polaris

What's New in Polaris and Leap

6.3

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innovative

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Polaris Installation Notes

Important:
When the new Polaris release is installed on a workstation, the file path changes from 6.2 to 6.3 as in the following examples:
C:\ProgramData\Polaris\6.3
C:\Program Files\Polaris\6.3
C:\Program Files (x86)\Polaris\6.3

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New and Modified Polaris Administration Settings

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

Setting	Purpose	Level
New Permissions		
Cataloging: Cataloging record sets: Delete/Undelete	Adds the ability to permission the undelete of Cataloging record sets that have been marked for deletion.	Staff
Patron record sets: Delete/Undelete	Adds the ability to permission the undelete of Patron record sets that have been marked for deletion.	Staff
Leap: Setup Offline: Allow	Controls which users can complete the Leap Offline installation.	System
System Administration: Modify genders table: Allow	Allows you to modify the new Database table, Genders Table.	Staff, Workstation, Permission Group
Item Bulk Change Templates: Access	Allows users to view and use the saved item bulk change template data.	Staff, Workstation, Permission Group
Item Bulk Change Templates: Create	Allows users to create new saved bulk change templates.	Staff, Workstation, Permission Group
Item Bulk Change Templates: Modify	Allows users to modify existing saved bulk change templates.	Staff, Workstation, Permission Group
Item Bulk Change Templates: Delete	Allows users to delete saved bulk change item bulk change template data.	Staff, Workstation, Permission Group
Use 'own' item bulk change templates: Allow	Allows staff to 'own' item record bulk change templates.	System

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Setting	Purpose	Level
New Profiles		
Cataloging: Automatically populate authority heading in Find Tool during check headings	Lets you enable or disable the automatic population of the heading in the **Authority Records - Heading Find Tool** when checking for duplicate headings.	System
PowerPAC: Title Display: Number of characters in the Summary (Short)	Allows you to specify the maximum number of characters of the Summary (Short) field that are displayed in the brief and full search results views for a title in the Polaris PowerPAC.	Branch
PAC: Reset password link timeout duration	Allows you to determine the time period (in minutes) during which the reset password link emailed to the patron remains active.	System, Library, and Branch
Patron Services: Retain deleted patron record sets.	Enables the system to retain deleted patron record sets.	Systems
Cataloging: Retain deleted cataloging record sets	Enables the system to retain deleted cataloging record sets.	Systems
New Parameters		
Request: Total holds thresholds include Inactive	Lets you specify whether inactive hold requests count toward a patron's total holds limit.	System
Patron Services: Patron Registration Filter genders	Allows you to manage gender drop down lists.	Branch
Patron Services:	Allows you to suppress gender tracking in Staff Client and Leap.	Branch

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Setting	Purpose	Level
Patron registration options		
Modified Profiles		
PAC: Patron access options: Self-registration: Suppress gender selection	Allows you to suppress gender in Self-Registration.	Branch
PAC: Patron Access Options: Login	Enable option to send patrons a reset password link.	Branch
Modified Parameters:		
Credit Card Payment: Online Payment Settings: Configure	A new JetPay option in the Payment processing gateway list allows you to configure Polaris to use JetPay for processing credit card payments from PowerPAC.	Library, Branch

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MARC Updates Implemented in Polaris 6.3

The updates specified in the October 26, 2018 MARC technical notice were implemented in Polaris 6.3.

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WebAdmin Updates

The tables below lists the most important new strings added in Polaris 6.3.

ExpressCheck Strings

Mnemonic String	Text
EC_TEXT_FORGOTPASSWORD_1010	The e-mail could not be sent. Please contact the library for assistance.
EC_TEXT_FORGOTPASSWORD_EMAIL_HOURS	Click on the following link to set/reset your password: Reset Password Link: {0} This link can be used to reset your password, and will expire in {1} hours. If the link is expired, request a new one: {2} If you did not request to reset your password, please ignore this message. Sincerely, Your Library System Administrator
EC_TEXT_FORGOTPASSWORD_EMAIL_MINUTES	Click on the following link to set/reset your password: Reset Password Link: {0} This link can be used to reset your password, and will expire in {1} minutes. If the link is expired, request a new one: {2}If you did not request to reset your password, please ignore this message. Sincerely, Your Library System Administrator

MobilePAC Strings

Mnemonic String	Text
MP_ACCOUNTLOGON_RESET_SUCCESS	Your password has been reset.
MP_CRUMBS_RESETPWD	Reset Password
MP_HOLD_REQ_AVAIL_ERROR	Hold Requests are not allowed for this

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Mnemonic String	Text
	title
MP_MSG_FORGOTPASSWORD_EMAIL_HOURS	Click on the following link to set/reset your password: Reset Password Link: {0} This link can be used to reset your password, and will expire in {1} hours. If the link is expired, request a new one: {2} If you did not request to reset your password, please ignore this message. Sincerely, Your Library System Administrator
MP_MSG_FORGOTPASSWORD_EMAIL_MINUTES	Click on the following link to set/reset your password: Reset Password Link: {0} This link can be used to reset your password, and will expire in {1} minutes. If the link is expired, request a new one: {2} If you did not request to reset your password, please ignore this message. Sincerely, Your Library System Administrator
MP_MSG_FORGOTPASSWORD_INFO_BARCODE_RESET	Your reset password link has expired. Please submit your Barcode below to request a new one.
MP_MSG_FORGOTPASSWORD_INFO_USERNAME_RESET	Your reset password link has expired. Please submit your Username or Barcode below to request a new one.

PowerPAC Strings

Mnemonic String	Text
PACML_DASH_CHILDFICTIONSERIES	Children's Fiction Series
PACML_DASH_CHILDILLUSTRATED	Children's Illustrated
PACML_DASH_DONATION	Make a Donation
PACML_DASH_EARLYMIDDLE	Early and Middle Grade Readers (sys

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Mnemonic String	Text
	cust)
PACML_DASH_HARDFICTION	Hardcover Fiction
PACML_DASH_HARDNONFICTION	Hardcover Non-Fiction
PACML_DASH_MASSMARKET	Mass Market
PACML_DASH_MOSTCIRCAUTHORS	Most Circ'd Authors
PACML_DASH_MOSTCIRCSUBJECTS	Most Circ'd Subjects
PACML_DASH_MOSTCIRCTITLES	Most Circ'd Titles
PACML_DASH_NEWTITLES	New Titles
PACML_DASH_ONORDERITEMS	On-Order Items
PACML_DASH_PAPERFICTION	Trade Paperback Fiction
PACML_DASH_PAPERNONFICTION	Trade Paperback Non-Fiction
PACML_DASH_YOUNGADULT	Young Adult
PACML_FORGOTPASSWORD_1014	Your reset password link is invalid or has expired. Please submit your Username or Barcode below to request a new one.
PACML_FORGOTPASSWORD_1015	Your reset password link is invalid or has expired. Please submit your Barcode below to request a new one.
PACML_FORGOTPASSWORD_CONFIRM	Confirm Password:
PACML_FORGOTPASSWORD_EMAIL_HOURS	Click on the following link to set/reset your password: Reset Password Link: {0} This link can be used to reset your password, and will expire in {1} hours. If the link is expired, request a new one: {2} If you did not request to reset your password, please ignore this message. Sincerely, Your Library System Administrator

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Mnemonic String	Text
PACML_FORGOTPASSWORD_EMAIL_MINUTES	Click on the following link to set/reset your password: Reset Password Link: {0} This link can be used to reset your password, and will expire in {1} minutes. If the link is expired, request a new one: {2} If you did not request to reset your password, please ignore this message. Sincerely, Your Library System Administrator
PACML_FORGOTPASSWORD_INST	Please create a new password. You will then be directed to log in.
PACML_FORGOTPASSWORD_NEW	New Password:
PACML_FORGOTPASSWORD_SHOW	Show password
PACML_FORGOTPASSWORD_TITLE	Reset Password
PACML_JETPAY_DONATION_NOTE	Thank you for your Donation.
PACML_JETPAY_PAYMENT_NOTE	Thank you for your payment.
PACML_JETPAY_TRANSACTION_ERR	There is a problem with your payment. Please contact the library for assistance.
PACML_LOGON_PASSWORDRESET	Your password has been reset.
PACML_PROCESSINGFEES_JETPAY_ERR	JetPay fee is $0.00 or there was a JetPay API error. You will see the fee when you are at the JetPay site.
PACML_SUMMARYLESS	Less
PACML_SUMMARYMORE	More

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Polaris API Changes

The table below is a list of changes to the Polaris APIs for v6.3.

Method Name	Purpose
PickupBranchesGet	This new endpoint returns a list of valid pickup branches based on the organization ID.
ShelfLocationsGet	This new endpoint returns a list of shelf locations based on the organization ID.
Synch_BibsPagedGet	This new endpoint allows a paged extraction of bib record data.
ItemUpdateBarcode	The new parameter BarcodeOrID has been implemented that enables a barcode to be updated using either the item ID or the item barcode as an identifier. An additional new parameter, isBarcode, specifies whether the identifier used is an item record ID or a barcode.
PatronHoldRequestGet	A new CanSuspend Boolean property has been added that indicates whether a patron's hold request can be suspended.
PatronReadingHistoryClear	Now removes a range of historical reading history entries by specifying their ID using the new id query string parameter.

For more information, see the **Polaris API Reference for v6.3**.

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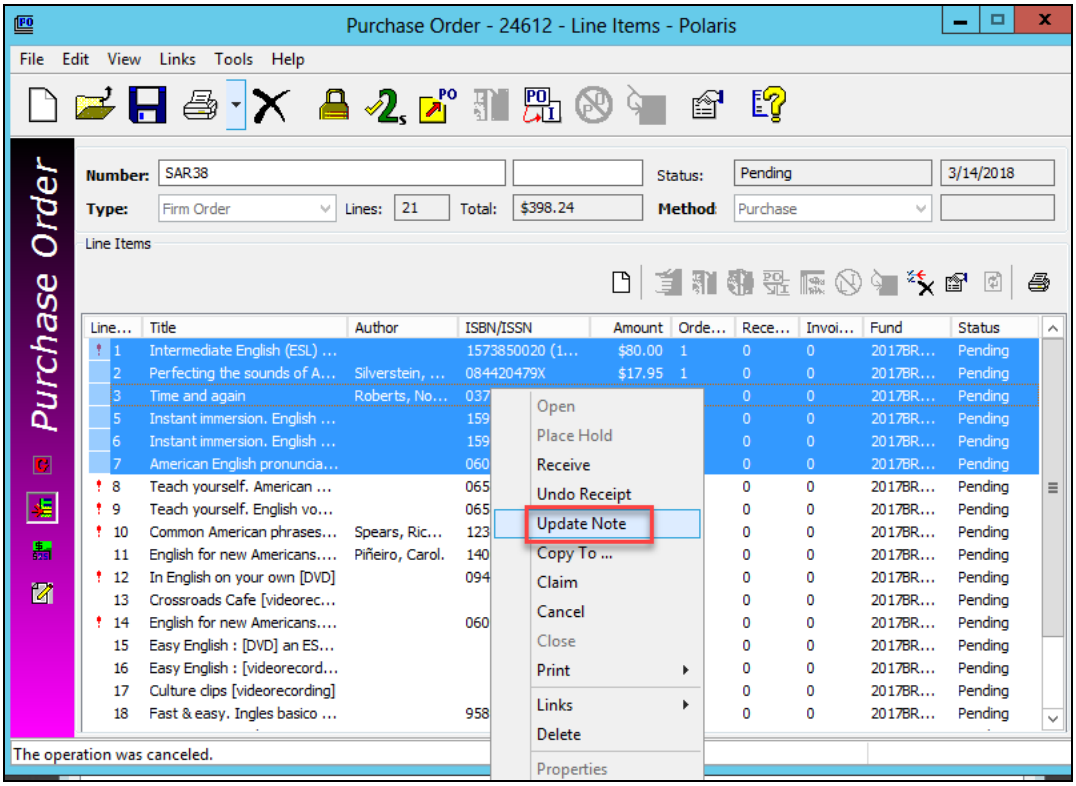
Bulk Update Purchase Order Notes

You now have the ability to update purchase order line item notes in bulk from the Purchase Order workform.

The **Update Note** option is now in the right-click menu for purchase order line items. You can select one or more notes to update with this option.



> **Note:**
> This menu option is not enabled if any of the selected purchase order line items have a status of Closed.

Selecting this option will open the **Update Notes** dialog with two note types:

- **Public Note**
- **Non-Public Note**

  Both note types have the following options:

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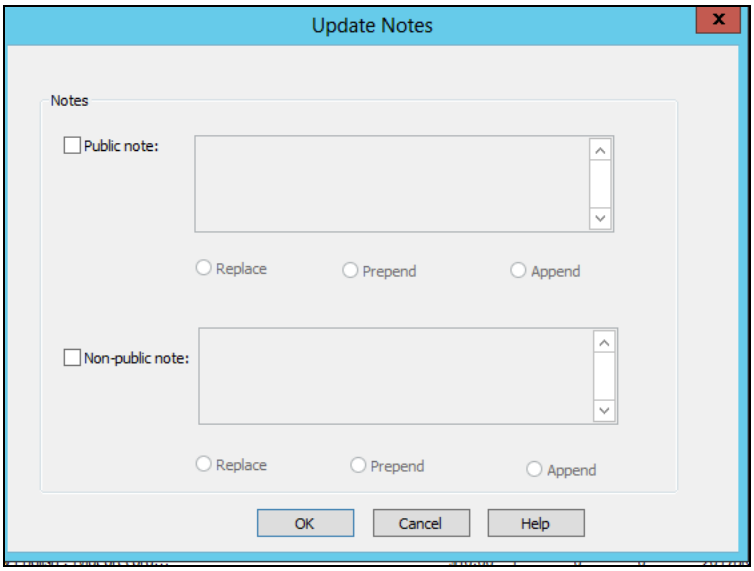
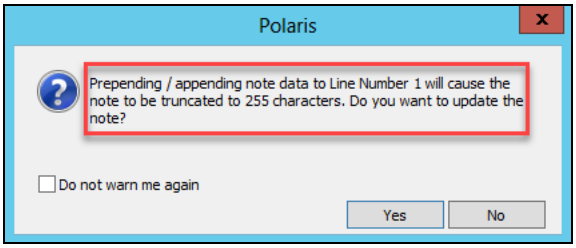
- **Replace** - replaces the existing note.
- **Prepend** - inserts the new note and a blank line before the existing note.
- **Append** - inserts a blank line and the new note after the existing note.



If Replace is selected and text is not entered in the note field, the existing note will be deleted.

Notes longer than 255 characters will be truncated to 255.

If prepending or appending causes a note to be larger than 255 characters, you will see the following message:



- Yes - updates the note(s).
- No - returns you to the Purchase order updating only the line items where the data would not be truncated. The above message will appear for each line item that may be truncated.
- Cancel - returns the user to the purchase order with the line item(s) still highlighted.

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New Index to Increase Workslip Speed

A new index was added to speed up the printing of PO line item work slips.

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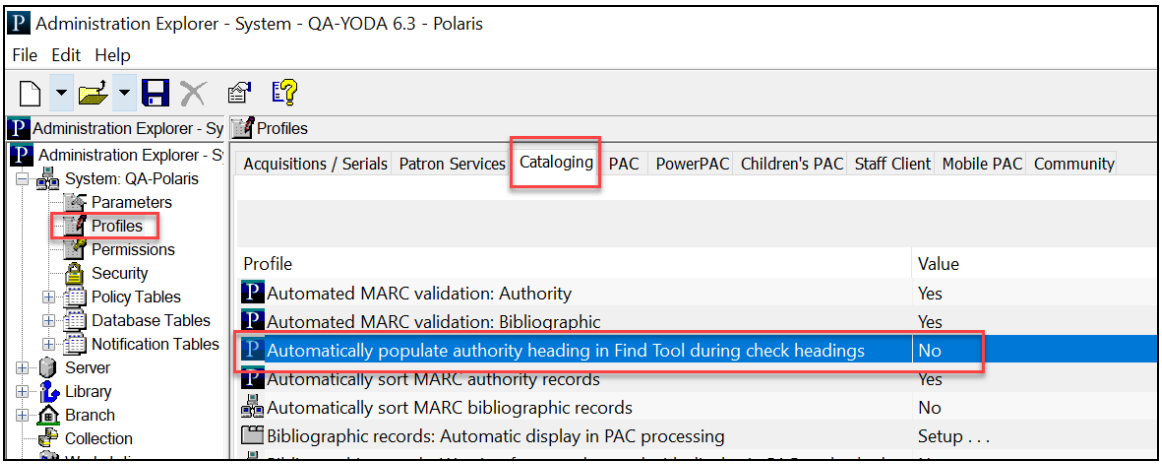
Automatically Populate Authority Heading in Find Tool During Check Headings - Staff Client

A new administration setting lets you enable or disable the automatic population of the heading in the **Authority Records - Heading Find Tool** when checking for duplicate headings.

Open **Administration Explorer** > **Profiles** > **Cataloging**:



The default value for this setting is No.

It is available at the System, Library, Branch, Work Station, and Staff Member levels.

If this setting is enabled, the Find Tool is automatically populated when:

1. The user is working in a bibliographic record with an unlinked heading.

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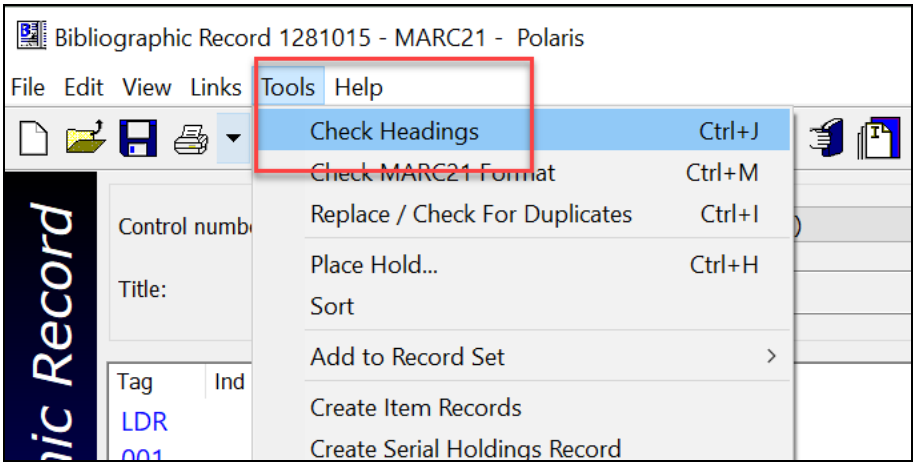
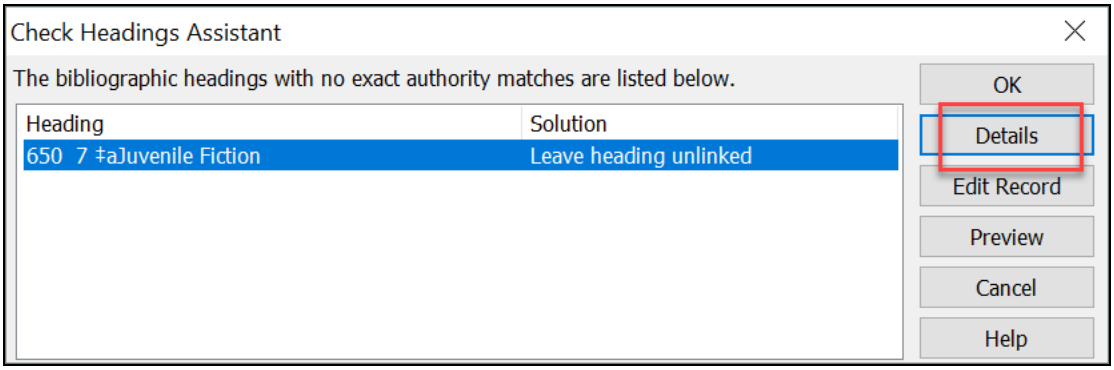
2. A heading check is triggered either by saving the record as final or by selecting **Check Headings** from **Tools** in the record workform:



3. The **Check Headings Assistant Dialog Box** displays the headings with no matching authority record, and the user selects **Details** for one of the headings:



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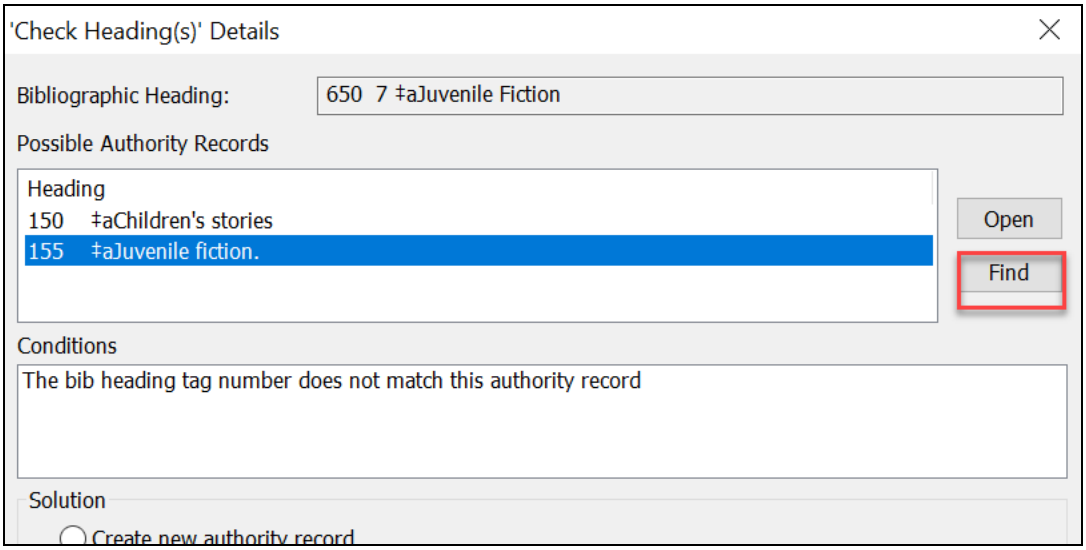
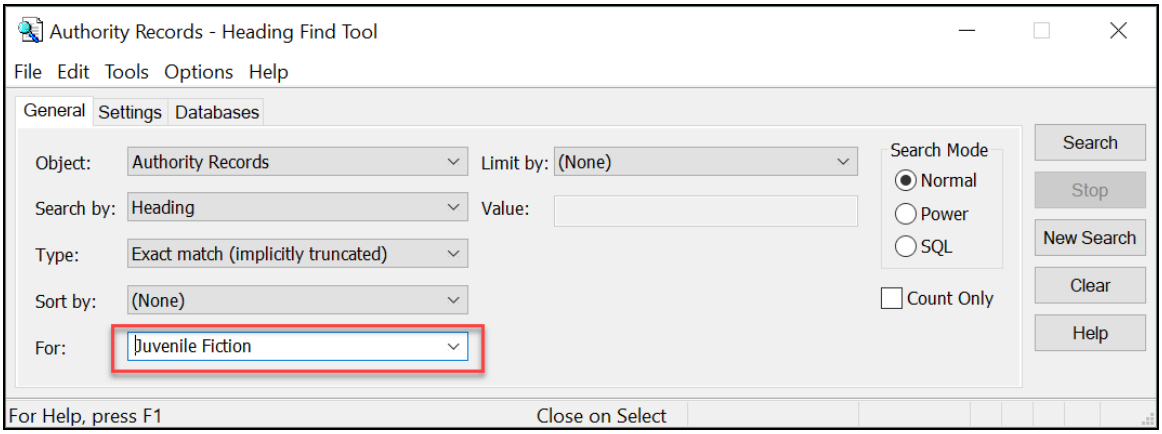
4. The **Check Headings Details Dialog Box** opens, and the user selects **Find** to search for a matching heading:



5. The **Authority Records - Heading Find Tool** appears with the **For** option pre-populated using the heading subfield a.:



Note:
The user can change the search criteria before executing the search in the Find Tool and search terms do not persist between searches.

