

What's New in Polaris 5.0 SP2 and Leap 1.0 SP2



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New and Modified Polaris Administration Settings

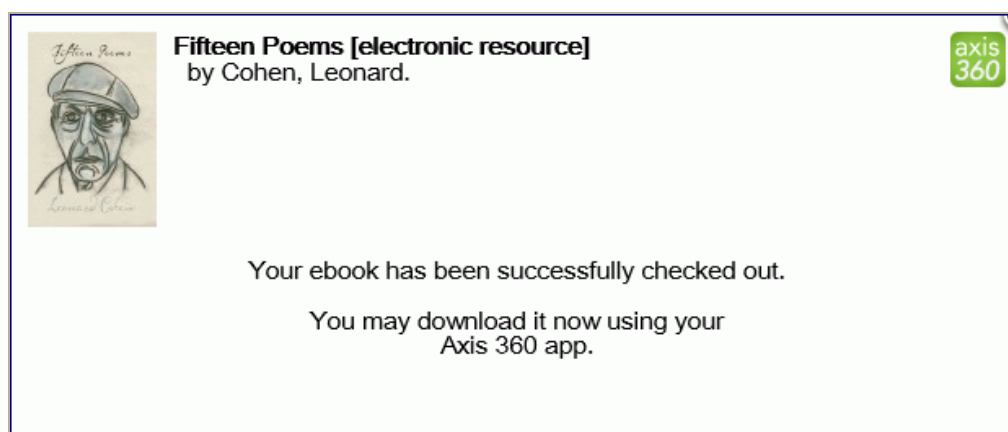
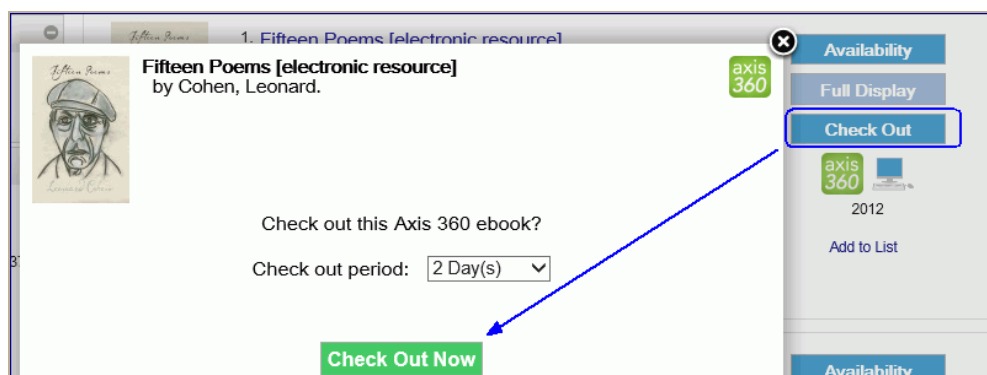
The following table lists the new and modified parameters, profiles, and permissions in Polaris Administration.

Location / Name	Purpose	Default	Level	More Info
Modified Credit Card Payment Parameter				
Online payments Configure: Setup	Added EnvisionWare configuration options to the Properties dialog box.	None	System, Library, Branch	See: "EnvisionWare ECommerce Integration - Polaris and ExpressCheck" on page 23.
Modified Patron Services Parameter				
Check-out: Receipt Options	Added option: Prompt for eReceipt configuration in Leap	Not selected	System, Library, Branch	See: "Option to Configure eReceipts at Checkout" on page 53.
New Circulation Permissions				
Bill a charge manually	Staff members with this Patron Status permission, in addition to the existing Patron Status Access and Modify permissions, can manually add charges to a patron's billing notice.	Not granted	Branch, Staff Member, Workstation	See: "Manually Bill Patrons for Charges " on page 14.
New PowerPAC Profile				
OverDrive download: Enable on in-house workstations	When this profile is set to No , patrons cannot download or access OverDrive eContent from library workstations designated as "in-house."	No	System, Library, and Branch	See: "Check Out and Download OverDrive Integrated EContent from the PAC" on page 5.

Axis 360 API Changes

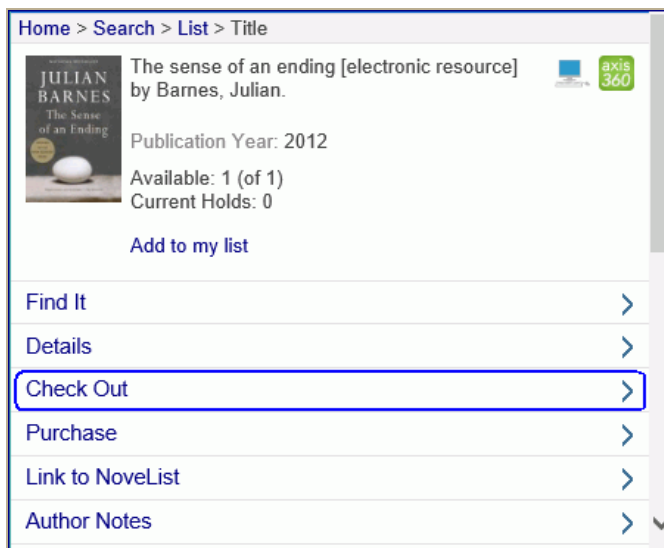
Axis 360 has developed a single app for listening to audio-ebooks and reading ebooks, which eliminates the need for a Blio User ID, Acoustik User ID, or Adobe ID. This improved ease of use for the patron required modifications to the Axis 360 APIs, and in response to those changes, PowerPAC and Mobile PAC were modified so that users no longer need to select the eContent format when checking out Axis 360 integrated eContent titles.

When checking out Axis 360 integrated eContent titles from PowerPAC, the user selects the **Check Out** button. A dialog box opens, and the user selects the **Check Out Now** button. There is no need to select a format.



When checking out Axis 30 integrated eContent from Mobile PAC, the user selects the title in the Mobile PAC search results and selects **Check Out** on the Title page to go to the Check Out page.

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On the Check Out page, the user selects the **Check Out** button.



A confirmation message informs the user that the eContent has been checked out and is ready to download.

Improved Processing for Integrated eContent

This release includes changes to import and synching processes to improve efficiency and accuracy for integrated eContent. The reorganized import processing steps improve efficiency, and a new overnight process provides more accurate title and availability information.

The new overnight process, `PolAPIConsumerServiceOvernightProc.exe`, checks for new titles (OverDrive only) and changes in item availability, such as added copies (OverDrive and Axis 360). It runs in addition to the existing `PolAPIConsumerService.exe`, which synchronizes patron circulation activity. For Axis 360 integrated eContent, processing is the same as before, but it runs in the new service.

For OverDrive, the `PolAPIConsumerServiceOvernightProc.exe` runs in either full synch or delta modes, based on a new `appSettings.key` named `LastProcessTime`. The first time the process runs after the service has been started, the `LastProcessTime` is set to nothing by default, and a full synch occurs. New titles are brought in and availability is synchronized for all OverDrive eContent titles owned by the library.

After the initial run, the `LastProcessTime` is determined by the previous successful run, and a delta synch occurs. During a delta synch, only titles that are new or have availability changes since the `LastProcessTime` are synchronized.

The service should be stopped, restarted, and run in full synch mode when:

- A vendor account is enabled
- It is necessary to bring in the full set of OverDrive titles again (occasionally necessary because of changes to import settings and related processing).

If it is necessary to stop and restart the service, but a full synch is not desirable for some reason, you can force a delta synch by entering a valid datetime string into the `LastProcessTime` `appSettings.key`.

Check Out and Download OverDrive Integrated EContent from the PAC

Patrons who are logged into their accounts in PowerPAC or Mobile PAC can now check out OverDrive integrated eContent titles, and access the file from the final checkout acknowledgment or from their patron accounts. If the title is available in a single format, the PAC user selects the single format shown. If the title is available in multiple formats, the user selects the **Get Title** button, and a drop-down menu displays the available formats.

The patron experience may vary according to the device used to access the eContent; the operating system and the apps installed; and the browser settings. To access the eContent, the patron may need to allow one-time pop-ups or turn off the pop-up blocker on some devices, such as on the iPad.

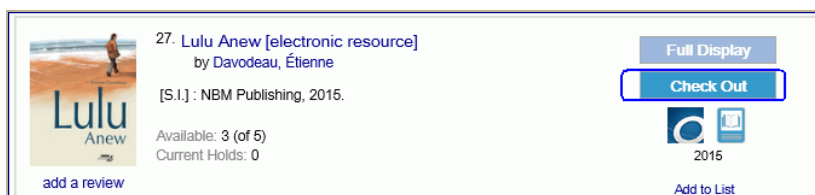
The following variables are outside of the control of the Polaris software:

- DRM-protected Adobe PDF, EPUB files (.acsm files), and Open EPUB files (.epub-files) may open in the OverDrive reading application, Adobe Digital Editions, or another reading application.
- OverDrive Read, OverDrive Listen, MediaDo, and streaming video titles open and play in a new browser tab or a new browser window.
- Kindle titles open in a new browser tab or window with an Amazon login page. The title is sent to the user's Kindle account; the Kindle app does not open automatically.
- Nook titles are sent to the user's Nook account; the Nook app does not open automatically. Depending on the user's device and the Barnes & Noble account, a new browser tab or window may open with a Barnes & Noble login page.
- Windows phone users may experience unsatisfactory results, and may prefer to switch to the OverDrive app to download their titles.

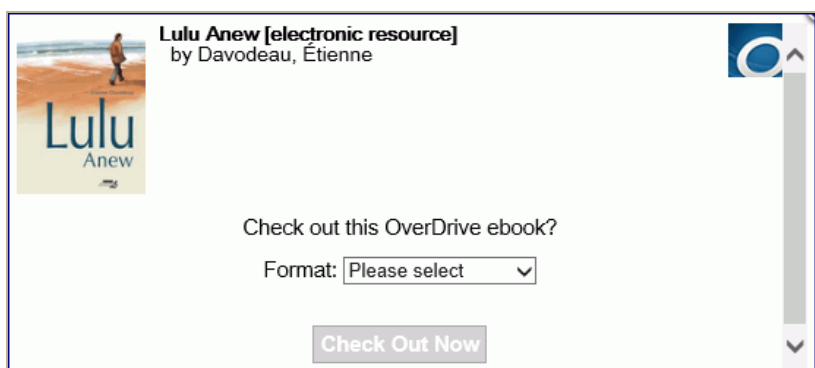
Check Out and Download OverDrive EContent from Polaris PowerPAC

A patron who is logged into PowerPAC can check out and immediately download or access OverDrive integrated eContent without going to the OverDrive app.

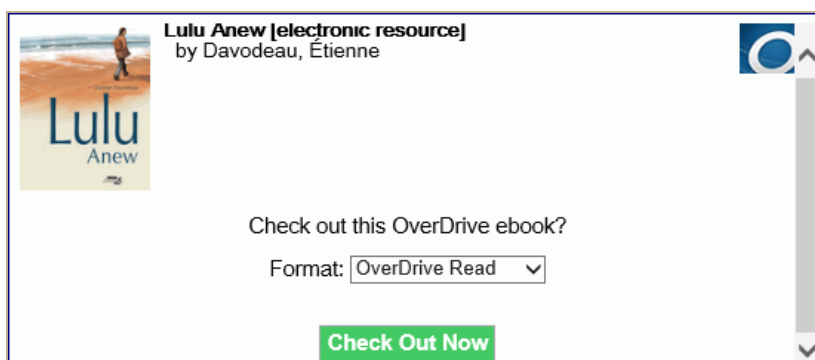
The patron selects the **Check Out** button from the title list.



Another light box prompts the patron to select the format for the eContent check out.

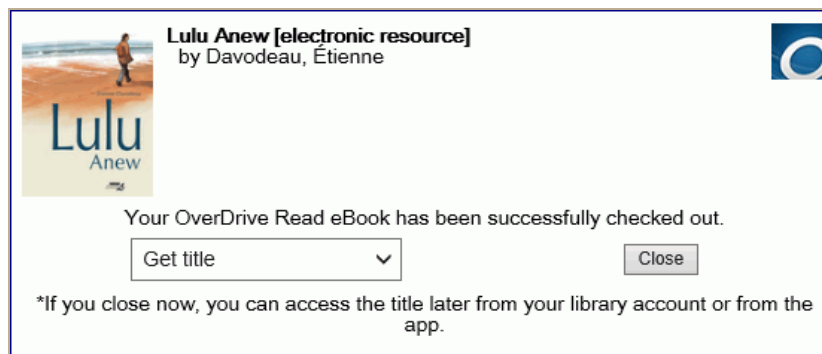


The patron selects the format in the **Format** drop-down list box, and the **Check Out Now** button is activated.

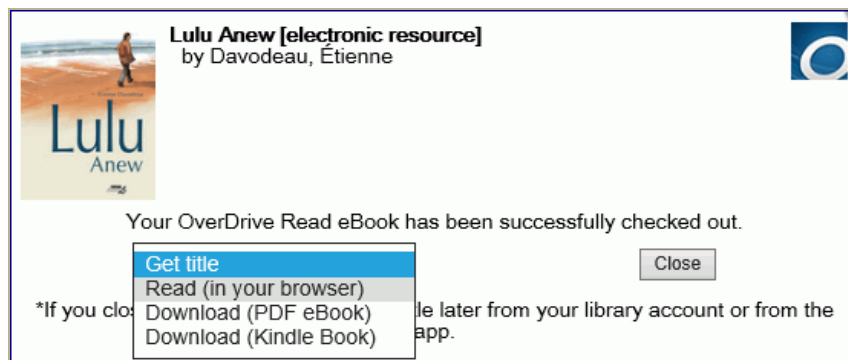


Another light box confirms that the eContent was checked out.

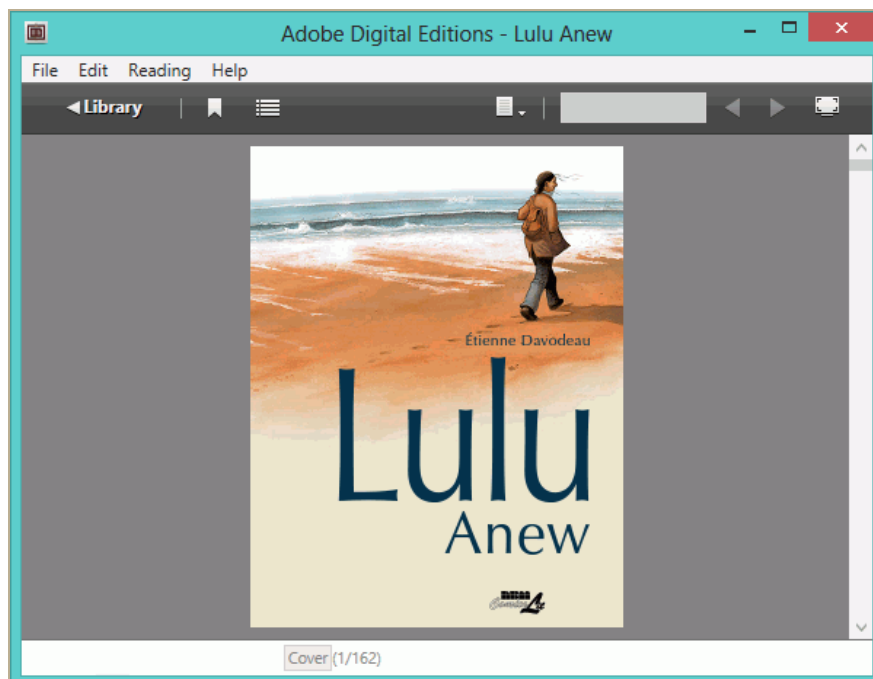
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The patron selects an option in the **Get title** drop-down list box.



