polaris

What's New in Polaris and Leap

6.5

© 2022

Legal Notices

Contents

Preferred Name

If a patron has a preferred name that's different from the patron's name on their ID, you can include both the preferred name and name on ID in the patron record. You can search for either the patron's preferred name or name on ID and designate the use of the name on ID for print and phone notices. If you provide both preferred and legal (name on ID) names, Polaris uses the Name on Identification section for collection agency reporting.

The following image shows the Name on Identification section on Polaris.

The following image shows the Name on Identification section on Leap.

Name on Identification fields are available to library staff and patrons who register themselves. The Name on Identification name fields are available on the following products:

- Polaris Staff Client
- Leap
- PowerPAC
- MobilePAC
- Polaris API
- SimplyReports

Hold Options: Permit Cancellation of Holds that Have Status of Shipped

A new system administration setting has been added to the Administration Explorer > System > Parameters > Request > Holds options > Staff client & PAC tab, called "Permit cancellation on Shipped status (system only)." This setting controls whether patrons and staff can cancel hold requests that have the status of Shipped in the PAC, MPAC, PAPI, staff client, MyLibrary, ExpressCheck, and Leap. This can reduce the time spent managing unclaimed holds.

This is a system-level setting. It is visible at the branch level, but it can only be changed at the system level.

This option is disabled by default.

The following image shows the option to permit cancellation of holds that have the status Shipped.
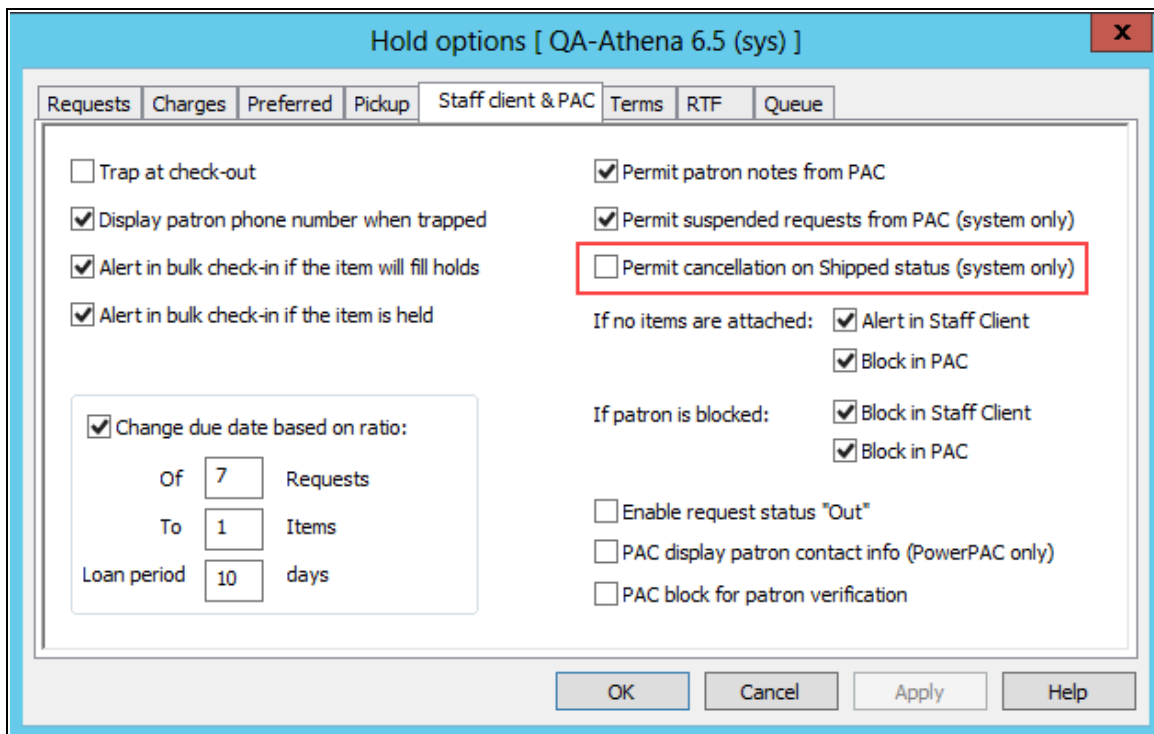
Requests that are canceled while in a shipped status are either routed to the appropriate branch, or trapped to fill another patron hold upon check-in. Also, a row is added to the item record history to indicate the request was canceled.

Outreach Services

The Outreach Services Manager is now accessible in Leap.

The Outreach Services Manager header in Leap automatically updates the display as the criteria are changed. If you manually add patrons or items and then make changes to the search options or refresh, you will see a warning that the patrons or items will be lost.

You can do the following:

- Identify patrons by the following criteria:
    - Branch name
    - Status
    - Delivery Routes
    - Delivery Modes
    - Date of Next Delivery
- Print a pick list.
- View picklists for multiple patrons.
- Update the last service date for multiple patrons.
- View combined picklists for multiple patrons.
- Add selected patrons to a new or existing patron record set.
- Add selected items to a new or existing item record set.
- Check out items from a patron's picklist.
- Temporarily add items to a combined pick list to streamline bulk actions.
- Temporarily remove items from a combined pick list to streamline bulk actions.
- Place bulk holds for outreach patrons.
- Bulk check out items for outreach patrons.
- Add existing held items to a combined pick list and check out all items at once.
- Print individual receipts for multiple patrons when performing a bulk checkout.
- Print a packing list to collect reviews of items when performing a bulk checkout.

State Not Required for International Addresses

A new setting in the Polaris staff client and Leap allow addresses to be entered, edited, and displayed without a state.

A new column, StateRequired, has been added to the Countries table in the database. If StateRequired is set to No in the database, the following is true:

- Library staff and patrons can add and edit patron, organization, and supplier addresses without a state.
- Library staff can print mailing labels with no extra line for the state in the address.
- Reports, notices, and receipts properly display addresses with no state.

A new System Administration profile allows library staff to suppress the display of the state column in the Find Tool results and workform table views for patron addresses.

- Display State in address: patron

This profile setting applies to both the staff client and Leap.

MARC Updates Implemented in Polaris 6.5

The updates specified in the MARC Format Documentation for Updates 27-29 and the MARC Technical Notices for February 8, 2019 - December 12, 2019 were implemented in Polaris 6.5.

Combine Phone and Text Notices into a Single File for Export to i-tiva

You can now combine phone and text notices into a single file to export to i-tiva.

PowerPAC Themes Table

A new database table called PowerPAC Themes is now available in System Administration to customize PowerPAC. It can be used to add new custom themes, modify the descriptions of existing themes, and delete custom themes.

Polaris API Changes

The table below is a list of changes to the Polaris API for v6.5.

Method Name	Purpose
PatronBasicDataGet and PatronRegistrationCreate	Supports the use of a patron's legal name. The legal name fields LegalNameFirst, LegalNameMiddle, LegalNameLast, and UseLegalNameOnNotices have been added to PatronBasicDataGet and PatronRegistrationCreate. PatronBasicDataGet also includes the new field LegalFullName.
PatronBasicDataGet, PatronRegistrationCreate, and PatronRegistrationUpdate	The state address field can now be undefined, if a country does not require a state definition. This requires "StateRequired" to be set to no in the System Administration "Countries" table.
HoldRequestCancel	Shipped holds can now be canceled with the status of "1 inactive", "2" active", and "4 pending". If enabled by the library, hold requests with a status of "5 shipped" can also be canceled.