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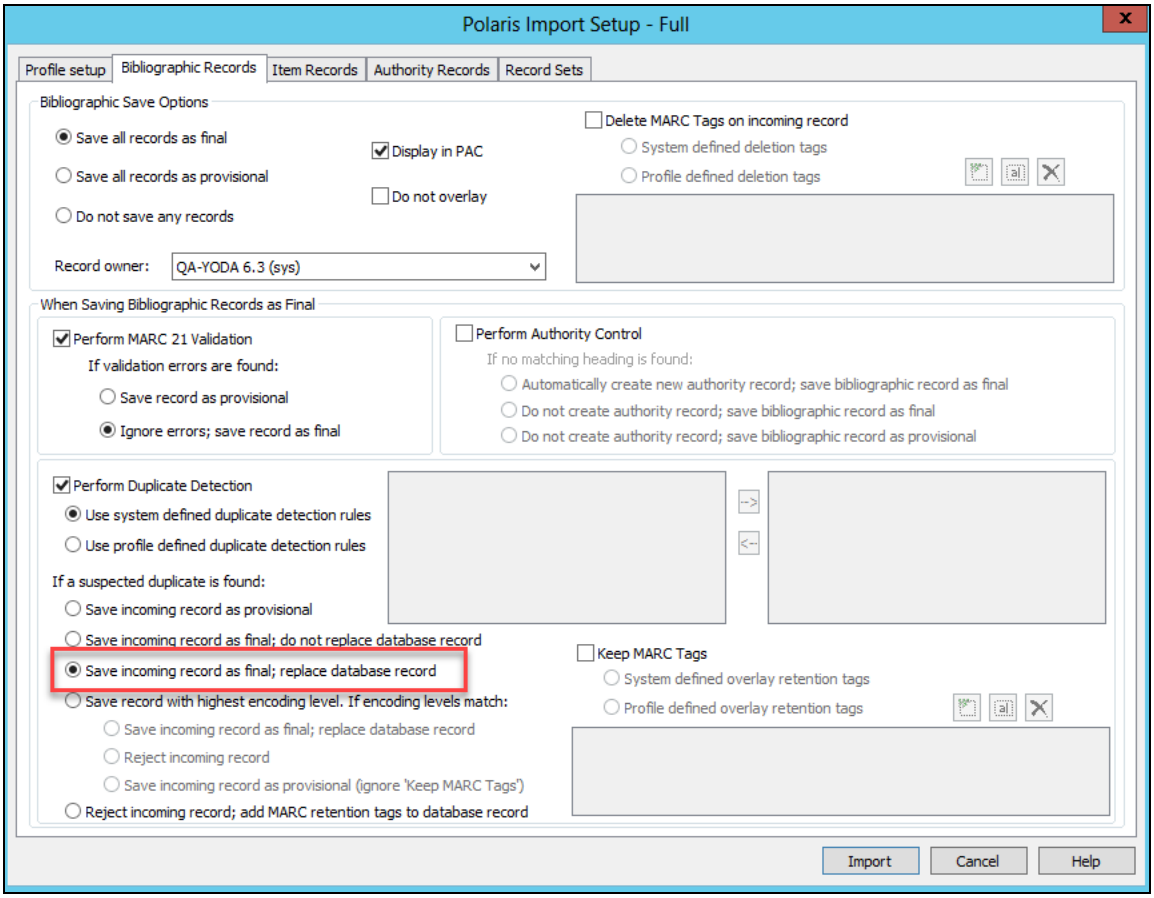
Retain Bibliographic Control Number During Overlay/Replace

Duplicate detection now maintains the control number of the existing bibliographic record by default during the import overlay/replace process. Import permissions remain unchanged.

When you choose **Save incoming record as final; replace database record**, the existing record is overlayed by the new incoming record but its control number is retained.



When you choose **Save record with highest encoding level. If encoding levels match:**, the **Save incoming record as final; replace database record** option is selected by default. You can also choose to reject the incoming record or save the incoming record as provisional. The control number is retained only when saving the record as final.

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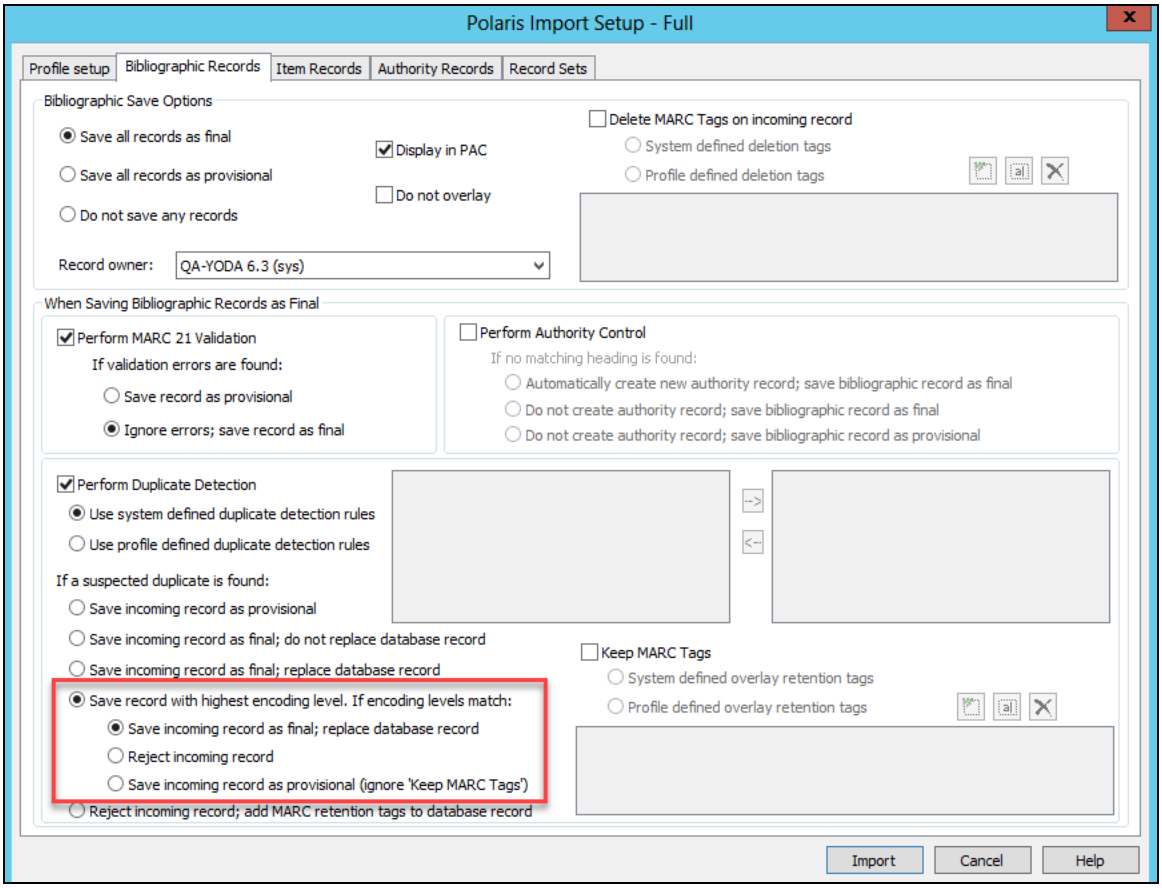

Interactive Save of a Brand New Record

When creating a new bibliographic record, or importing and saving a new bibliographic record using z39.50, the control number of the existing record will automatically be retained when there is only one duplicate. You can choose which control number to retain when there are multiple duplicates available.

A new column called Maintain control number has been added to the **Duplicate Detection** dialog.

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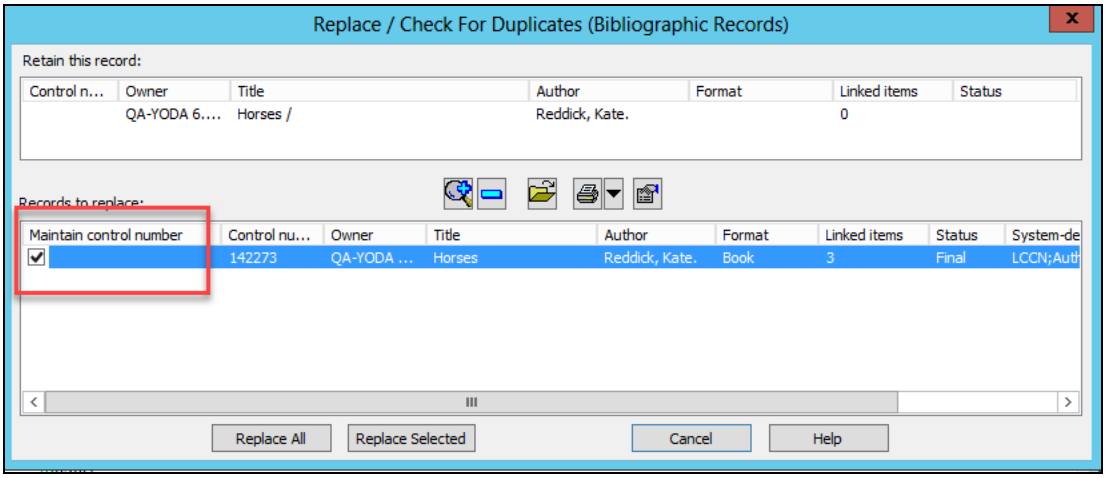
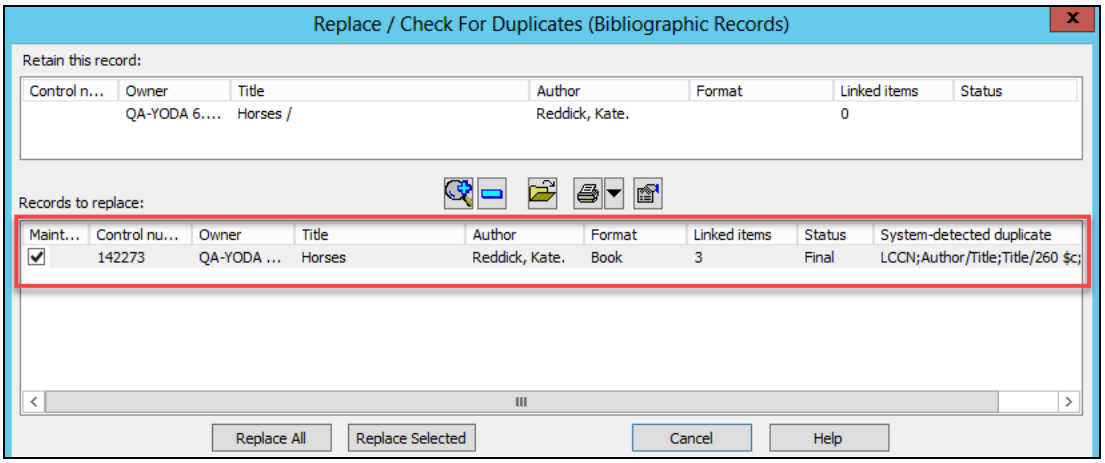


If only one duplicate is found, the check box is checked by default and cannot be unchecked. the control number of the suspected duplicate will be the one retained. The record owner is also retained. This requires the **Bib record modify** permission (overridable), and will update the modification date of the existing record.



If more than one suspected duplicate record is found, the user will have the option to select which records to replace, and of those records, which control number will be retained.

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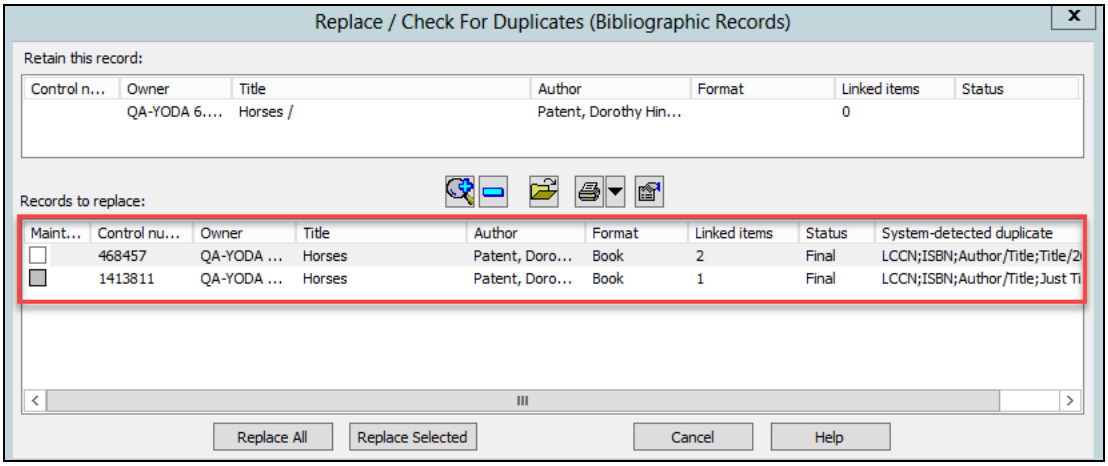

Records in a status of provisional are not eligible for this feature, and will have a disabled check box.

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Saving Default Remote Databases for Bibliographic Record Searches

You can now save default remote databases that Polaris searches when you use the Find Tool to search for bibliographic records.

> **Note:** Default search databases are associated with your user account.

To save default search databases:

1. Open the Find Tool for bibliographic records and navigate to the **Databases** tab.
2. Select the remote databases you would like to search.
3. Select **Options** > **Save as User Default**.

   Polaris saves your preferred remote search databases. When you open the Find Tool for bibliographic records in the future, your preferred search databases are already selected.

To clear saved default search databases:

1. Open the Find Tool for bibliographic records, and navigate to the **Databases** tab.
2. **Select Options** > **Revert to System Default**.

If an administrator deletes a remote database that is being used as a default search database by one or more users, the database is automatically removed from each user's saved default search databases.

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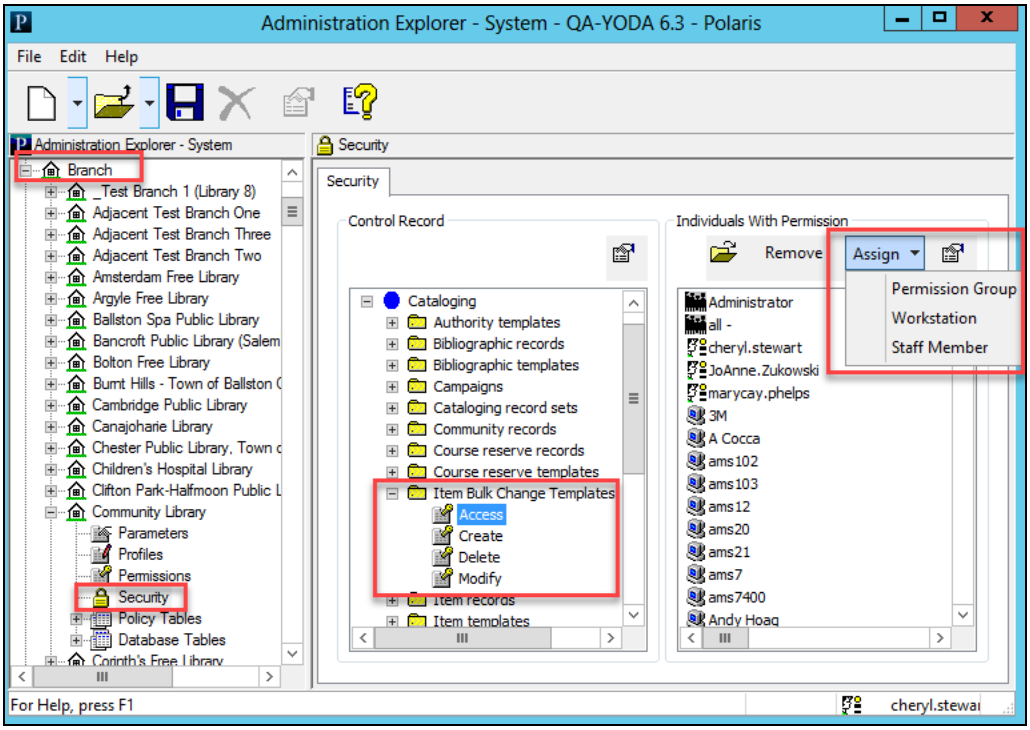
Save Item Record Bulk Changes as Templates

You now have the option to save item record bulk change settings as templates to reuse your item bulk change criteria. This feature is available in the Staff Client and Leap.

The following new permissions must be assigned to enable this feature. They can be assigned at the Permission Group, Workstation, and Staff member levels.

At the branch level, **Item Bulk Changes Templates**:

- **Access** – allows users to view and use the saved criteria.
- **Create** – allows users to create new saved bulk change templates.
- **Modify**– allows users to modify existing saved bulk change templates.
- **Delete** – allows users to delete saved bulk change criteria.



The following new permission is necessary if the library wants to allow staff to 'own' item record bulk change templates. If the library wants all templates to be owned at the sys/lib/branch levels, then they would not assign this permission to staff.

At the system level: Use 'own' item bulk change templates > **Allow**.

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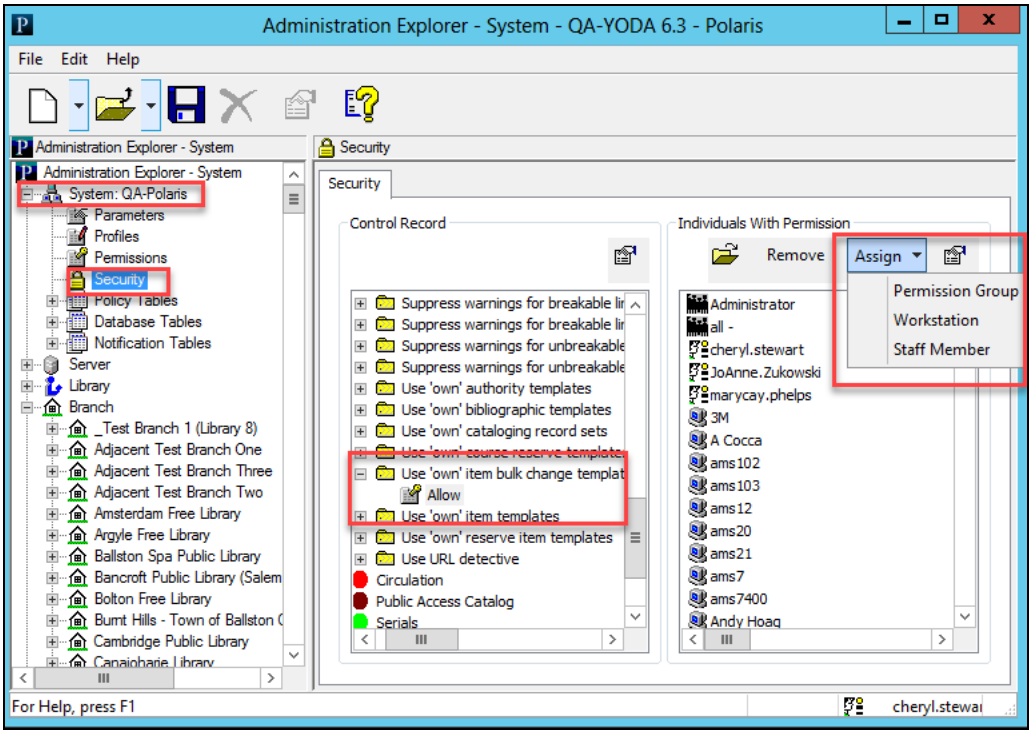

The Staff Client Item Bulk Change dialog is updated to include these options:

- **Template** – select an existing item record bulk change template available to you.
- **Save** – modify an existing template.
- **Save As** – save item bulk change criteria as a new template.

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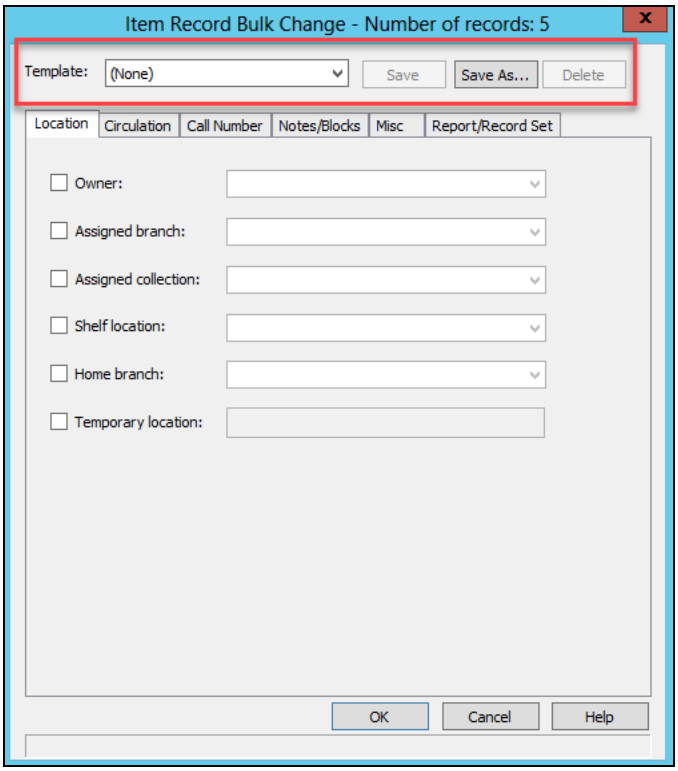
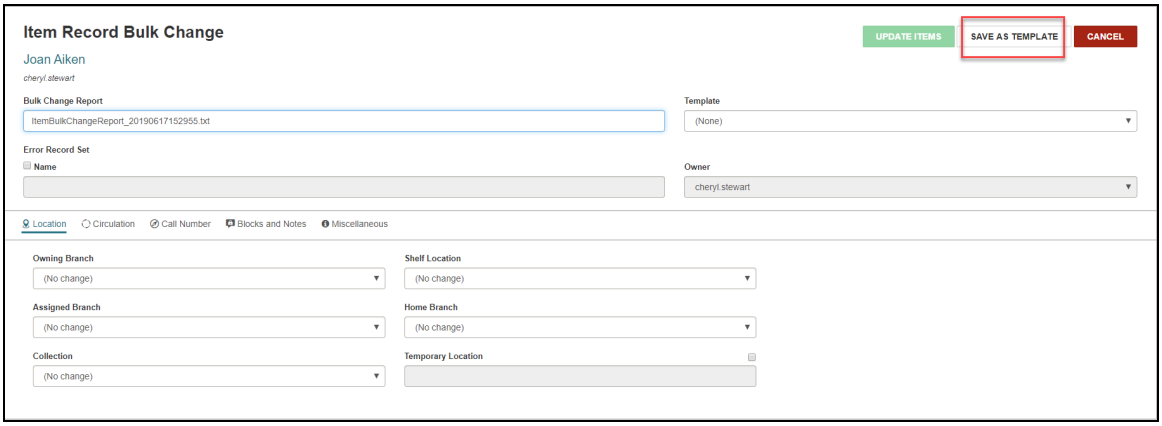
- **Delete** – delete an existing template.



The Leap Item Bulk change workform is updated to include these options:

- **SAVE AS TEMPLATE** - save item bulk change criteria as a new template.



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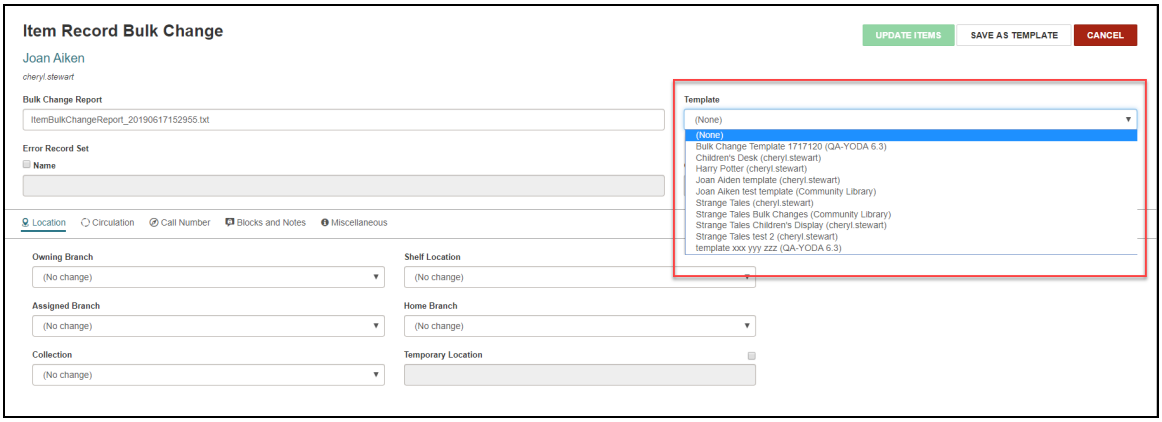
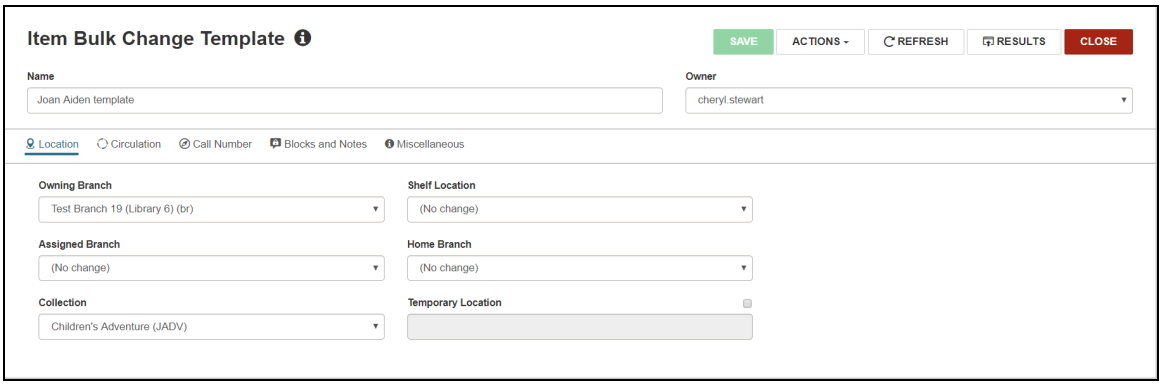
- **Template** - select an existing item record bulk change template from a list of templates available to you.



Leap also has a new **Item Bulk Change Template** workform to modify, copy, and delete item bulk change templates.



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Undelete Record Sets

Sometimes a record set is deleted by accident, and this can be a difficult situation to rectify if the user who deleted the set was not the creator.

You can now undelete record sets if this feature has been enabled by the system administrator. Record sets now have a status of Final or Deleted. If the status of the record set is Deleted, then staff could use the Undelete action similar to the item record delete/undelete function.

This functionality can be accomplished in both Leap and the Staff Client.