The eContent is downloaded in the format the patron selected without the patron having to go to the OverDrive app.



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Or, the patron can select **Close** to close the light box and download or access the eContent from the Items Out list or from the OverDrive app.

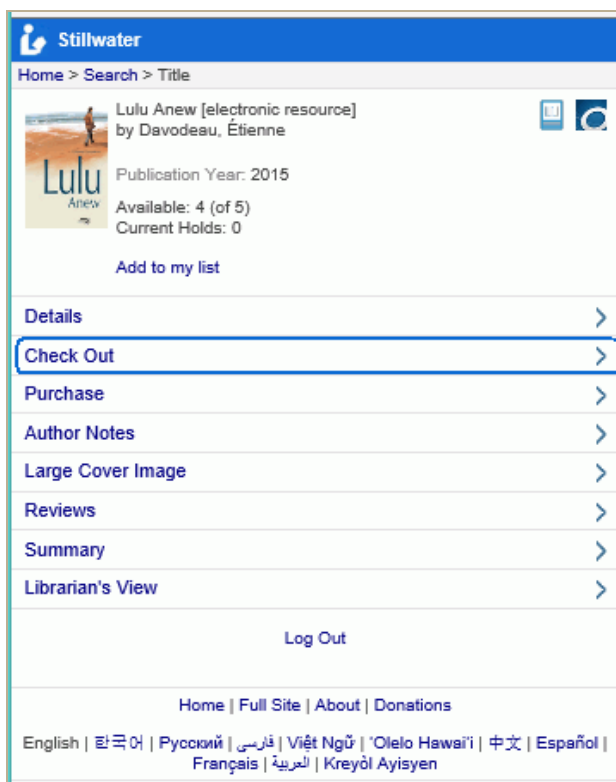
The screenshot displays the Stillwater Public Library's Polaris 5.0 SP2 interface. At the top, navigation tabs include LANGUAGE, LARGE TEXT, KID'S CATALOG, MY SHOPPING CART, and a branch switcher. The main header shows the library name and a navigation bar with LIBRARY INFO, SEARCH, COMMUNITY, MY ACCOUNT, and HELP. The left sidebar contains links for My Account, My Record, Items Out (7), Requests, Fines & Fees, Claimed and Lost, Saved Searches, My shopping cart, and Log Out. The central area shows account details for 'Kann, Susan (DOC)', including a barcode, username, registered location, patron code, registration date, and expiration date. Below this is the 'Items Out' section, which contains a table of borrowed items. The first item, 'Animal Farm [electronic resource]', is highlighted, and a context menu is open, showing options: 'Get title', 'Download (MP3 Audiobook)', and 'Listen (in your browser)'. The second item, 'The King's Taster [electronic resource]', also has a 'Get title' dropdown menu visible.

✓ i	Format	Call Number	Title	Assigned Branch	Due Date	Renewals Left
1			Animal Farm [electronic resource]	Digital Branch	9/30/2015	Get title Download (MP3 Audiobook) Listen (in your browser)
1			The King's Taster [electronic resource]	Digital Branch	9/30/2015	Get title

Check Out and Download OverDrive EContent from Polaris Mobile PAC

A patron who is logged into Mobile PAC can check out and immediately download or access OverDrive integrated eContent without going to the OverDrive app.

The patron selects **Check Out** from the title display in Mobile PAC.



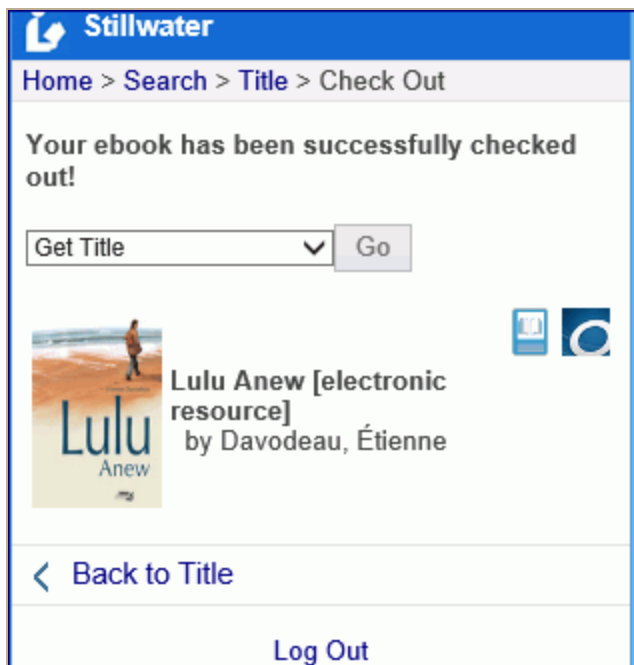
The Check Out view opens.

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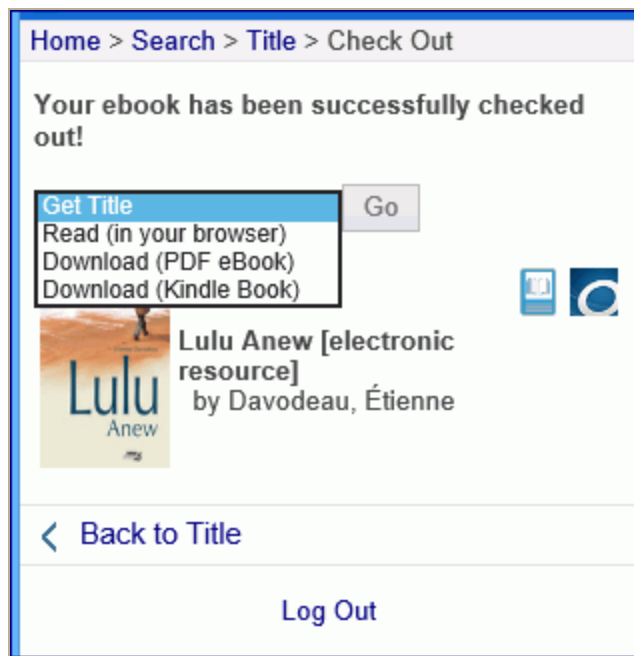


The patron selects the format in the **Format** drop-down list box and selects the **Check Out** button.

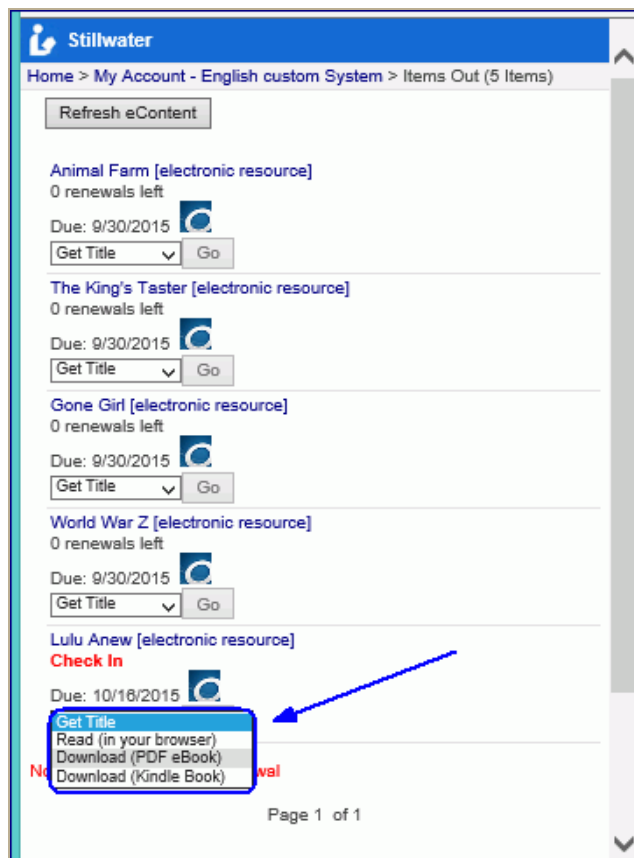
A message confirms that the check-out occurred, and the **Get Title** drop-down list contains the download formats for the eContent.



The patron selects the format for download in the **Get Title** drop-down list box. The OverDrive eContent is downloaded in the format the patron selected without the patron having to go to the OverDrive app.



Or, the patron can navigate away from the page without getting the title, and then download or access the eContent later from the Items Out list or from the OverDrive app.

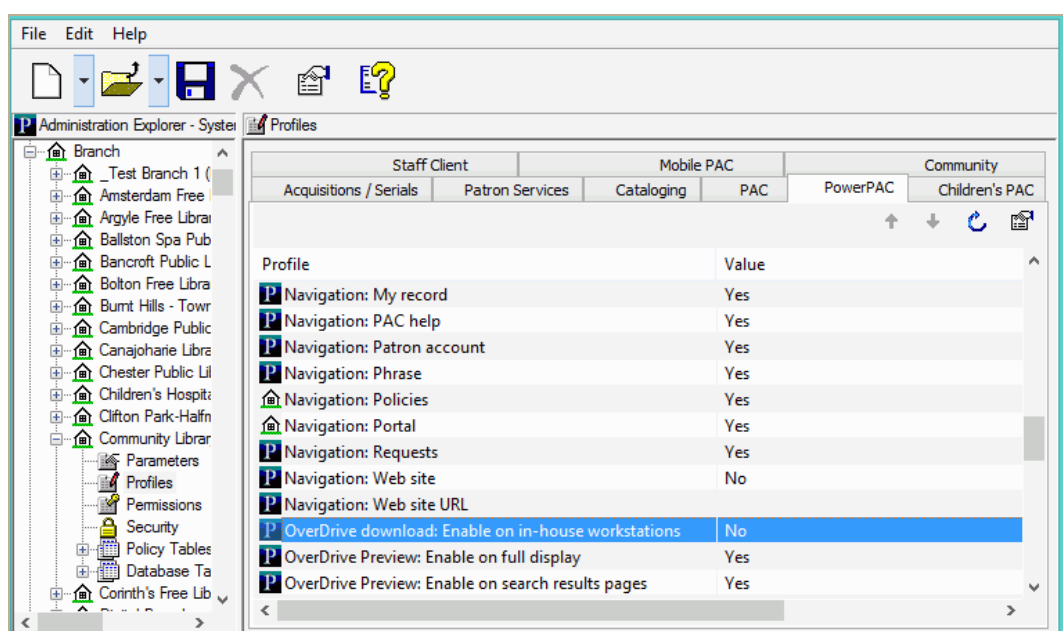


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The patron selects an option in the **Get title** list, and the eContent is downloaded to the patron's phone or device.

Option to prevent downloads of OverDrive eContent on library workstations

Your library can prevent patrons from downloading OverDrive eContent titles to library workstations or opening checked-out eContent in the browser on a library workstation by setting the new PowerPAC profile **OverDrive download: Enable on in-house workstations** to **No**. This profile is available at the System, Library, and Branch levels in Polaris Administration, and the default setting is **No**. If the profile is set to **No**, patrons will not be able to download or open checked-out OverDrive eContent on workstations specified as In-house (using the In-House Access Definitions table for the PAC connection library).



New TOM Icons for Blu-ray and DVD

To ensure that patrons and staff members can more readily distinguish between video formats for DVD and Blu-ray discs, the icon colors were changed. The Type of Material (TOM) icon for Blu-ray is now blue with **Blu** as the text above the image, and the TOM icon for DVD is a light silver-gray with **DVD** as the text above the image.

Example of a Blu-ray title displayed in PowerPAC:



1. **Gravity**

Published: [2014]

Publisher, Date: Burbank, CA : Warner Bros. Entertainment, [2014]
often test entity Title from web page.

Description: 1 videodisc (91 min.) : sound, color ; 4 3/4 in.

Target Audience Note: MPAA rating: PG-13; for intense perilous sequences, some disturbing images and brief strong language.

Available system-wide: 1 (of 1)

Call Number: Gravity

Format (Primary): Blu-ray Disc

Availability

Full Display

Place Request

Blu



2014

Add to My List

Example of a DVD title displayed in PowerPAC:



1. **Aloha (DVD) [videorecording]**

Published: 2015.

Publisher, Date: [United States] : Columbia, 2015.
often test entity 08/25/2015.

Description: 1 videodisc (ca. 105 min.) : sd., col. ; 4 3/4 in.

Available system-wide: 2 (of 2)

Format (Primary): DVD

Availability

Full Display

Place Request

DVD



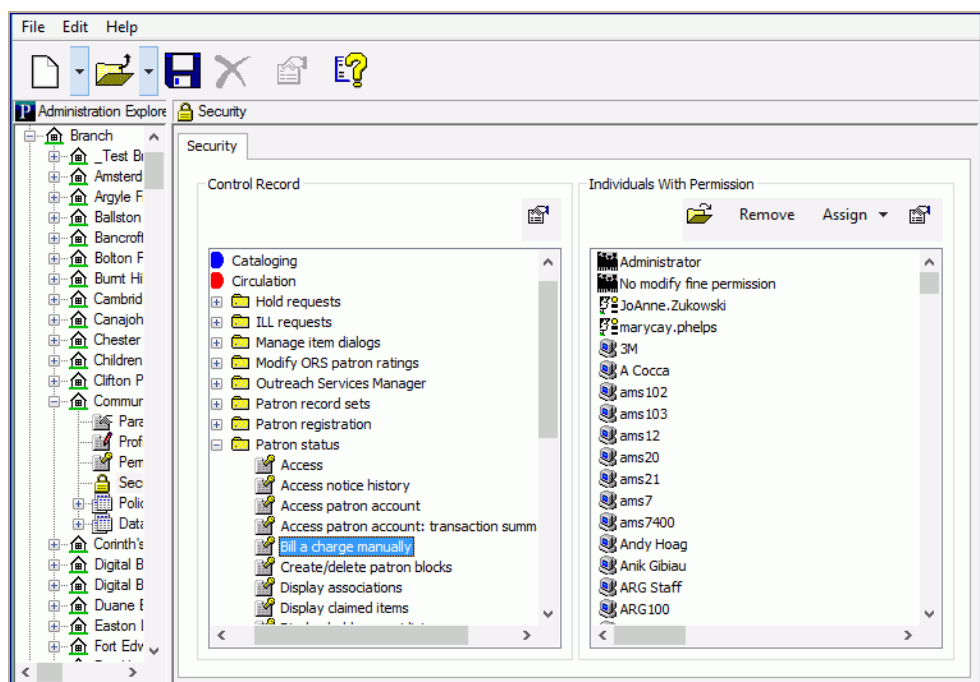
2015

Add to My List

Manually Bill Patrons for Charges

You can now manually bill patrons for charges related to lost items, missing parts, or other fees. When you add a new charge or select an existing unbilled charge and select the **Send a bill** option, the charge appears in a new section on the patron's billing notice. Charges previously billed to the patron cannot be manually charged.

To bill a charge manually, a staff member requires the new Circulation, Patron Status permission **Bill a charge manually** (available at the Branch level), in addition to the existing permissions, **Access patron account** and **Modify patron account**.



What's New in Polaris 5.0 SP2 and Leap 1.0 SP2

If you have the required permissions, you can add a charge to a patron's account and select **Send a bill** on the Charge dialog box. When the **Send a bill** check box is selected, the dialog box expands displaying the default Added message: **Your library has been billed for this charge**. This default message can be edited in WebAdmin. See ["WebAdmin Strings for Manually-Billed Charges"](#) on page 18.

You can also edit the added message by typing a new message in the **Added message** box. If you add a note from the Special Item Check-in dialog box when checking in a Claim Missing Part item, the edited text appears instead of the default text.

