polarıs

What's New in Polaris and Leap

6.6

© 2020



World Headquarters 1900 Powell Street, Suite 400 Emeryville, CA 94608 +1.510.655.6200

Legal Notices

© Innovative Interfaces Incorporated and/or its affiliates. All rights reserved. All trademarks shown are the property of their respective owners.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

The software and related documentation are provided under an agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of the software, unless required by law for interoperability, is prohibited.

Contents

| Polaris Installation Notes | . 5 |
|--|------|
| New and Modified Polaris Administrative Settings | 6 |
| Polaris API Changes | 8 |
| Duplicate Detection for Name on Identification | 9 |
| Serials Check In | .11 |
| Check In Serials or Parts | .12 |
| Undo a Check In | .13 |
| Predict the Next Group of Issues or Parts | .14 |
| Delete Future Issues or Parts | .14 |
| Generating and Printing Notices in Leap | .16 |
| Generating and Printing Overdue, Billing, Hold, Fine, or Combined Notices | 16 |
| Generating and Printing Patron Billing Statements for Organizations | .21 |
| Generating and Printing Patron Billing Statements for Specific Patrons \dots | .23 |
| View or Print Recently Generated Notices | 25 |
| Leap Default Quote Text Updated | . 27 |
| International Date and Time | .28 |
| Prompting PowerPAC Users to Accept Cookies | .29 |
| Enabling the Cookie Policy Message | .29 |
| Customizing the Cookie Policy Message Text | .30 |
| Configuring How Frequently the Cookie Policy Message Appears | . 31 |
| New Variable in Postal Codes | .34 |
| My Lists Now under My Account in PowerPAC | 35 |
| MARC Technical Updates in Polaris 6.6 | .36 |
| Changes to Supported Web Browsers | .37 |
| Firefox | .37 |

| Internet Explorer | |
|------------------------|--|
| Web Admin Tool Updates | |
| PowerPAC Strings | |

Polaris Installation Notes

Important:

When the new Polaris release is installed on a workstation, the file path changes from 6.5 to 6.6 as in the following examples: C:\ProgramData\Polaris\6.6 C:\Program Files\Polaris\6.6 C:\Program Files (x86)\Polaris\6.6

New and Modified Polaris Administrative Settings

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

| Setting | Purpose | Level |
|--|--|--------------------------------------|
| New Profiles | | |
| PowerPAC: Cookie acceptance: Enable | Determines whether PowerPAC displays a message that informs patrons that the site uses cookies and prompts them to agree to the use of cookies. | System |
| PowerPAC: Cookie acceptance: External workstation retention period | Determines how frequently the cookie policy message appears for external pat- rons. | System |
| New Parameters | | |
| Patron Services: Duplication detection options: Name on Iden- tification (First and Last) | Library administration staff now have the option to enable the Name on Iden- tification (First and Last) patron services administration parameter for Staff Client and Leap, PAC, Offline, or any combination of the three. When enabled, this new para- meter adds Name on Identification to the duplicate detection criteria for patron records. | System, Library and Branch |
| Modified Permissions | | |
| Access reports and notices | In previous versions, this permission determined whether users could access the Polaris Reports window in the staff client. As of version 6.6, the permission also determines whether users can access the Print Notices feature in Leap. | System, Library, Branch, and User |
| Modified Profiles | · | · |

| Setting | Purpose | Level |
|---|--|--------------------------------------|
| Staff Client: Report Server Setup: Override default Report Server authentication | In previous versions, this profile specified optional credentials used to authenticate a user to the report server for access to reports in the staff client. As of version 6.6, the setting also specifies the credentials required for a user to generate and print notices in Leap. | System, Library, Branch, and User |
| PowerPAC: Patron inactivity timeout | In previous versions, this setting specified the period of time that could elapse before PowerPAC automatically signed an inact- ive patron out. As of version 6.6, the setting also determines how frequently PowerPAC displays the cookie policy mes- sage for in-house patrons. | System, Library, and Branch |

Polaris API Changes

The table below is a list of changes to the Polaris API for v6.6.

| Method Name | Purpose |
|--------------------------|---|
| PatronRegistrationCreate | Method has been updated so that if "PSPARMDUPDETLEGALPAC" (Patron > Name on ID > PAC) is configured in Polaris System Administration Parameters, then Polaris compares Name on ID for duplicate detection. If there is a possible duplicate in the database, the following error appears: "Duplicate patron name on identification is specified." |
| BibKeywordSearch | Documentation has been updated to be more complete and accurate. |

For more information, see the **Polaris API Reference for v6.6**.