The following sections provide more information about enabling, configuring, and using the Undelete Record Set function:

System Administration

- System Administration Options to Retain Deleted Record Sets
- Delete Record Sets Permissions Updated
- Record Set Status
- Record Set Undelete Transactions

Staff Client

- Record Set Status in Record Set Header and Properties
- Undelete Menu Option and Icon for Record Sets
- Find Tool Updated for Deleted Record Sets
- Record Set Status in Find Tool Search Results

Leap

- Record Set Status in Record Set Header and Info Properties in Leap
- Undelete Menu Option for Record Sets in Leap

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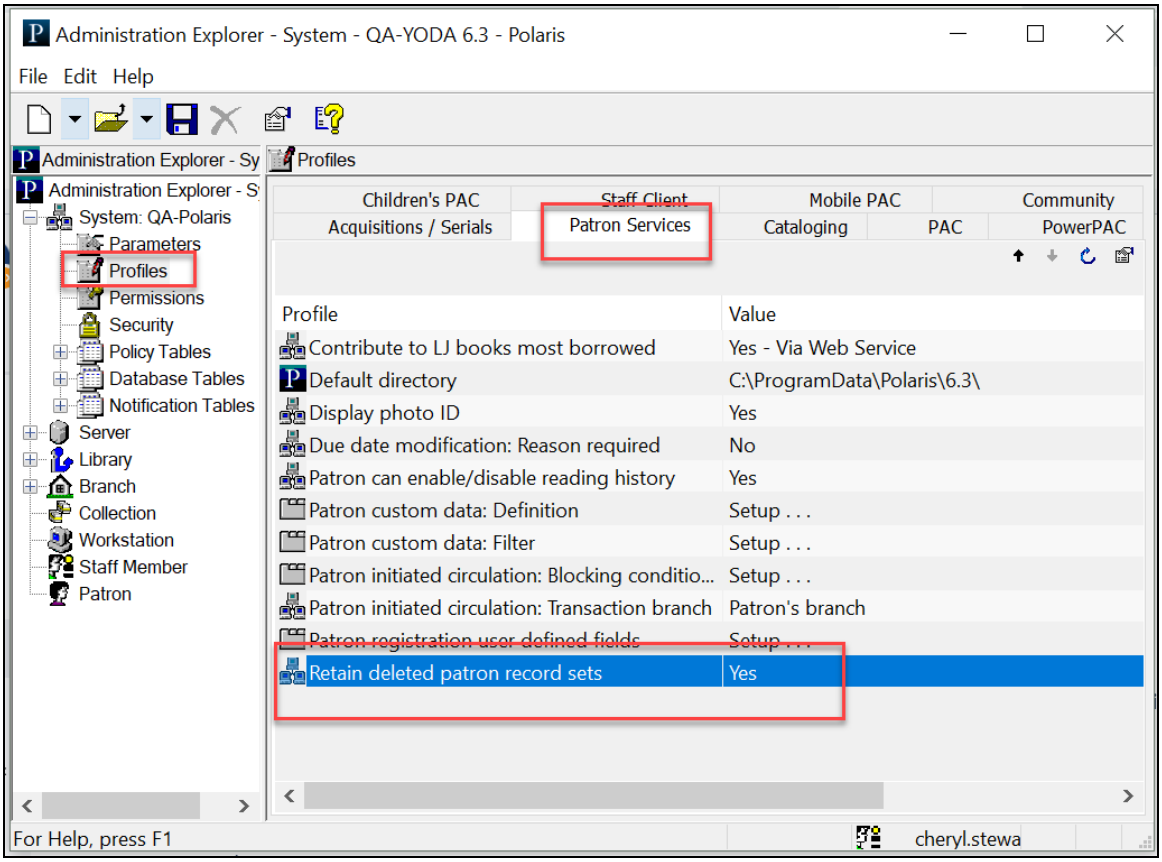
- Find Tool Updated for Deleted Record Sets in Leap
- Record Set Status in Find Tool Search Results

System Administration Options to Retain Deleted Record Sets

Deleted record sets must be retained to enable the Undelete Record Sets option. These are system level settings.

To retain Patron record sets, go to **Administration Explorer** > **Profiles** > **Patron Services** > **Retain deleted patron record sets**. Select **Yes**.



To retain Cataloging record sets, go to **Administration Explorer** > **Profiles** > **Cataloging** > **Retain deleted cataloging record sets**. Select **Yes**.

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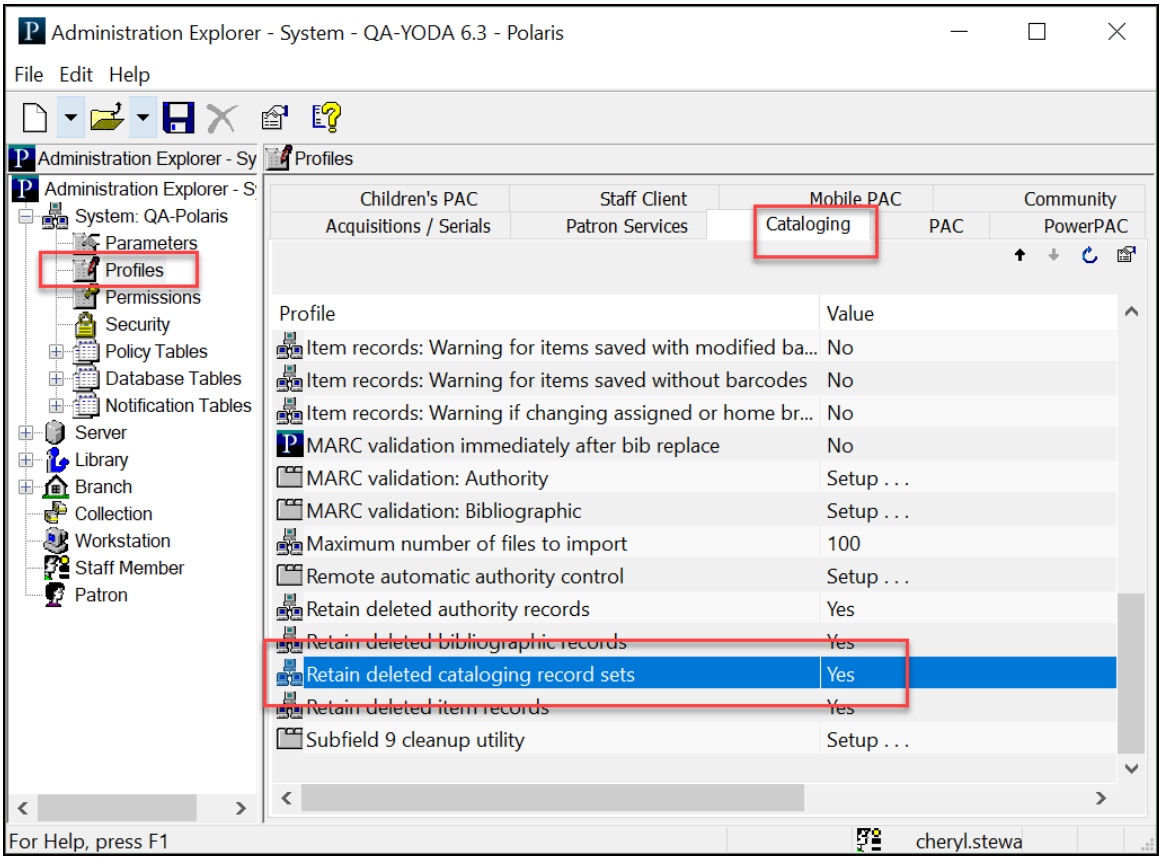

Delete Record Sets Permissions Updated

Cataloging and patron record sets permissions are updated to support the ability to permission the undelete of record sets that have been marked for deletion.

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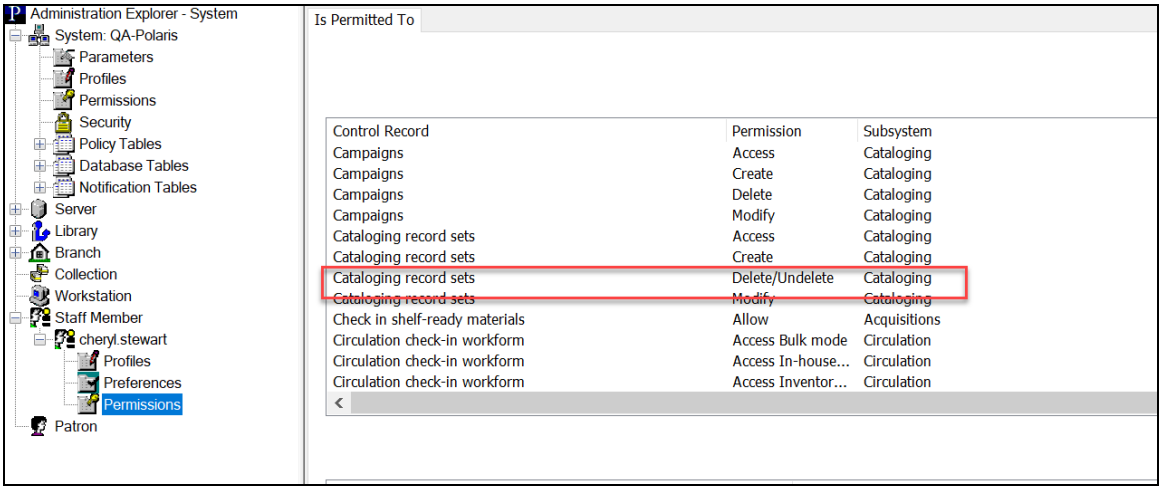
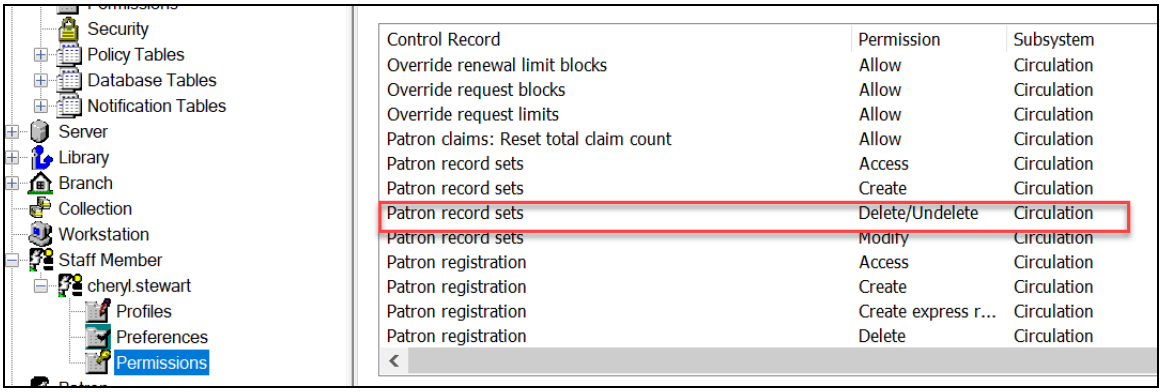
- Cataloging Record Sets: Delete permission now includes **/Undelete**



- Patron Record Sets: Delete permission now includes **/Undelete**



Record Set Status

To support the ability to undelete a record set, record sets now have a status that is stored as an additional column in the Record Sets table.

Record sets have a status of 1 = **Final** or 4 = **Deleted**.

Record Set Undelete Transactions

To support the ability to track deleted or undeleted record sets, two new types of transactions are now available in the Transaction Logging database table:

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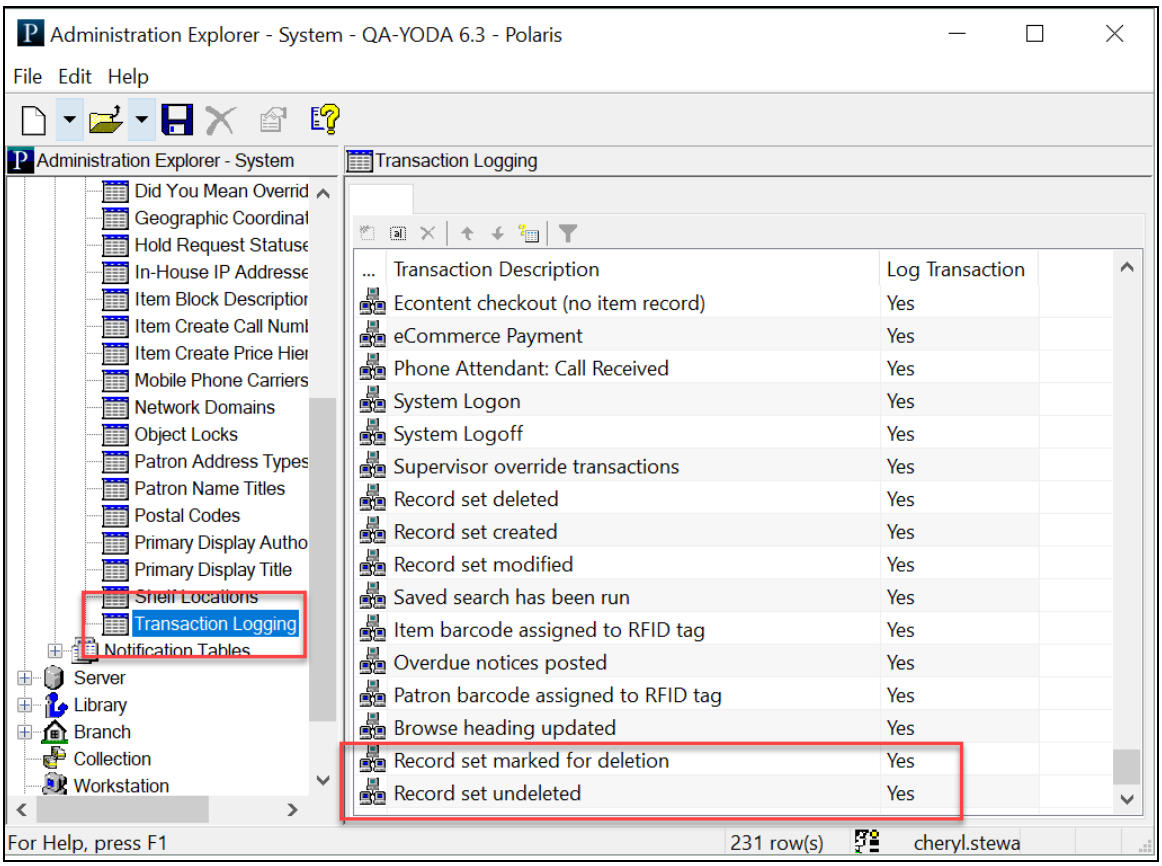
- Record set marked for deletion
- Record set undeleted



The following subtype data are included:

- 50 Type of Record
- 168 Record set RecordID
- 192 Record set owner
- 193 Record set name

Record Set Status in Record Set Header and Properties in Staff Client

Record set status is now in the Record Set Header on Record Set Workforms for Authority, Bibliographic, Item, and Patron record sets. Record sets can have a status of Final or Deleted.

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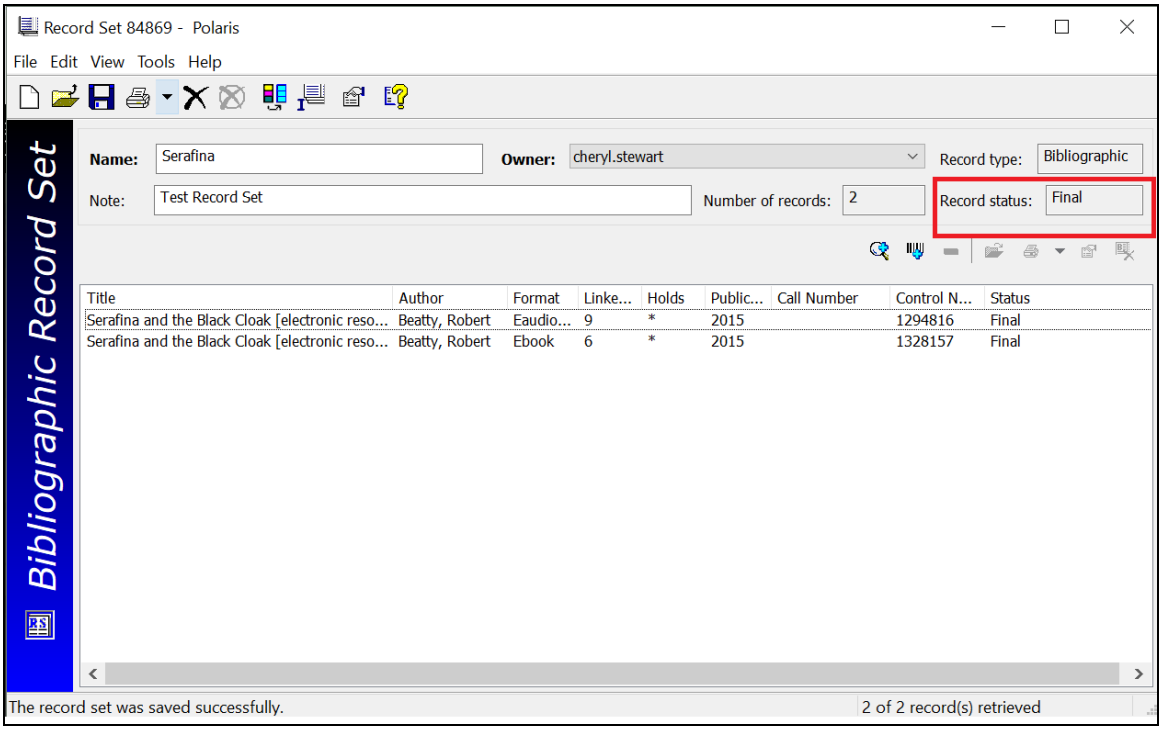

Record set status is also now in Record Set Properties.

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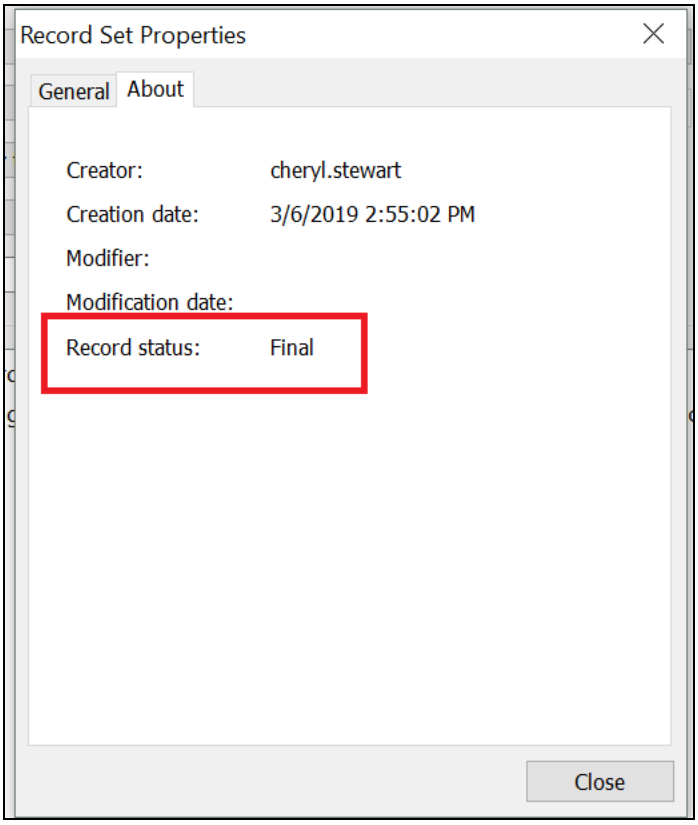

Undelete Menu Option and Icon for Record Sets

An Undelete menu option and icon are now available for all four record set types: Patron, Item, Bibliographic, and Authority.

The Undelete Menu option is on the File menu directly below the Delete option. The keyboard control for this option is **Ctrl+ U**.

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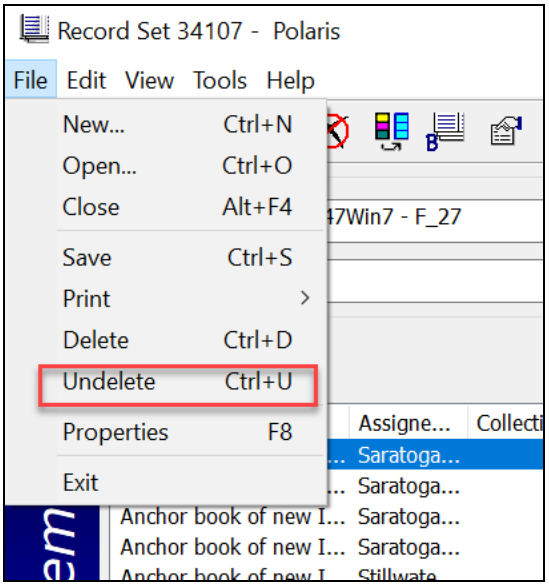
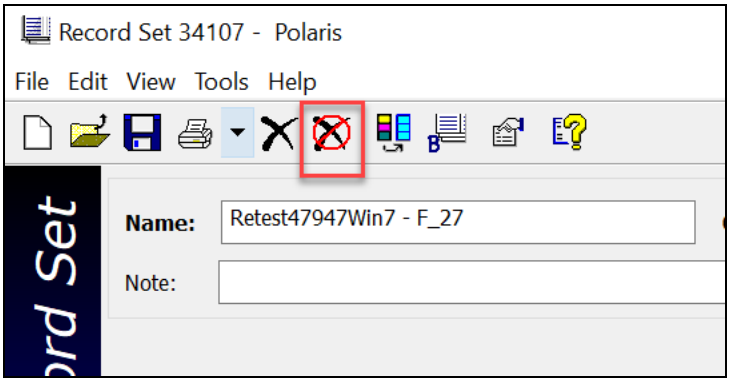


The Undelete icon is to the right of the Delete icon on the Record Set Workform.



The Undelete option is only enabled if the record set's status is Deleted.

Find Tool Updated for Deleted Record Sets

The Find Tool in the Staff Client has been updated so that deleted record sets are excluded from search results unless you search by Record Status or Record Set ID.

Record Status has been added to both the Cataloging Record Sets and the Patron Services Record Sets Find Tools as access points for searches by Record Status:

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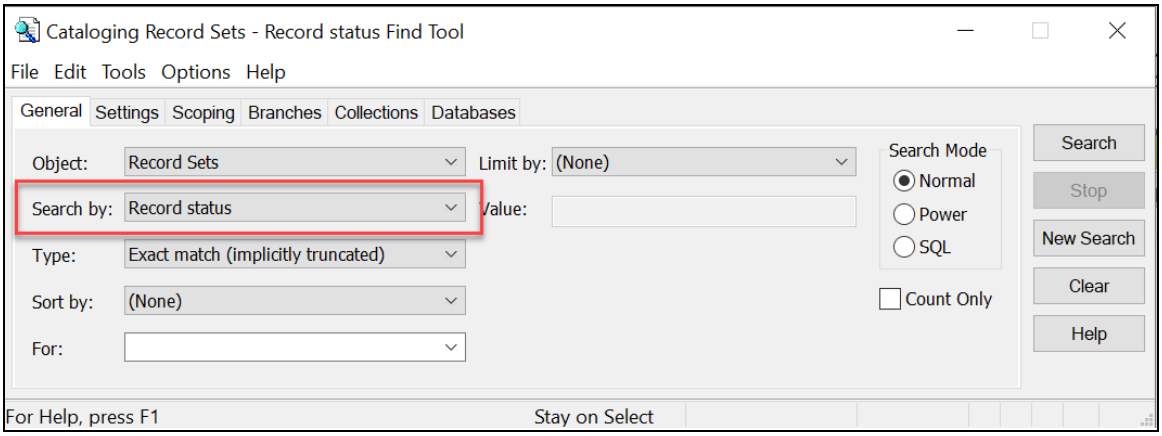

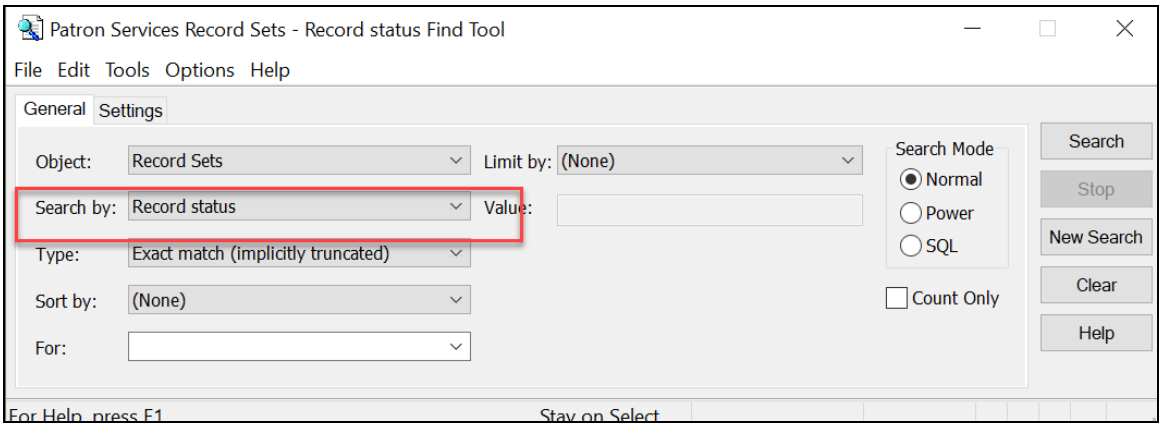

The following access points in the Find Tool have been updated to exclude record sets with the status of Deleted from these search results:

- Creation Date
- Name
- Owner

Record Set Status in Find Tool Search Results

Record set status is now available in data returned in the Find Tool search results.