The screenshot shows the 'Patron Status - 370376 - Account - Polaris' window. The main window displays account details for Harold T Smythe, including barcode, charges, credits, and a list of transactions. A 'Charge' dialog box is open in the foreground. The dialog box has fields for 'Amount' (\$0.00), 'Reason' (a dropdown menu), 'Associated item' (with a 'Find...' button), and 'Notes (for internal use)'. The 'Send a bill' checkbox is checked, and the 'Added message (appears on bill)' field contains the text 'Your library account has been billed for this charge.' The dialog box also has 'OK', 'Cancel', and 'Help' buttons. The background window shows a sidebar with various icons and a table of transactions.

Barcode	Name	Patron code	Registered branch	Expiration date	Registration date
12291954022100	Harold T Smythe	Regular	Community Library	3/13/2017	3/13/2014

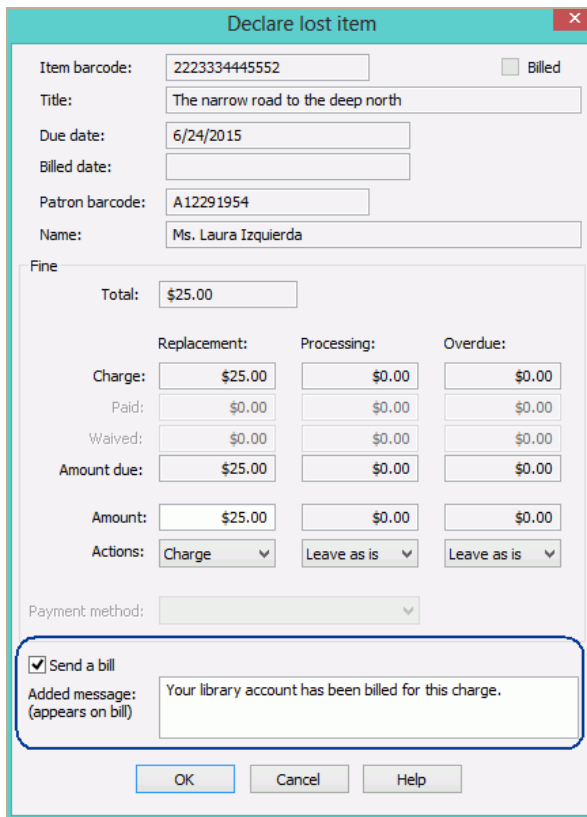
Acct charges	Acct credit	Items out	Total overdue	Claims/Lost	Items held	Total holds/ILL
\$0.50	\$5.00	0	0			

Date	Organization	Note
10/30/2014 1:...	Community ...	
8/27/2014 1:3...	Community ...	
8/27/2014 10:...	Community ...	
8/27/2014 10:...	Community ...	
8/27/2014 10:...	Community ...	
8/27/2014 10:...	Community ...	
8/27/2014 10:...	Community ...	

Charges	Deposits	Credits	Balance
\$0.50	\$0.00	(\$5.00)	(\$4.50)

What's New in Polaris 5.0 SP2 and Leap 1.0 SP2

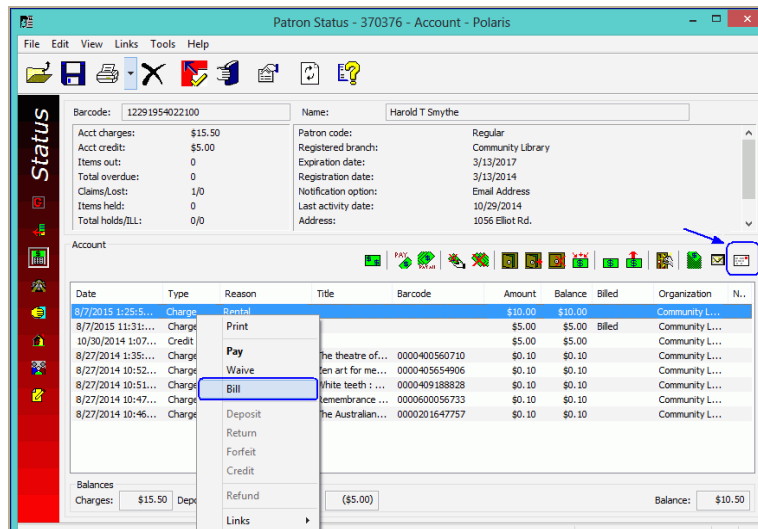
When you declare an item lost from the Items Out or Claims view of the Patron Status workflow, you can bill a charge manually from the Declare lost item dialog box if the charge has not already been billed.



The 'Declare lost item' dialog box contains the following fields and sections:

- Item barcode:** 2223334445552
- Title:** The narrow road to the deep north
- Due date:** 6/24/2015
- Billed date:** (empty)
- Patron barcode:** A12291954
- Name:** Ms. Laura Izquierda
- Billed:** (checkbox, unchecked)
- Fine:**
 - Total:** \$25.00
 - Replacement:** Charge: \$25.00, Paid: \$0.00, Waived: \$0.00, Amount due: \$25.00
 - Processing:** Charge: \$0.00, Paid: \$0.00, Waived: \$0.00, Amount: \$0.00
 - Overdue:** Charge: \$0.00, Paid: \$0.00, Waived: \$0.00, Amount: \$0.00
 - Actions:** Charge (dropdown), Leave as is (dropdown), Leave as is (dropdown)
 - Payment method:** (dropdown)
- Send a bill:** (checked checkbox)
- Added message:** Your library account has been billed for this charge.
- Buttons:** OK, Cancel, Help

To bill an existing charge, select the charge on the Patron Status workflow, Account view, and select the bill button, press **Alt+B**, or right-click and select **Bill**.



The 'Patron Status - 370376 - Account - Polaris' window shows the following information:

- Barcode:** 12291954022100
- Name:** Harold T Smythe
- Patron code:** Regular
- Registered branch:** Community Library
- Expiration date:** 3/13/2017
- Registration date:** 3/13/2014
- Notification options:** Email Address
- Last activity date:** 10/29/2014
- Address:** 1056 Elliot Rd.

Account Summary:

Date	Type	Reason	Title	Barcode	Amount	Balance	Billed	Organization
8/7/2015 1:25:5...	Charge	Rental			\$10.00	\$10.00		Community L...
8/7/2015 11:31:...	Charge	Print			\$5.00	\$5.00	Billed	Community L...
10/30/2014 1:07:...	Credit				\$5.00	\$5.00		Community L...
8/27/2014 1:35:...	Charge	Pay			\$0.10	\$0.10		Community L...
8/27/2014 10:52:...	Charge	Waive			\$0.10	\$0.10		Community L...
8/27/2014 10:51:...	Charge				\$0.10	\$0.10		Community L...
8/27/2014 10:47:...	Charge				\$0.10	\$0.10		Community L...
8/27/2014 10:46:...	Charge				\$0.10	\$0.10		Community L...

Summary: Balances: Charges: \$15.50, Dep: (\$5.00), Balance: \$10.50

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The Charge dialog box opens. When you are billing for an existing charge, you can edit only the **Added message** field; the other fields are read-only.

The Patron Status workform, Account view is updated with **Pending** in the Billed column.

Patron Status - 370376 - Account - Polaris

File Edit View Links Tools Help

Barcode: 12291954022100 Name: Harold T Smythe

Acct charges: \$5.50
Acct credit: \$5.00
Items out: 0
Total overdue: 0
Claims/Lost: 1/0
Items held: 0
Total holds/ILL: 0/0

Patron code: Regular
Registered branch: Community Library
Expiration date: 3/13/2017
Registration date: 3/13/2014
Notification option: Email Address
Last activity date: 10/29/2014
Address: 1056 Elliot Rd.

Account

Date	Type	Reason	Title	Barcode	Amount	Balance	Billed	Organization	N...
8/7/2015 11:31:...	Charge	Copy / Print			\$5.00	\$5.00	Pending	Community L...	

Manually billed charges are also included in existing billing notices on all bill types (print, email, and text message) in a new section with a separate header. The billed charges are processed during overnight notices processing, and the notices are sent out according to the library's notification settings in Polaris Administration and the patron's preferences. If you export billing notices, manually-billed charges are in a separate export file.

When notice processing has run, the **Billed** column on the patron record is updated from Pending to Billed, and the notice history is updated showing the charge was billed. If the charge is associated with a title, the title and material type displays. If the charge is not associated with a title, the reason for the charge (postage, printing, etc.) is listed instead of the title and the material type is blank.

WebAdmin Strings for Manually-Billed Charges			
Usage	Notice Types	Default String	Mnemonic
Header for print notices	billing notice print full, half page, half page dot matrix, combined print full, combined half page, combined print Z fold	Miscellaneous Charges (Bill)	NT_MANBILL_PRINT_HEADER
Text for print notices	billing notice print full, half page, half page dot matrix, combined print full, combined half page, combined print Z fold	Please pay the following miscellaneous charges on your library account. See the individual charges for details.	NT_MANBILL_PRINT_BODY
Postcard text	postcard	[date notice printed]. Your library account was billed <\$.\$\$> for <n> charges. Please call the library or check your account online. Example: 8/12/2015. Your library account was billed \$12.00 for two charges. Please call the library or check your account online	NT_MANBILL_POSTCARD
Header for email notices	email notices.	Uses the existing string for email notices which appears in the subject line of the email. Note: If your library has customized this string in WebAdmin, you may want to review it to ensure the text is general enough to cover overdue bills and manual bills for other charges.	NT_BILL_EM_HEADER
Text for email notices	email notices	Uses the existing string for billed items.	NT_BILL_SMS_TEXT
Added message	print, email, and text notices	Your library account has been billed for this charge. Note: If you added a note from the Special Item Check-In dialog box when checking in a Claim Missing Part item, that note appears instead of the default <i>text.2</i>	SCML_MANUALBILL_ADDEDMSG

New Billed Column and Data in Patron Account

The Patron Status workform now includes a new **Billed** column that displays **Pending** if a bill has been initiated, and **Billed** when the bill is sent. Charges billed before the upgrade will display **Billed** in this column if the free text note starts with the term **Billed** and the charge has actually been billed by the system (TxnCode=1).

Notes supplied by the system (billed, billed with replacement cost, etc.) will continue to display in the **Notes** column to provide additional details about the charge. You can also enter notes when generating the charge.

See also: "[Manually Bill Patrons for Charges](#)" on page 14.

Note:

In the new **PatronAccounts.BillingStatusID** column, the value **0** is reserved for future use.

Patron Status - 206732 - Account - Polaris

File Edit View Links Tools Help

Barcode: 1004300052884 Name: Kristoffer B Gritmon

Acct charges: \$10.00
Acct credit: \$0.00
Items out: 0
Total overdue: 0
Claims/Lost: 0/0
Items held: 0
Total holds/ILL: 0/0

Patron code: Juvenile
Registered branch: Amsterdam Free Library
Expiration date: 8/21/2009
Registration date: 6/24/2003
Notification option: Mailing Address
Last activity date: 10/7/2014
Address: Greene William 127 Elm St.

Account

Date	T...	Reason	Title	Barcode	A...	B...	Billed	Orga...	Note
11/20/20...	C...	Over...	The Ox-Bo...	00043...	\$5.00	\$5.00	Billed	Amst...	Billed with replacement cost
11/20/20...	C...	Over...	Flight into...	00043...	\$5.00	\$5.00	Billed	Amst...	Billed with replacement cost

Balances
Charges: \$10.00 Deposits: \$0.00 Credits: \$0.00 Balance: \$10.00

For Help, press F1

Combined Renewal and Overdue Charges

If your library has set the **Check Out: Charge Options** Patron Services parameter to charge for renewals and prompt the user regarding the charge, the renewal charge now appears on the same dialog box as the overdue charge when renewing overdue items. This development was implemented to prevent the situation where a patron decides to cancel a renewal after charges, payments, or waivers have already been posted to the patron's account.

This newly combined **Renew chargeable overdue item** dialog box opens when you renew items (**Renew**, **Renew All**, or **Special Renew**) from the Patron Status workform, Items Out view and when you renew a single item from the **Check Out** workform. The updated user interface for the combined dialog box includes repositioned **Action** and **Amount** fields and a combined total amount for checkout charges and overdue fines.

Renew chargeable overdue item

Item barcode: 0001900034057

Title: The golden rope

Due date: 2/10/2015

Patron barcode: 1000400888086

Name: Mrs. Eunice K Covey

Fine

Total: \$6.00

	Checkout:	Overdue:
Charge:	\$1.00	\$5.00
Actions:	v	v
Amount:	\$1.00	\$5.00

Payment method:

Payment amount: \$0.00

OK Cancel Help

You can select separate actions for the checkout and overdue charges, or you can select the same action for both. For example, you can select **Pay** for both the checkout and overdue amounts, and the payment amount is totaled at the bottom of the dialog box.

What's New in Polaris 5.0 SP2 and Leap 1.0 SP2

Renew chargeable overdue item

Item barcode: 0001900034057

Title: The golden rope

Due date: 2/10/2015

Patron barcode: 1000400888086

Name: Mrs. Eunice K Covey

Fine

Total: \$6.00

	Checkout:	Overdue:
Charge:	\$1.00	\$5.00
Actions:	Pay	Pay
Amount:	\$1.00	\$5.00
Payment method:	Cash	
Payment amount:	\$6.00	

OK Cancel Help

New Circulation Status: eContent External Loan

(This circulation status is reserved for future eContent development.)

A new circulation status **eContent external loan** was added in anticipation of future enhanced support for interlibrary loan features offered by eContent vendors (for example, 3M Cloud Link or OverDrive Advantage).

Although you may see the new status in database tables and search drop-down lists, it is not actively used in 5.0SP2. In this release, no eContent item records are assigned the status by either the APIs or other processes.

We look forward to continuing this development in future Polaris releases.

EnvisionWare ECommerce Integration - Polaris and ExpressCheck

Your library can now use EnvisionWare to process credit card payments made from the Polaris staff client without using EnvisionWare's Staff Register point of sale (POS) software. In addition, EnvisionWare can be used as the credit card payments gateway for processing payments from Polaris ExpressCheck.

If the library has the required license, EnvisionWare can be selected as the payment gateway in Polaris Administration. When EnvisionWare is selected as the payment gateway, the following options are available:

- Enable credit card payments from the PAC (PowerPAC and Mobile PAC)
- Enable credit card payments from the staff client without using EnvisionWare's Staff Register software
- Enable credit card payments from the staff client using EnvisionWare's Staff Register software
- Enable credit card payments from ExpressCheck

Note:

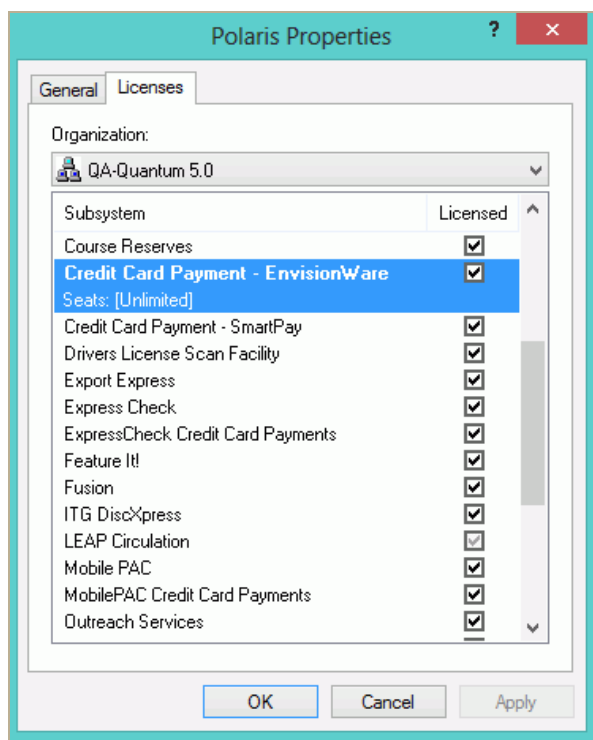
Partial payments can be accepted in the staff client, but not in ExpressCheck. Refunds for credit card payments cannot be processed through EnvisionWare.