Duplicate Detection for Name on Identification

If a patron has a preferred name that is different from the name on their identification, you can include both the preferred name and name on ID in the patron record. Library administration staff have the option to enable the **Name on Identification (First and Last)** patron services administration parameter for Staff Client and Leap, PAC, Offline, or any combination of the three.

| Duplicate detection options | \times |
|---|----------|
| Use the following UDFs | |
| D Number | |
| Privileges / Restrictions | |
| Voter Registration | |
| CybraryN Use Only (XXX,YYY) | |
| Not Currently in Use | |
| Name on Identification (First and Last) | |
| Staff Client PAC Offline | |
| Use Phone 1 | |
| Use E-mail Address | |
| OK Cancel Help | |

When enabled, this new parameter adds Name on Identification to the duplicate detection criteria for patron records. When detecting possible duplicate patrons, the system continues to check for duplicates using barcode, patron name (first and last), and birth date.

If the barcode, patron name and birth date, or Name on Identification match, the patron records are also flagged as duplicates.

If the application finds a suspected duplicate patron record, the following happens:

• **Staff Client/Leap**: A dialog box appears listing the possible duplicates. You can choose to continue creating the patron record, or cancel and change one of the fields used in duplicate detection. After you create a duplicate, you can merge the

duplicate records. See "Merge Patron Records" in the Leap online help.

- PAC (PowerPAC, MPAC, and PAPI): The record creation fails with a library-configurable error.
- **Offline**: Duplicates are listed in a report when patron records are uploaded. Library staff can use the report to cancel the record upload or merge the duplicates.

Serials Check In

Leap now offers the ability to check in serials, check in parts of standing orders, and predict the next group of serial issues or parts.

For the permissions needed to check in serials and standing order parts, search the Polaris online help for "Serials Workflow Permissions."

You can check in any issue or part that has a status other than Received, such as:

- Expected
- Pending Claim
- Claimed
- Not Available
- Never Published

To check in issues or parts

1. Go to **Utilities > Serials Check In**.



The serials Find Tool opens.

- 2. In the Find Tool, type the title of a serial.
- 3. Select a result, and select **Open**. The Serials Check In workform opens.
- 4. From the Serials Check In workform, you can do any of the following:
 - a. Check In Serials or Parts
 - b. Undo a Check In
 - c. Predict the Next Group of Serials
 - d. Delete Future Issues or Parts

Check In Serials or Parts

To check in serials or parts

- 1. In the Serials Check In workform, select an issue or part that has a status other than Received.
- 2. Select Check in.

| Serials Check In | | | SAVE | ACTIONS - | C REFRESH | RESULTS CLOSE |
|--|--|---|---------------|-------------|----------------|------------------|
| GQ | | | | | | |
| Status: Currently Received Serial holding record ID: 1525 Copy no: 1 Call number: | Destination: Library Syst Bib control m Collection: (M Material type | Southern Adirondack em (SAL) amber: 342231 ione) | Non-Public N | iotes | Non-Publ | ic Warning Notes |
| 🕁 Check in 👘 Undo Check in | B Delete | | | Fib | er by Column 👻 | Filter |
| DESIGNATION | CATEGORY | EXPECTED | STATUS | STATUS DATE | PATTERN | ROUTE STATUS |
| Caption A (Feb. 2010) | Basic Bib / 1 | 2/22/2010 | Expected | 7/27/2020 | Open | |
| Caption B (Mar. 2010) | Basic Bib / 1 | 3/22/2010 | Received | 7/20/2020 | Open | |
| Caption C (Apr. 2010) | Basic Bib / 1 | 4/22/2010 | Received | 7/20/2020 | Open | |
| Caption D (May 2010) | Basic Bib / 1 | 5/22/2010 | Pending Claim | 7/20/2020 | Open | |