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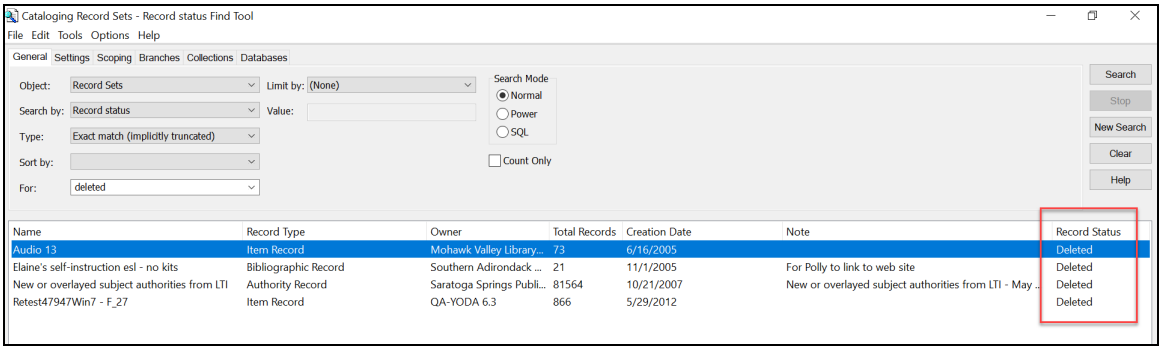
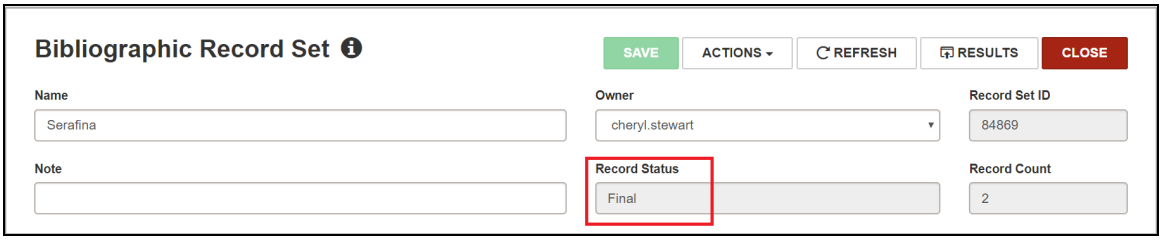


Record Set Status in Record Set Header and Info Properties in Leap

Record set status is now in the Record Set Header on Record Set Workforms for Authority, Bibliographic, Item, and Patron record sets. Record sets can have a status of Final or Deleted.



Record set status is also now in Record Set Properties.

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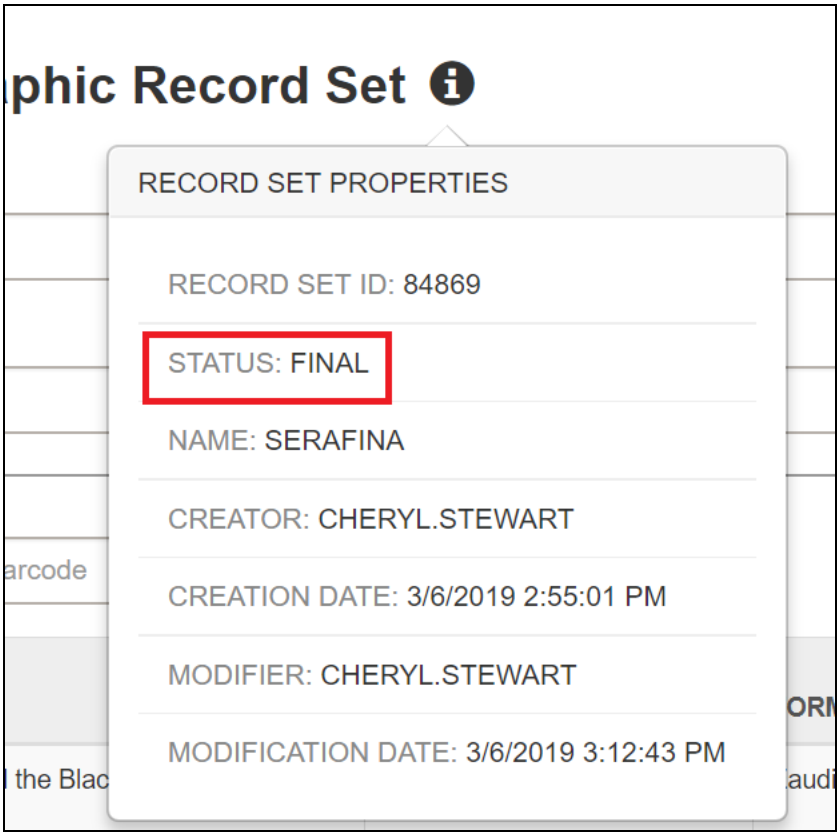
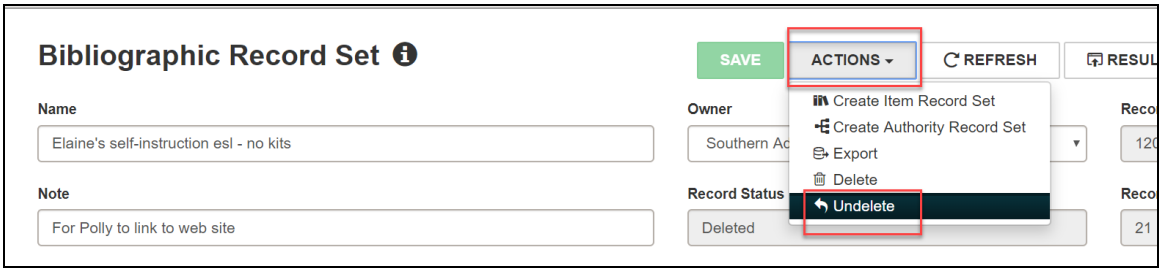


Undelete Menu Option for Record Sets in Leap

An Undelete menu option is now in the header level **ACTIONS** button on all four record set types: Patron, Item, Bibliographic, and Authority.

The Undelete option is only enabled if the record set's status is Deleted.



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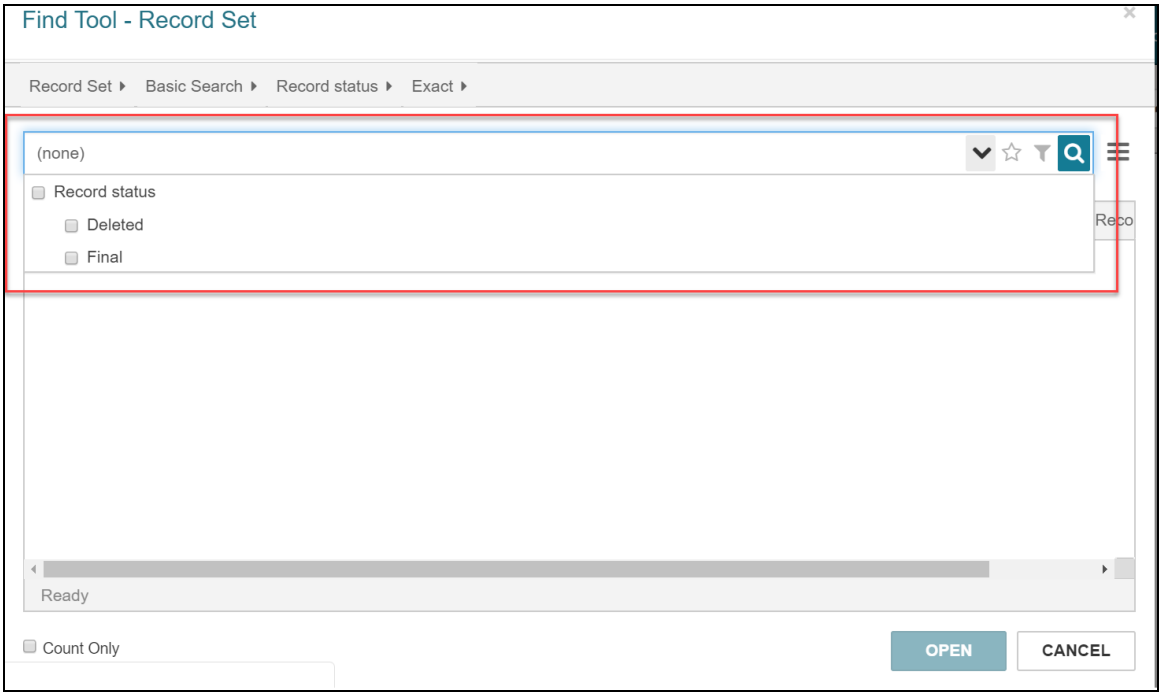
Find Tool Updated for Deleted Record Sets in Leap

The Find Tool in Leap has been updated so that deleted record sets are excluded from search results unless you search by Record Status or Record Set ID.

Record Status has been added to the Find Tool as an access point for searches by Record Status:



The following access points in the Find Tool have been updated to exclude record sets with the status of Deleted from these search results:

- Creation Date
- Name
- Owner
- Type

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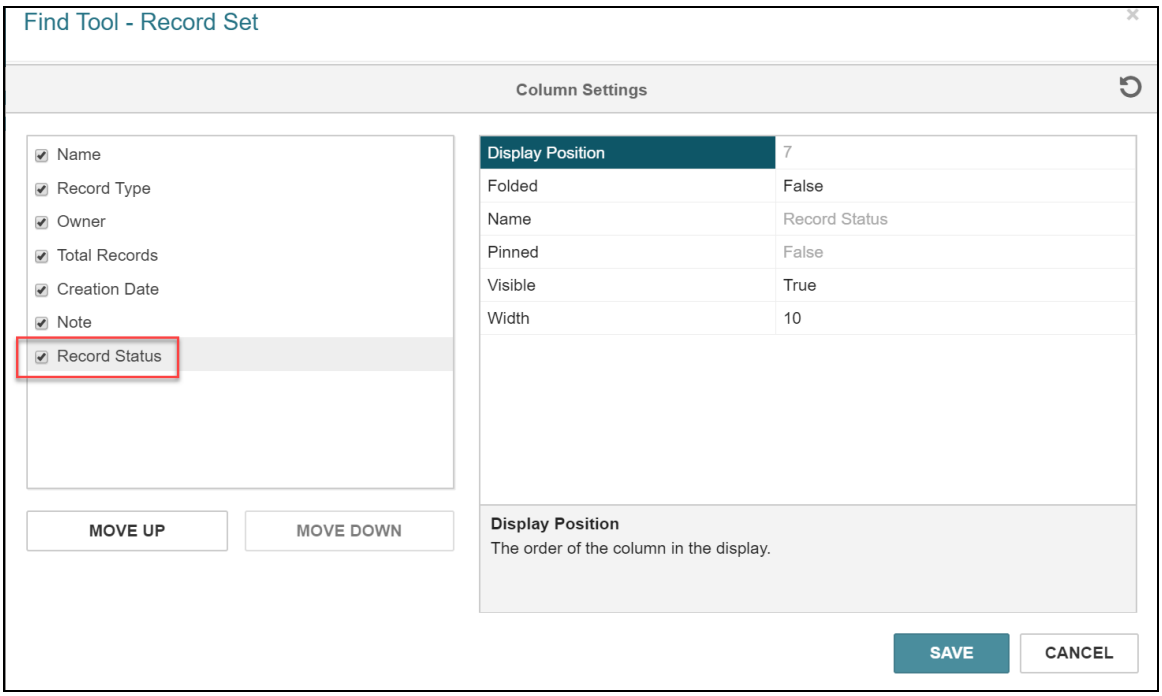
Record Set Status in Find Tool Search Results in Leap

Record set status is now available in data returned in the Find Tool search results in Leap.

A column called Record Status is now listed under Column Settings in the Find Tool. This column is unselected by default.



Once selected, the column can be pinned and manipulated like all the other columns under Column Settings.

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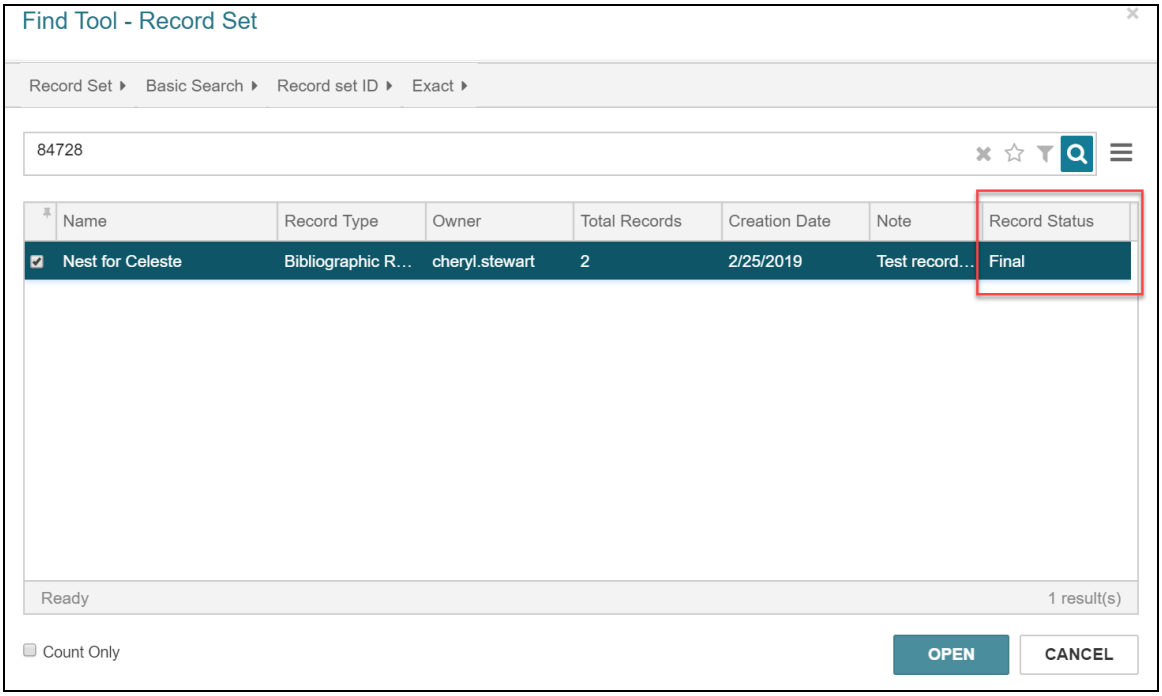

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Call Number and Volume on Hold and Almost Overdue Notices

The item call number and volume are now included on Hold Notices and Almost Overdue Reminders.

Both are added to each of the following notices after the Format column:

- Holds - Full-page mailer
- Holds - Half-page mailer
- Holds - Half-page mailer - dot matrix
- Holds - Z-fold mailer
- Holds - Z-fold oversize
- Email - Almost Overdue
- Email - Almost Overdue Other Items
- Email - Reminder Almost Overdue
- Email - Request

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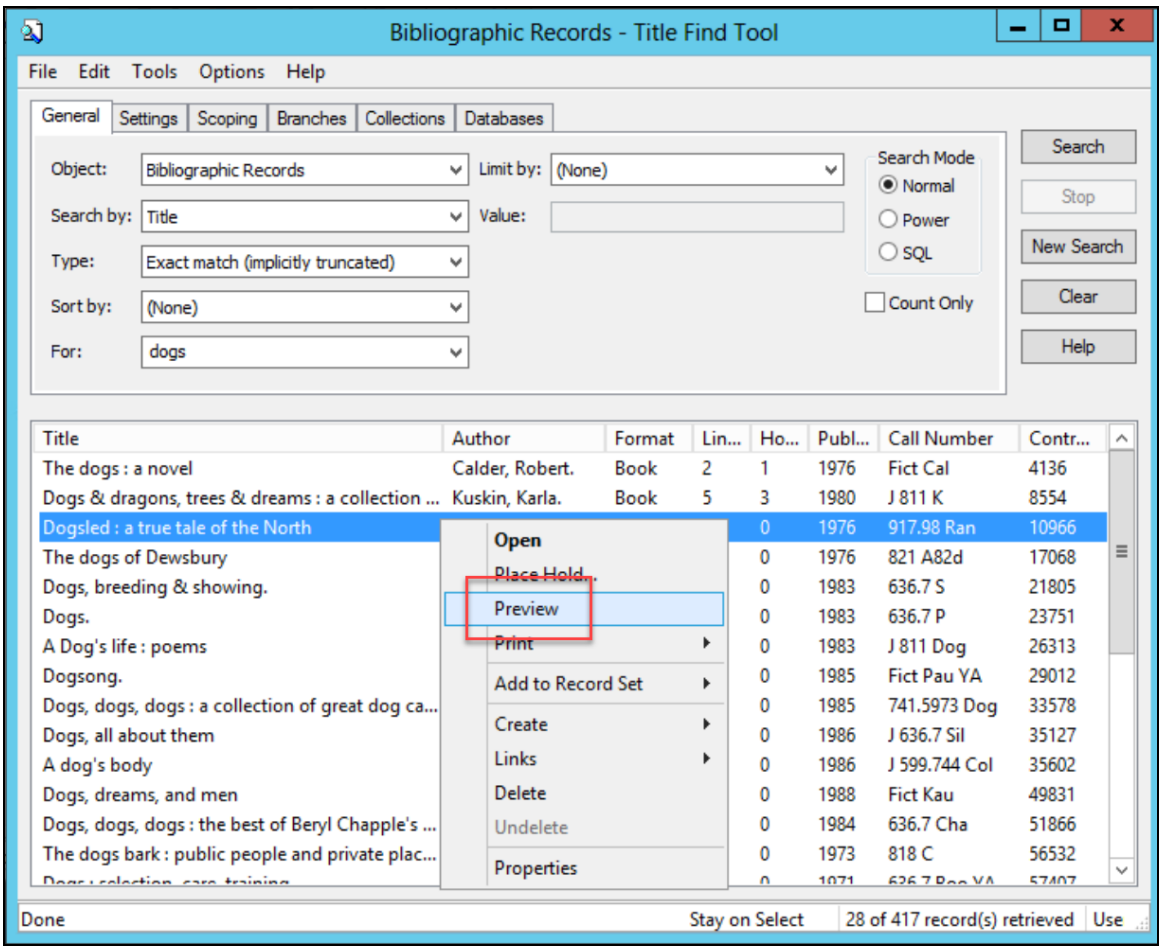
Circ Stats Added to Item View

The **(YTD) circulation (circ) count** and **lifetime circ count** stats are now displayed in the Item Level view in the Bibliographic Records Preview window.

To view these stats:

1. From the Bibliographic Records Find Tool, right-click on a bibliographic record, and select **Preview**.



2. The Preview window opens. The (YTD) circulation (circ) count and lifetime circ

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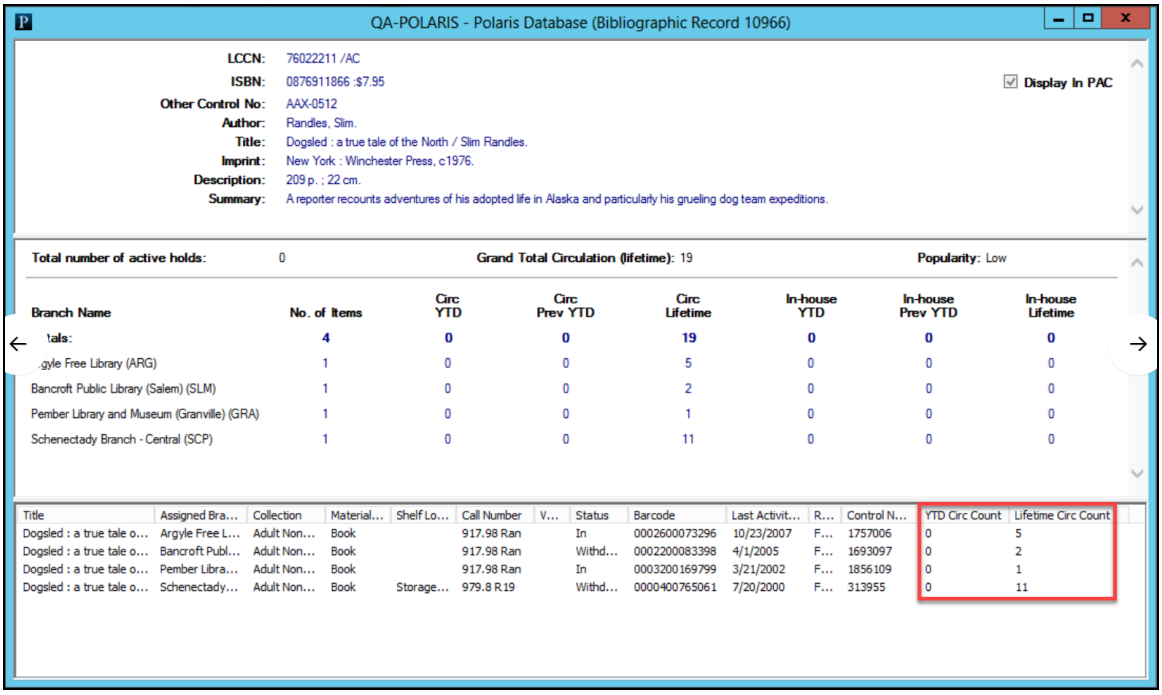
count stats are displayed in the Item Level view.



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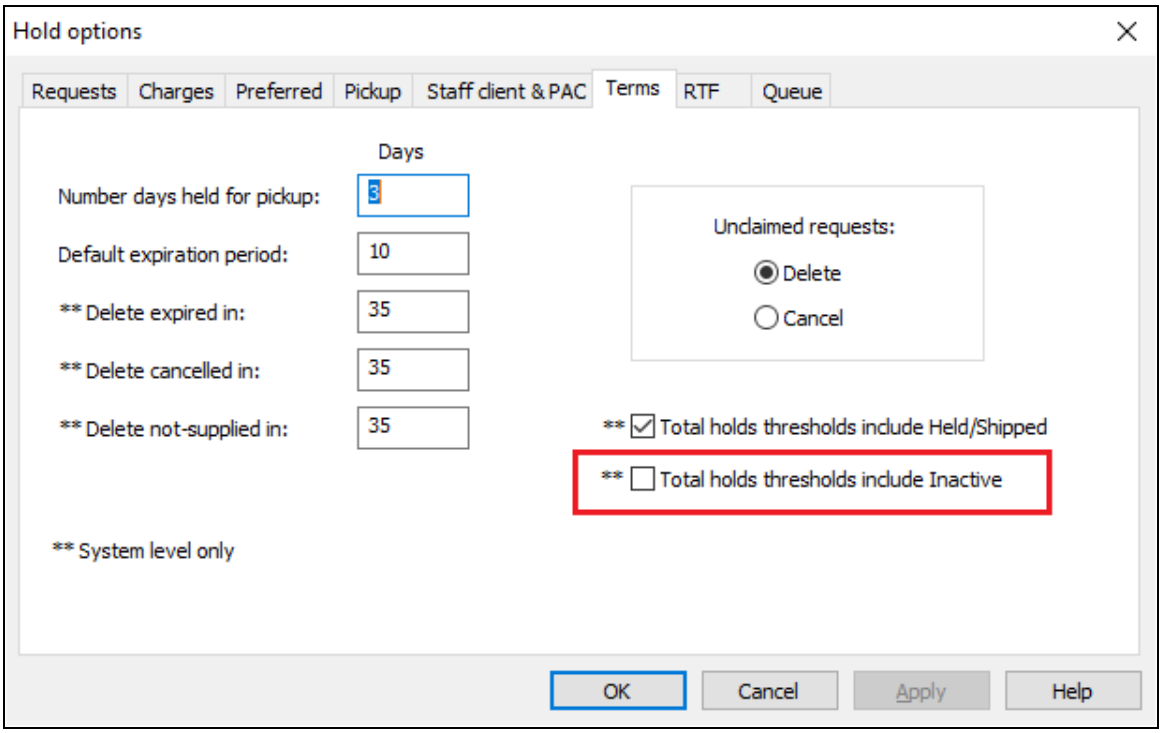
New Total Holds Thresholds Include Inactive Setting

In previous versions of Polaris, inactive hold requests counted toward a patron's total number of allowed hold requests. As of Polaris version 6.2, a new system-level **Total holds thresholds include Inactive** setting lets you specify whether inactive hold requests count toward a patron's total holds limit.

The new system-level **Total holds thresholds include Inactive** setting is now available on the **Terms** tab of the **Hold options** window. This window is accessible in the Administration Explorer by selecting **Parameters** > **Request**.



When the **Total holds thresholds include Inactive** check box is:

- Selected - Inactive hold requests count toward a patron's total holds limit. This is the default setting.
- Not selected - Inactive hold requests do not count toward a patron's total holds limit.