See also:

- ["License for EnvisionWare eCommerce" on page 24.](#)
- ["Updates to EnvisionWare ECommerce Properties " on page 26.](#)
- ["Use EnvisionWare for credit card payments without Staff Register" on page 28.](#)
- ["Use EnvisionWare for credit card payments from Polaris ExpressCheck" on page 30.](#)
- ["View payments made through EnvisionWare in the Credit Card Payments Manager " on page 32.](#)
- ["EnvisionWare transactions in Fines and Fees - Credit Card Payments report" on page 33.](#)

License for EnvisionWare eCommerce

A license is now required for EnvisionWare eCommerce with Polaris. When a library has a license for EnvisionWare eCommerce integration with Polaris, the EnvisionWare license, Credit Card Payment EnvisionWare, is selected in the license list.



If your library has a license for EnvisionWare, you can select EnvisionWare from the list of eCommerce gateways in the Online Payment Settings dialog box in Polaris Administration.

What's New in Polaris 5.0 SP2 and Leap 1.0 SP2

Online Payment Settings

Payment processing gateway

EnvisionWare

(None)
Active Network (CLASS)
Comprise MSP
EnvisionWare
Payflow Link
Payments Gateway
PayPal's Payflow Pro

Properties

Minimum fine (\$): \$1.00

Processing fee (\$): \$0.00

☐ Send email receipt

☐ Display privacy policy

☐ Display refund policy

☐ Allow donations

Processing fee (\$): \$0.10

☐ Allow patron to designate title purchase

OK Cancel Help

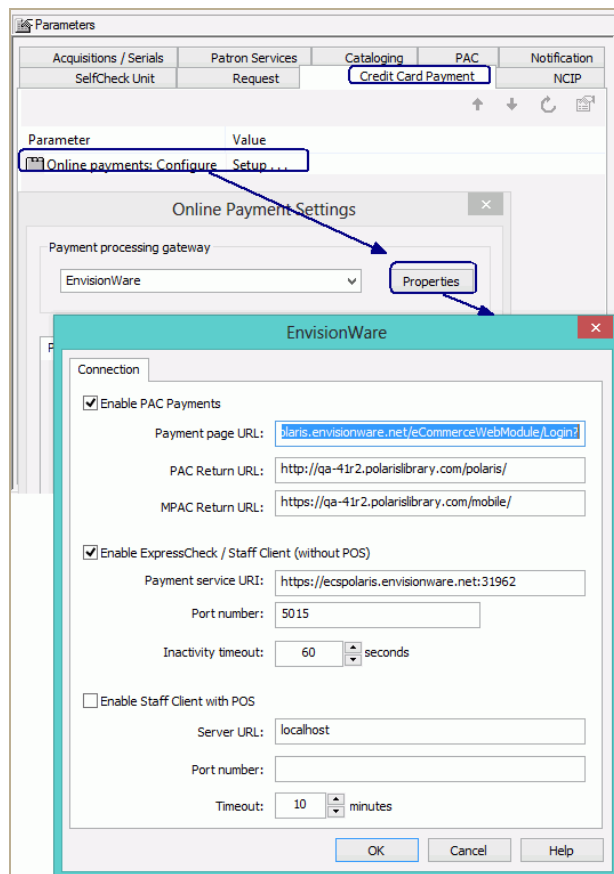
Note:

Upon upgrading to Polaris 5.0SP2, customers using EnvisionWare will require a license. Contact your Polaris support representative to obtain a license and enable the integration options your library uses.

Updates to EnvisionWare ECommerce Properties

The EnvisionWare properties dialog box now includes various Polaris and EnvisionWare integration options, and the library identification was removed from the properties. The EnvisionWare properties dialog box opens when you select **System Administration | Parameters | Credit Card Payment | Online payments: Configure | EnvisionWare | Properties**.

You can select the options at the System, Library, or Branch organization level.



On the EnvisionWare properties view, you can select from the following options:

- **Enable PAC payments**
- **Enable ExpressCheck/Staff Client (without POS)**
- **Enable Staff Client with POS**

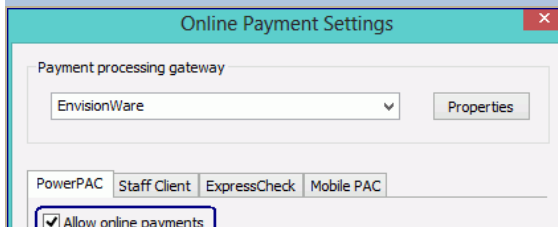
When the **Enable PAC payments** box is checked on the EnvisionWare properties dialog box for the library, patrons can make credit card payments from the PowerPAC or Mobile PAC.

What's New in Polaris 5.0 SP2 and Leap 1.0 SP2

Note:

For customers who already use EnvisionWare eCommerce, the following updates will be made upon upgrade to Polaris 5.0 SP2:

If **Allow online payments** is checked on the PowerPAC or Mobile PAC tab on the Online Payment Settings dialog box, the **Enable PAC Payments** check box is selected automatically on the EnvisionWare properties dialog box.



If your library has set up online payments in the staff client using EnvisionWare's Staff Register software, you will need to check the **Enable Staff Client with POS** check box .

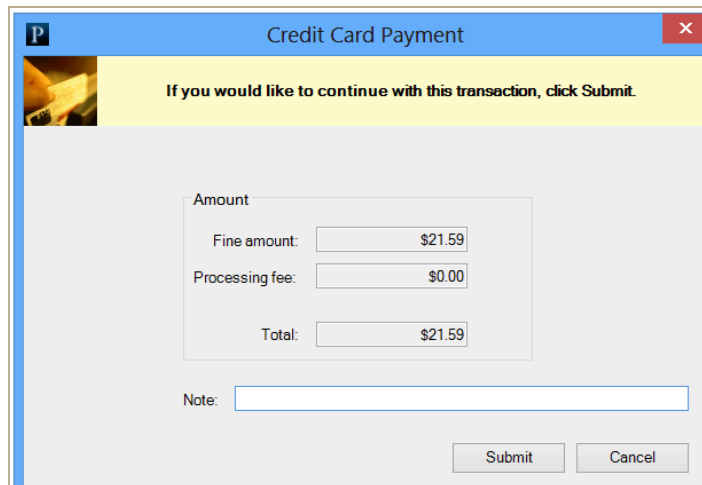
Use EnvisionWare for credit card payments without Staff Register

If your logon branch has selected EnvisionWare as the payment gateway in Polaris Administration, and **Enable ExpressCheck/Staff Client (without POS)** is selected on the EnvisionWare properties dialog box, staff members can make credit card payments for patrons from the Polaris staff client without using the EnvisionWare Staff Register software.

To make a credit card payment from the Polaris staff client without using EnvisionWare's Staff Register:

1. Initiate the credit card payment from one of the following areas in the Polaris staff client:
 - Patron Status workform, Account view- select **Pay**
 - Patron Status workform, Items Out view- select **Declare lost, Renew**
 - Patron Registration workform - select **Pay registration fee**
 - Item Record workform - select **Check In, Pay overdue fine**
 - Check-in workform - select **Resolve Billed or Lost Item**
 - Check-in workform - select **Pay overdue fines**
 - Check-out workform - select **Check out fee, renew**

The Credit Card Payment dialog box opens.



P Credit Card Payment

If you would like to continue with this transaction, click Submit.

Amount

Fine amount:	\$21.59
Processing fee:	\$0.00
Total:	\$21.59

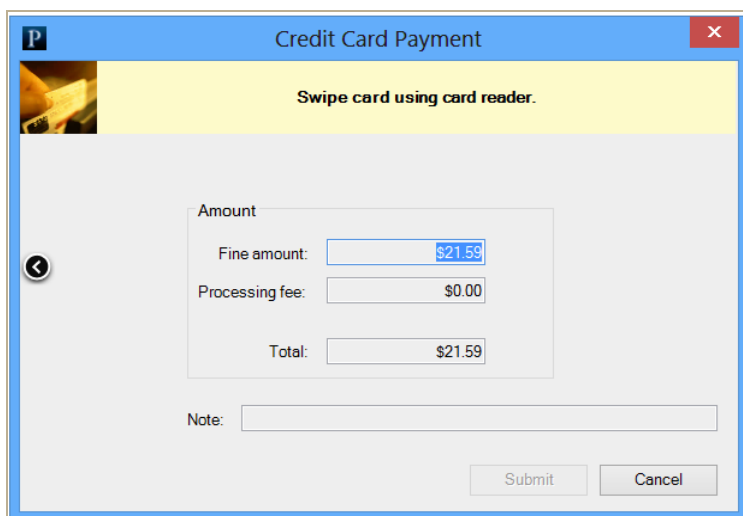
Note:

Submit Cancel

2. Select **Submit**.

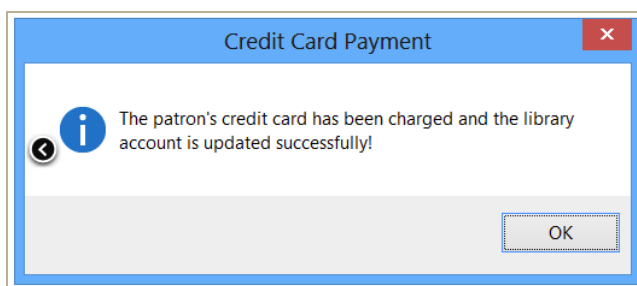
A message instructs you to swipe the credit card.

What's New in Polaris 5.0 SP2 and Leap 1.0 SP2



3. Slide the patron's credit card through the card reader, and select **Submit**.

A message indicates that the patron's credit card has been charged, and the patron's library account is updated.



4. Click **OK** to close the message box.

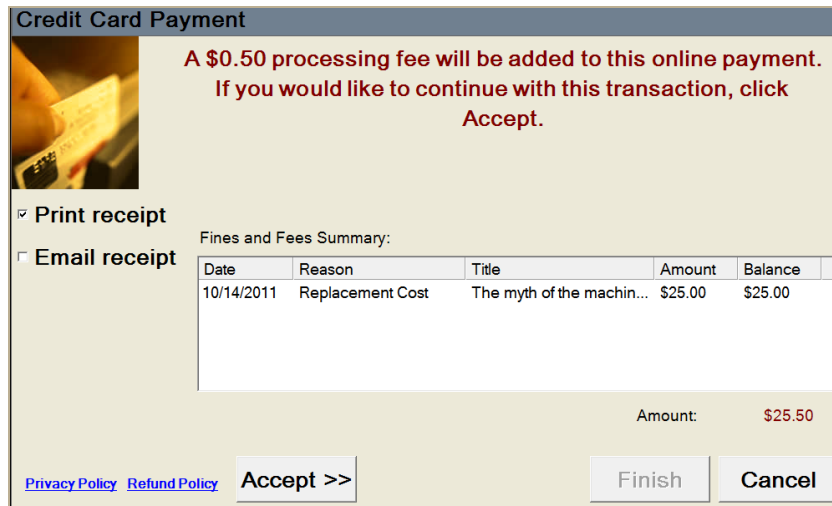
Use EnvisionWare for credit card payments from Polaris ExpressCheck

If your logon branch has selected EnvisionWare as the payment gateway in Polaris Administration, and **Enable ExpressCheck/Staff Client (without POS)** is selected on the EnvisionWare properties dialog box, patrons can make credit card payments from Polaris ExpressCheck units.

To make a credit card payment from Polaris ExpressCheck units:

1. Select **Pay** on the ExpressCheck Patron Account Fines and Fees view.

The Credit Card Payment dialog box opens.



Credit Card Payment

A \$0.50 processing fee will be added to this online payment.
If you would like to continue with this transaction, click **Accept**.

☒ Print receipt
☐ Email receipt

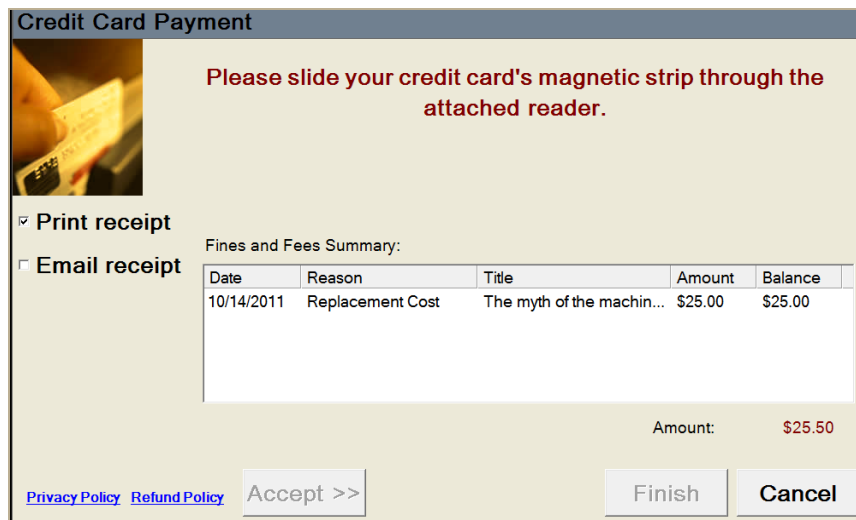
Fines and Fees Summary:

Date	Reason	Title	Amount	Balance
10/14/2011	Replacement Cost	The myth of the machin...	\$25.00	\$25.00

Amount: **\$25.50**

[Privacy Policy](#) [Refund Policy](#) **Accept >>** **Finish** **Cancel**

2. Select **Accept** to go to the next view.



Credit Card Payment

Please slide your credit card's magnetic strip through the attached reader.

☒ Print receipt
☐ Email receipt

Fines and Fees Summary:

Date	Reason	Title	Amount	Balance
10/14/2011	Replacement Cost	The myth of the machin...	\$25.00	\$25.00

Amount: **\$25.50**

[Privacy Policy](#) [Refund Policy](#) **Accept >>** **Finish** **Cancel**

What's New in Polaris 5.0 SP2 and Leap 1.0 SP2

- Slide the credit card through the card reader.

Credit Card Payment



Please click the **Finish** button to complete this transaction.

Authorization Successful!

☒ Print receipt

☒ Email receipt

Fines and Fees Summary:

Date	Reason	Title	Amount	Balance
10/14/2011	Replacement Cost	The myth of the machin...	\$25.00	\$25.00

Amount: **\$25.50**

[Privacy Policy](#) [Refund Policy](#)

Accept >>

Finish

Cancel

- Select **Finish** to complete the payment.

