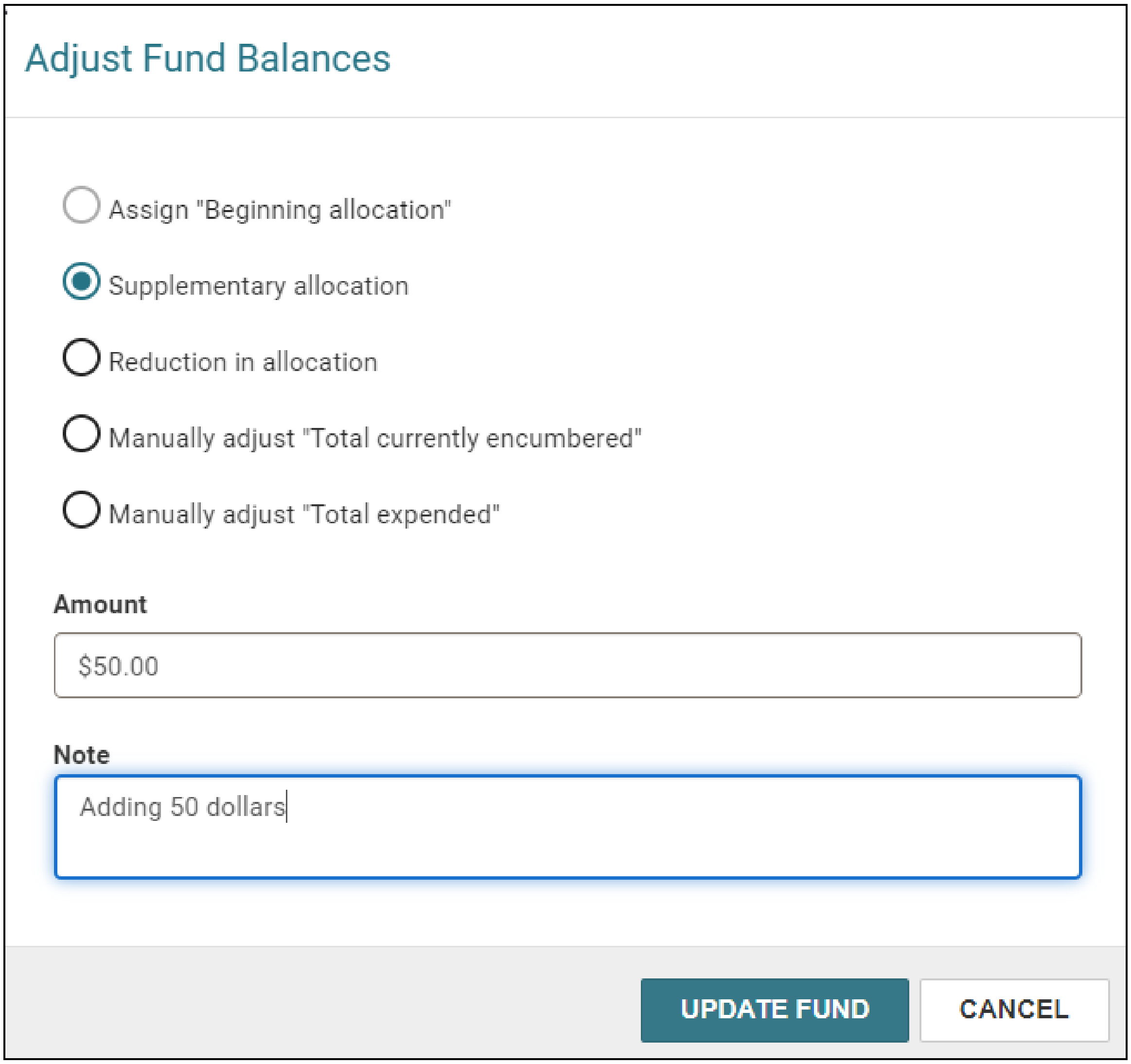
On the Fund workform, you can use the Actions menu to manually adjust fund balances.

To manually adjust fund or subfund balances

1. View a Subfund Record.
2. Select **Actions** > **Adjust Fund Balances**.



The Adjust Fund Balances dialog opens.



3. Select one of the new values to manually adjust:
   - **Manually adjust "Total currently encumbered"** — Enter a value in the **Amount** field:
     - If you enter a negative number, Leap subtracts the amount entered from the total currently encumbered for the fund or subfund.
     - If you enter a positive number, Leap adds the amount entered to the total currently encumbered for the fund or subfund.

   You can do this multiple times.

- **Manually adjust "Total expended"** — Enter a value in the **Amount** field:
  - If you enter a negative number, Leap subtracts the amount entered from the total expended for the fund or subfund.
  - If you enter a positive number, Leap adds the amount entered to the total expended for the fund or subfund.

  You can do this multiple times.

4. Enter the currency **Amount**.
5. (Optional) Enter a **Note**.
6. Select **Update Fund**.

Checking In Resource-Sharing Items

Now you can quickly check in resource-sharing items, such as from INN-Reach, by scanning or typing the item's barcode. You can also search by title to check in the item. You can do all of this on the Check In workform.

> **Note**:
> You must have the **Access Resource Sharing mode** permission to access resource-sharing check in.

To check in resource-sharing items

1. Select **CHECK IN**.

   The Check In workform opens.

2. Select **INN-Reach**.

   The **INN-Reach** view opens.

3. Do one of the following to enter the resource-sharing item:

   - Type the barcode.
   - Use the Find tool to look up the barcode or the title.
   - Scan the barcode.

   Leap adds each item entered to the list, attempts to find a matching resource-sharing request, and the opens the Brief Item Entry dialog.

4. (Optional) To change information about this resource-sharing request, modify any of the fields, including the Barcode field.

5. Select **Continue**.

   Leap prints a slip for the pickup branch either for the current branch or to ship to the requested pickup branch.

   > **Note**:
   > To modify print settings, go to your Leap profile > **Settings** > **Print Options** > **ILL requests** section.

Web-Based Polaris ExpressCheck in Beta

A web-based version of Polaris ExpressCheck is now in beta for version 7.7. This self-check application offers an updated, modern interface that allows patrons to:

- Check out items
- Renew items
- Manage hold requests
- View fines and fees

ExpressCheck communicates directly with the Polaris application and database for fast transactions. The SIP communication protocol is not required.

If your library is licensed for multiple languages, patrons can select their preferred display language.

> **Important**:
> ExpressCheck is purchased and licensed separately. Contact Innovative to obtain your license for ExpressCheck.

For more information about the web-based ExpressCheck, see the following:

- Using ExpressCheck
- Installing and Setting Up ExpressCheck
- Configuring ExpressCheck Options
- Accessing ExpressCheck
- Customizing the ExpressCheck Interface

> **Note**:
> Documentation for the web-based version of ExpressCheck will be published in the Leap help shortly following the release of Polaris 7.7.

Using ExpressCheck

ExpressCheck provides an easy-to-use, touchscreen interface for patrons to check out items without the help of library staff. If your library allows access to the patron's account, patrons can also renew items, manage holds, and view fees and fines.

To use ExpressCheck

1. The patron authenticates at the ExpressCheck workstation using one of the following methods.
   - Scanning a library card

     To authenticate using the library card

     a. The patron scans their library card with the barcode reader.
     b. If your library is licensed for multiple languages, the system displays a list of languages, and the patron taps the button for the language they want to use.
     c. If your library requires a patron password for check-out, the system displays a keyboard on the touch screen. The patron enters a password, and taps **OK**.
   - Manually entering patron credentials

     If your library allows it, patrons can enter a user name or barcode manually to authenticate.