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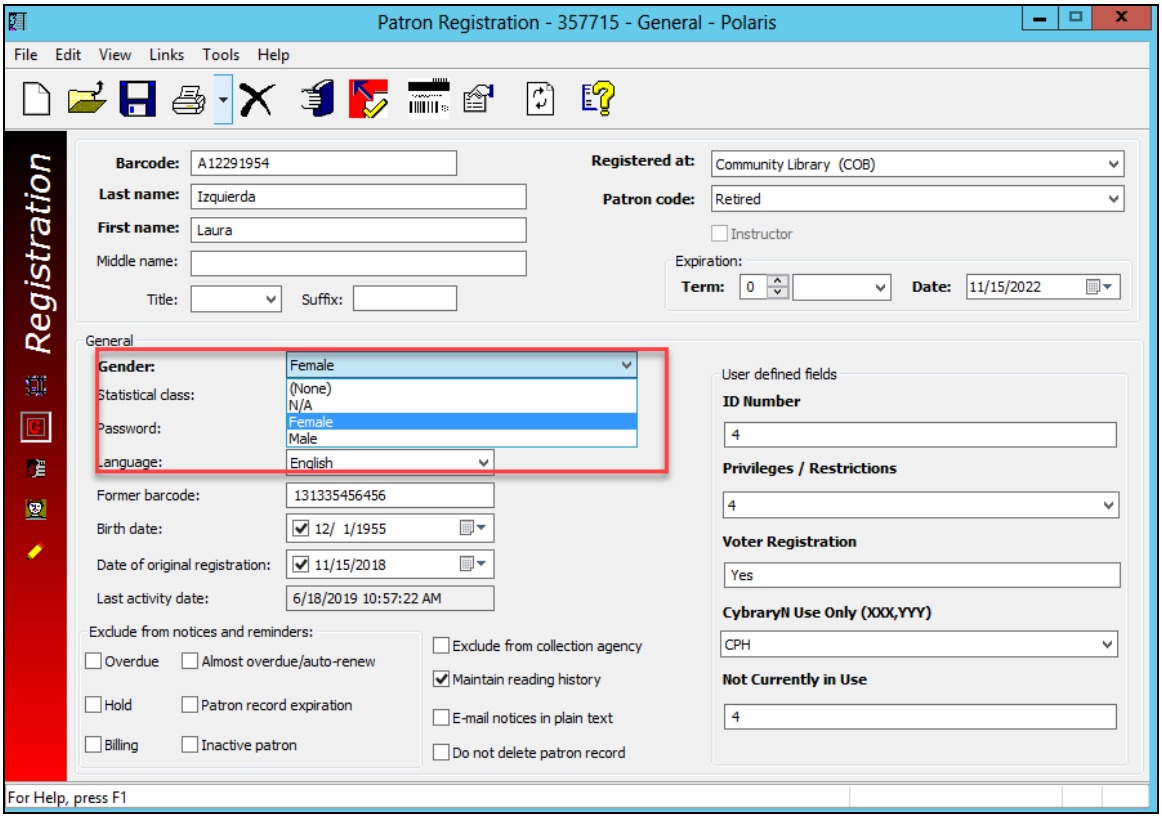
New Patron Gender Options

New patron gender options now allow flexibility in how you track or don't track gender.

Gender Drop Down Menus

Patron registration workforms in the Staff Client, Leap, PowerPAC, and MobilePAC now include Gender selection drop down menus.

All drop down menus start with a **(None)** option followed by a list of genders specified for the specific organization. The (None) option is selected by default unless a patron has already selected a gender. Selecting (None) sets the patron's gender to "null" in the database as if they have opted out of a gender selection.



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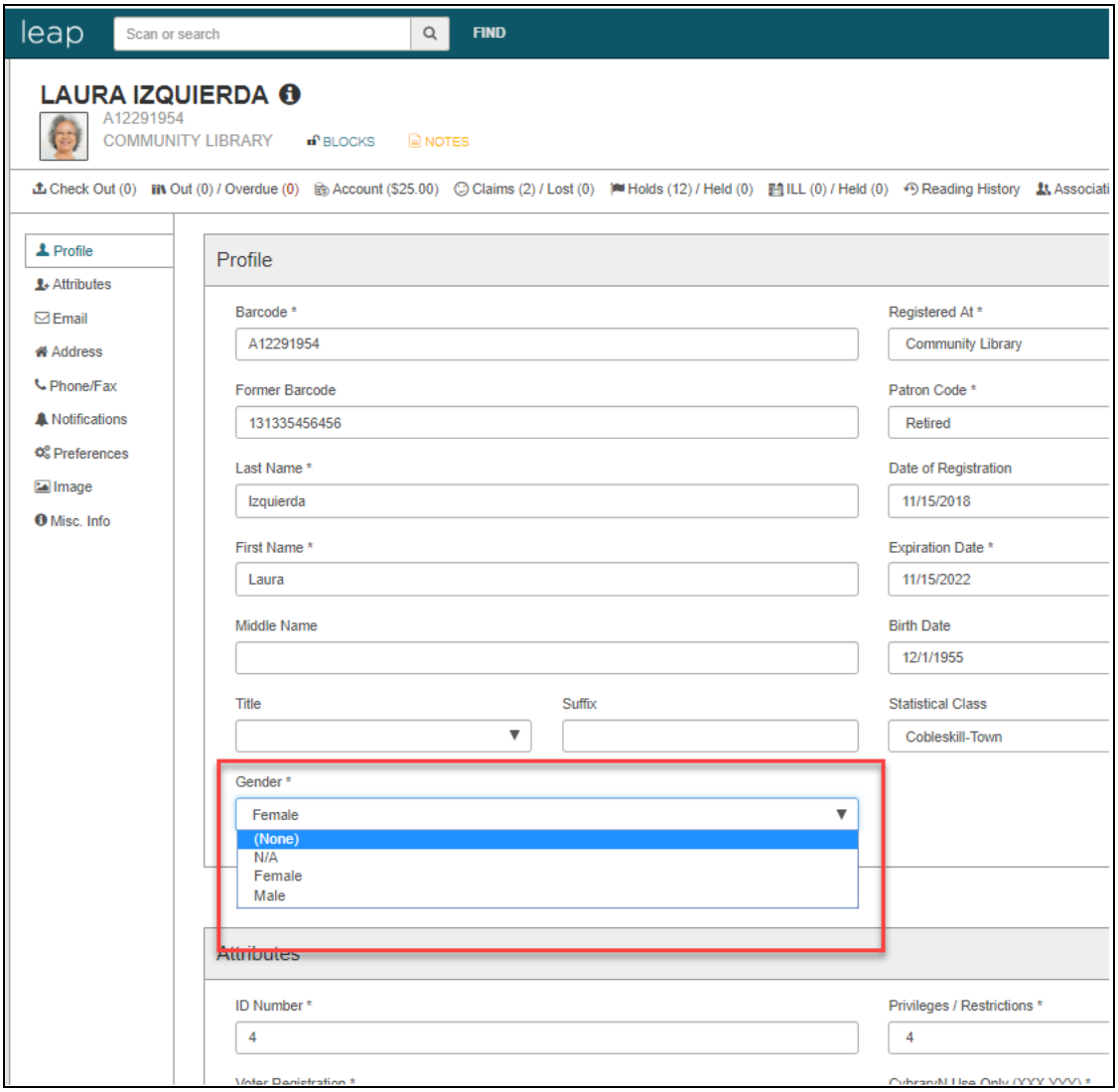

Manage Genders

A Genders Database table is available at the system, library, and branch levels. Changes to the table modifies it for all users. Select **Database Tables** > **Genders**.

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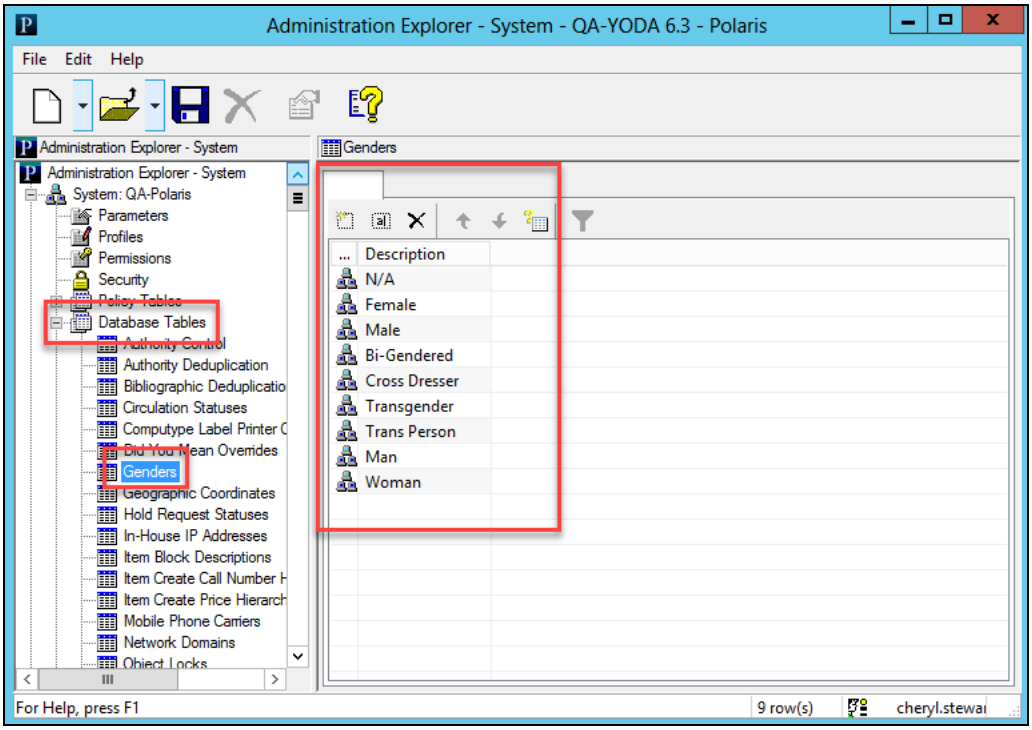
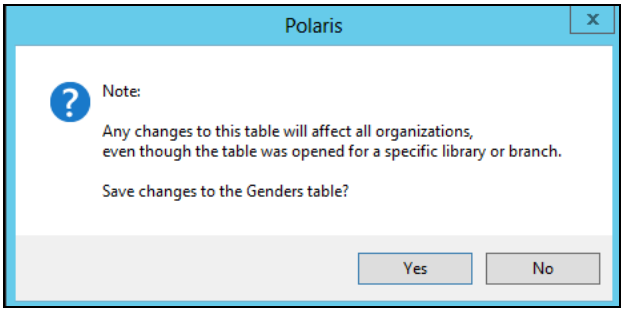
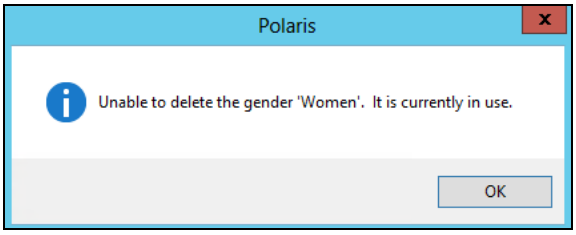


Entries can be added/modified/deleted.

- A message is presented for changes that affect all libraries.



- Database integrity is enforced on the deletion, not allowing a user to delete a row that is in use by a patron with the following message presented.



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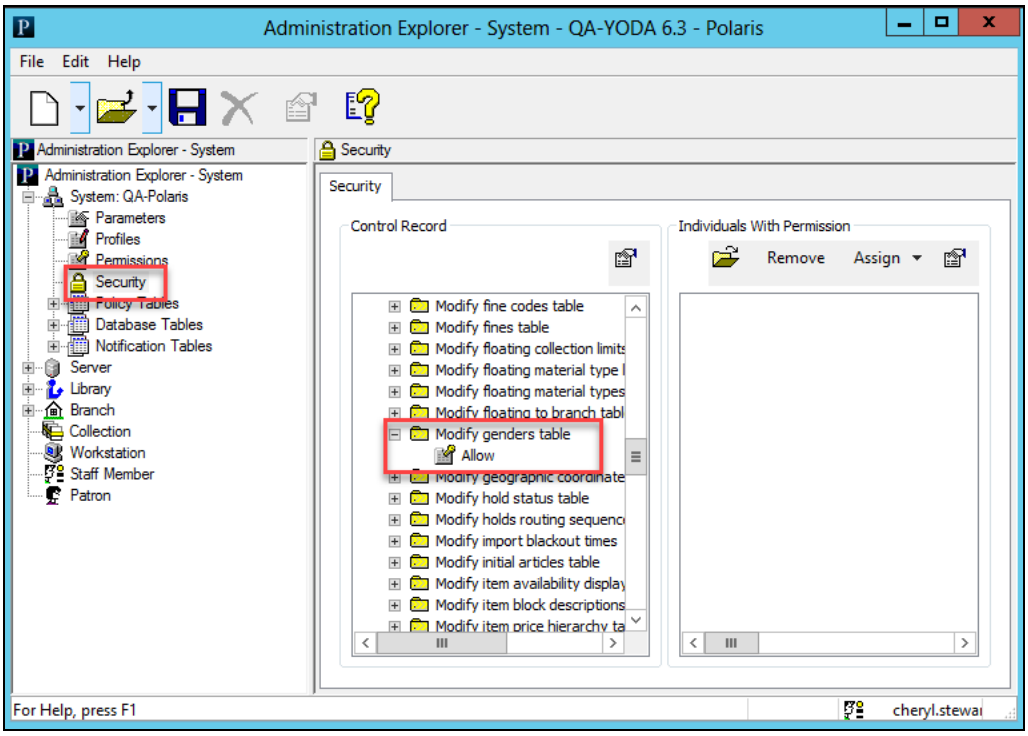
Editing the Genders Table requires a new permission. Select **Security** > **System Administration** > **Modify genders table: Allow**. This permission is granted at the Staff Member, Workstation, and Permission Group levels. It is not granted by default.



You can also manage gender displays. These can be managed at the system, library, and branch levels. Select **Parameters** > **Patron Services** > **Patron Registration Filter genders**.

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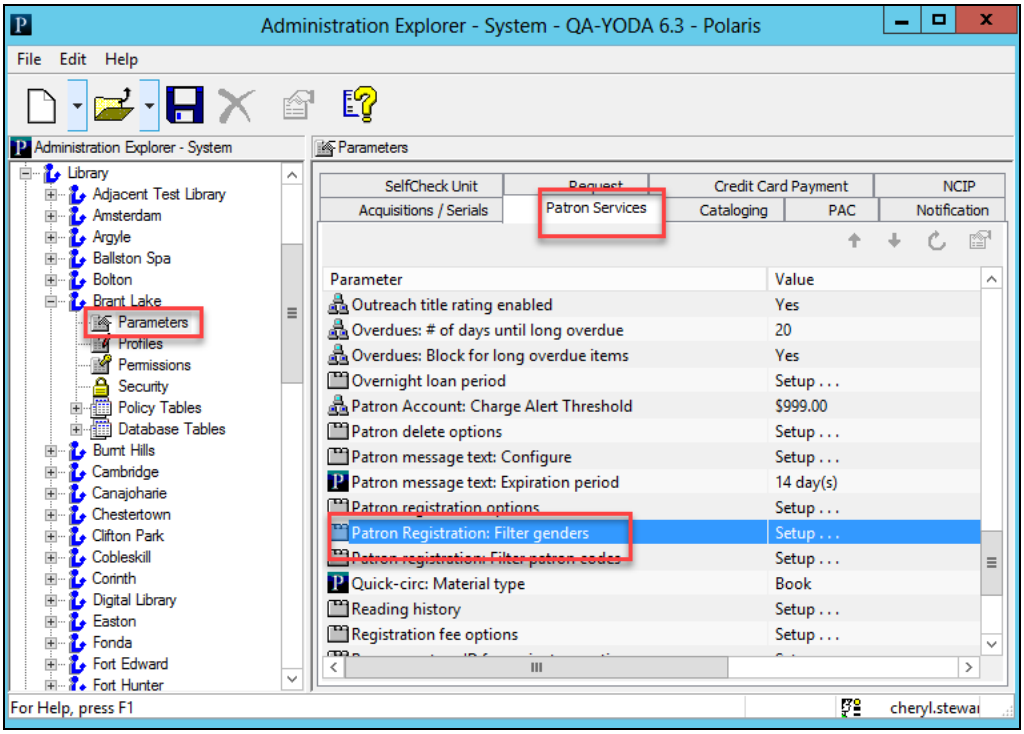
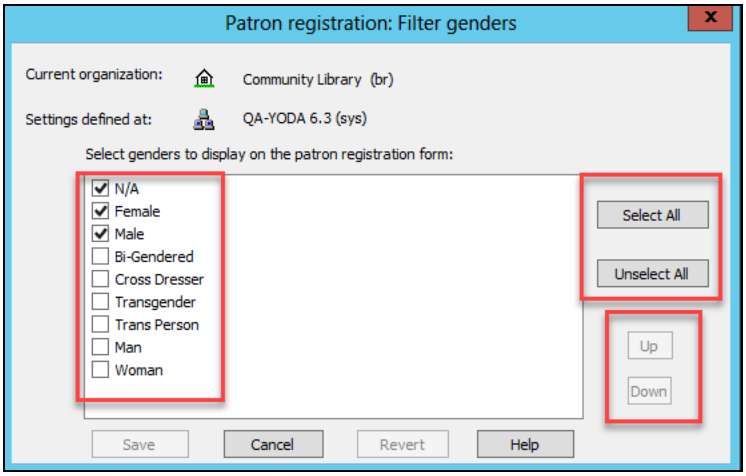


You can select the gender options to display and change the order in which they are displayed.



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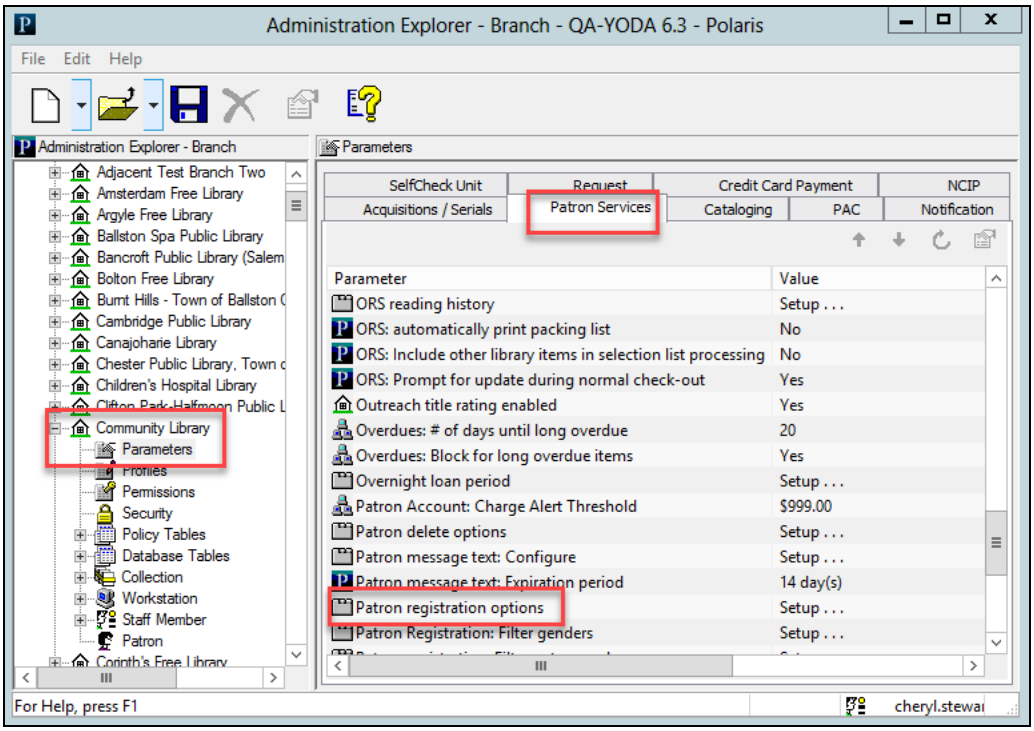
Gender Suppression

You now have the ability to suppress the Gender question when registering and opening patron records. When suppressed, the Gender question will not be visible on patron workforms, and gender is not tracked. Suppression is based on the patron's registered branch.

To suppress Gender tracking in the Staff Client and Leap, select **Branch** > **Parameters** > **Patron Services** > **Patron registration options**.



Select **Display Options**. When Gender is checked, it is suppressed.

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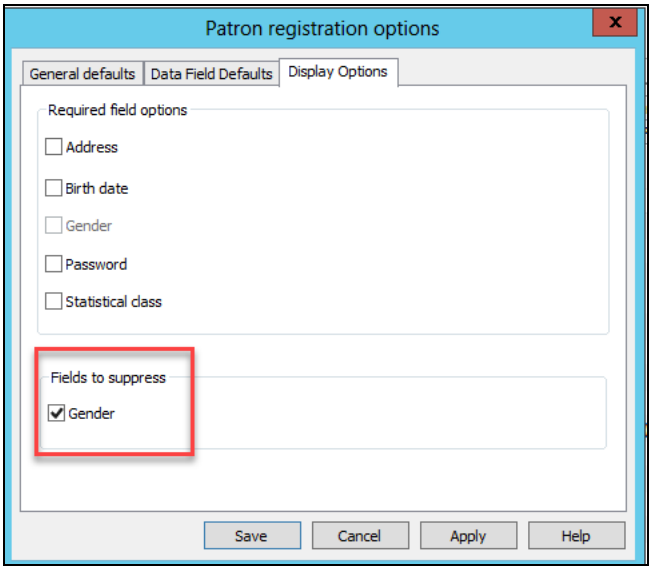
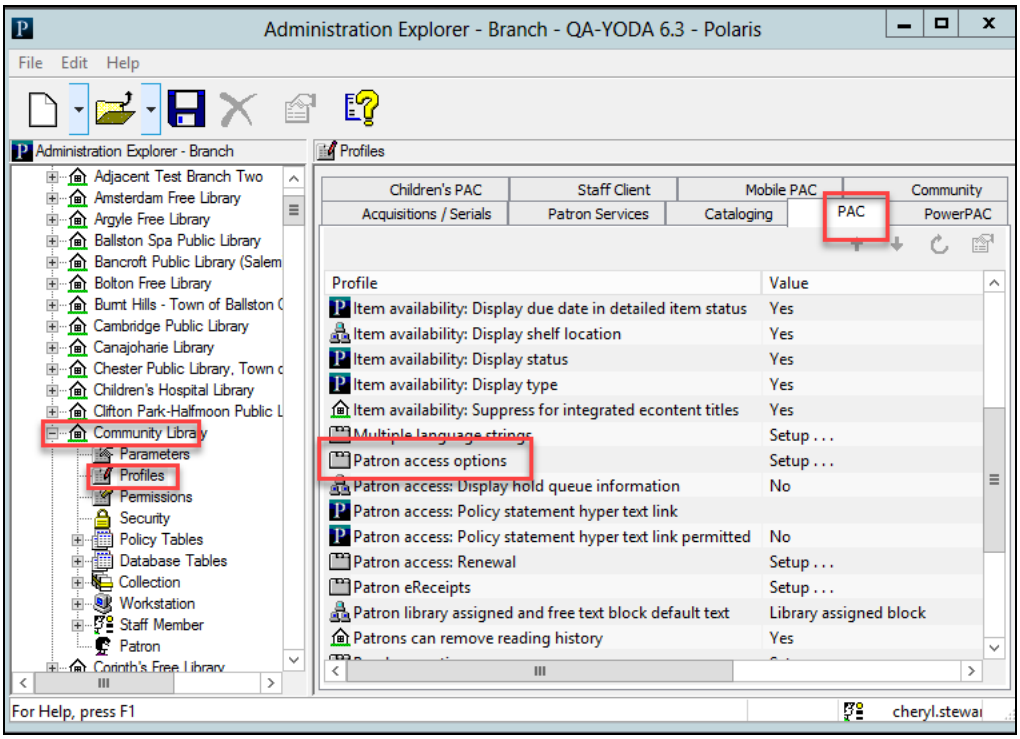


To suppress Gender in Self-registration, select **Branch** > **Profiles** > **PAC** > **Patron access options**.



Select **Self-registration**. Gender is suppressed when **Suppress gender selection** is checked.

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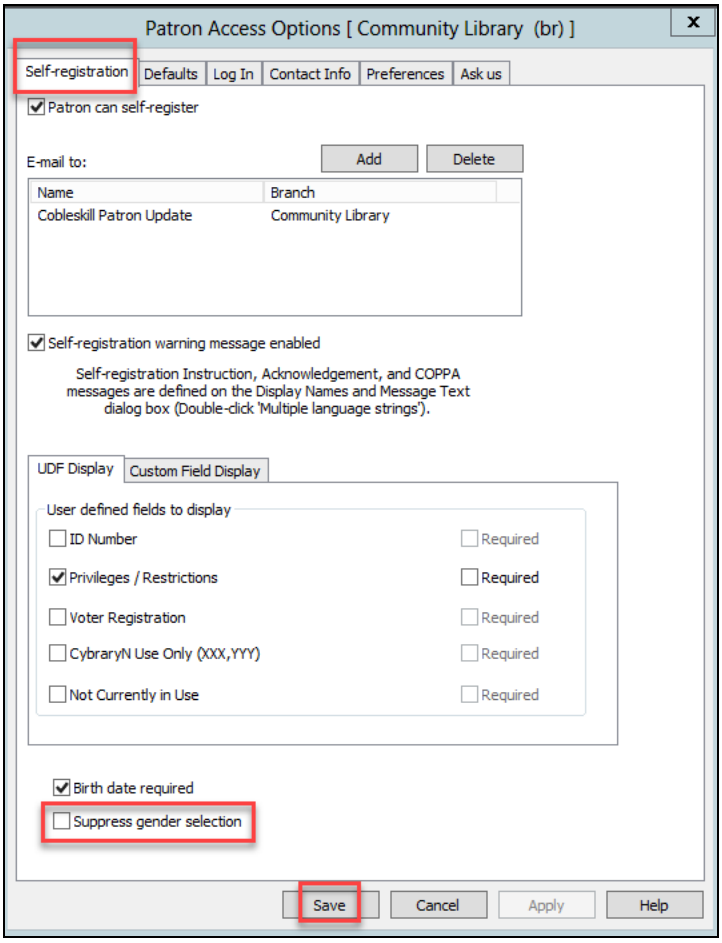

Gender No Longer Copied During Copy Patron Operation

Copying a patron record will not copy over the gender but should use the same suppression rules unless/until the patron's registered branch changes.

Important Notes About Staff Client Offline Registration and Automated Offline Upload

- While uploading offline transactions, specifically offline patron registration, using Bookmobile or Automated Offline, the upload process will try to convert the existing single character gender (N, F, M) to the new GenderID values.