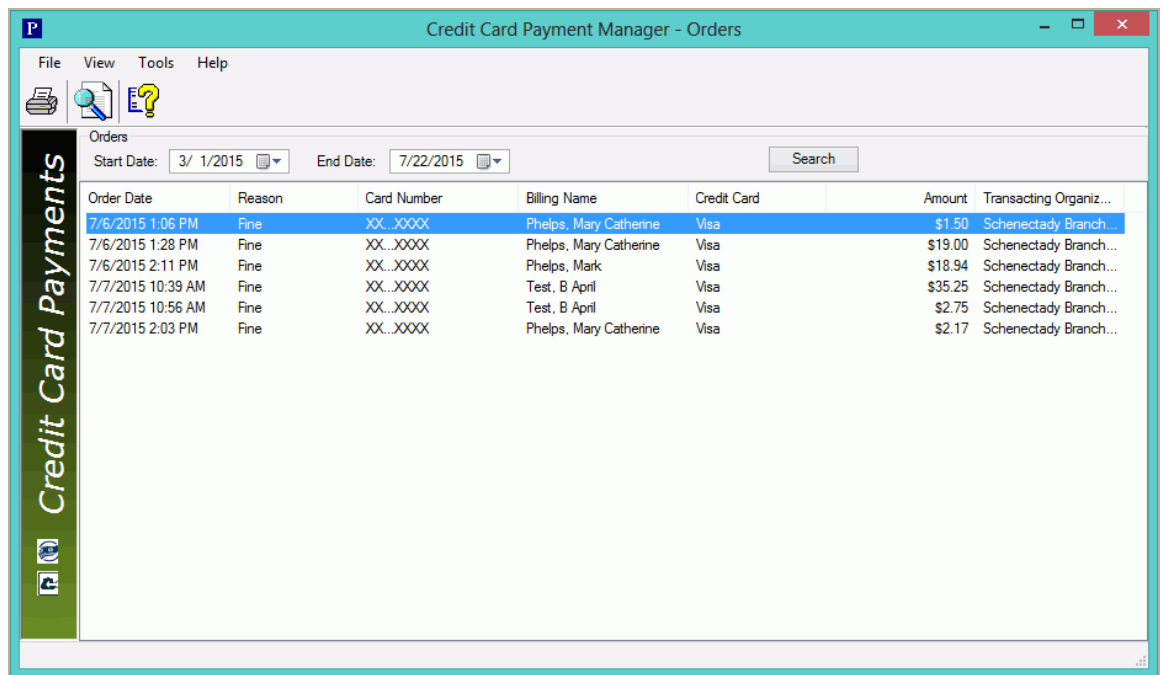
The patron account is updated with the payment transaction, and a receipt is printed or sent by email or text message.

Note:

If the payment cannot be completed, an error message appears indicating the reason the transaction could not be completed. Select **Cancel** and return to the Patron Account view.

View payments made through EnvisionWare in the Credit Card Payments Manager

If your library uses EnvisionWare to transact credit card payments without using the EnvisionWare Staff Register application, the transactions appear in the Credit Card Payments Manager. The Billing Name in the Credit Card Payments Manager is taken from the patron account associated with the charge, which may be different from the name on the credit card used for the payment. Since Polaris does not store any credit card information, the patron account information is retained to facilitate any future troubleshooting.



EnvisionWare transactions in Fines and Fees - Credit Card Payments report

When credit card payments are made using the EnvisionWare payment gateway, the transactions appear on the Fines and Fees - Credit Card Payments report.

EDI Implemented with Findaway World

Libraries can now send EDI orders to the materials vendor, Findaway World. When Findaway receives the electronic order, an acknowledgment file is placed in the library's directory on Findaway's site. The Polaris EDI Agent retrieves the acknowledgment file from Findaway's site and creates the purchase order acknowledgment (POA) report in Polaris. In addition, the EDI Agent retrieves the invoice file from Findaway and automatically generates an EDI invoice in Polaris. A library staff member can retrieve the invoice using the Polaris Find Tool. For more information on EDI ordering, see the Polaris staff client online Help. If your library is interested in sending EDI orders to Findaway World, contact your Polaris site manager.

EDI Implemented with Library Services Centre

Libraries can now send EDI orders to the materials vendor, Library Services Centre. When Library Services Centre receives the electronic order, an acknowledgment file is placed in the library's directory on Library Services Centre's site. The Polaris EDI Agent retrieves the acknowledgment file from Library Services Centre's site and creates the purchase order acknowledgment (POA) report in Polaris. In addition, the EDI Agent retrieves the invoice file from Library Services Centre and automatically generates an EDI invoice in Polaris. A library staff member can retrieve the invoice using the Polaris Find Tool. For more information on EDI ordering, see the Polaris staff client online Help. If your library is interested in sending EDI orders to Library Services Centre, contact your Polaris site manager.

Note:

Library Services Centre limits EDI purchase order numbers to 12 characters. Polaris will block the release of EDI purchase orders to Library Services Centre if the number exceeds 12 characters.

EDI Implemented with Children's Plus

Libraries can now send EDI orders to the materials vendor, Children's Plus, Inc. When Children's Plus receives the electronic order, an acknowledgment file is placed in the library's directory on Children Plus's site. The Polaris EDI Agent retrieves the file from Children Plus's site and creates the purchase order acknowledgment (POA) report in Polaris. In addition, the EDI Agent retrieves the invoice file from Children's Plus and automatically generates an EDI invoice in Polaris. A library staff member can retrieve the invoice using the Polaris Find Tool. For more information on EDI ordering, see the Polaris staff client online Help. If your library is interested in sending EDI orders to Children's Plus, contact your Polaris site manager.

Note:

Children's Plus limits EDI purchase order numbers to 10 characters. Polaris will block the release of EDI purchase orders to Children's Plus if the purchase order number exceeds 10 characters.

Polaris Leap Development

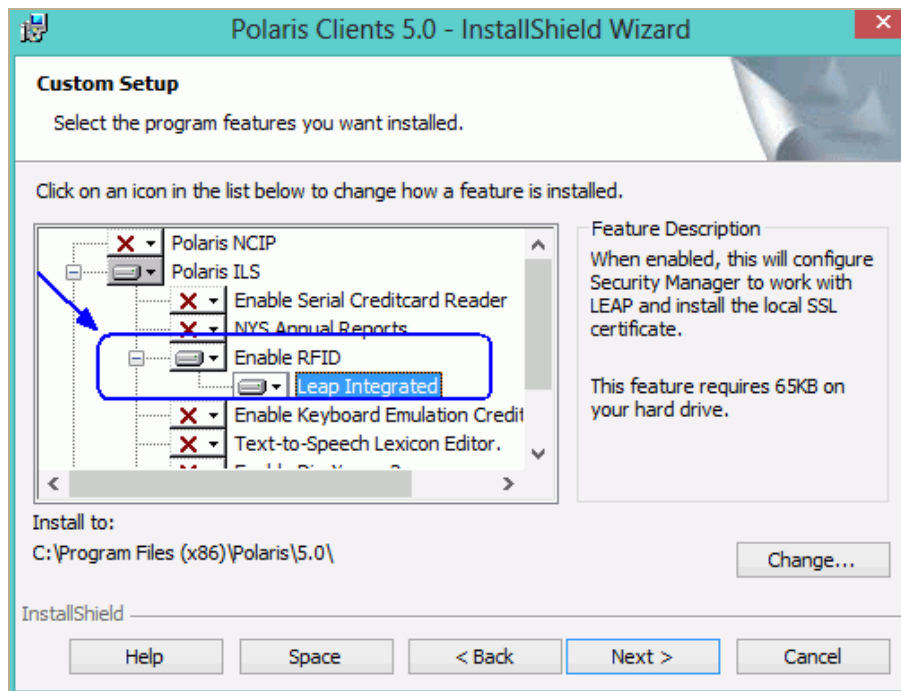
Leap development for 1.0 SP2 includes the following new and enhanced functions, navigation options, search capabilities, and other improvements:

- ["Integrated RFID for Desktops Running Leap" on page 38.](#)
- ["Printing Leap Workforms " on page 43.](#)
- ["Bulk Check-In from Leap" on page 44.](#)
- ["Check in user defaults" on page 48.](#)
- ["Change Item Information or Barcode at Check-In" on page 49.](#)
- ["Option to Configure eReceipts at Checkout" on page 53.](#)
- ["Change Pickup for Shipped Holds and Rerouting Message for Held Items" on page 56.](#)
- ["Move Claimed Items to Lost" on page 59.](#)
- ["Secured Patron Records" on page 60.](#)

Integrated RFID for Desktops Running Leap

You can use RFID with Leap on a workstation where the Polaris staff client has been installed or on a workstation where Leap is running alone.

If you install the Polaris staff client on a workstation and select **Enable RFID**, you can select **Leap Integrated** on the InstallShield Wizard. The Polaris Security Manager is installed automatically with the Polaris staff client.



Click **Next** and select the RFID vendor and security options on the RFID Configuration window.

What's New in Polaris 5.0 SP2 and Leap 1.0 SP2

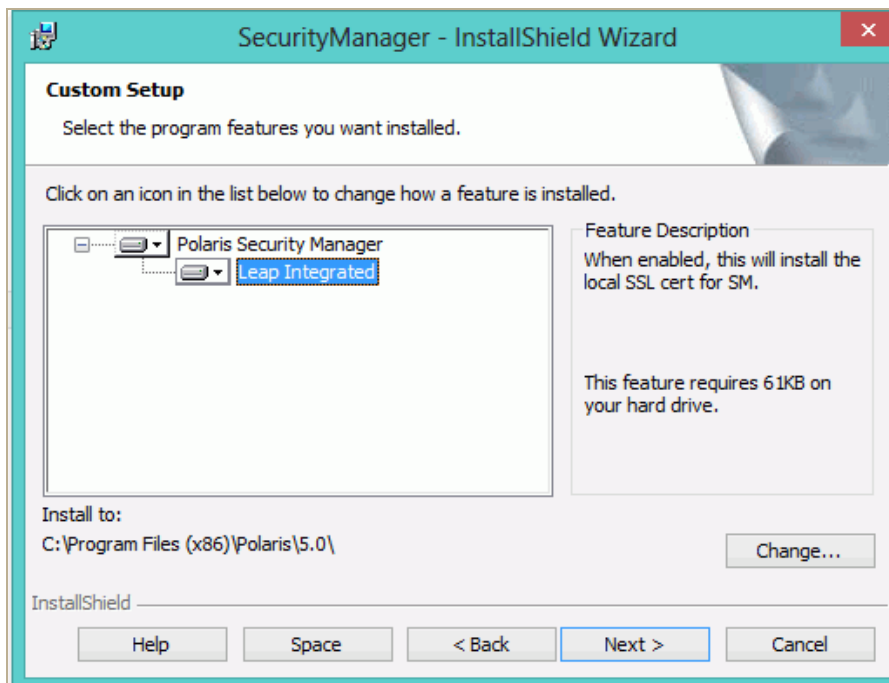
The screenshot shows the 'Polaris Clients 5.0 - InstallShield Wizard' window, specifically the 'RFID Configuration' step. The window has a teal title bar with a close button. The main content area is white with a light blue header. The header contains the title 'RFID Configuration' and a sub-header 'Please provide the following information to properly configure RFID.' Below this, a text prompt says 'Please select your RFID hardware vendor from the dropdown list below.' There is a dropdown menu for 'RFID Vendor' with '3M' selected. Below the dropdown is a section titled 'Available Security Options' which contains several checkboxes: 'RFID' (checked), 'USB Reader' (unchecked), 'Patron Tag Supported' (unchecked), 'Dedupe Item Barcodes' (unchecked), 'Targeted Security' (checked), 'EM' (unchecked), and 'Audio\Visual Locker' (unchecked). There is also a 'Tag Format' dropdown menu with '3M Alphanumeric Item' selected. At the bottom of the window, there is a progress bar labeled 'InstallShield' and three buttons: '< Back', 'Next >', and 'Cancel'.

If the workstation will be running Leap without installing the Polaris ILS, you can enable RFID by installing the standalone Polaris Security Manager.

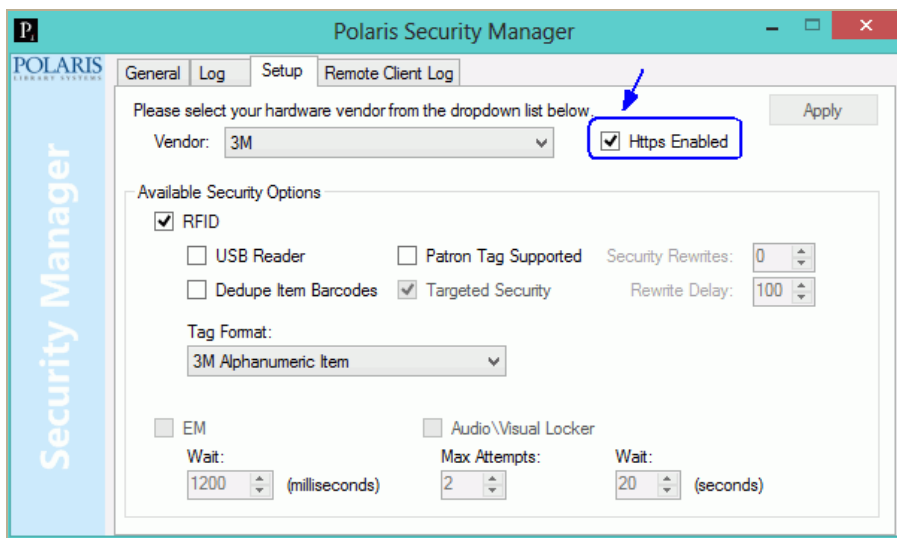
To install the standalone Security Manager, run **setup.exe** in the Security Manager folder.

In the SecurityManager - Install Shield Wizard dialog box, select **Leap Integrated**, and click **Next**.

What's New in Polaris 5.0 SP2 and Leap 1.0 SP2



Open the Polaris Security Manager, and select the Setup tab.



Select the RFID vendor in the **Vendor** drop-down list box.

If it is not already checked, select the **Https Enabled** check box.

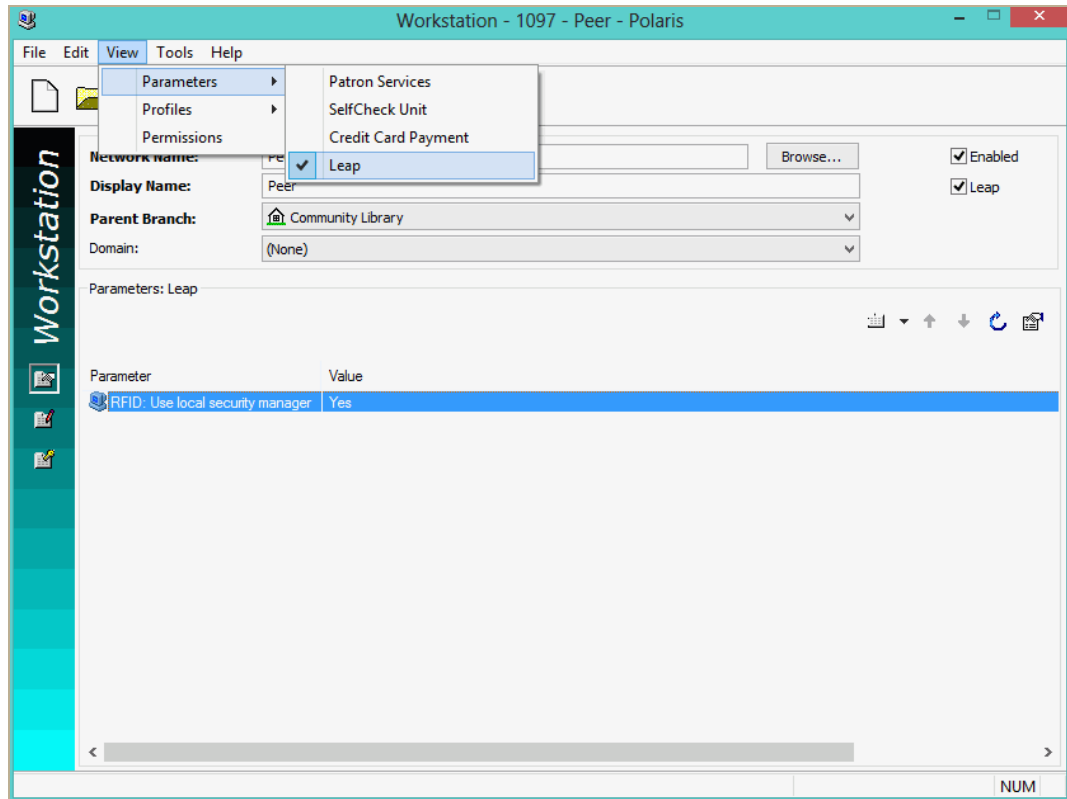
Select the RFID check box and set the security options.