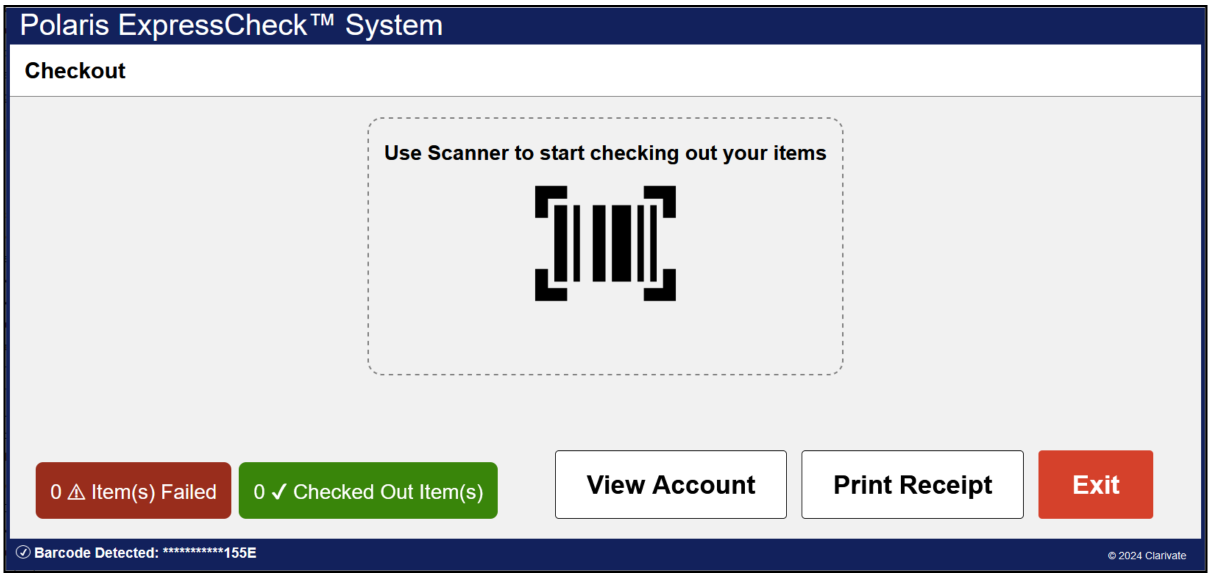
     To authenticate manually

     a. The patron taps **Forgot your library card? Press here!**.
     b. If your library is licensed for multiple languages, the system displays a list of languages, and the patron taps the button for the language they want to use.
     c. The patron enters their user name or barcode and their password, and taps **OK**.

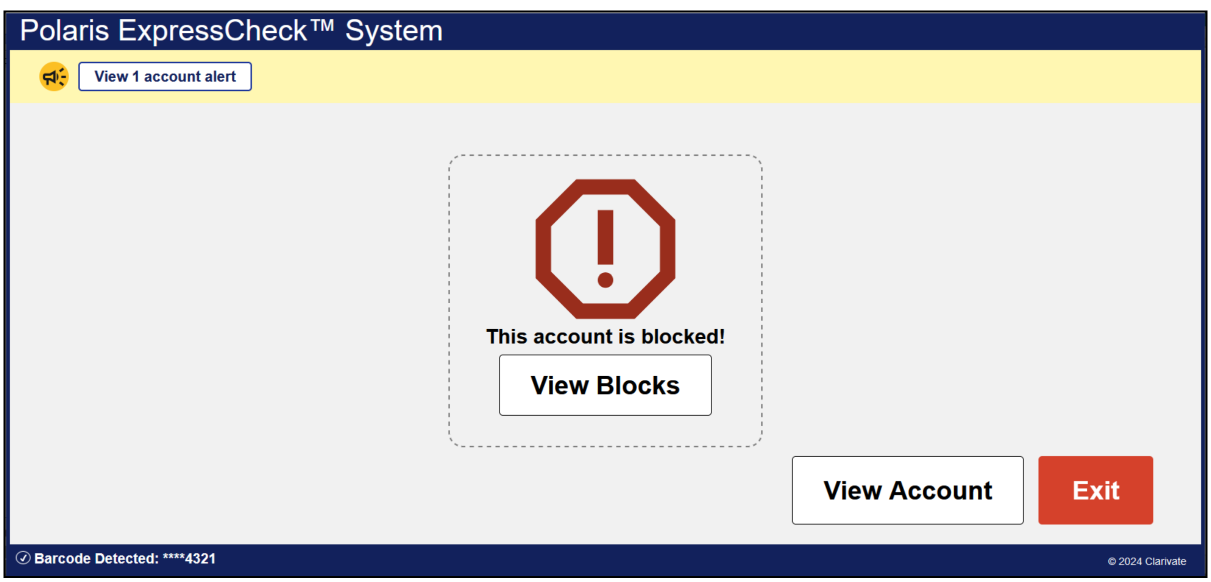
        Note:
        The **Require patron password for ExpressCheck** option in

Polaris Administration (staff client) does not affect this authentication method. The patron must always enter a password when authenticating manually.

Once the patron authenticates, the system displays the Checkout screen.



If the patron is blocked, the system displays a block message. For example:



The patron can view the blocking conditions by tapping **View Blocks**.

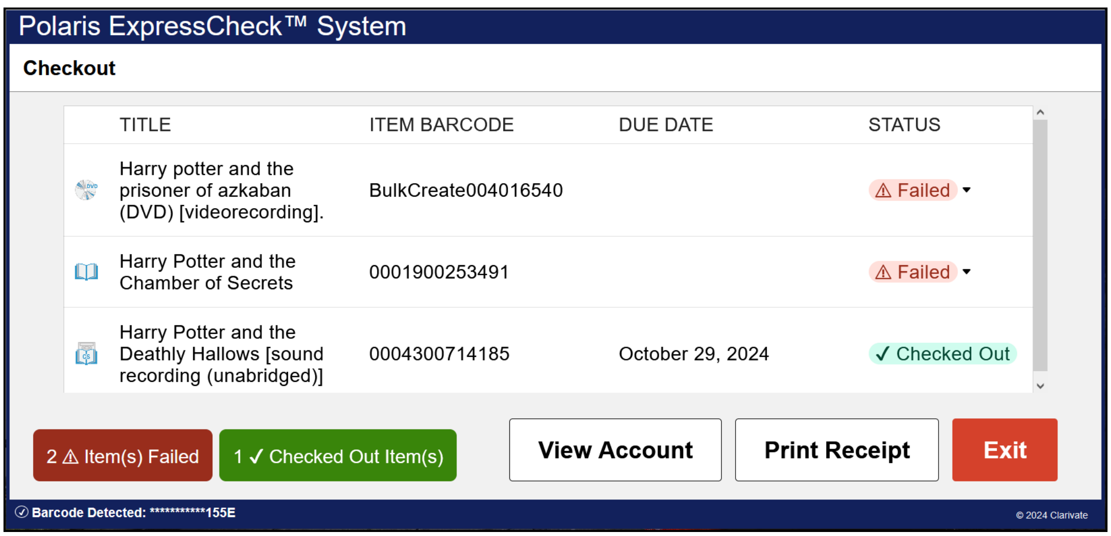
2. From the Checkout screen, the patron can do the following:

- Check out items

  To check out items

  a. The patron scans each item with the barcode scanner. If your library has enabled charging for checkouts, the system displays the charge amount, and the patron decides whether to complete the transaction.

     The screen displays a list of the items scanned and whether each transaction succeeded. In the bottom, left corner, the system tallies the number of successful checkouts and failed transactions. For example:

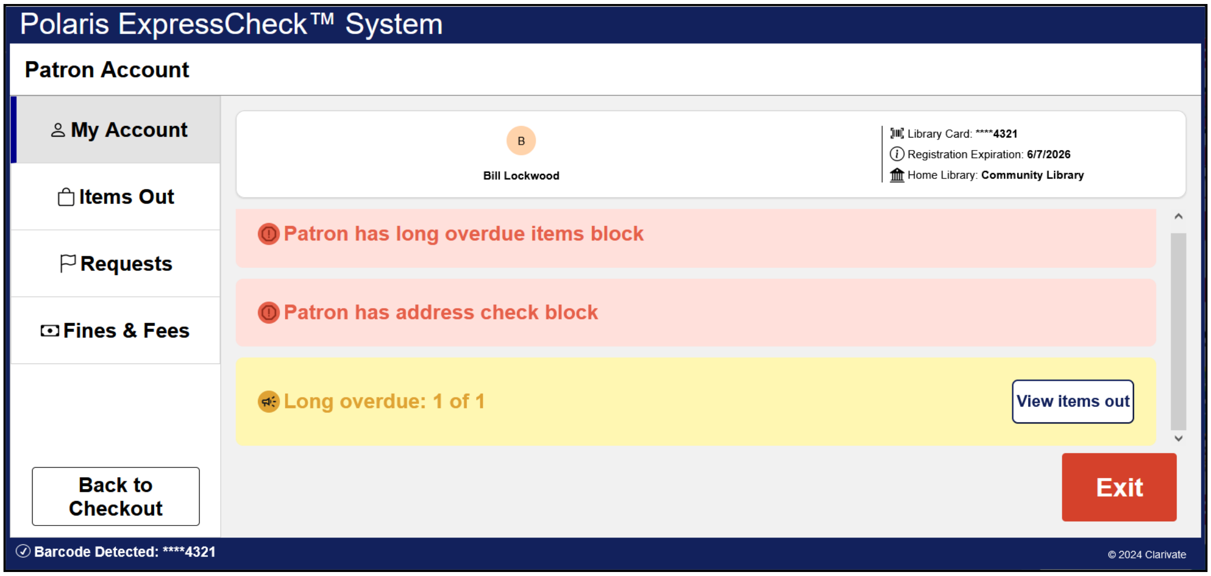


  b. (Optional) To view the reason why a checkout failed, the patron taps the row for that transaction. The line expands to display a message (if available).

  c. The patron taps **Print Receipt** at any time during check-out. The printed receipt lists the items the patron has checked out in the session so far. EReceipts are also available if your library has configured them.