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- The new GenderID mappings are allowed to be deleted, but if the library plans to do so, then they MUST keep them until ALL offline transaction files created on releases older than 6.3 are uploaded.
- Once the library starts doing offline circulation on a 6.3 or newer staff client, they can remove the default gender entries if they choose to do so, but they will not be able to maintain a gender when uploading transactions from a previous release.

Important Notes about INN-Reach

The gender in the virtual patron record is set from the gender in the institutional patron template. If the registered branch of the virtual patron is not set to display the gender in the template, the gender of the virtual patron will be set to (None). The INN-Reach gender applied to the institutional patron template should be a gender that is available at all branches.

Important Notes about SimplyReports

Any saved reports that used the Gender field will now be broken. To fix these:

1. Open the report for editing.
2. Verify your Gender selection is still valid.
3. Save the report.

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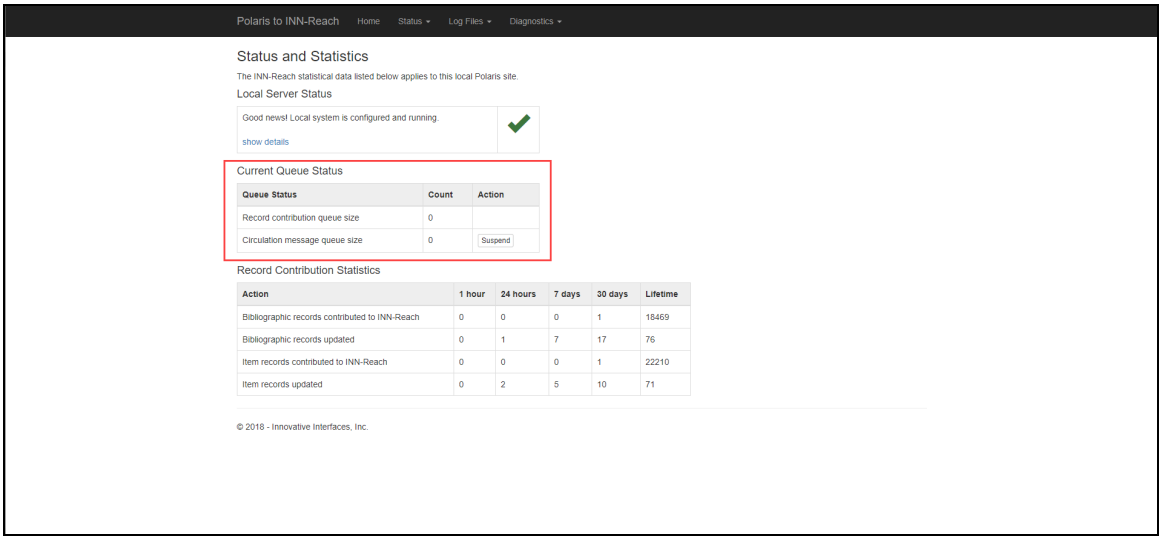
Suspend and Resume Outgoing Circulation API Messages for INN-Reach

Suspend and Resume buttons were added to the Current Queue Status section of the Status and Statistics page in Polaris INN-Reach Administration. These buttons provide the ability to suspend and resume outgoing circulation API messages. You must have the INN-Reach Modify user permission to use this feature. Otherwise, the Action column and the buttons do not appear.

When you select the Suspend button, the Resume button appears.



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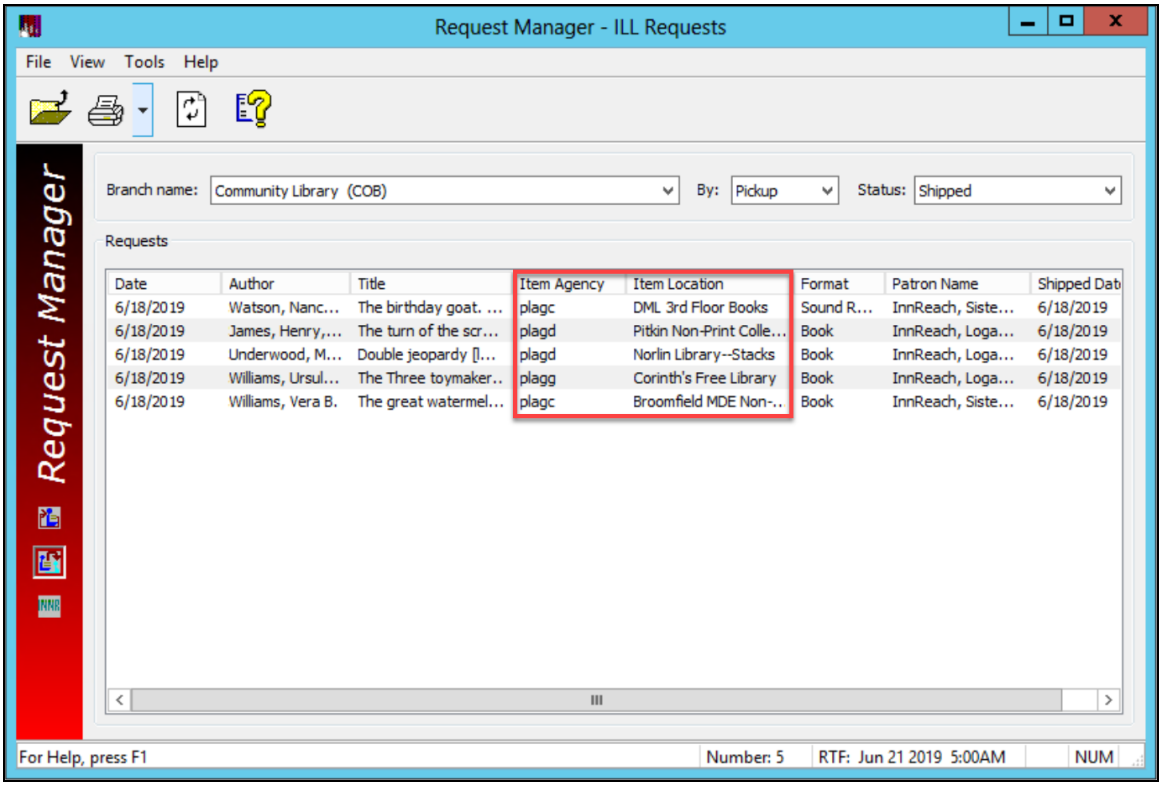
Additional Item Columns Added to Request Manager

You can now view Item Agency and Item Location information directly in the Request Manager. This ability is available in both the Staff Client and Leap. This information was previously only visible by opening each request and viewing the Notes field. The function of the Notes field remains unchanged; information will still display in the Notes field.

Customers must be licensed for INN-Reach in order to view the new columns. Customers who don't use INN-Reach will not see the additional columns.

Staff Client View



Leap View

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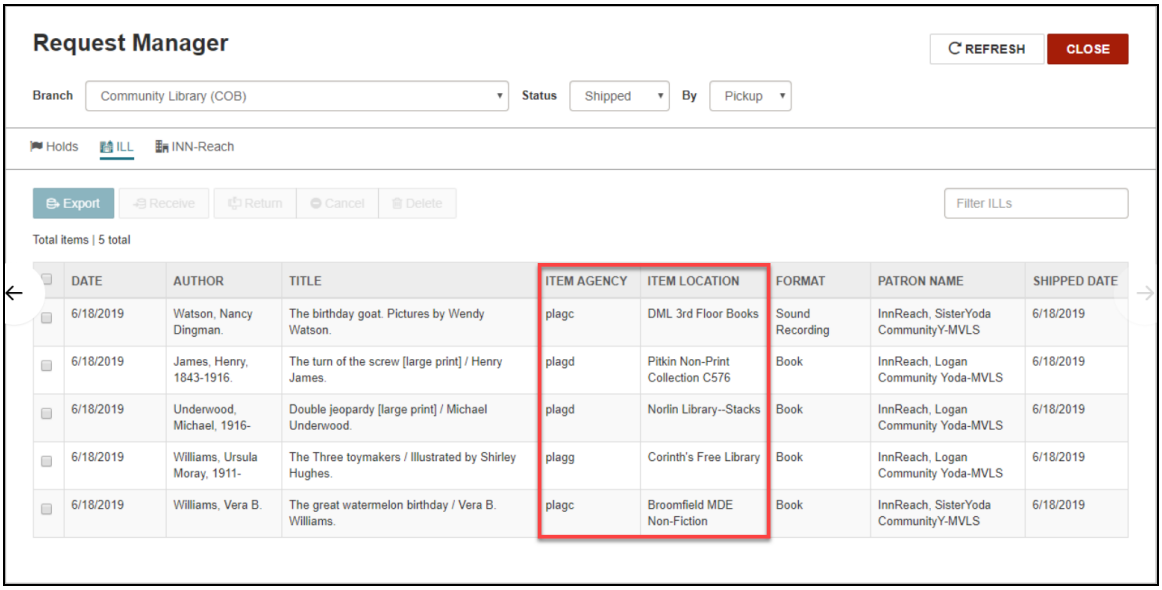

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Support for JetPay E-commerce in Polaris PowerPAC

You can now use the JetPay gateway to accept credit card payments from Polaris PowerPAC. JetPay is a hosted method of accepting credit card payments from PowerPAC. You can enable the use of JetPay at the system, library, or branch level.

When you use JetPay for payments, JetPay handles much of the responsibility of Payment Card Industry Data Security Standard (PCI DSS) compliance for your library. No credit card information is stored in the Polaris database when a payment is made via JetPay.

> **Note:**
> The use of JetPay for payments from the staff client, Polaris ExpressCheck, or Mobile PAC is not supported.

To enable JetPay e-commerce, you must:

1. Set up a JetPay account
2. Set up JetPay processing in the Administration Explorer

Set Up a JetPay Account

To enable the use of JetPay for accepting credit card payments from Polaris PowerPAC, contact JetPay to establish an account for your library.

When establishing your library's JetPay account, make a note of the following two pieces of information:

- Client key
- Web key

You will need this information to set up JetPay processing in the Administration Explorer.

Set Up JetPay Processing in the Administration Explorer

To configure Polaris to use JetPay for processing credit card payments from PowerPAC:

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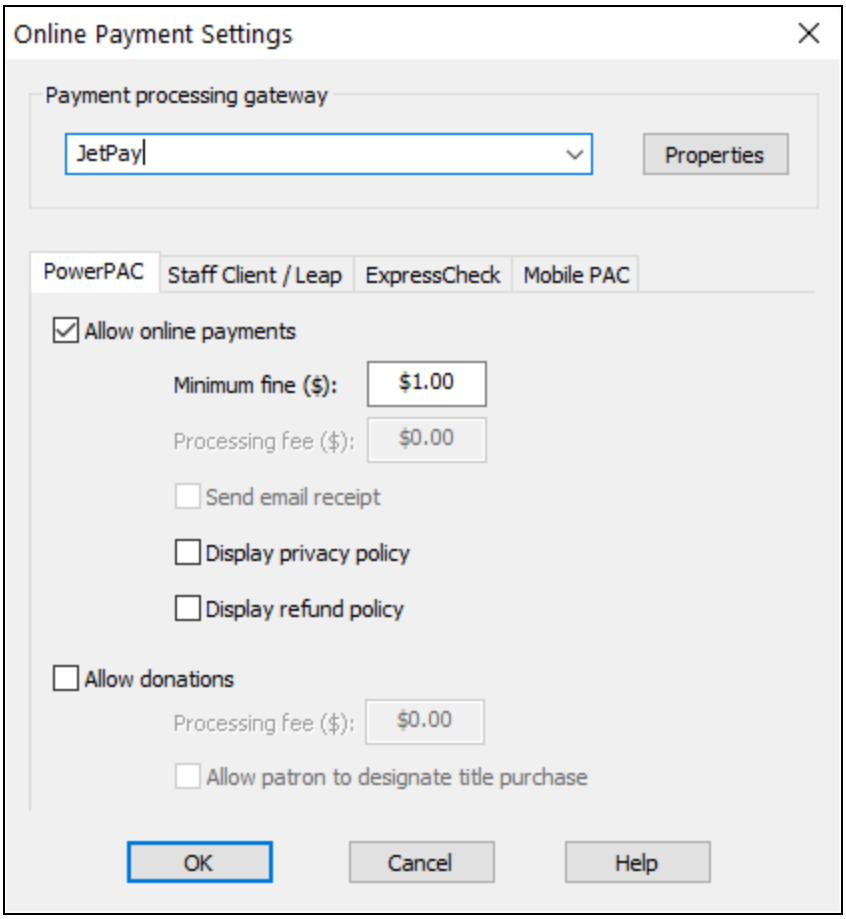
1. In the Administration Explorer tree view, navigate to the organization for which you want to enable JetPay processing, and click **Parameters** > **Credit Card Payment**.
2. Double-click **Online Payments: Configure**.

   The Online Payments Settings dialog box opens.



3. In the **Payment processing gateway** list, select **JetPay**.
4. Click **Properties**.

   The JetPay dialog box appears.

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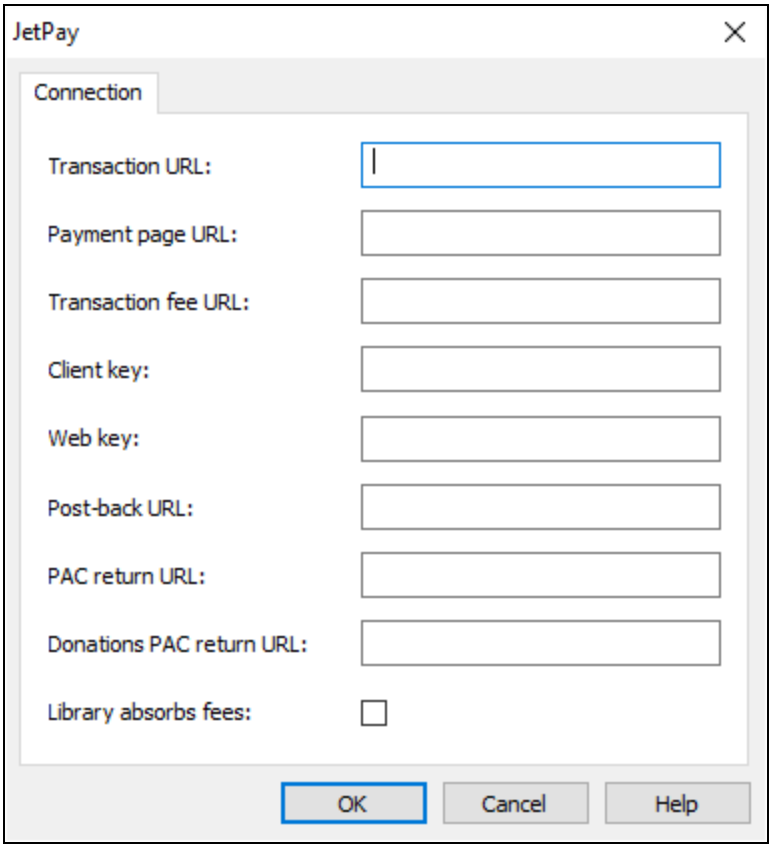

5. Enter the following connection information:
    a. Transaction URL - Enter the following URL:

       https://magic.collectorsolutions.com/magic-api/api/transaction/redirect
    b. Payment page URL - Enter the following URL:

       https://magic.collectorsolutions.com/magic-ui/PaymentRedirect
    c. Transaction fee URL - Enter the following URL:

       https://magic.collectorsolutions.com/magic-api/api/fee
    d. Client key - Enter the client key provided when your library set up a JetPay account.
    e. Web key - Enter the web key provided when your library set up a JetPay account.
    f. Post-back URL - Enter the post-back URL for your site, using the format below:

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https://<www.mylibrary.org/polaris>/payments/PostbackJetPay.aspx

> **Note:**
> Replace <www.mylibrary.org/polaris> with your Polaris PowerPAC URL.

This field accepts a maximum of 250 alphanumeric characters.

g. PAC return URL - Enter the URL that will be displayed when the user clicks the return link on the JetPay final payment transaction page. To use your library's PowerPAC patron account Fine & Fees page, use the format below:

   https://<www.mylibrary.org>/polaris/patronaccount/finesfees.aspx

   > **Note:**
   > Replace <www.mylibrary.org/polaris> with your Polaris PowerPAC URL.

   This field accepts a maximum of 250 alphanumeric characters.

h. Donations PAC return URL - If you plan to accept donations, enter the URL of the Polaris PowerPAC page that will be displayed when the user clicks the return link on the JetPay final payment transaction page. This field is required. If you do not plan to accept donations, simply enter your PAC Return URL. This field accepts a maximum of 250 alphanumeric characters.

i. Library absorbs fees - Select this check box if you want the library to absorb the JetPay credit card processing fee. This check box is a shadow setting of how your account is set up in JetPay to display warnings and fees to the patron and it must match the corresponding setting in JetPay. If this check box is not selected, the processing fee is billed to the patron.

j. Click **OK**.

6. Configure the following settings on the **PowerPAC** tab of the Online Payments Settings dialog box:

   a. Allow online payments - Select this check box to enable the use of JetPay for credit card payment processing.

      > **Note:**
      > In PowerPAC, patrons pay fines on the Fines and Fees page of the patron account. Be sure the PowerPAC profile **Navigation:**

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> **Fines & fees** is set to **Yes** for the organization to allow patrons to access this page. For more information, see Enable patron account access - PowerPAC.

b. Minimum fine - Enter the minimum fine amount that will be accepted via credit card payment. The default value for this setting is $1.00.

> **Note:**
> If the amount a patron owes is less than the **Minimum fine** value, the **Pay fines** link does not appear in the patron's account in Polaris PowerPAC.

c. Processing fee -This is controlled completely by JetPay and should be set up there. To charge a processing fee for fine payments, enter an amount in the **Processing fee** box. The maximum value for this setting is $20.00. The default value is $0.00.

d. Display privacy policy - To display a privacy policy link in Polaris PowerPAC, select **Display privacy policy**. For more information, see Privacy and Refund Policy Display Options.

e. Display refund policy - To display a refund policy link in Polaris PowerPAC, select **Display refund policy**. For more information, see Privacy and Refund Policy Display Options.

f. Allow donations - Select this check box to enable the use of credit card payments for donations.

g. Processing fee - This is controlled completely by JetPay and should be set up there. To charge a processing fee for donations, enter an amount in the **Processing fee** box for donation payments. The maximum value is $20.00. The default value is $0.00.

h. Allow patron to designate title purchase - Select this check box to allow the donor to direct a donation toward a title purchase in a specific subject area. When this option is selected, the donations page includes a field where the donor can specify a title purchase.

7. Click **OK** to save your settings.

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Display Improvements in Polaris PowerPAC

Item availability information in the PowerPAC user interface has been improved to reduce horizontal scrolling. This change makes it easier for users to navigate Polaris PowerPAC using mobile devices.

Tablets will display item availability information in a table format similar to that on a PC.

Phones will display item availability information in a list.

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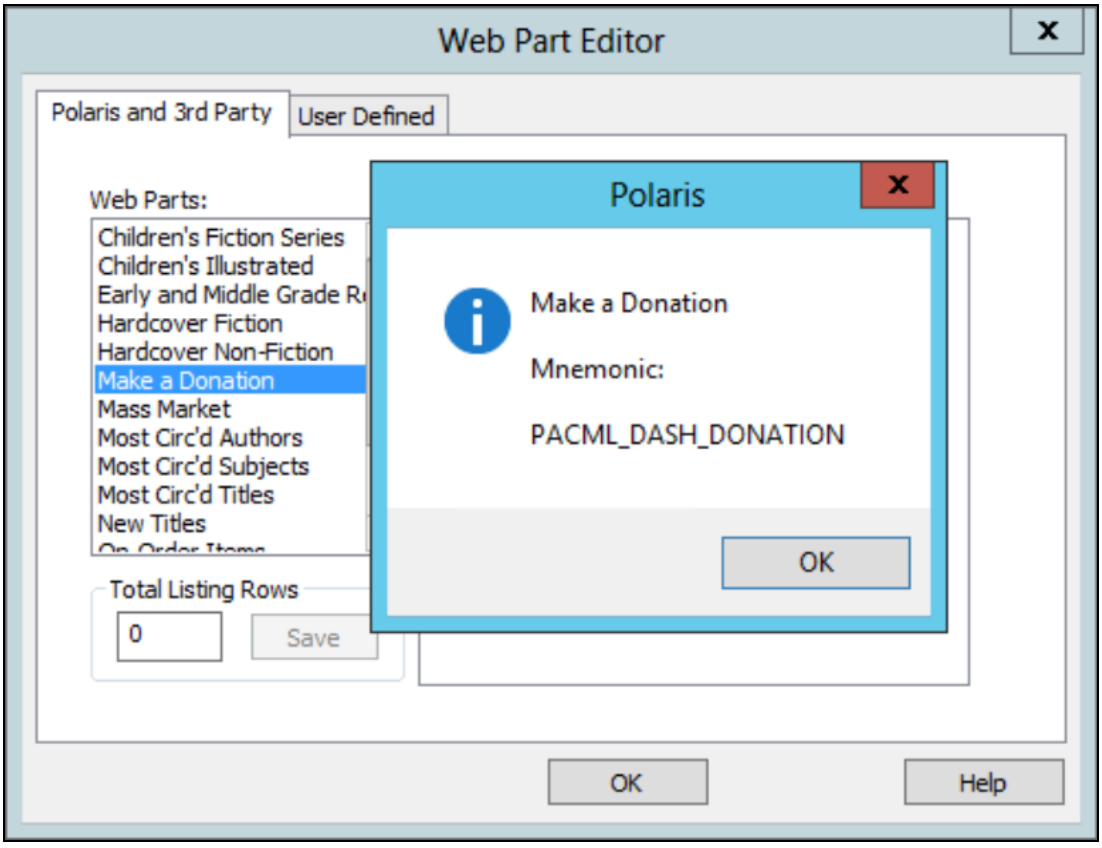
Multilingual Support for Dashboard Titles

If your library is licensed for additional languages in the PAC, you can now view dashboard labels in a language other than English, and the labels can be customized. Previously, when a different language was selected, the dashboard labels would continue to display in English. Labels can now appear in the language the user selects if the database contains the appropriate translation.

Two dashboard types can be configured: Polaris PowerPAC dashboards and customer-defined dashboards. The following sections describe how to customize each dashboard.

Customize the Polaris PowerPAC dashboard

Each of the Polaris-defined dashboards now have a system-assigned mnemonic that can be used to edit the dashboard's default title. You can view a dashboard's mnemonic in the properties box that opens when the dashboard label is double clicked.



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To change a mnemonic, edit the strings associated with that mnemonic in WebAdmin. The following table lists new mnemonics and associated values that can be used with multilingual support.

Mnemonic	Value
PACML_DASH_CHILDFICTIONSERIES	Children's Fiction Series
PACML_DASH_CHILDILLUSTRATED	Children's Illustrated
PACML_DASH_DONATION	Make a Donation
PACML_DASH_EARLYMIDDLE	Early and Middle Grade Readers
PACML_DASH_HARDFICTION	Hardcover Fiction
PACML_DASH_MASSMARKET	Mass Market
PACML_DASH_MOSTCIRCAUTHORS	Most Circ'd Authors
PACML_DASH_MOSTCIRCSUBJECTS	Most Circ'd Subjects
PACML_DASH_MOSTCIRCTITLES	Most Circ'd Titles
PACML_DASH_NEWTITLES	New Titles
PACML_DASH_ONORDERITEMS	On-Order Items
PACML_DASH_PAPERFICTION	Trade Paperback Fiction
PACML_DASH_PAPERNONFICTION	Trade Paperback Non-Fiction
PACML_DASH_YOUNGADULT	Young Adult

Some dashboards are not listed. They already have mnemonics that allow them to be customized in WebAdmin. These dashboards are listed in the table below.