If the Leap application is running on a workstation where RFID has been enabled for Leap, you can use RFID to circulate items in normal and bulk mode. Place the tagged items on the reader or click the return icon next to the input box. If the tag cannot be read, the message

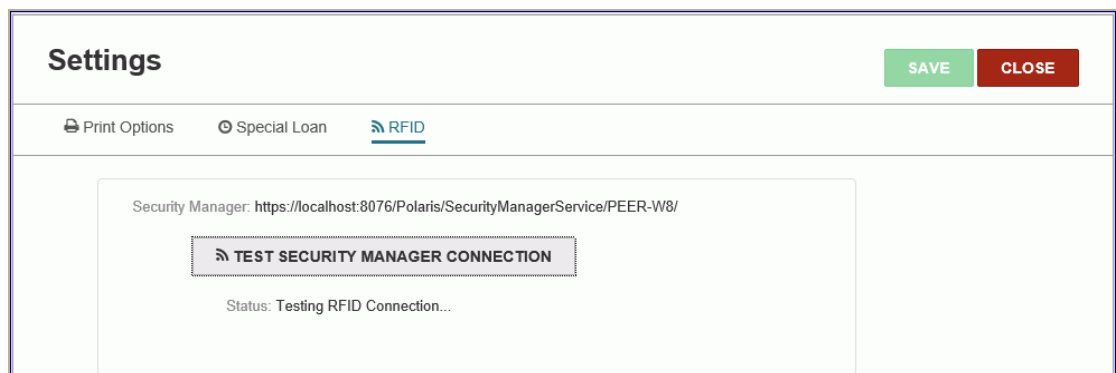
What's New in Polaris 5.0 SP2 and Leap 1.0 SP2

Tag not found. Please try again appears. If the item is on the RFID pad, the barcode is entered in the barcode input box in Leap, and the check-in is performed.

The Workstation workflow in the Polaris staff client now includes a Leap category in the Parameters view and a new parameter **RFID: Use local security manager**. The default value is set to **No**. To use integrated RFID from Leap, set this value to **Yes**.

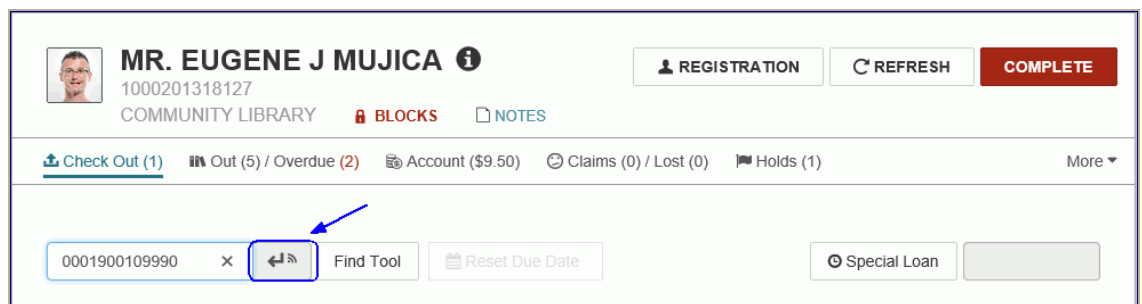
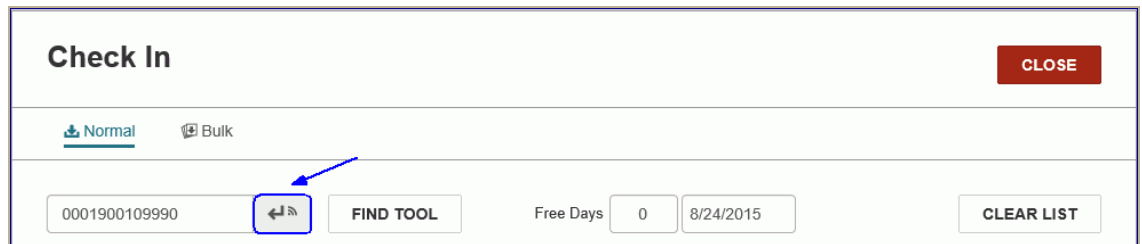


To ensure that Security Manager is installed and connecting correctly, you can test the connection in Leap. Go to the Settings page in Leap, select the new **RFID** tab, and select **TEST SECURITY MANAGER CONNECTION**.



Using RFID in Leap

Once Leap RFID has been enabled on a workstation, you can place RFID-tagged items on the reader to check the items in (normal or bulk mode) and check the items out. The RFID icon on the return button indicates that RFID is enabled for the workstation. This icon acts as an on-screen shortcut equivalent to the F9 shortcut key combination in the Polaris staff client.



If the RFID tag cannot be read, the following message is displayed: **Tag not found, please try again.**

If the item is successfully checked out, a single attempt is made to disable security on the tag. If this attempt fails, the following message is displayed: *Unable to turn off security for item barcode.*

In addition, RFID scans can be used in quick search. If the quick search input box is empty and an RFID-tagged item is on the pad, selecting the RFID-enabled quick search button will automatically execute the search if a match is found.



Printing Leap Workforms

The new Print function works in the following browsers:

- Windows IE 11
- Windows Chrome 45
- OS X Chrome

However, the **PRINT** button does not appear if you are using Leap on an iPad due to iOS limitations.

When you select the new **PRINT** button, the entire view is printed including all entries in a list view.

The screenshot shows the Polaris 5.0 SP2 and Leap 1.0 SP2 interface. At the top, there are buttons for 'CHECK IN', 'NEW PATRON', and 'PRINT'. A blue arrow points to the 'PRINT' button. Below these buttons, there is a section for the user profile of ANAR KAMAT, including a photo, name, ID number (1001900146413), and library affiliation (COMMUNITY LIBRARY). There are also buttons for 'REGISTRATION', 'REFRESH', and 'CLOSE'. Below the profile section, there is a summary bar showing 'Check Out (0)', 'Out (3) / Overdue (3)', 'Account (\$2.40)', 'Claims (0) / Lost (0)', and 'Holds (4)'. Below this, there is a section for item management with buttons for 'Renew', 'Special Renew', 'Reset Due Date', 'Estimate Fines', and 'More'. A 'Filter Items' button is also present. The main section is a table with columns: TYPE, DUE ON, BARCODE, TITLE, AUTHOR, RENEWALS LEFT, CALL NO., and BRANCH. The table contains three rows of data:

TYPE	DUE ON	BARCODE	TITLE	AUTHOR	RENEWALS LEFT	CALL NO.	BRANCH
Music	7/28/2015	0000401367461	Gone girl. [sound recording]	Cash, Johnny.	0 of 0	RD F C33go	Schenectady Branch - Ce...
Book	9/8/2015	0001900128818	The low-maintenance house	Logsdon, Gene.	2 of 3	643.7 Log	Community Library
Book	9/8/2015	0001900042910	The new diary : how to use a journal for self-guidance and expanded creativity	Rainer, Tristine.	2 of 3	150.13 R15	Community Library

Bulk Check-In from Leap

You can now use Leap to quickly check in multiple items in bulk. With bulk check-in, most blocks and dialog boxes do not appear. Users who have selected the bulk view as the default check-in view in Leap or in the Polaris staff client will automatically go to the bulk view when checking in items using Leap.

The default view for the Leap Check In workform can be set in Leap using a new tab in the Settings page. See ["Check in user defaults" on page 48](#). In the Polaris staff client, the default view is set using the **View** menu on the Check In workform.

If the user's default is set to **In House** or **Inventory** mode in the staff client or in Leap, the Leap Check In workform opens in the Normal view.

The Leap Bulk Check In view uses the same display settings as the Bulk Check In mode in the Polaris staff client. The displayed columns are determined by the settings in the **Check in list view options** parameter in Polaris Administration. For more information on bulk check in, see the Polaris staff client online Help.

To check in items in bulk using Leap:

1. Select **CHECK IN**.

The Check In page opens in Normal or Bulk mode depending on your default check-in mode setting.

2. If the **Normal** check-in mode is displayed, select **Bulk** to change to the Bulk check-in mode.
3. If you want to change the free days, enter the number of days in the **Free Days** box or select a date from the calendar. Free days are set according to the **Free days (bulk)** Patron Services parameter in Polaris Administration.
4. Scan the item barcodes to check the items in.

What's New in Polaris 5.0 SP2 and Leap 1.0 SP2

Check In

CLOSE

Normal

Bulk

FIND TOOL

Free Days

0

9/18/2015

ACTIONS -

☐	BARCODE	DUE DATE	STATUS	COMMENT	FINE CHARGED	TITLE	MATERIAL TYPE	PATRON NAME
☐	0001900007881	1/17/2008	Out -> In		\$0.00	Foucault's pendulum	Book	Katie Ramharak
☐	0001900008824	4/12/2012	Out -> In		\$0.00	Firestorm	Book	Brooke L Volpe
☐	0001900008550	2/8/2008	Out -> In		\$0.00	The devil's teardrop : a novel of the last night of the century	Book	Selma Baker

As items are checked in, they display at the top of the list, the status in the Status column indicates the status change: from > to. For example: **Out > In**.

The item barcode, due date, status, comments, and fine charged to the borrowing patron, if applicable, appear in columns in the list of items checked in. Your library may also choose to display the item's title, material type, and/or the borrower's name. The Comment column displays conditions such as **Quick circ item** for a Quick Circ item or **To Branch name** for an item that is in-transit.

- Continue to scan item barcodes until you have checked in all the items.

When an item is checked in, a transaction is logged with the type: Checkin Leap Bulk.

When you check in items using bulk check in, you may encounter messages, dialog boxes, or prompts for the following types of items:

- Items belonging to other branches**

If you scan an item that does not belong to your branch, a prompt displays if the **Patron Services parameter Check-in: Prompt for in-transit in bulk mode** is set to **Yes**. If the parameter is set to **No**, items that belong to other branches are set to In-transit without a prompt. When the item is checked in, the Status column displays **In-Transit** and the Comment column displays **To Branch name**. If you set Polaris for in-transit slip printing at the Check In workform, an in-transit slip is printed.

- Items that have been billed**

If the patron has been billed for an item, the Resolve billed item dialog box appears. Select an action for each billed amount and select **CONTINUE**.

What's New in Polaris 5.0 SP2 and Leap 1.0 SP2

Resolve billed item

Item Barcode: 1229195488	Title: Euphoria : a novel		
Due Date: 5/15/2015	Billed Date: 8/14/2015	☒ Billed	
Patron Name: Adrienne Rose Leonne	Patron Barcode: 12291954007		

	Replacement:	Processing:	Overdue:
Charge:	\$18.50	\$0.00	\$5.00
Paid:	\$0.00	\$0.00	\$0.00
Waived:	\$0.00	\$0.00	\$0.00
Amount due:	\$18.50	\$0.00	\$5.00

Amount:	\$18.50	\$0.00	\$5.00
---------	--------------------------------------	-------------------------------------	-------------------------------------

Actions:		Leave as is	
----------	-------------------------------	---	-------------------------------

Payment method:	Cash	Total Fine: \$23.50	
-----------------	-----------------------------------	----------------------------	--

- **Items with blocks**

If an item has a free-text or manually-assigned block, a dialog box displays the text and offers the option to check in or cancel.

- **Items that satisfy hold requests**

When you scan an item that will fill a hold request where the pickup branch is also the check-in branch, the item is trapped for the request, and the status becomes Held. The Comment field displays “For [patron name]”. If the pickup branch is a different branch, the item status becomes Transferred to pickup branch, and the Comment field displays “To [branch]”

If the item is already held, the item status changes to In, In-transit, or Held for the next patron. The Comment field displays the action taken.

- **Items from other library systems (ILL items)**

If you check in an ILL item from another library system, a message indicates the item is an ILL and prompts you to continue or stop the check in. If you continue with the check in, the ILL item will be processed in the same way as in the Polaris staff client.

- **Quick Circ items**

If you check in a quick circ item in bulk mode, the Comment column displays **Quick-circ item**.

- **Claimed items**

If you check in an item with a Claimed status, the status column displays Claim Returned, Claim Never Had, or Claim Missing Part.

- **Items in floating collections**

What's New in Polaris 5.0 SP2 and Leap 1.0 SP2

When you check in items in the bulk view, items float (or not) according to the library's policy. If the option "Prompt for additional floating items" is set to yes for the check-in branch, the prompt displays. The floating limits set in Polaris administration are respected.

- **Items with fines**

If items that you are checking in have fines, they are charged to the patrons' accounts automatically as the items are checked in and no messaging displays. The amount is displayed in the Fine Charged column.

Check in user defaults

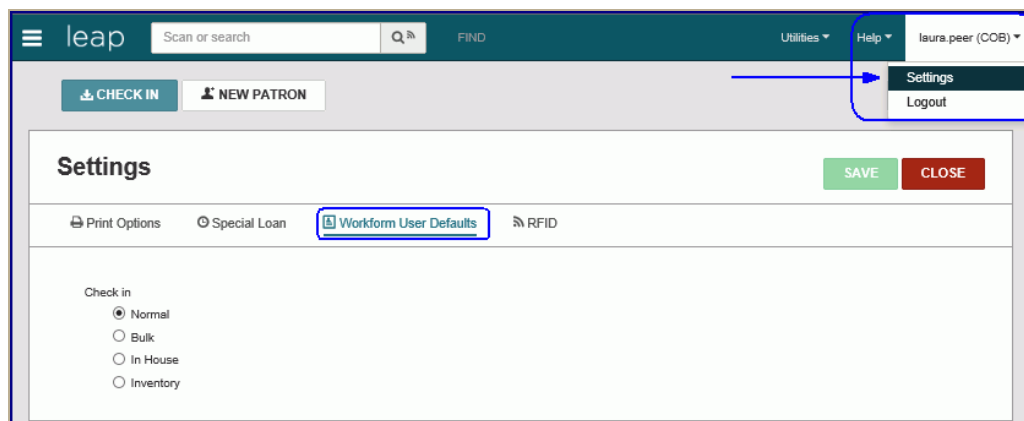
The Settings page has a new **Workform User Defaults** tab where the user can select the preferred view for the Check In workform.

To specify the preferred view for the Check In workform:

1. Select your username, and select **Settings**.

The Settings page opens.

2. Select the **Workform User Defaults** tab.



3. Select the default view for the Check In workform. **Normal** is the setting selected by default, but you can set it to **Bulk**.

Note:

The **Inventory** and **In House** options are not available in this version of Leap.

Change Item Information or Barcode at Check-In

When checking in items in Leap, staff members who have the appropriate **Manage item dialogs** permissions can edit specific fields and replace the item barcode. These **Circulation | Manage item dialogs** permissions allow staff members who may not have full **Cataloging | Item records** permissions to modify certain fields at check in. For more information on these Circulation permissions, see Polaris online Help.

To change item information:

1. Check In an item.
2. Select the checked-in item in the list.
3. Select **ACTIONS** and select **Manage Item Record** in the drop-down list box.

The screenshot shows the 'Check In' window with a table of items. The 'ACTIONS' dropdown menu is open, and 'Manage Item Record' is highlighted. A blue arrow points from the 'ACTIONS' header to the 'Manage Item Record' option.

☒	BARCODE	DUE DATE	STATUS	COMMENT	TITLE	MATERIAL TYPE	SHELF LOCATION	CALL NUMBER	PATRON NAME
☒	0001900122563	9/8/2015	Out -> In		Noel the coward	Book		JP Fict Kra	Sarah R

The Manage Item Record dialog box opens.

The 'Manage Item Record' dialog box is shown with several input fields and checkboxes. The fields are organized into two columns.