- View patron account and messages

  If your library allows access to patron accounts from ExpressCheck, the patron can view their account by tapping the **My Account** tab.



This tab displays patron messages as follows:

- Patron messages that appear in yellow *do not* prevent the patron from checking items out.
- Patron blocks that appear in red *do* prevent the patron from checking items out.

Additionally, the patron can view information about their account, such as their home library and the expiration date of their account.

- Renew items

Patrons can renew eligible items from ExpressCheck. If the patron has the item with them, they can scan it from the Checkout screen to renew it.

If your library allows access to patron accounts from ExpressCheck, patrons can also renew items they don't have with them from the **Items Out** tab.

To renew items not present

a. From the Checkout screen, the patron taps **View Account**.

   The Patron Account screen opens.

b. On the left side of the screen, the patron taps the **Items Out** tab.

The system displays a list of items that the patron currently has checked out. For each item, the system displays bibliographic information, the due date, and the number of renewals left.

c. The patron selects the items they want to renew by doing one of the following:

    - To renew a subset of the list, the patron taps the items they want to renew and taps **Renew [#] Item(s)**.
    - To renew all items in the list, the patron taps **Renew All**.

    The system attempts to renew the items and displays a summary showing whether each renewal was successful or not.

- Manage hold requests

  If your library allows access to patron accounts from ExpressCheck, the patron can view a list of holds, cancel holds, and suspend or reactivate holds.

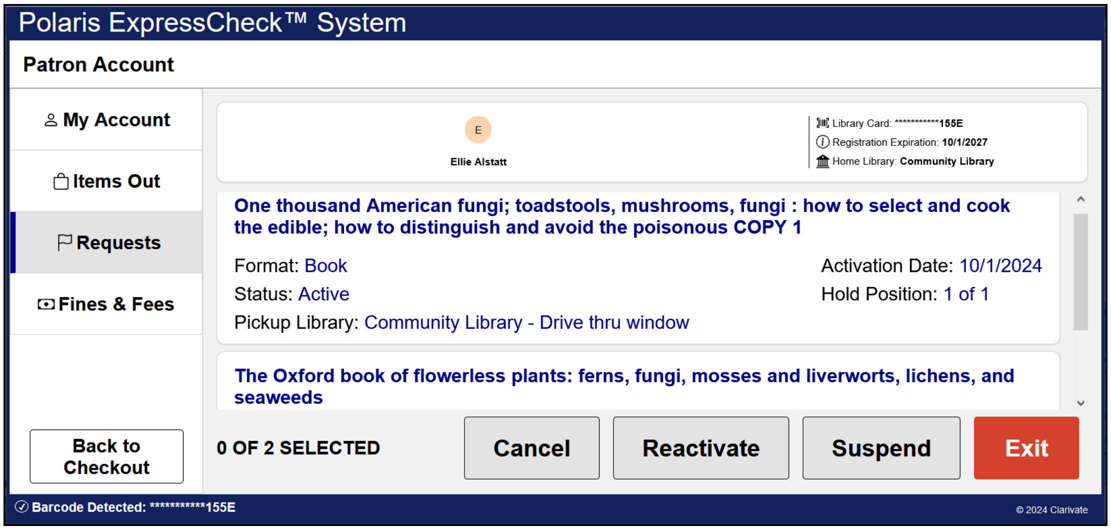
  To view and manage hold requests

  a. From the Checkout screen, the patron taps **View Account**.

     The Patron Account screen opens.

  b. On the left side of the screen, the patron taps the **Requests** tab.

     The system displays a list of holds. For example:



c. (Optional) Patrons can do the following:

   - To cancel holds, the patron selects one or more holds, and taps **Cancel [#] Holds**.
   - To suspend or reactivate a hold, the patron selects one or more holds, and taps **Suspend** or **Reactivate**.

- View fines and fees

  If your library allows access to patron accounts from ExpressCheck, the patron can view a list of fines and fees.

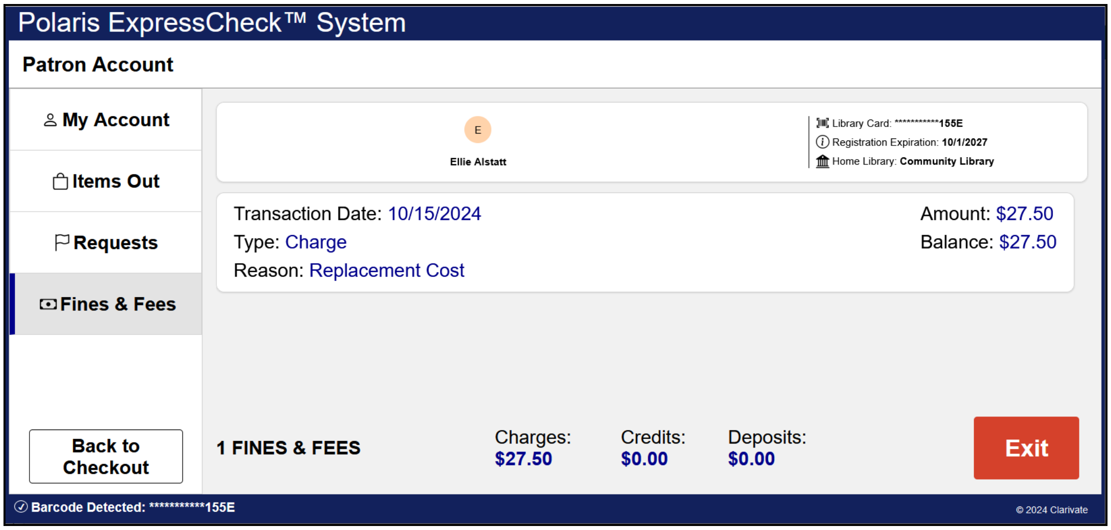
  To view fines and fees

  a. From the Checkout screen, the patron taps **View Account**.

     The Patron Account screen opens.

  b. On the left side of the screen, the patron taps the **Fines & Fees** tab.

     The system displays a list of unpaid fines and fees. For example:



c. When finished with the session, patrons select **Exit**. The system clears all patron information from the screen, and the workstation is ready for the next patron.

Installing and Setting Up ExpressCheck

As a web-based application, ExpressCheck does not require installation. However, your library must install receipt printer software and set up ExpressCheck prior to using the application. Contact your Site Manager for assistance with these steps.

Configuring ExpressCheck Options

The same settings used for the legacy ExpressCheck application work with the web-based version of ExpressCheck. These settings are found in Polaris Administration (staff client) and Polaris Web Admin Tool (Language Editor).

- **Parameters** > **SelfCheck Unit** > **Polaris ExpressCheck: Options** — Enables ExpressCheck and sets options governing patron access, display, and receipt printing. Done in Polaris Administration (staff client).

- **Profiles** > **PAC** > **Patron Access options** — Allows patrons to sign on to ExpressCheck using a user name instead of barcode, and provides a link that allows patrons to receive an email message to reset their passwords. Done in Polaris Administration (staff client).
- **Policy Tables** > **SelfCheck Material Types** — Restricts the circulation of specific material types in ExpressCheck. Done in Polaris Administration (staff client).
- **Parameters** > **SelfCheck Unit** > **Polaris SelfCheck: Blocking Conditions** — Sets circulation blocks related to patron records, item records, and material types that apply specifically to ExpressCheck circulation transactions. Done in Polaris Administration (staff client).
- ExpressCheck language strings — (Optional) Customizes ExpressCheck language strings for English and other licensed languages. Done in the Polaris Web Admin Tool (Language Editor).

Accessing ExpressCheck

You can sign in to the web-based version of ExpressCheck using the following URL:

https://*polaris.library.com*/ExpressCheck

(Replace *polaris.library.com* with the fully qualified domain name that matches your Polaris server address.)