Mnemonic	Value
PACML_HEADER_1007	Patron Account
PACML_FEATURE_DASHHEAD	Feature It!
PACML_DASHBOARD_XSL_1551	Title Lists
PACPROF_NARROW_DASH_LABEL (multilingual SA string)	Narrow Search
PACPROF_RELATED_DASH_LABEL (multilingual SA string)	Related Searches
ACPROF_NARROW_DASH_LABEL (multilingual SA string)	Narrow Community Search

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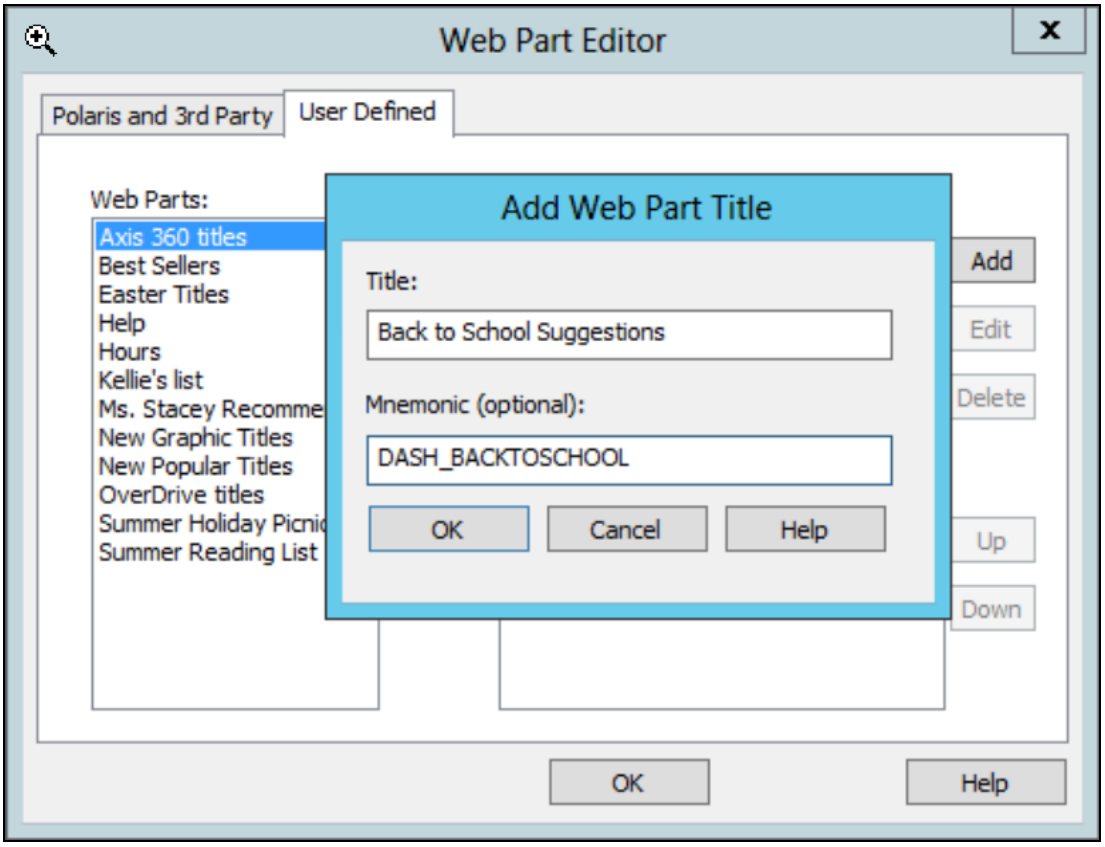
PACPROF_RELATED_DASH_LABEL (multilingual SA string)	Related Community Search
PACML_DASHBOARD_XSL_1558	Saved Searches
PACML_RVT_DASHHEAD	Previous Titles

Customize a customer-defined dashboard

You can now associate a multilingual mnemonic with user-defined dashboard labels.

When creating a new user-defined dashboard, specify a mnemonic along with a default title. Mnemonics should not contain spaces.



- Mnemonics are optional. If multiple languages are not used in PowerPAC, a mnemonic does not need to be specified during dashboard creation. The dashboard title will only display what is entered in the dialog box “Title” field.

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- A mnemonic is only specified when creating a dashboard. To add a mnemonic to an existing user-defined dashboard, the old dashboard must be deleted and a new one created. When the new dashboard is created, a mnemonic can be specified.

Strings for each language are created automatically with the title specified as the default display value for the mnemonic. The title label can then be edited for each language using the mnemonic in WebAdmin.

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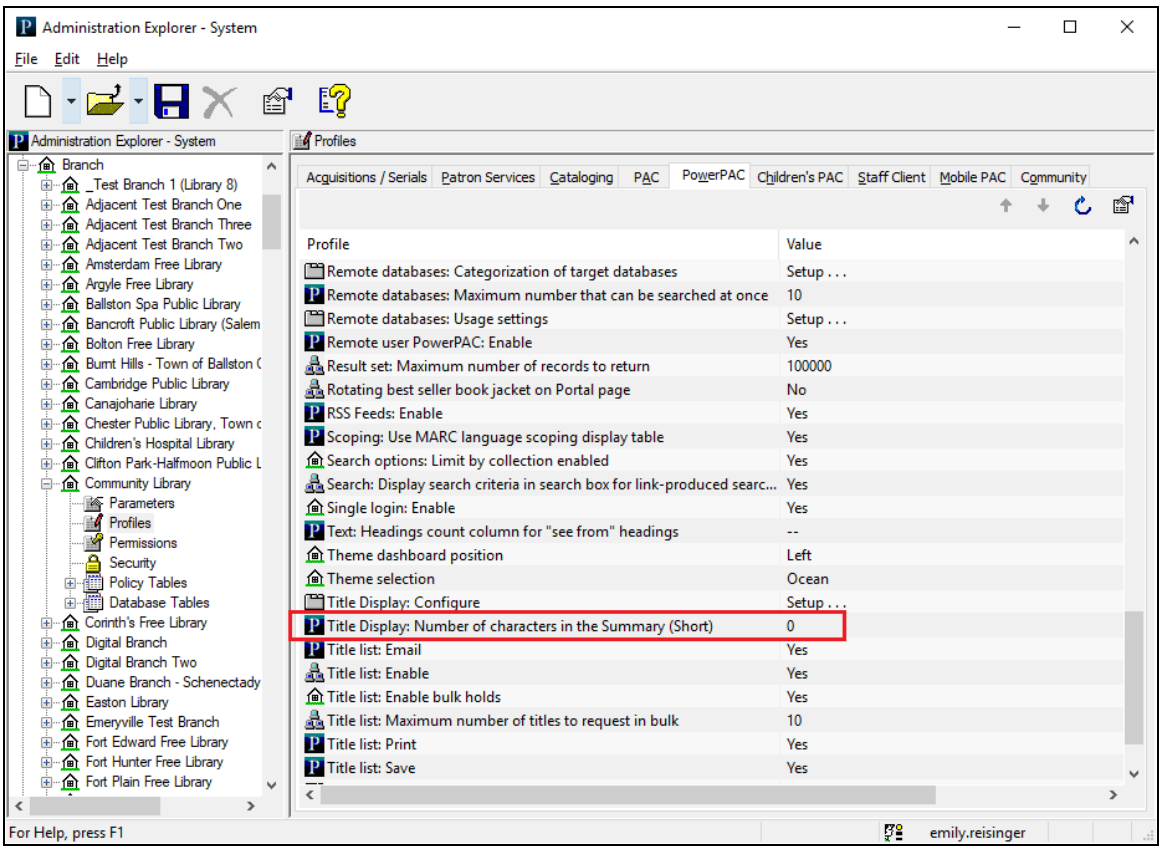
Configure the Maximum Length of the Title Summary in PowerPAC Search Results

The new PowerPAC profile **Title Display: Number of characters in the Summary (Short)** allows you to specify the maximum number of characters of the Summary (Short) field that are displayed in the brief and full search results views for a title in the Polaris PowerPAC.



By default, this profile is set to "0", and the number of characters displayed is not limited. You can enter a value between 0 and 4000.

When **Summary** field text exceeds the specified limit, Polaris PowerPAC displays truncated summary text followed by a **More** link. Users can click **More** to expand the display to show the entire summary, and click **Less** to collapse the display again.

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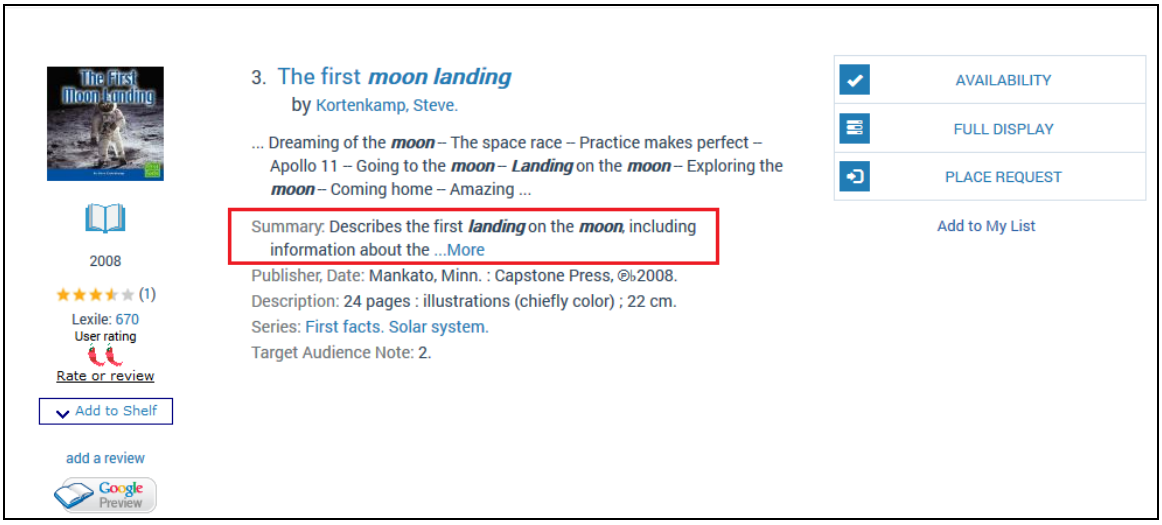

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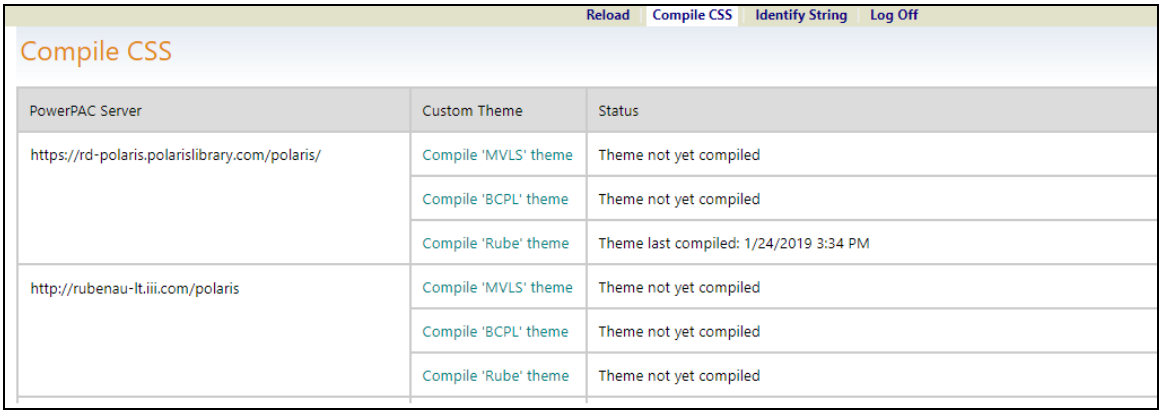
Compile CSS File with Polaris Web Admin Tool

An option to compile custom CSS for custom themes has been added to the **Polaris Web Admin tool** for hosted libraries without direct access to the PowerPAC server.

The new option is found under **PAC Tools** > **Compile CSS**:

When a site has at least one custom theme, a table similar to the PAC reload is displayed:



The table contains:

- **PowerPAC Server** - the names of the servers on which the custom themes are compiled.
- **Custom Theme** - the name of each custom theme found on the server. The name is clickable and executes the compile/recompile action on click.
- **Status** - the status of the compile. This column will display one of the following:
  - Last date/time the theme was compiled successfully
  - Theme not yet compiled
  - Compiling
  - Compile failed with any error details

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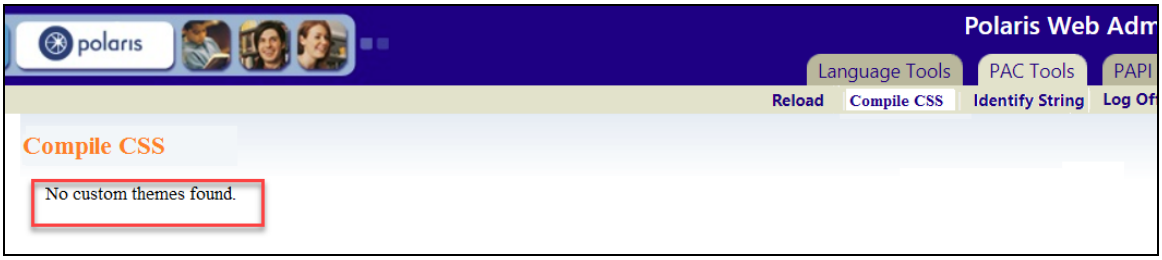
- Compile successful

http://QA-Polaris.polarislibrary.com/polaris/	Compile 'MVLS' theme	Theme last compiled: 4/24/2019 1:22 PM
	Compile 'BCPL' theme	Theme not yet compiled
	Compile 'Responsive Test' theme	Compiling ...

http://rubenau-lt.iii.com/polaris	Compile 'MVLS' theme	Theme not yet compiled
	Compile 'BCPL' theme	**Compile failed** File: 'G:\Projects\Dev\Software\src\PowerPAC\custom\themes\bcpl\scss\style-bcpl.scss' not found on server
	Compile 'Rube' theme	**Compile successful**

When the site does not have custom themes, the page will display the following message:



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Security Improvements for Patron Password Workflows

Polaris 6.3 contains updates that improve security for patrons who create or reset the password for their library account from Polaris PowerPAC, Mobile PAC, or ExpressCheck.

In previous versions, a patron could request a new password by clicking a **Forgot your password?** link in either Polaris PowerPAC, Mobile PAC, or ExpressCheck. The library would then send a new password to the patron in an email message.

If a patron had a library account but had never created a password for the account, the patron could create a password by clicking a **Create a password** link in Polaris PowerPAC, Mobile PAC, or ExpressCheck.

In Polaris 6.3, a patron who wishes to create or reset a password can click a link in Polaris PowerPAC, Mobile PAC, or ExpressCheck and receive an email containing a time-sensitive link to a Reset Password page where the patron can configure a new password. Libraries can use the new **Reset password link timeout duration** setting to specify the time period during which the time-sensitive password reset link remains valid.

Patron Workflow for Creating or Resetting a Password

Configuring the Reset Password Link Timeout Period

Other User Interface Changes

Patron Workflow for Creating or Resetting a Password

Patrons can use the workflow described below to reset a library account password or create a password for the first time in Polaris PowerPAC or Mobile PAC.

To reset or create a password:

1. In Polaris PowerPAC, select **Log In** at the top of the page or **Log In/Register** from the My Account menu. In Mobile PAC, click the **My Account** link. Or, in ExpressCheck, scan your barcode or select **Forgot your library card? Press here!**.

   The Log In page appears.

2. Click the **Forgot your password?** link.

   A Reset Password page appears.

3. Enter your user name or barcode in the **Username or Barcode** box.

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4. Click **Submit**.

   Your library sends an email to the email address associated with your library account.

5. Open the email and click the provided reset password link.

   A Reset Password page opens in a new browser window or tab.

6. Enter your new password in the **New Password** box.
7. Enter your new password in the **Confirm Password** box.
8. Click **Submit**.

   A confirmation message appears, and your library account is updated with your new password.

Configuring the Reset Password Link Timeout Period

A new **Reset password link timeout duration** profile setting is now available on the **Profiles** > **PAC** tab of the Administration Explorer.

This setting determines the time period (in minutes) during which the reset password link emailed to the patron remains active. The setting is available at the System, Library, and Branch levels. You can enter a value between 1 and 999 minutes. By default, the timeout period is set to 60 minutes.

If a patron clicks the reset password link after the active period has elapsed, a Reset Password page appears. The page notifies the patron that the reset password link has expired and prompts the patron to request a new one by entering a library user name or barcode.

The nightly Patron Processing SQL job removes reset password links after the specified active period has elapsed.

Other User Interface Changes

In the Administration Explorer, the **Display prompt for new password** setting no longer appears on the **Log In** tab of the Patron Access Options profile. This profile setting is no longer needed; a patron with an existing library account who has never created a password can create one using the workflow described above.

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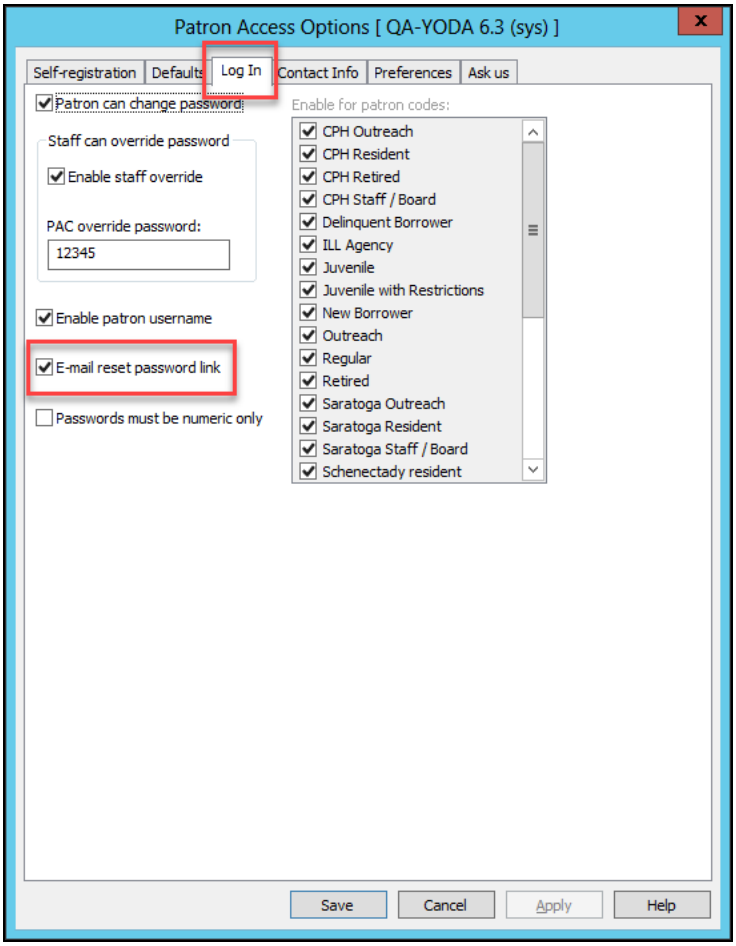
Updated E-mail Forgotten Password Label

The label for the optional system email forgotten password feature has been updated. The label is now called **E-mail reset password link**.

To access the feature in the Administration Explorer, go to **Profiles** > **PAC** > **Patron Access Options** > **Login**:



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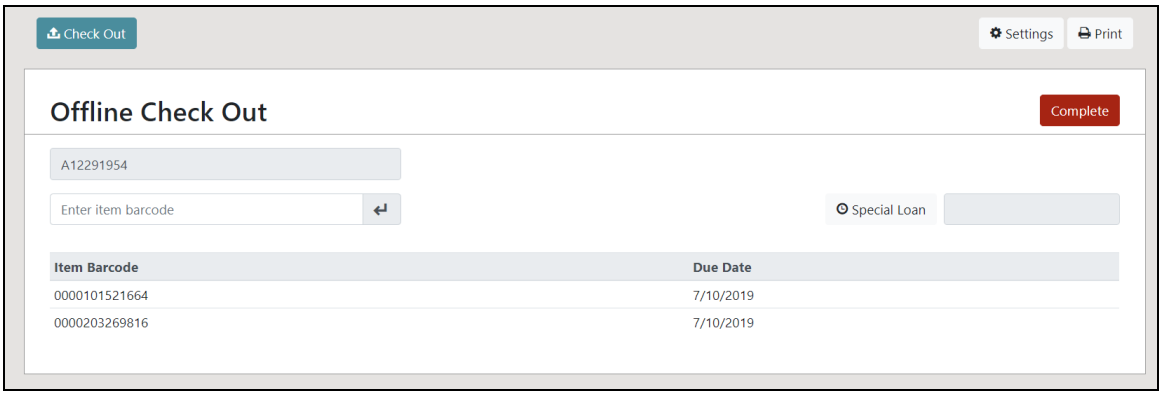
Leap Offline

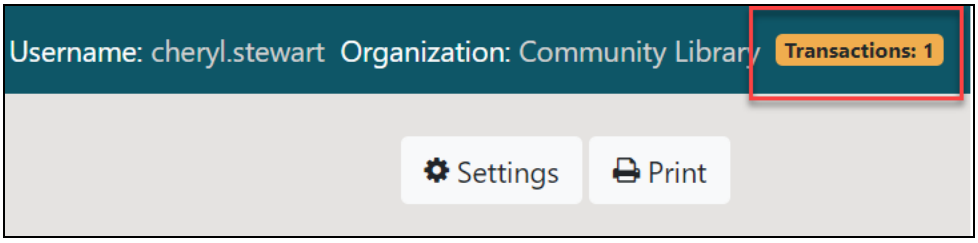
Permission based Leap Offline is now available for circulating materials while your database server or network are unavailable. Each Windows user will have a unique installation of Leap Offline for each browser they use. Installation of the application is initiated through Leap and should be bookmarked for future use. The application uses the local storage features of your browser to store limited installation data that is required to process offline transactions. No patron data will be stored locally.

The Leap Offline application is shown below:



Offline transactions are stored in the local storage of the user's browser until the user chooses to send them to the server for processing or to delete them.

As you work in Leap offline, you will see your transaction count increment with each check out. The Transactions badge will keep you informed of your progress.



Selecting the Transactions badge will open a dialog showing all the offline transaction files you have generated, with an option to delete them. You should only delete

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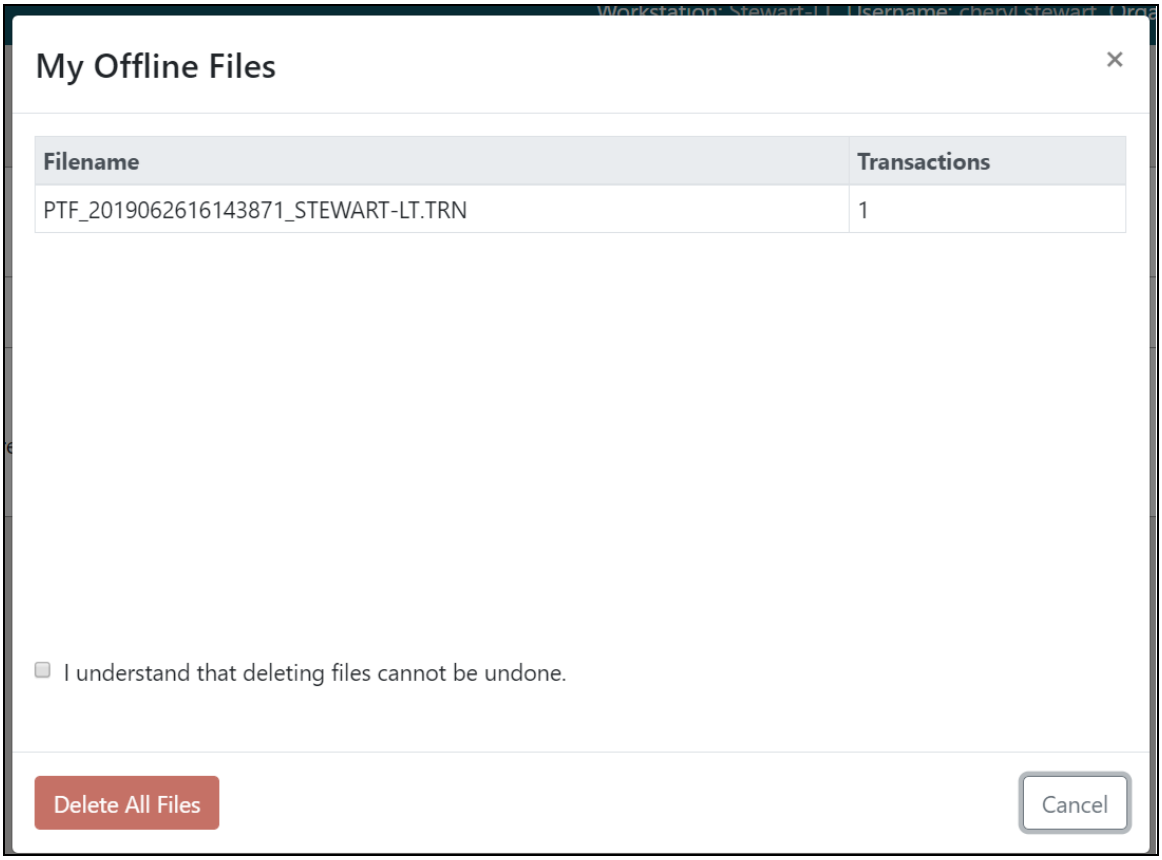
transaction files you created while training or testing. Deleting files cannot be undone.



New Permission for Leap Offline Setup

A system administration permission to control which users can complete the Leap Offline installation is now available. Select **Security** > **Leap** > **Setup Offline** > **Allow**.

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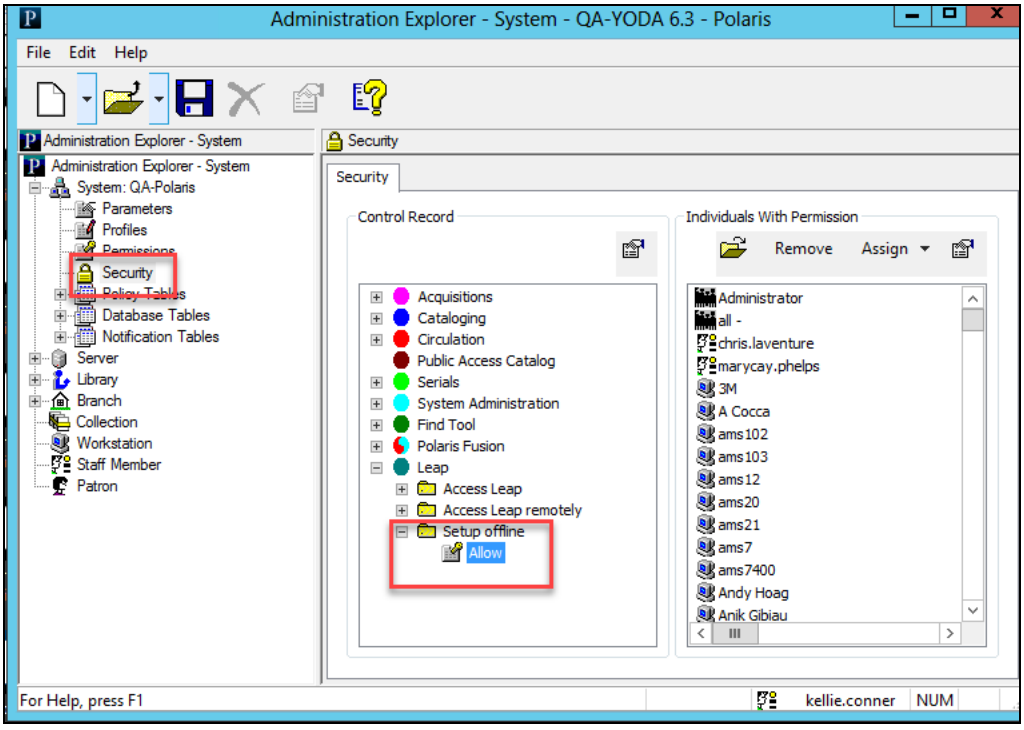

- This permission is not assigned at upgrade.
- Workstation access is permitted by default.
- The permission is not overridable.