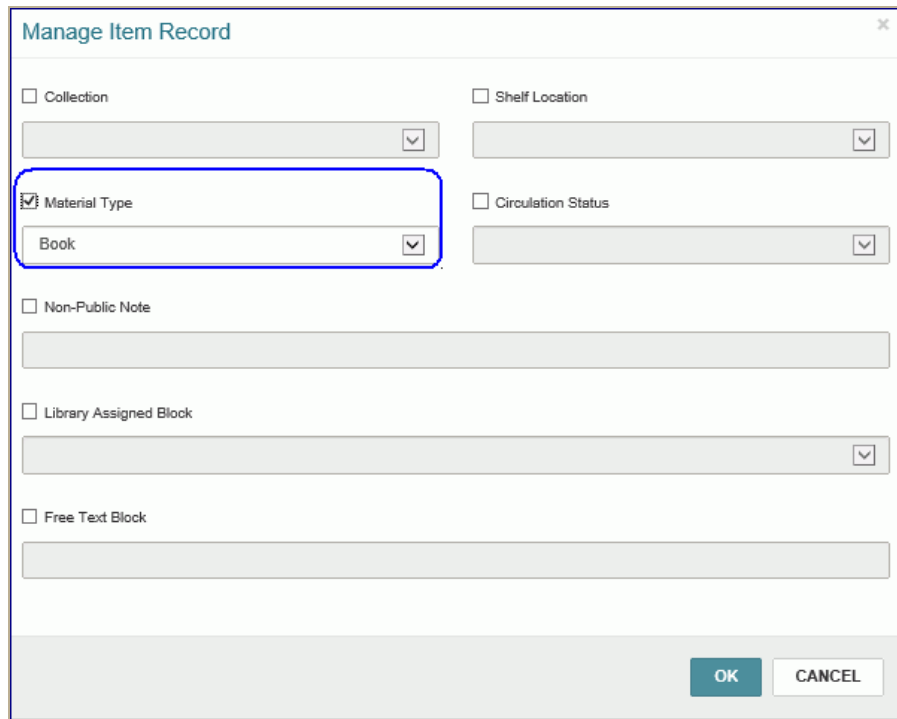
Field	Field
☐ Collection	☐ Shelf Location
☐ Material Type	☐ Circulation Status
☐ Non-Public Note	
☐ Library Assigned Block	
☐ Free Text Block	

Buttons: OK, CANCEL

What's New in Polaris 5.0 SP2 and Leap 1.0 SP2

4. Select the check box for the item record field to modify.

The current value appears in the box.



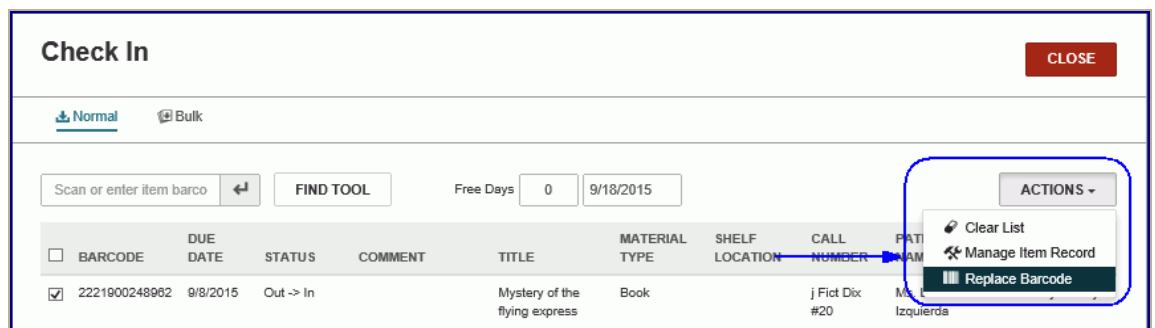
The 'Manage Item Record' dialog box contains several sections. The 'Material Type' section is highlighted with a blue box. It includes a checked checkbox, a text box containing 'Book', and a dropdown arrow. Other sections include 'Collection', 'Shelf Location', 'Circulation Status', 'Non-Public Note', 'Library Assigned Block', and 'Free Text Block', each with a checkbox and a text box. At the bottom right are 'OK' and 'CANCEL' buttons.

5. Select the new value in the drop-down list box.
6. Select **OK**.

The item record field or fields are changed.

To change the item barcode:

1. Check In an item.
2. Select the checked-in item in the list.
3. Select **ACTIONS** and select **Replace Barcode** in the drop-down list box.

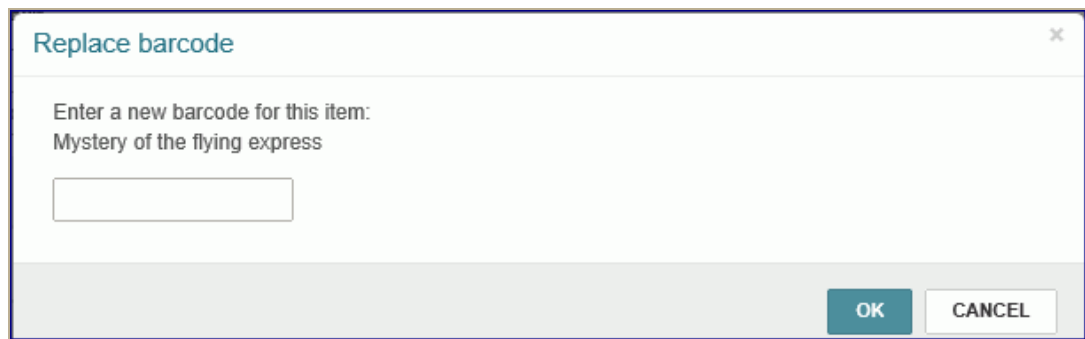


The 'Check In' screen features a 'CLOSE' button in the top right. Below it are 'Normal' and 'Bulk' tabs. A search bar with 'Scan or enter item barco' and a 'FIND TOOL' button is present. To the right, 'Free Days' is set to 0 and the date is 9/18/2015. A table lists items with columns: BARCODE, DUE DATE, STATUS, COMMENT, TITLE, MATERIAL TYPE, SHELF LOCATION, CALL NUMBER, and PAT. The first item is checked. An 'ACTIONS' dropdown menu is open, showing options: 'Clear List', 'Manage Item Record', and 'Replace Barcode' (which is highlighted with a blue box).

	BARCODE	DUE DATE	STATUS	COMMENT	TITLE	MATERIAL TYPE	SHELF LOCATION	CALL NUMBER	PAT
☒	2221900248982	9/8/2015	Out -> In		Mystery of the flying express	Book		j Fict Dix #20	M Izquierda

The Replace barcode dialog box opens.

What's New in Polaris 5.0 SP2 and Leap 1.0 SP2



The screenshot shows a dialog box titled "Replace barcode" with a close button (X) in the top right corner. Inside the dialog, there is a text prompt "Enter a new barcode for this item:" followed by the item name "Mystery of the flying express". Below this text is a rectangular input field for the new barcode. At the bottom right of the dialog, there are two buttons: "OK" and "CANCEL".

4. Type the new barcode in the box, and select OK.

The item's barcode is changed.

Option to Not Print Check Out Receipts for Patrons Using eReceipts

You can now set an option to prevent receipts from being printed at check out if the patron has selected eReceipts.

To prevent check out receipts from being printed for patrons who have chosen eReceipts:

1. Go to the **Settings** page and select the **Print Options** view, if it is not already displayed.
2. Under **Check out**, select the **only if no eReceipt** check box.
3. Under **Patron status**, select the **only if no eReceipt** check box. This option controls the check out receipt when renewing from the patron status.

The screenshot shows the 'Settings' page with the 'Print Options' tab selected. The page is divided into three main sections: 'Check in', 'Check out', and 'Patron status'. Each section has a set of checkboxes and radio buttons for different receipt and slip options. In the 'Check out' section, the 'only if no eReceipt' checkbox under 'Check out receipt' is selected and highlighted with a blue box. A blue arrow points from this box to the 'Patron status' section, where the 'only if no eReceipt' checkbox under 'Check out receipt' is also selected and highlighted with a blue box. Another blue arrow points from the 'Check in' section to the 'Check out' section. The 'SAVE' and 'CLOSE' buttons are visible in the top right corner.

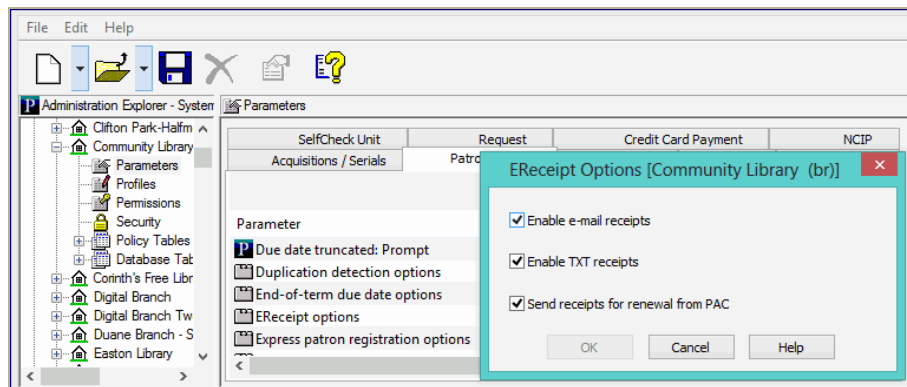
Check in	Check out	Patron status
☒ Fine receipt ☐ only if no eReceipt ☐ In-transit slip ☐ Holds only ☒ Hold slip ☐ Hold call slip ☐ Hold pickup slip	☒ Check out receipt ☒ only if no eReceipt ☐ Fine receipt ☐ only if no eReceipt ☐ In-transit slip ☐ Holds only ☐ Hold slip ☐ Hold call slip ☒ Hold pickup slip	☒ Check out receipt ☒ only if no eReceipt ☒ Fine receipt ☐ only if no eReceipt ☐ In-transit slip ☐ Holds only ☒ Hold slip ☐ Hold call slip ☐ Hold pickup slip
ILL requests ☐ In-transit slip ☐ Print ILL Slip ☐ Print ILL Pickup Slip	Hold requests ☐ In-transit slip ☒ Hold slip ☐ Hold call slip ☐ Hold pickup slip	Item record ☒ Fine receipt ☐ only if no eReceipt ☐ In-transit slip ☐ Holds only ☒ Hold slip ☐ Hold call slip ☐ Hold pickup slip

Option to Configure eReceipts at Checkout

You can now set an eReceipt prompt that will appear when checking out items to patrons whose eReceipt option is set to **None**. When the prompt appears, you can use a new dialog box to update the eReceipt options in the patron's record.

The eReceipt prompt appears in Leap when all the following conditions are met:

- The patron's registered branch and the Leap login (checkout) branch have enabled at least one eReceipt option using the existing patron services parameter **EReceipt options**; the **Enable e-mail receipts** and/or **Enable TXT receipts** check boxes are selected on the EReceipt Options dialog box.

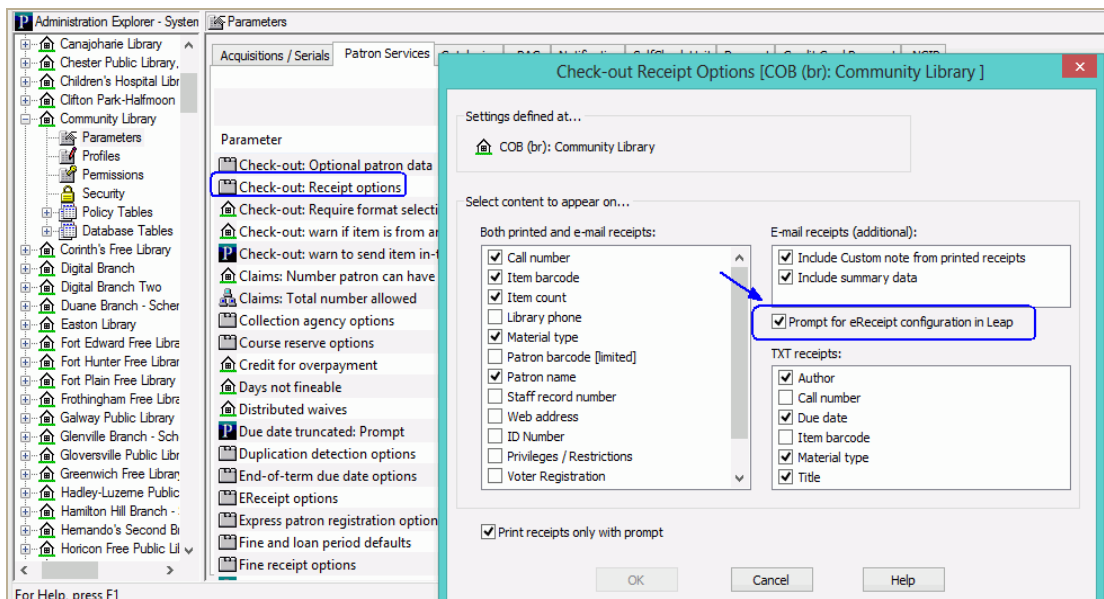


- The patron's **eReceipt Option** is set to **None**.

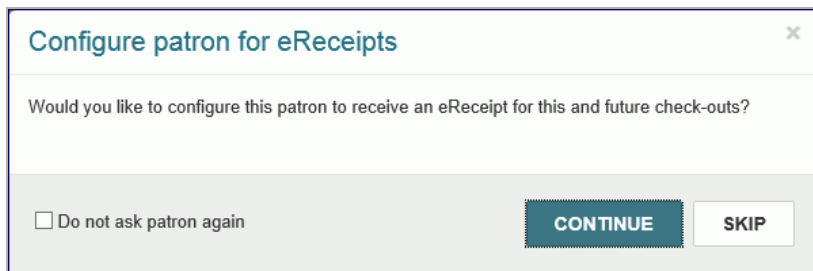
Notification Settings	
Notices Address Home	eReceipt Option (None)
Notification Option Mailing Address	☐ Additional TXT Notice
Text Messaging Phone (None)	Wireless Carrier (None)

- The Leap login branch has selected the new option to prompt for eReceipts in Leap; the **Prompt for eReceipt configuration in Leap** check box is selected on the Check-out Receipt Options dialog box.

What's New in Polaris 5.0 SP2 and Leap 1.0 SP2



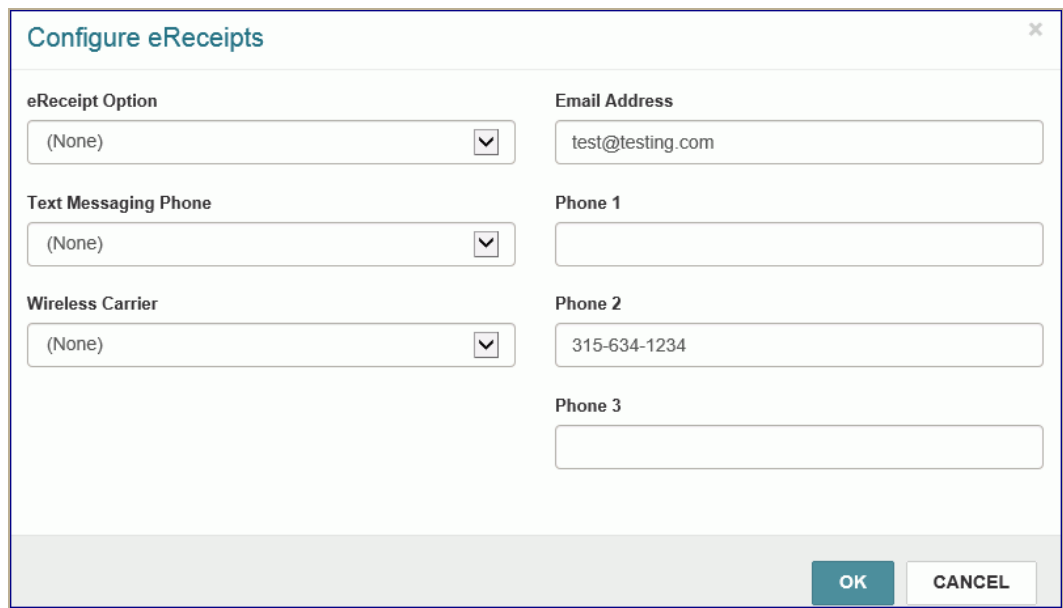
If the conditions for the prompt are met, a message asks **Would you like to configure this patron to receive an eReceipt for this and future check-outs?** when you complete a checkout.