- 3. Depending on the settings in the staff client, you might see one or a number of the following prompts:
 - Scan Barcode: If the Serial Holdings Publication Pattern in the staff client is set to **Prompt for Barcode**, the Create Item for Issue/Part dialog box appears with the **Barcode** field empty. Scan or type the barcode and select **Continue**.
 - **Modify Price**: If the Serial Holdings Publication Pattern in the staff client is set to **Prompt for Barcode**, and the Unit Price is zero, then the Create Item for Issue/Part dialog box appears with the **Barcode** field empty. Scan or type the barcode and select **Continue**.
 - **Template error**: If the Serial Holdings Publication Pattern in the staff client is set to **Generate items at check-in**, but there is not a template associated with serials for your branch, you'll see the Item Template error. When you select **OK** in the error, the check in is canceled and no item record is generated.
 - **Print route slip**: If the option is available, the Print Route Slip dialog box appears. Select **Yes** to see the Print dialog box. Select **Cancel** to continue the check in without printing the route slip.
- 4. For subscription parts, proceed to the next step.

For serials, a message displays saying the check in is complete. Proceed to the last step.

5. For subscription parts, the Create Part Bibliographic Record dialog box opens. Enter text in the required fields and select **Continue**.

| Create Part E | Bibliographic Record | | , |
|---------------|----------------------------------|----------------|--------|
| ISBN: | 1234567894567 | Display in PAC | FIND |
| Title: | Thomas the Tank Engine | | |
| Author: | Wilbert Awdry | | |
| Publisher: | Egmont Books UK | Pub date: 2007 | |
| Series title: | Thomas & friends. Thomas gets bu | Series no.: 10 | |
| | | co | CANCEL |

- 6. The Create Part Bibliographic Record dialog box opens. Enter text in the required fields and select **Continue**.
- 7. When the check in is complete, the issue or part status changes to Received. Overnight processes update changes to the compressed holdings in PAC. If you made an error, you can undo the check in.

Undo a Check In

To undo a check in

- 1. In the Serials Check In workform, select an issue or part that has a status of Received.
- 2. Select Undo Check In.

| Serials Check In | | | SAVE | ACTIONS + | CREFRESH | RESULTS CLOSE |
|--|---------------|-----------|----------|-------------|-------------------|--------------------|
| GQ | | | | | | |
| Status: Currently Received Destination: Southerm Adirondack Non-Public Notes Non-Public Warning Notes Serial holding record ID: 1525 Bib control number: 342231 Image: Collection: Image: Collection: | | | | | | blic Warning Notes |
| 💩 Check In 👆 Undo Check In | 8 Delete | | | F | itter by Column 👻 | Filter |
| DESIGNATION | CATEGORY | EXPECTED | STATUS | STATUS DATE | PATTERN | ROUTE STATUS |
| Caption A (Feb. 2010) | Basic Bib / 1 | 2/22/2010 | Received | 8/6/2013 | Open | |
| Caption B (Mar. 2010) | Basic Bib / 1 | 3/22/2010 | Received | 7/20/2020 | Open | |
| Caption C (Apr. 2010) | Basic Bib / 1 | 4/22/2010 | Received | 7/20/2020 | Open | |
| | | | | | | |

The Status of the selected item returns to the non-received status it had before it was checked in.

Predict the Next Group of Issues or Parts

To predict the next group of issues or parts

1. In the Serials Check In workform, go to the **Actions** menu and select **Predict Issues/Parts**.



- 2. If there is more than one publication pattern, then the Publication Pattern Dialog box opens. Select the publication pattern you want to use to predict future issues.
- 3. Select **Continue**. A number of issue or part records are added according to the publication pattern you selected. You can edit the publication pattern and the number predicted in the staff client. Search Polaris online help for "Create Publication Pattern Pattern Options Window" for more information.