Web Browser Information for Leap Offline

The following browsers are compatible with Leap Offline:

- Windows Chrome v74.0.3729.157+
- Windows Edge v44.17763.1.0+
- Windows Firefox v66.0.5+
- OS X Safari v12+
- OS X Chrome v74+
- iOS Safari 11.3+ (eg: iPad 5th+, iPad Air+)

Incompatible browsers:

- Windows Internet Explorer (all)
- iOS Safari 1.0-11.2

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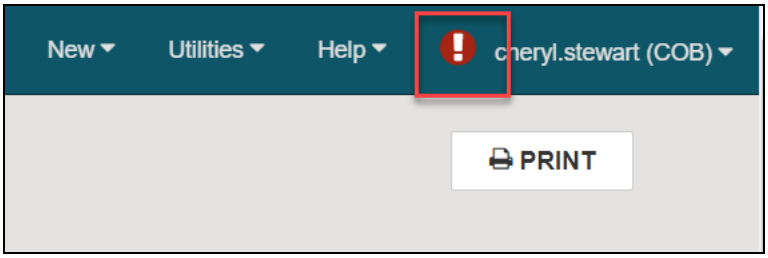
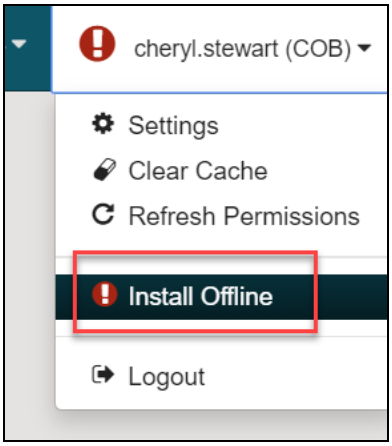
Leap Offline Installation

You must have the Leap Offline permission enabled and use a compatible web browser to install the application.

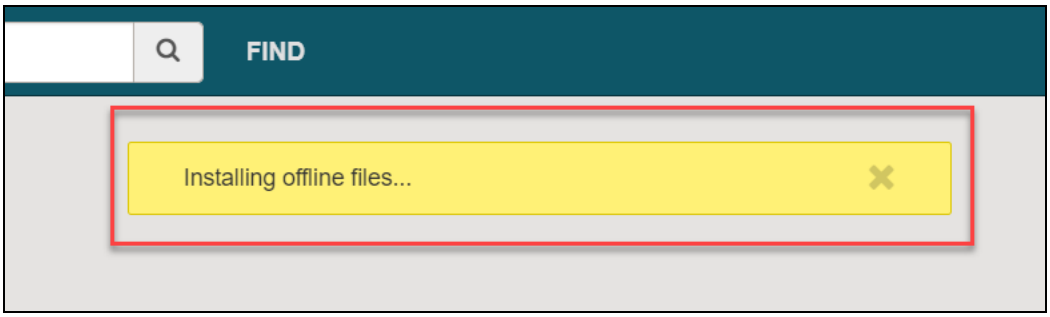
1. If Leap Offline has not been previously installed, you will see an installation Warning icon. To install, select the **Warning** icon:



2. Select **Install Offline**:



3. You will see the following message:



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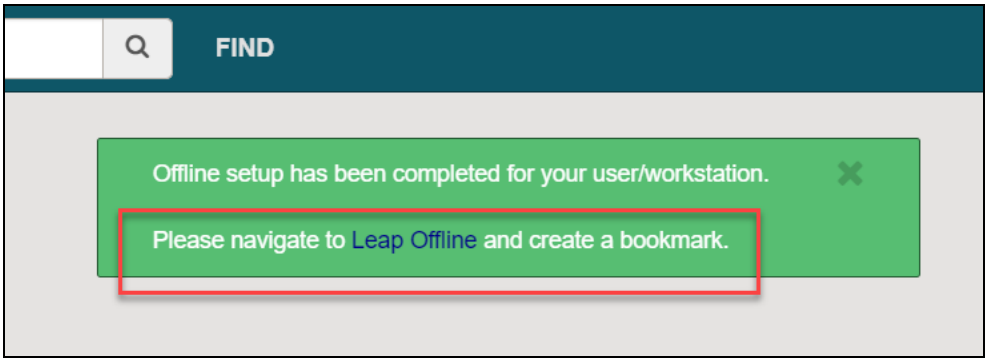
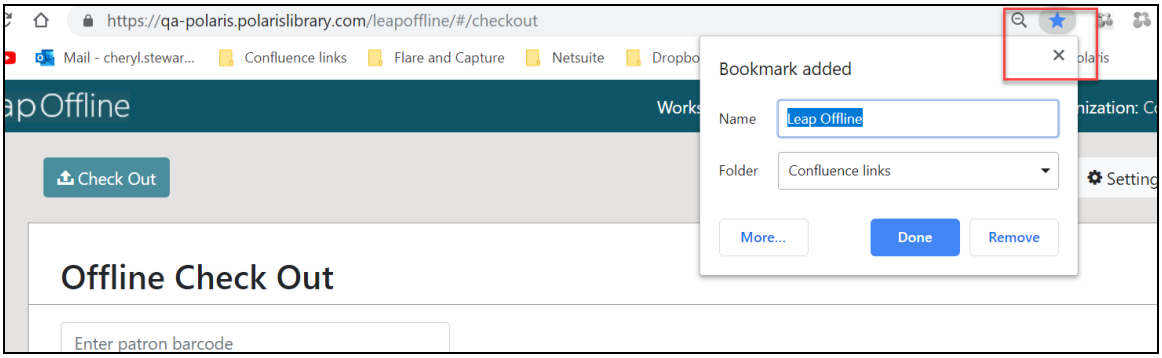
4. Select **Leap Offline**.



5. **Leap Offline** will open in the browser.



Note:
The URL used to access Offline is case sensitive, and you should create a bookmark for it to access the Leap Offline application for future sessions.

Note:
Offline data (both setup data AND actual transaction data) is stored in the local storage of the user's browser. You should not clear your cache while you have unprocessed offline transactions.

Refresh Leap Offline Installation

You have an option to update your Leap Offline installation with any changes made to system administration without manually clearing your cache and re-installing the application.

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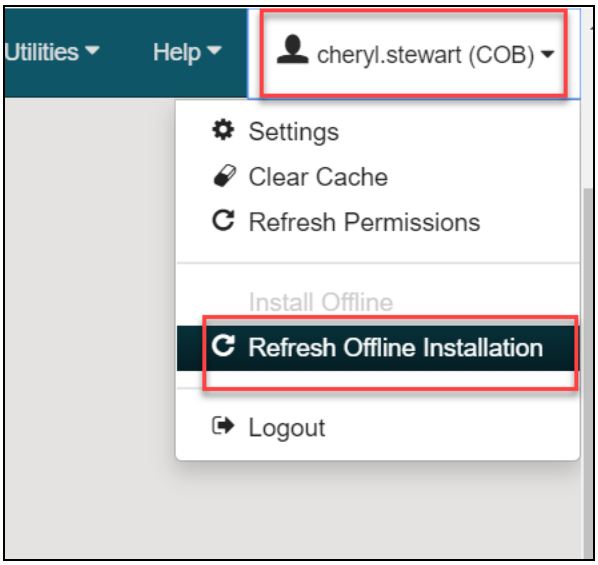
This option is found in the Leap application. Select **User Profile** > **Refresh Offline Installation**.



Refreshing the installation updates the following values:

- User ID
- User Name
- Workstation ID
- Workstation Branch ID
- Workstation Name
- Branch ID
- Standard Loan Period
- Branch Name
- Branch Phone
- Branch Home Page
- Branch Receipt Note
- Locale Name

Leap Offline Settings

The Settings workform in Leap Offline has several options.

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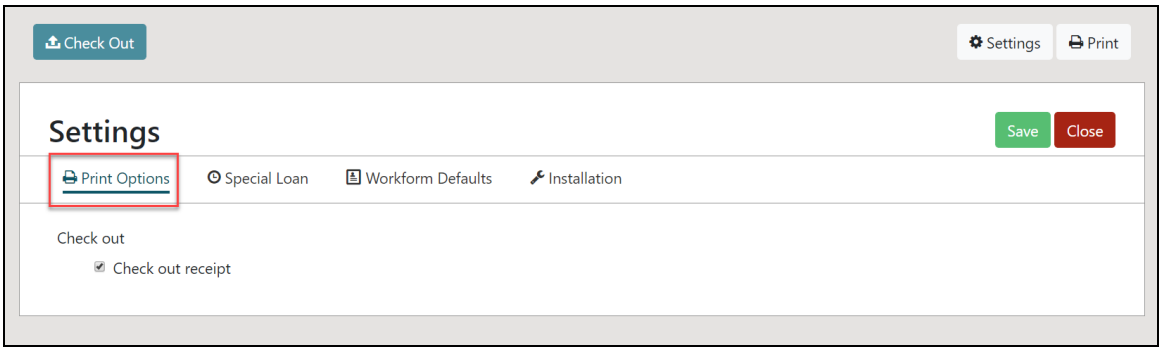
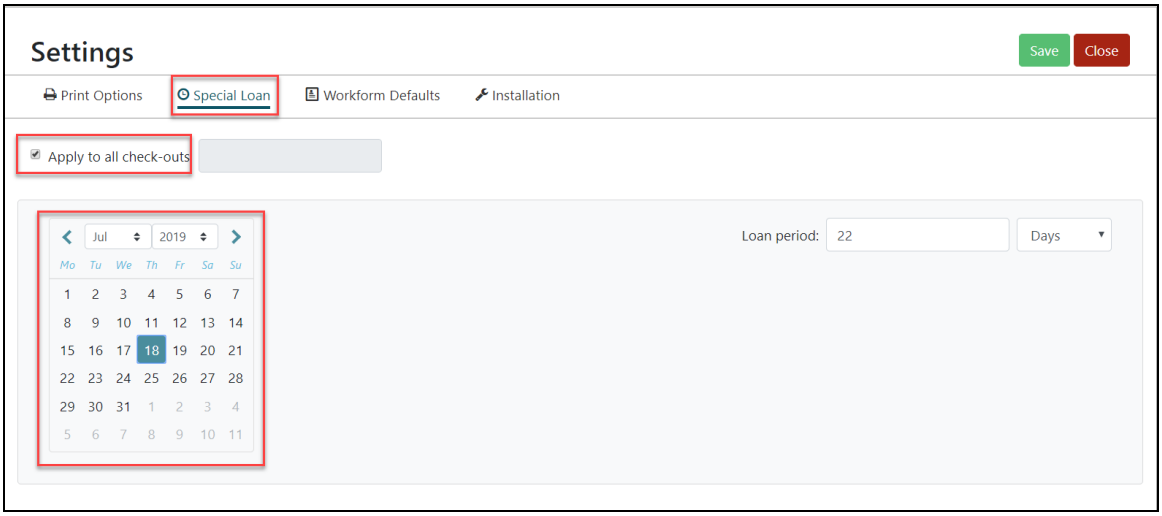
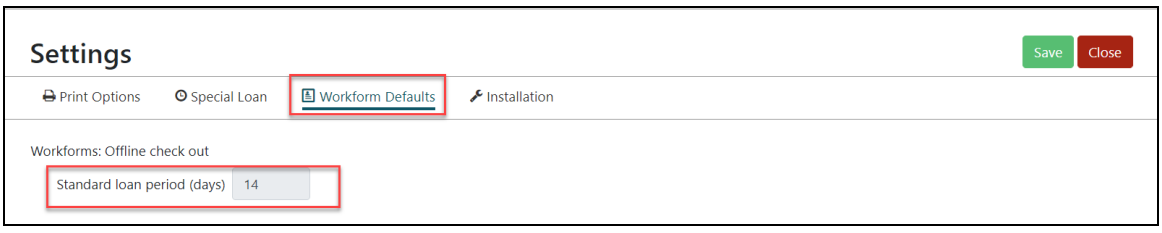
Select **Print Options** to enable Check Out receipt printing for patrons. This selection is persistent unless the cache is cleared.



Select **Special Loan** to set a special loan period that applies to all checkouts. If selected, this value is stored globally for the loan session.



Select **Workform Defaults** to view the value that is used to calculate the due date if the user doesn't choose to use the special loan. This value is not editable.



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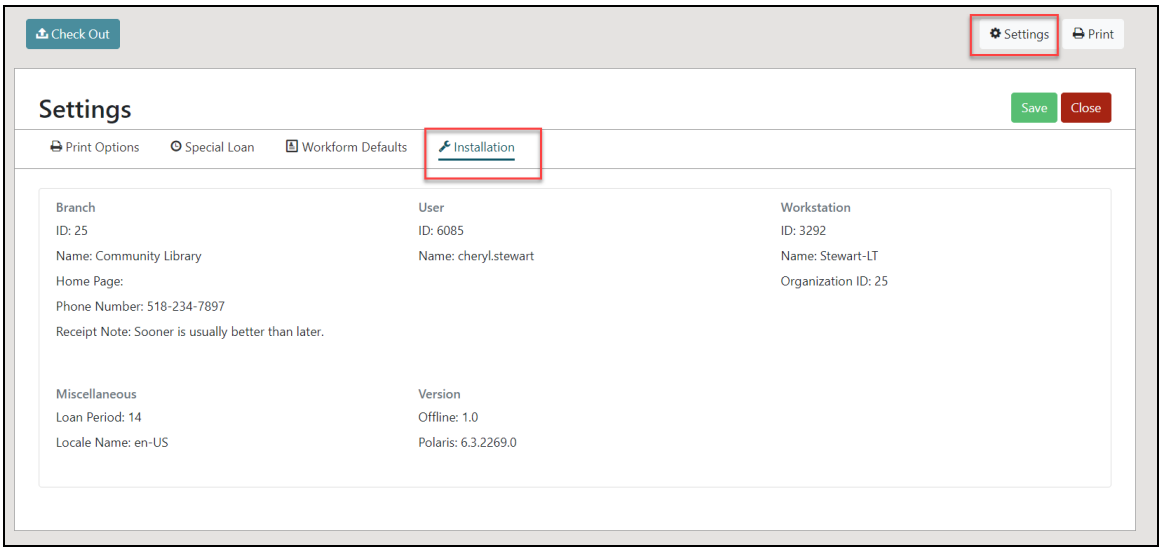
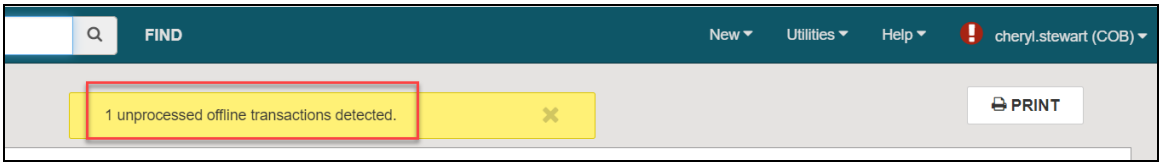
Select **Settings** > **Installation** to view installation settings. All values stored in the web browser's local storage during Leap Offline installation are displayed.



Uploading Offline Transactions

If you have unprocessed offline transactions when you log into Leap, you will see the following message:



The User profile icon is also set to the **Warning** icon. Select the icon to access options to process the offline transactions.

- The **Send Offline Files to Server** option sends all unprocessed offline transactions to the server for processing. All transactions sent to the server will be processed and uploaded using the Automatic Offline Upload process.
- The **Delete My Offline Files** options deletes all unprocessed offline transactions

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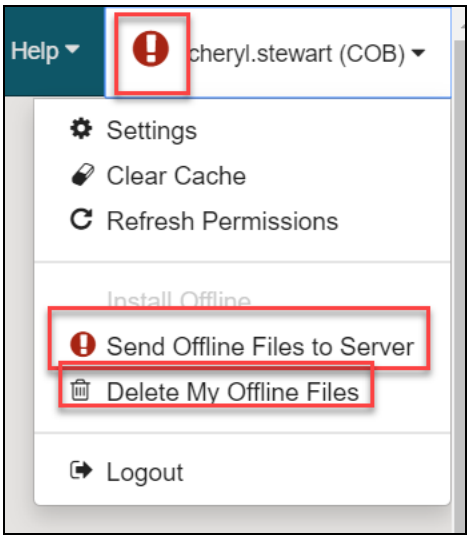
from the browser. The deleted transactions cannot be recovered.



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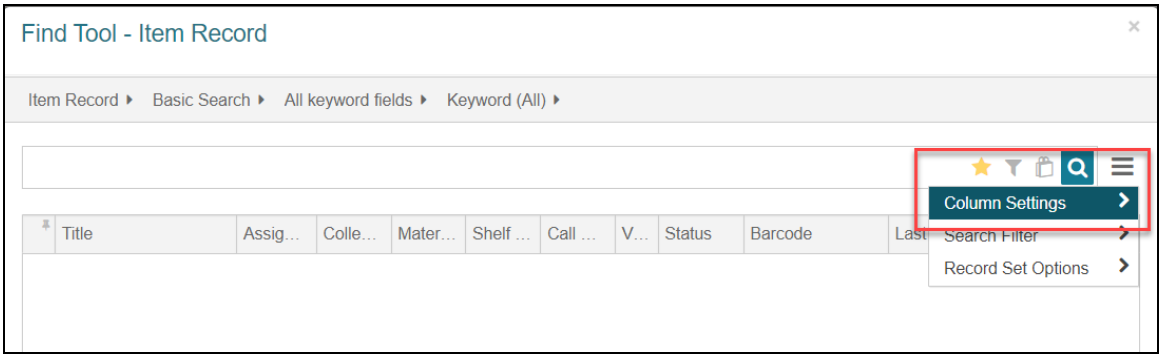
Columns Added For Display in Leap Item Find Tool

The following configurable columns were added under Column Settings in the Leap Item Find tool:

- Author
- Due date
- Publication date
- YTD Circ
- Prev YTD Circ
- Lifetime Circ
- YTD in-house use
- Prev YTD in-house use
- Lifetime in-house use
- Public notes
- Non-public notes
- Physical condition
- Copy number
- Assigned branch abbreviation
- PO number

In the Item Find tool select Column Settings:



The added columns can be selected and configured for display in the Item Find tool.

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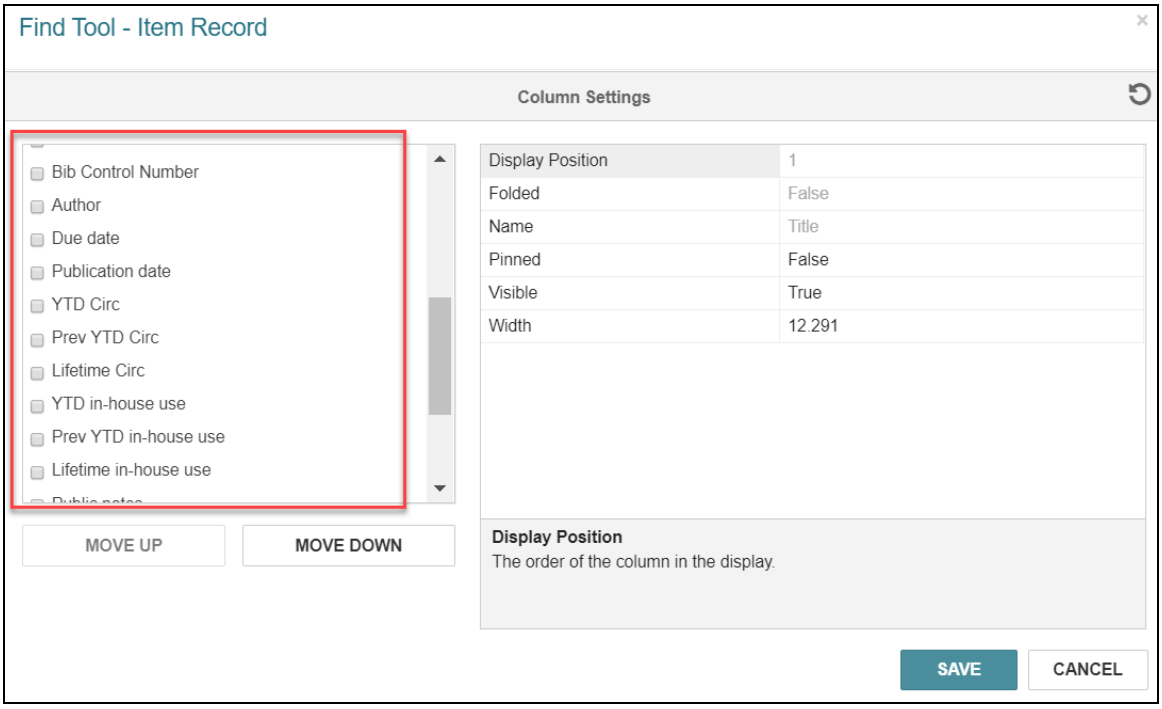

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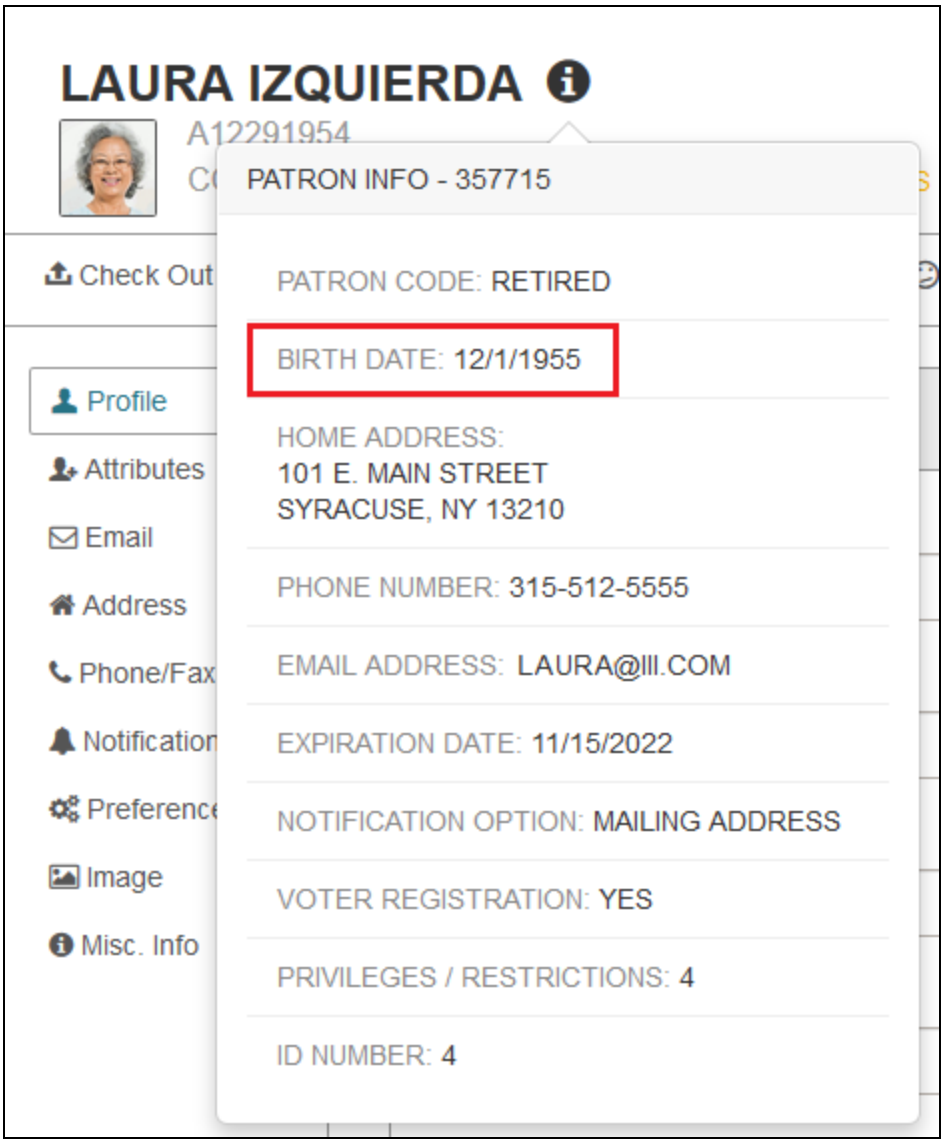
Improvement to Patron Properties in Leap

The patron's birth date is now included in the list of patron information that appears when you view patron properties in Leap.



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Improved Sorting for Title Lists in Leap Patron Views

Lists of titles that appear in patron views in Leap are now sorted using Name Authority Cooperative Program (NACO) normalization rules.

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Editing Saved Reports in SimplyReports

You can now edit all column and filter settings for the following types of saved reports: fund list reports, invoice list reports, and purchase order list reports.

You can also edit many other types of saved reports. See the SimplyReports user documentation for more information.

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