If the patron does not want to change the receipt options, select **Do not ask patron again** and **SKIP**. The eReceipts prompt will not appear for subsequent check outs for that patron.

If the patron agrees to receive eReceipts, select **CONTINUE**. The Configure e-Receipts dialog box opens.

What's New in Polaris 5.0 SP2 and Leap 1.0 SP2



The image shows a 'Configure eReceipts' dialog box with a close button (X) in the top right corner. It contains two columns of fields. The left column has three dropdown menus: 'eReceipt Option' (set to '(None)'), 'Text Messaging Phone' (set to '(None)'), and 'Wireless Carrier' (set to '(None)'). The right column has four text input fields: 'Email Address' (containing 'test@testing.com'), 'Phone 1' (empty), 'Phone 2' (containing '315-634-1234'), and 'Phone 3' (empty). At the bottom right are 'OK' and 'CANCEL' buttons.

Field	Value
eReceipt Option	(None)
Email Address	test@testing.com
Text Messaging Phone	(None)
Phone 1	
Wireless Carrier	(None)
Phone 2	315-634-1234
Phone 3	

To update the patron's eReceipts options, select the eReceipt option and enter the appropriate information for that type of eReceipt. For example, if you select TXT messaging, select the text messaging phone and the wireless carrier.

Select **OK** to close the dialog box and update the patron's record. Once the patron's record is updated with the eReceipt option, the prompt will not appear for subsequent checkouts.

Change Pickup for Shipped Holds and Rerouting Message for Held Items

You can now change the hold request pickup location (branch) for hold requests with a status of **Shipped**. In addition, when a request has a status of **Held** and the item is held at a branch other than your logged-in branch, a message now alerts staff members if the pickup branch is changed, so that the item can be shipped to the new pickup branch. Leap also indicates if the pickup location for a held or shipped item was changed in PowerPAC, Mobile PAC, Leap, or the Polaris staff client.

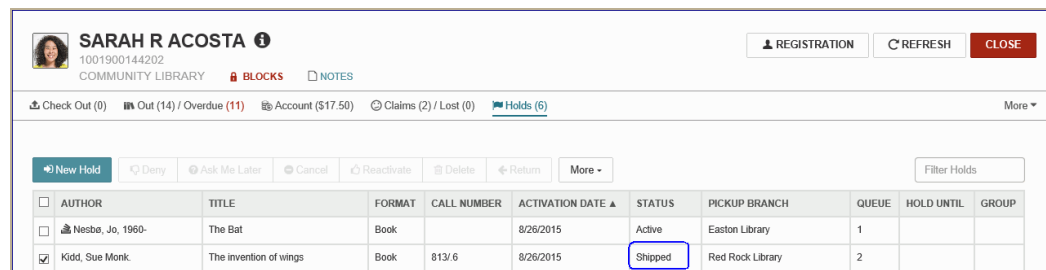
Note:

The pickup branch list in Leap excludes branches (if any) selected in the Request parameter: **Hold options | Pickup | Exclude selected branches in staff client**.

Change the pickup branch for a Shipped hold

To change the pickup location for a hold request with a status of **Shipped**:

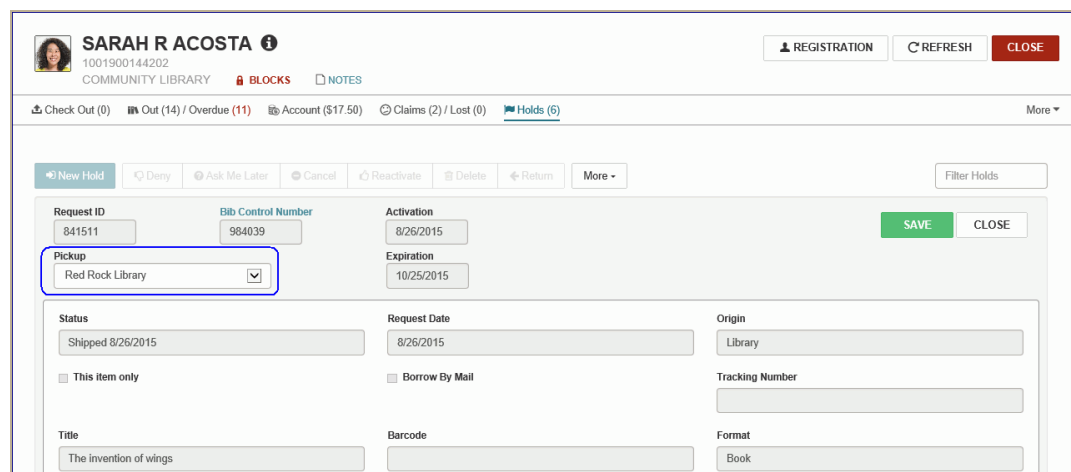
1. Go to the **Holds** view of the patron record, and select a hold with a status of **Shipped**.



SARAH R ACOSTA									
1001900144202 COMMUNITY LIBRARY									
REGISTRATION REFRESH CLOSE									
Check Out (0) Out (14) / Overdue (11) Account (\$17.50) Claims (2) / Lost (0) Holds (5)									
New Hold Deny Ask Me Later Cancel Reactivate Delete Return More									
AUTHOR	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS	PICKUP BRANCH	QUEUE	HOLD UNTIL	GROUP
Nesbe, Jo, 1960-	The Bat	Book		8/26/2015	Active	Easton Library	1		
Kidd, Sue Monk	The invention of wings	Book	813/.6	8/26/2015	Shipped	Red Rock Library	2		

The Hold Request page opens.

2. Select a different pickup branch in the **Pickup** drop-down list box.



SARAH R ACOSTA		
1001900144202 COMMUNITY LIBRARY		
REGISTRATION REFRESH CLOSE		
Check Out (0) Out (14) / Overdue (11) Account (\$17.50) Claims (2) / Lost (0) Holds (5)		
New Hold Deny Ask Me Later Cancel Reactivate Delete Return More		
Request ID	Bib Control Number	Activation
841511	984039	8/26/2015
Pickup	Expiration	
Red Rock Library	10/25/2015	
Status	Request Date	Origin
Shipped 8/26/2015	8/26/2015	Library
☐ This item only	☐ Borrow By Mail	Tracking Number
Title	Barcode	Format
The invention of wings		Book

What's New in Polaris 5.0 SP2 and Leap 1.0 SP2

3. Select **SAVE**.

A message informs you that the hold was modified, and the pickup branch is changed in the holds list.

Change pickup location for an item held at another branch

If the pickup branch is changed (from PowerPAC, Mobile PAC, the Polaris staff client, or Leap) for a request with a status of **Held**, and that item is being held at a branch other than your logged-in branch, the following message displays in the **PICKUP BRANCH** column of the Holds view: **Rerouting from: original pickup branch to: new pickup branch**.

The screenshot shows the user interface for Sarah R Acosta's account. At the top, there's a header with the user's name, ID (1001900144202), and library (COMMUNITY LIBRARY). Below this, there are tabs for Check Out (0), Out (14) / Overdue (1), Account (\$17.50), Claims (2) / Lost (0), and Holds (6). The Holds tab is selected. Below the tabs, there's a table of holds. The first hold is for 'The nonesuch.' by Heyer, Georgette, 1902-1974. The status is 'Held'. The pickup branch is 'Hudson Falls Free Library'. A message in the pickup branch column reads: 'Rerouting from: Hudson Falls Free Library to: Inlet Public Library, Town of'.

When you open the hold request, the original pickup branch is selected in the **Pickup** drop-down list box, and the new pickup branch is selected in the **Rerouted to** drop-down list box.

The screenshot shows the detail view of the hold request. It includes fields for Request ID (841512), Bib Control Number (72480), Activation date (8/26/2015), and Expiration date (10/25/2015). There are buttons for 'SAVE' and 'CLOSE'. The 'Pickup' dropdown is set to 'Hudson Falls Free Library' and the 'Rerouted to' dropdown is set to 'Inlet Public Library, Town of'.

When you check in an item that can fill a hold request for which the pickup location has been changed, the Transfer for hold message box displays the new pickup branch. You can select **YES** to transfer the checked-in item to the new pickup location, **NO** to check the item in but cancel the hold, or **CANCEL** to cancel the check in.

What's New in Polaris 5.0 SP2 and Leap 1.0 SP2

Transfer for hold

Barcode: 0002700008101
Title: The nonesuch.

This item fills a request at
Hadley-Luzerne Public Library (LUZ)

Transfer for hold?
(Click Cancel to stop the check-in/check-out process.)

YES

NO

CANCEL

Move Claimed Items to Lost

You can now change a claimed item to a status of Lost from the Claimed/Lost view of the patron's record. Select a singled claimed item (Claim Never Had, Claim Returned/Accruing, Claim Missing Part), and select the new **Declare Lost** button.

Barcode	Title	Claim Date	Description	Due Date
2223334445552	The narrow road to the deep north	8/13/2015	Claim Returned/Accruing	6/24/2015

The Declare Lost dialog box opens where you specify the action to take for each charge and select **OK**.

Charge	Replacement	Processing	Overdue
\$25.00	\$0.00	\$0.00	\$0.00

Total Fine: \$25.00

Depending on your selections in the dialog box, the Claims/Lost view displays the description **Lost/Unpaid** or **Lost/Accruing**.

Secured Patron Records

If you have the required Polaris permission, **Patron record: Secure**, you can now set a patron record to a "secured" status in Leap so that the patron is restricted from most library activity. In addition, secured patron records cannot be deleted. To allow a secured patron to resume library activities, you must have the permission, **Patron record: Release**.

To set a patron's record to a secured status, open a patron record, and select **SECURE**.

The screenshot shows the Polaris Patron Record interface for a patron named NASIR AZIZ. The interface includes a header with the patron's name, ID (1229195408668), and library name (COMMUNITY LIBRARY). Below the header, there are tabs for Profile, Attributes, Email, Address, Phone/Fax, Notifications, Preferences, Password, Image, and Misc. Info. The Profile tab is selected, showing a form with the following fields:

- Barcode *: 1229195408668
- Registered At *: Community Library
- Former Barcode: (empty)
- Patron Code *: Regular
- Last Name *: Aziz
- Date of Registration: 7/31/2014
- First Name *: Nasir
- Expiration Date *: 7/31/2017

On the right side of the form, there is a vertical menu with buttons: SAVE, RENEW, COPY, DELETE, and SECURE. A blue arrow points to the SECURE button.

If the patron's record cannot be secured, a message appears.

Patron record cannot be secured. Record has one or more of the following:
items checked out, hold/ILL requests, claimed or lost items, or is on the
'Patrons to include' list in the Collection Agency Setup dialog.

If a patron record has been secured to prevent library activity, the information icon displays in

red . When you select the icon, the information box displays **Record secured: mm/dd/yyyy hh.mm.ss am/pm**. You can move among the different views of a secured patron record, but no actions can be taken except copying the patron record. Items can be checked in for secured patrons, but no other circulation activity is possible.

What's New in Polaris 5.0 SP2 and Leap 1.0 SP2

NASIR AZIZ 1229195408668

REGISTRATION REFRESH RESULTS CLOSE

RECORD IS SECURED

RECORD SECURED: 1/30/2015 12:59:11 PM

PATRON CODE: REGULAR

HOME ADDRESS:
856 OAK DRIVE
SYRACUSE, NY 13210

PHONE NUMBER: 3158642544

EMAIL ADDRESS: ANAZIZ@GMAIL.COM

EXPIRATION DATE: 7/31/2017

NOTIFICATION OPTION: EMAIL ADDRESS

Check Barcode Scan Barcode

Due Date Special Loan

DATE	ACTION	SHELF LOCATION	ASSIGNED BRANCH	MATERIAL TYPE
Claims (0) / Lost (0) Holds (0)				

You can search for secured patrons in the Leap Find Tool with a new limiter **Patron record is secured**, values **Yes** or **No**. In the patron Find Tool results list, a red exclamation point next to the patron's barcode indicates the patron record is secured.

Find Tool - Patron

Patron Basic Search Patron record is secured Exact

Yes

	Barcode	Name	Street	City	S...	Zip	Birth D...	Library
✓	100020000718	Tracki, Linda C	Gray-BerkowiJanis	KIAWAH...	SC	29...		Schene...
!	00009548	Williams, Gino B	45 Anchor Drive	KIAWAH...	SC	29...	8/1/2013	Kellie's...
!	1000600191059	Decourcy, Joanne	1335 Fleming Ave	WEBSTER	FL	33...		Schene...
!	1000200029279	Marsh, Leslie S	5458 St Rt 145	KIAWAH...	SC	29...		Schene...
!	1000200303591	Patenaude, Ethel	1763 Devendorf Road	KIAWAH...	SC	29...		Schene...
!	100020006269	Greenfield, Jean D	449 Seven Hills Rd	CORAL...	FL	33...		Schene...
!	1000800041997	Haff, Russell A	ARC	GREENV...	SC	29...		Schene...
!	1000201446944	Brownell, Kathleen M	5 Anthony Ct	DACULA	G...	30...		Schene...
!	1000201386546	Ponte, Scott M	West Connie	KIAWAH...	SC	29...	10/27/...	Stillwat...

Ready 81 result(s)

☐ Count Only OPEN CANCEL

If a staff member scans a barcode for a secured patron record or selects a secured patron from the Find Tool results list, a message displays: *This record is secured; no changes can be made.*

To release a secured patron record so that library activity can resume, go to the Registration view of a secured patron record, and select **RELEASE**.

Note:

The **RELEASE** button displays only if the patron record is secured and you have the permission to release secured patron records.

What's New in Polaris 5.0 SP2 and Leap 1.0 SP2



NASIR AZIZ ⓘ
1229195408668
COMMUNITY LIBRARY

REGISTRATION

REFRESH

CLOSE

BLOCKS

NOTES

Check Out (0)

Out (0) / Overdue (0)

Account (\$3.10)

Claims (0) / Lost (0)

Holds (0)

More ▾

Profile

Attributes

Email

Address

Phone/Fax

Notifications

Preferences

Password

Image

Misc. Info

Profile

Barcode *

1229195408668

Registered At *

Community Library ▾

Former Barcode

Patron Code *

Regular ▾

Last Name *

Aziz

Date of Registration

7/31/2014

First Name *

Expiration Date *

SAVE

RENEW

COPY

DELETE

RELEASE

Pickup Branch Column Added to the Picklist

The Picklist page now includes a new **PICKUP BRANCH** column so that staff members can identify items that need to be routed to other locations for pickup.

Picklist

[Pending](#) [Located](#)

Branch:

LOCATED

ASK ME LATER

MISSING

REFRESH

DENY

Filter requests

Total items | 3 total

	COLLECTION	SHELF LOCATION	CALL NUMBER	AUTHOR	TITLE	FORMAT	PICKUP BRANCH	ITEM BARCODE
☐			YA fict Row	Rowling, J. K.	Harry Potter and the sorcerer's stone	Book	KMC	0004300378090
☐	Adult Nonfiction		333.3 I72o2	Irwin, Robert, 1941-	The \$125,000 decision : the older American's guide to selling a home and choosing retirement housing	Book	SAR	0004300203843