Customizing the ExpressCheck Interface

Polaris provides two standard themes for ExpressCheck: the default theme and a theme that you can copy and customize. The customizable theme allows you to define the following variables:

- The library card image for the home page
- The display font
- The background color
- The header and footer color

- A folder full of icons that you can update or replace
- Sounds for checkout success and checkout error

To create a custom theme, you set up a custom theme folder and add its path in **Parameters** > **SelfCheck Unit** > **Polaris ExpressCheck theme** in Polaris System Administration (staff client).

To select which theme an ExpressCheck workstation displays, use **Parameters** > **SelfCheck Unit** > **Polaris ExpressCheck theme** in Polaris System Administration (staff client). You can select a theme at the system, library, branch, and workstation levels using the **ExpressCheck themes** drop down list.

New Features in Polaris Administration (Web-Based)

Polaris Administration (web-based) is a user interface where you can configure Polaris administrative settings in a web browser without signing in to the Polaris staff client. In version 7.7, Polaris Administration (web-based) includes support for the following new features:

- Using Polaris Administration (web-based) with basic authentication
- Managing organizations (libraries and branches) and editing the system record
- Managing collections
- Copying staff members and configuring staff member settings
- Configuring over 60 patron services administrative settings

This section covers the following topics:

- Installing and Configuring Polaris Administration (Web-Based)
- Accessing Polaris Administration (Web-Based)
- Using Polaris Administration (Web-Based) with Basic Authentication
- Managing Collections
- Managing Organizations
- Configuring Patron Services Settings
- Copying Staff Members and Configuring Staff Member Settings
- Accessing Documentation for Polaris Administration (Web-Based)

Installing and Configuring Polaris Administration (Web-Based)

You can install Polaris Administration (web-based) by selecting the "Polaris Administration" component during the Polaris server software installation process.

Before using Polaris Administration (web-based), you must configure it for your library. For more information, see the Polaris Installation Guide (7.7).

For help getting started with Polaris Administration (web-based), contact Innovative.

Accessing Polaris Administration (Web-Based)

You can sign in to Polaris Administration (web-based) if your Polaris user account has the **Access administration: Allow** permission.

To access Polaris Administration (web-based)

1. Go to this URL:

   https://*polaris.library.com*/PolarisAdmin/

   Replace *polaris.library.com* with the fully qualified domain name that matches your Polaris server address.
2. Sign in with your Polaris credentials.

Using Polaris Administration (Web-Based) with Basic Authentication

In previous versions, Polaris Administration (web-based) only supported OAuth 2.0 for authentication. As of version 7.7, it also supports basic (non-OAuth 2.0) authentication.

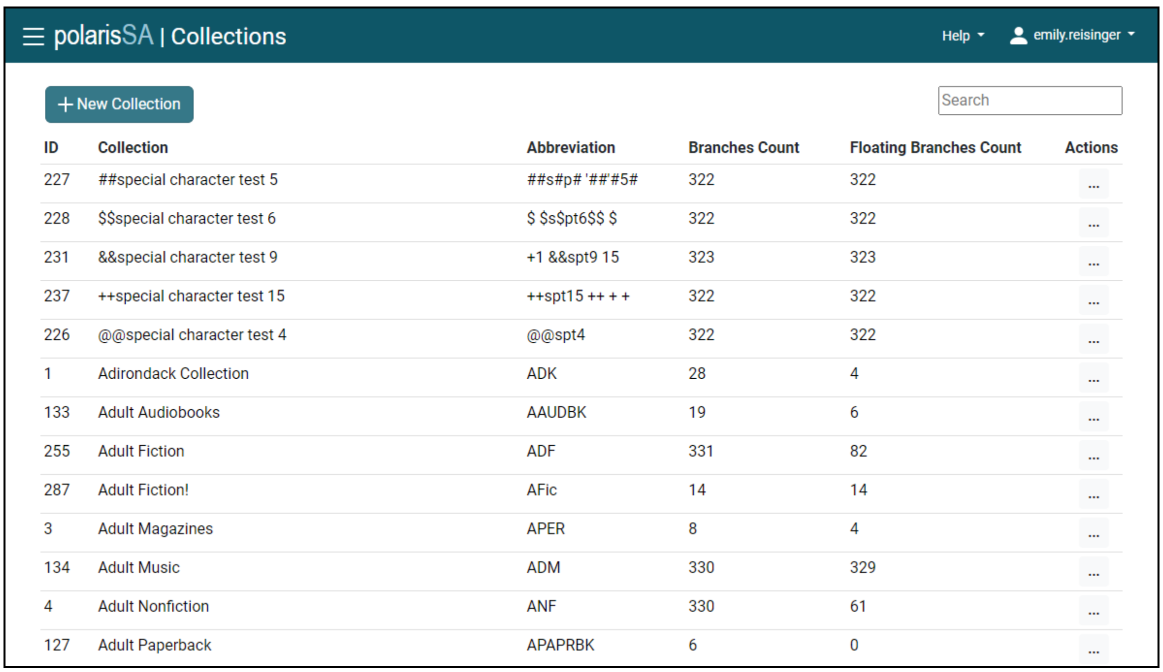
If your library uses basic authentication, you can start using Polaris Administration (web-based) by doing the following:

1. Install and configure Polaris Administration (web-based).
2. Sign in with your Polaris credentials. For information, see Accessing Polaris Administration (Web-Based).

Managing Collections

Version 7.7 includes a new Collections view, where you can:

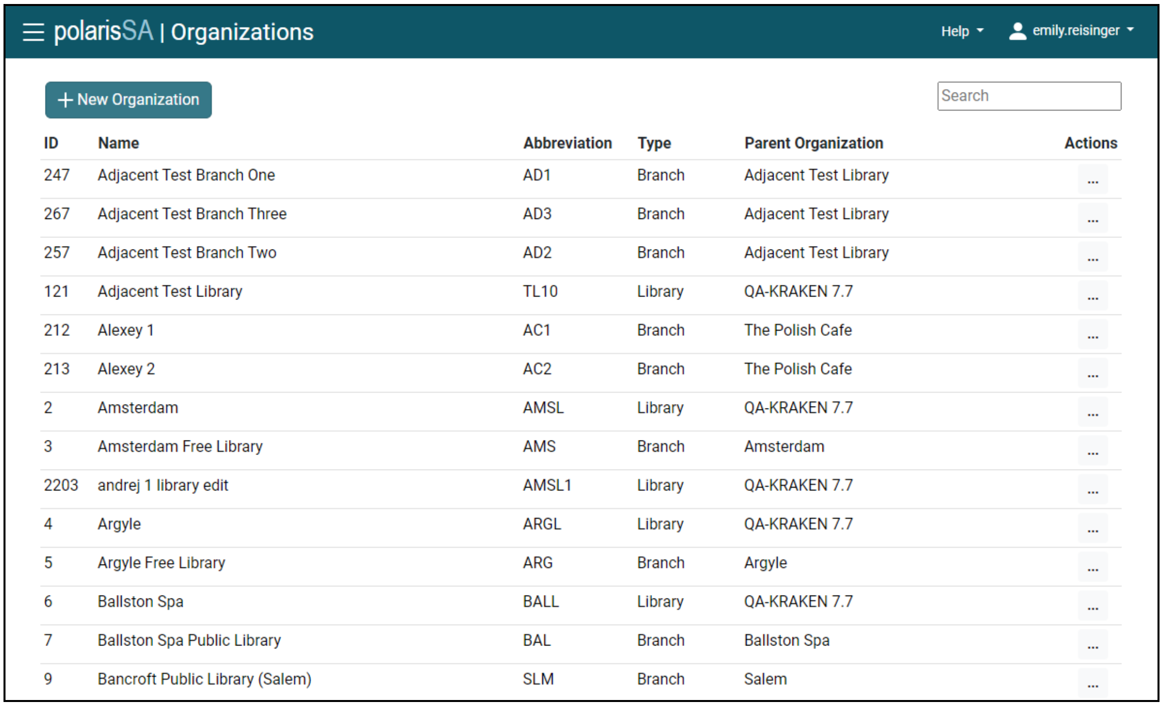
- Add a collection.
- Edit a collection.
- Copy a collection.
- Delete a collection.



Managing Organizations

Version 7.7 includes a new Organizations view, where you can:

- Add a library or branch.
- Edit a library or branch.
- Edit the system record.