Delete Future Issues or Parts

To delete future issues or parts

1. In the Serials Check In workform, select an issue or part.

| Serials Check In | | | SAVE | | C REFRESH | RESULTS CL | OSE |
|---|---|---|---------------|-------------|--------------------|-------------------|-----|
| GQ | | | | | | | |
| Status: Currently Received Serial holding record ID: 1525 Copy no.: 1 Call number: | Destination: S Library Syste Bib control nu Collection: (No Material type: | outhern Adirondack m (SAL) mber: 342231 one) | Non-Public No | otes | Non-Pub | lic Warning Notes | |
| 🛓 Check In | 自 Delete | | | | Filter by Column 🗸 | Filter | |
| DESIGNATION | CATEGORY | EXPECTED | STATUS | STATUS DATE | PATTERN | ROUTE STATUS | |
| Caption A (Feb. 2010) | Basic Bib / 1 | 2/22/2010 | Expected | 7/27/2020 | Open | | |
| Caption B (Mar. 2010) | Basic Bib / 1 | 3/22/2010 | Received | 7/20/2020 | Open | | |
| Caption C (Apr. 2010) | Basic Bib / 1 | 4/22/2010 | Received | 7/20/2020 | Open | | |
| Caption D (May 2010) | Basic Bib / 1 | 5/22/2010 | Pending Claim | 7/20/2020 | Open | | |

2. Select Delete.

Note:

You might see one or a number of dialog boxes. Examples include the following:

- If you delete a part or issue that has a defined retention period in the serial holdings record, the Issue/Part is Retained dialog box appears.
- If you delete a part or issue that is linked to another record, such as a route list or bibliographic record, additional dialog boxes appear.

Generating and Printing Notices in Leap

You can now generate and print the following types of notices in Leap:

- Overdue and billing notices
- Hold notices
- Fine notices
- Combined notices
- Patron billing statements

Note:

To generate or print notices in Leap:

- Your user account must have the Access reports and notices: Allow permission. For more information, see "Granting Permissions" in the Polaris Administration help.
- The **Override default Report Server authentication** setting must be enabled and properly configured on the Report Server Setup window in Polaris Administration. For more information, see "Specify a Server for Reporting Services" in the Polaris Administration help.

Generating and Printing Overdue, Billing, Hold, Fine, or Combined Notices

To generate and print overdue, billing, hold, fine, or combined notices

1. Select **Utilities > Print Notices**.

The Notices workform appears.

| QA-POLARIS > Notices Filter TYPE NAME MODIFIED DATE Image: Prime Signature 1/10/20 4:50 AM 1/10/20 4:50 AM Image: Prime Signature 1/10/20 4:50 AM 1/10/20 4:50 AM | CLOSE |
|---|-------|
| TYPE NAME MODIFIED DATE Image: Model and Mo | |
| Image: Spin series 1/10/20 4:50 AM Image: Mode series 1/10/20 4:50 AM | E |
| Holds 1/10/20 4:50 AM | 1 |
| | 1 |
| Cverdues 1/10/20 4:50 AM | 1 |
| Combined Notice Full Page Mail 6/15/20 8:12 PM | 1 |
| Combined Notice Half Page Mail 6/15/20 8:12 PM | 1 |
| L Combined Notice Z Fold Mailer 6/15/20 8:12 PM | 1 |

Note:

Mailers in various formats for combined notices are listed individually on the Notices workform. Overdue notices, billing notices, and patron billing statements are in the **Overdues** folder.

- 2. Do one of the following:
 - To print fine notices, select Fines.
 - To print hold notices, select Holds.
 - To print overdue notices or billing notices, select **Overdues**.
 - To print combined notices, select one of the combined notice formats:
 - Combined Notice Full Page Mail
 - Combined Notice Half Page Mail
 - Combined Notice Z Fold Mailer

If you selected **Fines**, **Holds**, or **Overdues**, the appropriate notices appear.