ID	Name	Abbreviation	Type	Parent Organization	Actions
247	Adjacent Test Branch One	AD1	Branch	Adjacent Test Library	...
267	Adjacent Test Branch Three	AD3	Branch	Adjacent Test Library	...
257	Adjacent Test Branch Two	AD2	Branch	Adjacent Test Library	...
121	Adjacent Test Library	TL10	Library	QA-KRAKEN 7.7	...
212	Alexey 1	AC1	Branch	The Polish Cafe	...
213	Alexey 2	AC2	Branch	The Polish Cafe	...
2	Amsterdam	AMSL	Library	QA-KRAKEN 7.7	...
3	Amsterdam Free Library	AMS	Branch	Amsterdam	...
2203	andrej 1 library edit	AMSL1	Library	QA-KRAKEN 7.7	...
4	Argyle	ARGL	Library	QA-KRAKEN 7.7	...
5	Argyle Free Library	ARG	Branch	Argyle	...
6	Ballston Spa	BALL	Library	QA-KRAKEN 7.7	...
7	Ballston Spa Public Library	BAL	Branch	Ballston Spa	...
9	Bancroft Public Library (Salem)	SLM	Branch	Salem	...

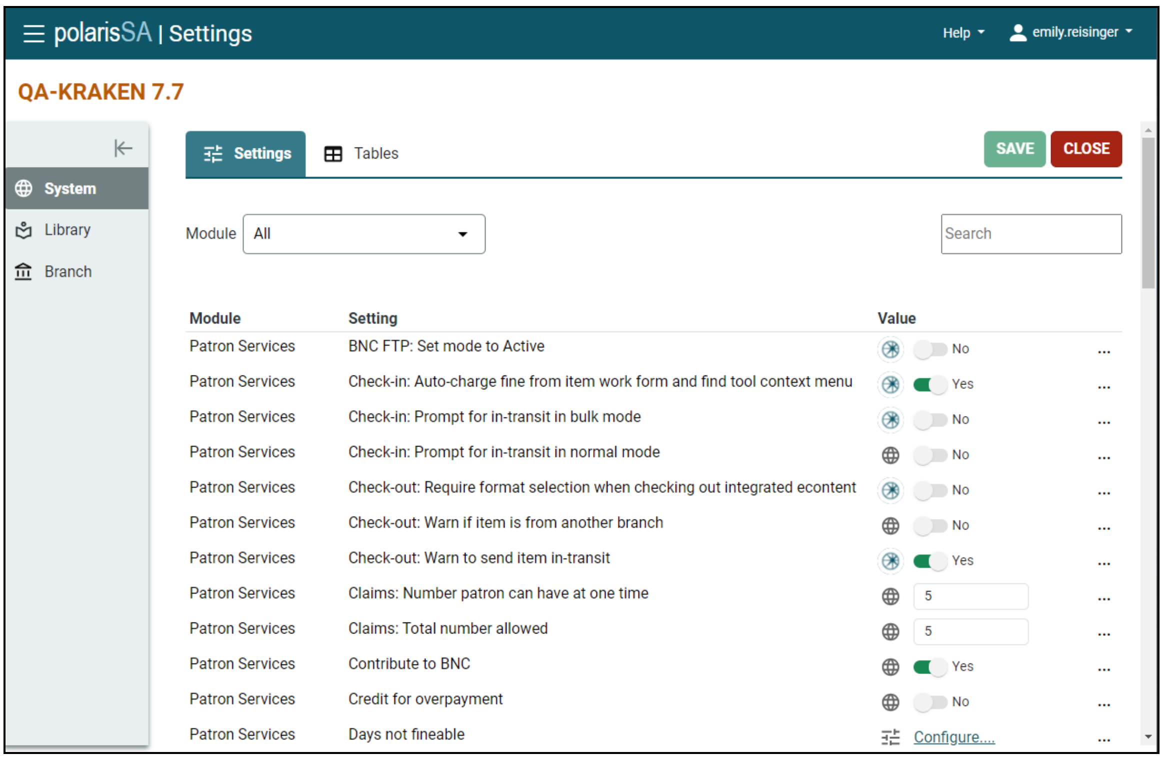
Configuring Patron Services Settings

Version 7.7 includes a new Settings view, where you can:

- Configure more than 60 patron services administrative settings. You can configure settings in one of the following ways:
  - Select or enter the setting value directly on the Settings view.
  - Select the **Configure** link to open a dialog where you can configure the setting.
- Search for settings by typing in the **Search** box.
- Select an option from the menu on the left side of the screen to view system, library, or branch-level settings.
- Use the icons in the **Value** column to understand how each setting is configured. The icons indicate whether each setting value is:

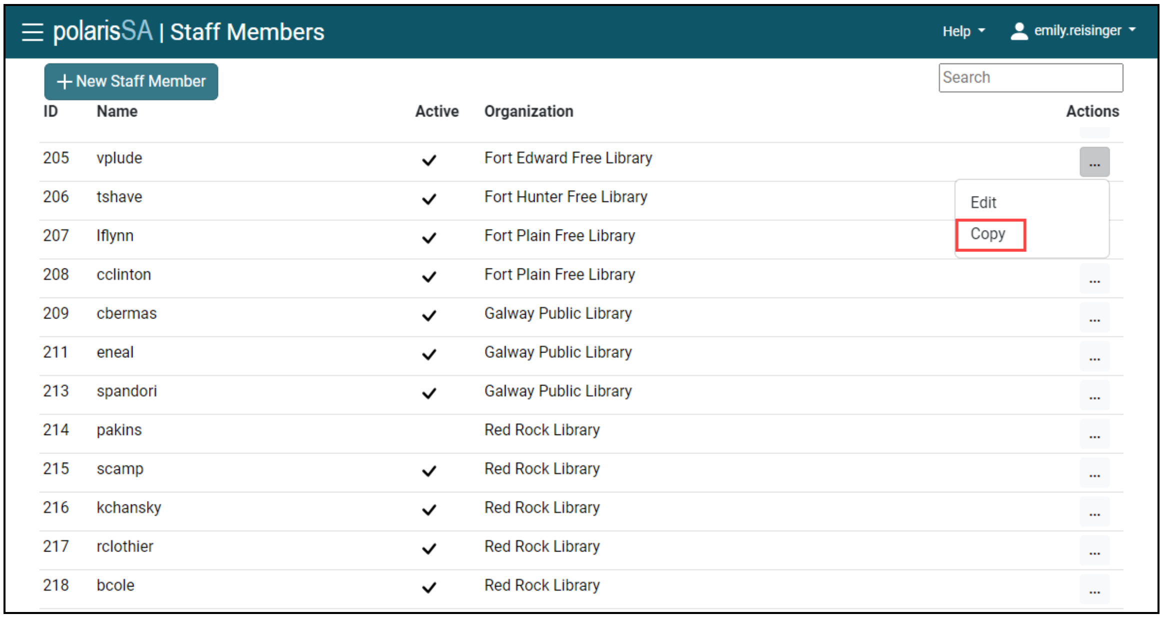
- Configured at the system, library, or branch level
- The Polaris default setting

- 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.

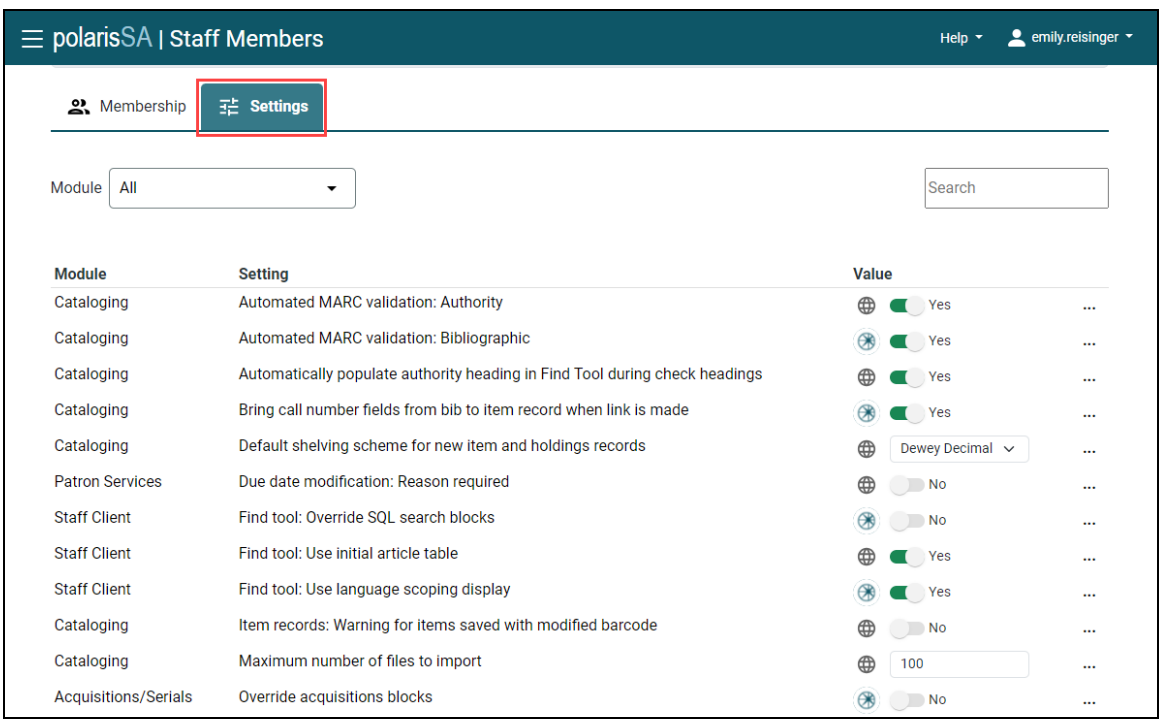


Copying Staff Members and Configuring Staff Member Settings

In previous versions, you could add or edit a staff member on the Staff Members view. In version 7.7, you can now also copy a staff member by selecting **Actions** > **Copy**.



When you edit a staff member's record, a new **Settings** tab lets you configure settings that apply to the staff member.

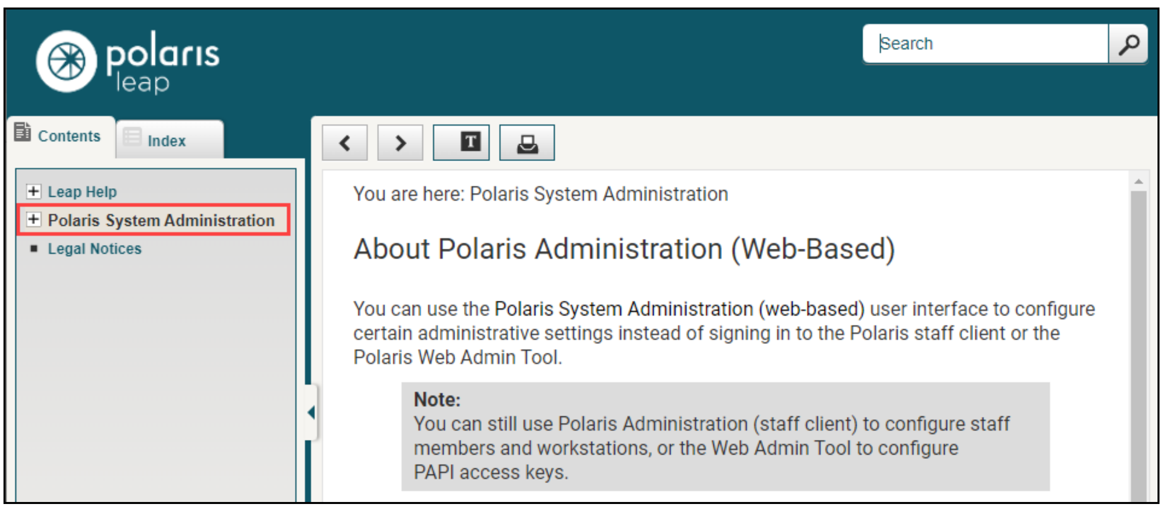


Accessing Documentation for Polaris Administration (Web-Based)

You can now find documentation for Polaris Administration (web-based) in the same location as the Leap help.

Use this link to go directly to documentation for Polaris Administration (web-based): https://documentation.iii.com/leap/7.7/Default.htm#LEAP1_0/SystemAdmin/introduction.htm

Detailed documentation for new features will be posted after the 7.7 release in this location.



Support for Harvesting Bibliographic Record Data with OAI-PMH

Polaris now supports harvesting bibliographic record data using the Open Archives Initiative Protocol for Metadata Harvesting (OAI-PMH). This makes it possible for your library to integrate with external applications or vendors that consume your library's bibliographic data.

To use OAI-PMH harvesting, you must enable the feature when you install Polaris 7.7. For more information, see the Polaris Installation Guide (7.7).

Your integration partners can use the following base URL for harvesting data:

https://*polaris.library.com*/polaris.oaipmh.dataprovider/polaris/bibliographic

Replace *polaris.library.com* with the fully qualified domain name that matches your Polaris server address.

New Deferred Processing SQL Job

Version 7.7 includes a new Deferred Processing SQL job. This job replaces the following two SQL jobs, which are no longer available in version 7.7:

- Hold Request RTF Routing Deferred
- PAC Availability Calculator

> **Important:**
> Do not disable or reschedule the Deferred Processing job.

The Deferred Processing job performs asynchronous processing that improves performance when the system processes hold requests. The SQL job is enabled by default and runs continuously. The job does the following:

- Performs material type limit processing for hold requests. The job performs processing for item records that meet both of the following criteria:
  - The item record is linked to a bibliographic record with a high volume of hold requests (more than 100).
  - The hold limit for the item's material type is set to 0 or 1. For more information about material type hold limits, see List and modify loan and request limit entries.
- When Polaris is set to perform asynchronous RTF processing, performs a health check on the asynchronous RTF queue every five seconds to ensure the system is processing high-volume hold requests. For information about enabling or disabling asynchronous RTF processing, see the Holds: Enable asynchronous RTF threshold parameter.
- Checks the **Suppress items by circulation status** setting in Polaris Administration (staff client) and recalculates the availability counts shown in the PowerPAC and Mobile PAC, if necessary. For more information, see Suppressing Items from Search Results.

Support for Axis 360's Rebranding to Boundless

Baker & Taylor has rebranded Axis 360 to Boundless. This release updates all the default strings in Polaris from "Axis 360" to "Boundless." However, if your library was initially set up for Axis 360, you might still see Axis 360 in library-defined fields. Library-defined fields include the names in your vendor account records. You have the option to update these fields anytime.

Configuring the Display of the Reading Level Facet in PowerPAC

Version 7.7 contains two new settings that control the display of the reading level facet in PowerPAC search results. The reading level facet lets patrons filter PowerPAC search results based on the reading levels your library catalogs in bibliographic records.

> **Note:**
> If your library already has the reading level facet feature enabled when you upgrade to version 7.7, the upgrade process automatically populates the new settings with the appropriate data for your library. If you want to continue using your current reading level labels and facets, you don't need to take any action. Note that the reading level facet might not appear in PowerPAC search results for a short time (no more than 24 hours) after you upgrade. Contact Innovative if you have questions about the upgrade process.

This section covers the following topics:

- Configuring the Reading Level Match String
- Configuring Reading Level Ranges

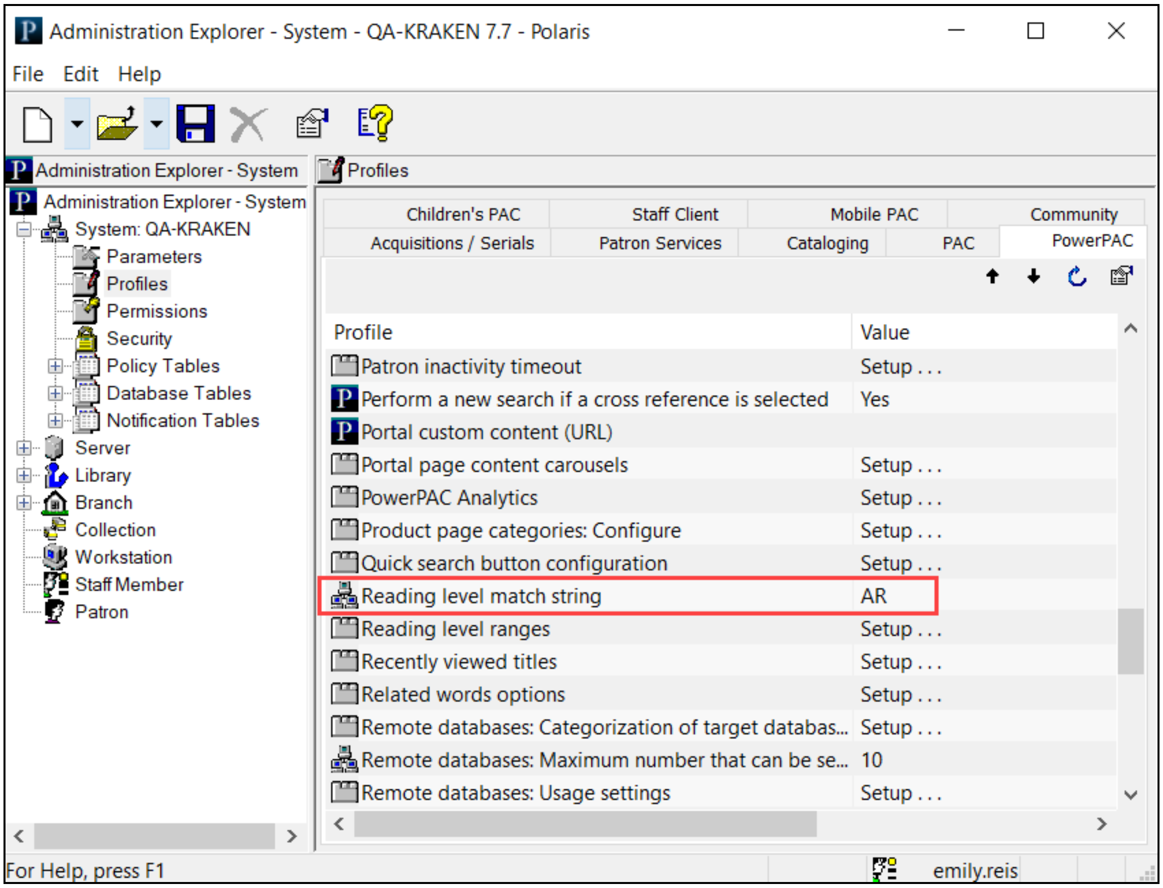
Configuring the Reading Level Match String

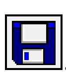
Polaris uses the **Reading level match string** setting to determine whether a bibliographic record is included in the reading level facet counts that appear in PowerPAC search results. If the reading level match string you specify matches the data found in the bibliographic record 521 tag subfield $b, the bibliographic record is included in the facet counts. The reading level value from the bibliographic record's 521 tag subfield $a determines which reading level range the record falls within.

To configure the reading level match string

1. In Polaris Administration (staff client), go to **Administration** > **Explorer** > **System**.
2. Select **Profiles** > **PowerPAC**.

3. Double-click **Reading level match string**, then enter the reading level match string in the **Value** field.

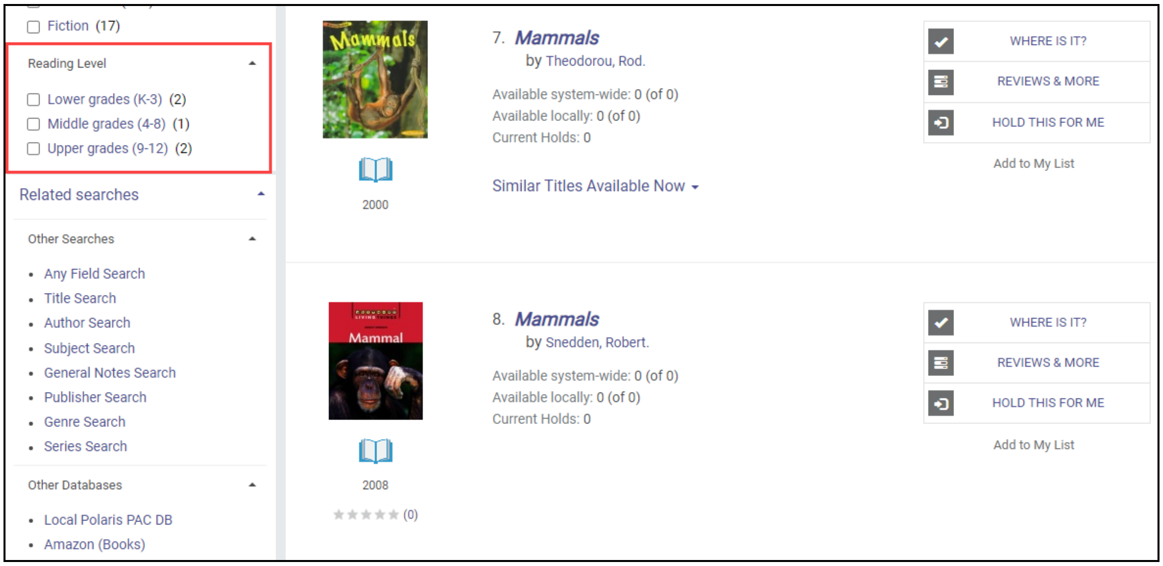


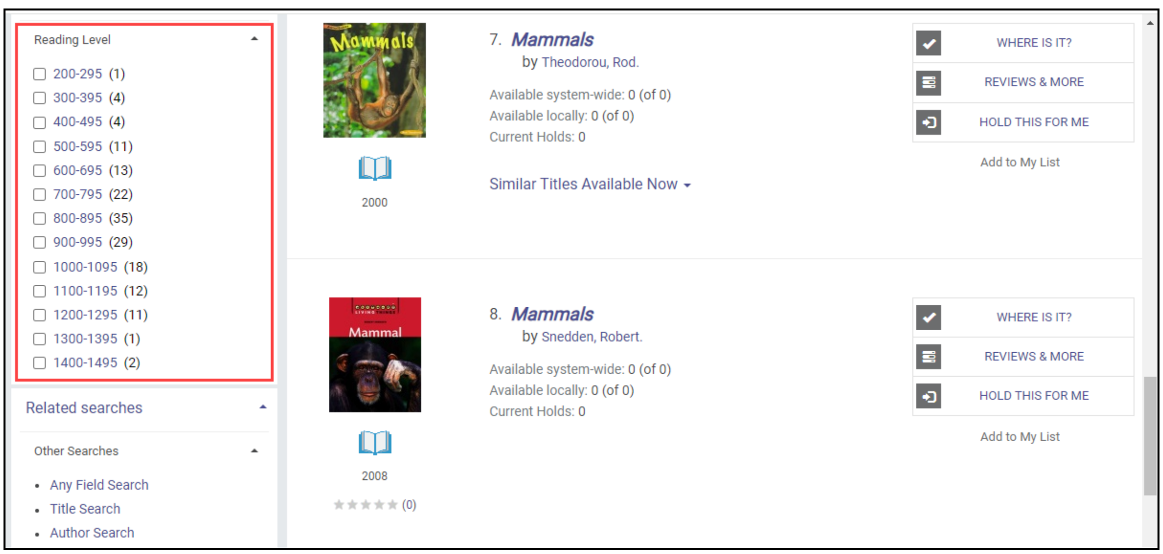
4. Enter the reading level match string. The string must match the data from the 521 tag subfield $b of your library's bibliographic records.
5. Select **OK**.
6. Select **Save** .

Configuring Reading Level Ranges

The **Reading level ranges** setting defines the reading level ranges that appear in PowerPAC search results if your library has enabled the reading level facet feature. Patrons can select reading level ranges to narrow their search results.

The images below show two different possible reading level range configurations. You can configure PowerPAC to display ranges that are appropriate for the reading level system your library uses.





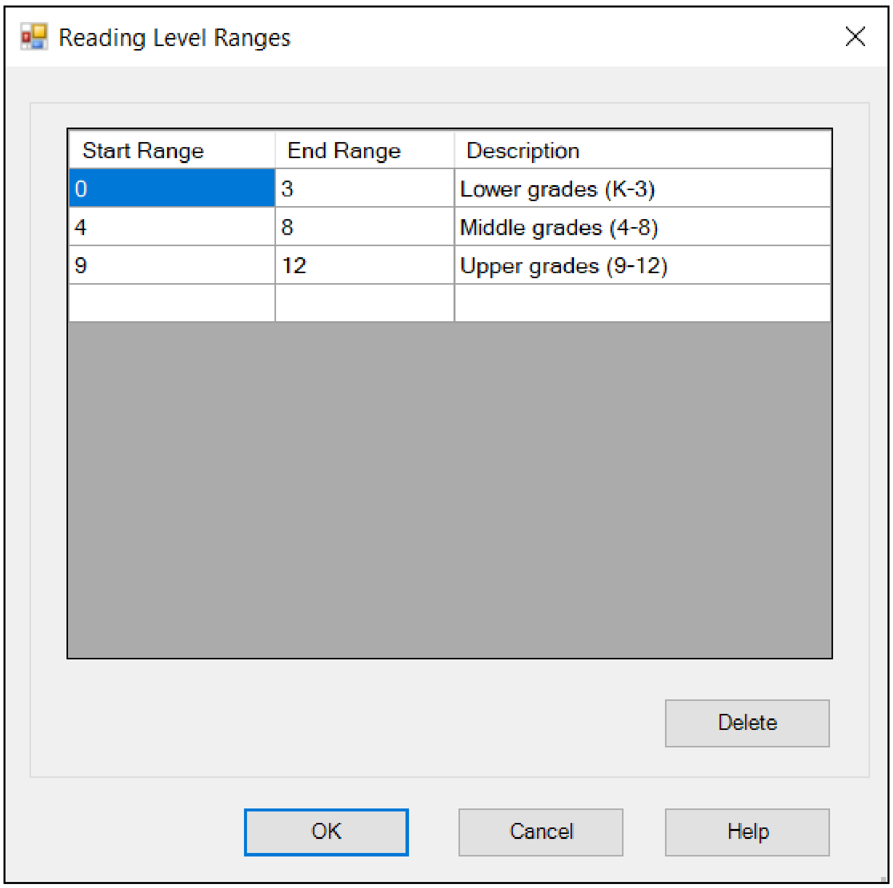
To configure reading level ranges

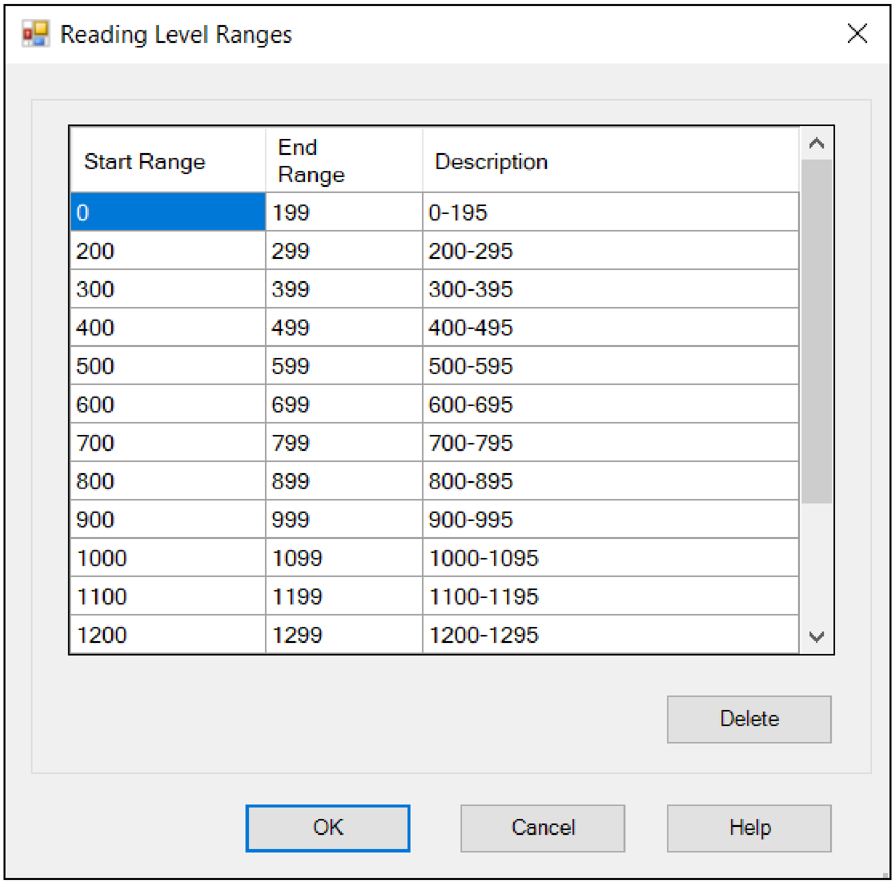
1. In Polaris Administration (staff client), go to **Administration** > **Explorer** > **System**.
2. Select **Profiles** > **PowerPAC**.
3. Double-click **Reading level ranges**.

The Reading Level Ranges dialog appears.

> **Note:**
> If your library already has the reading level facet feature enabled when you upgrade to version 7.7, the dialog contains your library's reading level ranges. If your library does not already have the reading level facet feature enabled, the dialog is empty.

The images below show two different possible reading level range configurations. You can configure ranges that are appropriate for the reading level system your library uses.





Start Range	End Range	Description
0	199	0-195
200	299	200-295
300	399	300-395
400	499	400-495
500	599	500-595
600	699	600-695
700	799	700-795
800	899	800-895
900	999	900-995
1000	1099	1000-1095
1100	1199	1100-1195
1200	1299	1200-1295

4. Do one or more of the following:
   - To modify an existing reading level range, select a start range or end range value and enter a number. A title falls within a reading level range if the reading level specified in the bibliographic record 521 tag subfield $a is greater than or equal to the start range value and less than or equal to the end range value.
   - To modify the description of the range that appears in the PowerPAC reading level facet, select a description and enter text.
   - To delete a reading level range, select a line in the table and select **Delete**.
   - To add a reading level range, enter the following information in the empty row at the bottom of the table: start range, end range, and description.
5. Select **OK**.

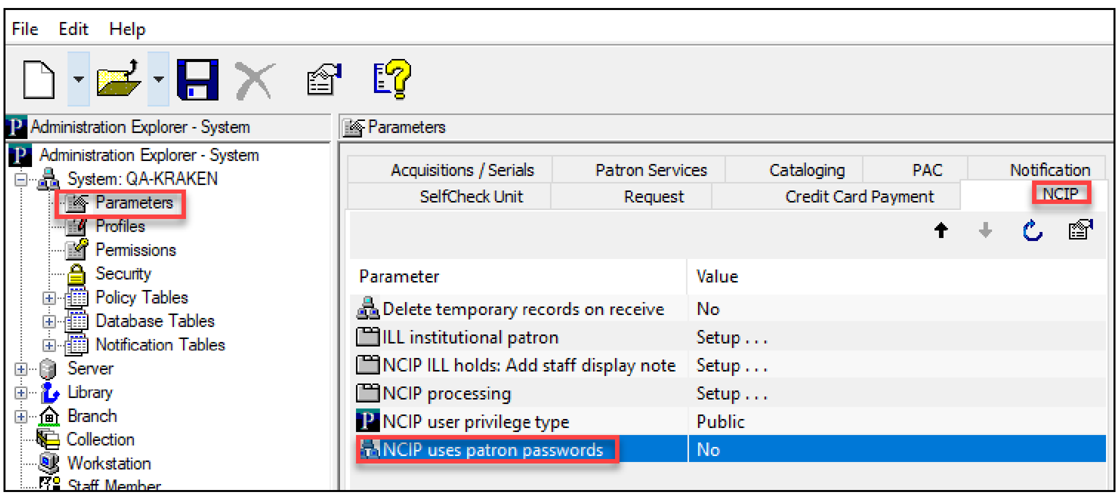
6. Select **Save** .

Specifying if NCIP Requires a Password

You can now use the **NCIP uses patron passwords** parameter to specify whether NCIP requires a patron's password. You can set this option to **Yes** if you want to require a patron's password. If your library doesn't require a patron's password for NCIP, or your NCIP vendor has an alternative authentication method, you can set this option to **No**. The default setting is **Yes**.

To set whether NCIP requires a patron's password

1. Go to **Administration** > **Explorer** > **System**.
2. Select **Parameters** > **NCIP**.
3. Double-click **NCIP uses patron passwords**.



4. Select one of the following:
   - **Yes** — require an NCIP patron password
   - **No** — don't require an NCIP patron password
5. Select **File** > **Save**.

MARC Technical Updates in Polaris 7.7

The updates specified in the following links were implemented in Polaris 7.7.

- MARC Update Number 37 (December 2023)
  - Bibliographic format updates
  - Authority format updates
- MARC Technical Notice (December 5, 2023)
- MARC Technical Notice (January 23, 2024)
- MARC Technical Notice (February 6, 2024)
- MARC Technical Notice (February 27, 2024)
- MARC Technical Notice (February 27, 2024)
- MARC Technical Notice (March 12, 2024)
- MARC Technical Notice (March 19, 2024)
- MARC Technical Notice (March 26, 2024)
- MARC Technical Notice (April 17, 2024)
- MARC Technical Notice (April 23, 2024)
- MARC Technical Notice (April 30, 2024)