If you selected a combined notice format, the Report Wizard appears. Skip to step 4.

3. Select a notice format:

- Full Page Mailer 8.5 x 11 inches
- Half Page Mailer 9 x 5.5 inches, suitable for commonly available half-page mailer stock
- Post Card 6 x 4 inches
- Z Fold Mailer 8.5 x 11 inches, folds so addresses are exposed in window envelope
- Z Fold Mailer Oversized 8.5 x 14 inches, folds so addresses are exposed in window envelope

Note:

The following notice formats are designed to be inserted in a standard #10 window envelope: Full Page Mailer, Z Fold Mailer, and Z Fold Mailer Oversized.

The Report Wizard appears.

| Report Wizard - Billing Z Fold Mailer | × |
|---------------------------------------|----|
| Parameters Sorting Options | |
| Organizations: | ^ |
| | |
| □ _Test Branch 1 (Library 8) (TB1L8) | |
| Adjacent Test Branch One (AD1) | |
| Adjacent Test Branch Three (AD3) | |
| Adjacent Test Branch Two (AD2) | |
| Amsterdam Free Library (AMS) | |
| Argyle Free Library (ARG) | |
| Ballston Spa Public Library (BAL) | |
| Paneroff Dublic Library (Colom) (CLM) | ~ |
| | |
| | |
| | |
| CANCEL SUBMIT REPO | RT |
| | |

4. On the Parameters tab, select the organization(s) for which you want to generate

notices.

Note:

The organizations that are available for selection are set in the **Report server** profile. For more information, see "Report Server Set Up Dialog Box" in the Polaris Administration help.

5. Select **Sorting Options**.

The Sorting Options tab appears.

| Report Wizard - Billing Z Fold Mailer | | X |
|--|---|---|
| Parameters Sorting Options | | |
| Sorting options: CybraryN Use Only (XXX,YYY) ID Number Library return address Not Currently in Use Patron address city Patron address zip Privileges / Restrictions Voter Registration | → | Selected: Reporting branch name Patron last name |
| | | |
| | | CANCEL SUBMIT REPORT |

Note:

Your system's user-defined fields for patron records are included in the sorting options.

6. (Optional) Select one or more options from the **Sorting options** list, and select the right arrow button.

The sorting options are moved to the **Selected** list, indicating that they will be used for sorting notices.

The **Selected** list must contain at least one sorting option. If you select more than one sorting option, the option at the top of the **Selected** list is the primary sort criterion, the second option in the list is the secondary sort criterion, and so on.

Note:

Reporting branch name appears in the **Selected** list by default. If your library or system does not do central notice processing, you might want to use this default setting and select additional sorting fields, as needed. If you do central processing, you might want to remove **Reporting branch name** from the **Selected** list and instead select a more useful primary sort for mailing (for example, **Patron address zip**).

7. Select Submit Report.

Leap generates notices and displays them in a preview window. This might take a few moments. A **Post Notice** message also appears.

8. Review the notices in the preview window.

Note:

If you see problems or decide not to print the notices, close the preview window.

9. To print notices, select the printer icon on the preview window. You can also print the notices after posting them to the database (see the next step for more information).

Tip:

You can print a limited range of pages to test the notices. Note that by design, title and author information is limited to 100 characters on all notices.

- 10. On the **Post Notice** message, do one of the following:
 - Select **Yes** to post notices to the database.

Important:

When you select Yes, notices are posted (recorded) in the

database as issued, and the appropriate queue is cleared for the notice type and organization.

• Select **No** to proceed without posting notices to the database.

Generating and Printing Patron Billing Statements for Organizations

To generate and print patron billing statements for one or more organizations

1. Select Utilities > Print Notices.

The Notices workform appears.

| Parent S > Notices TYPE NAME MODIFIED DATE Image: | Notic | es | C CLOSE |
|--|--------|--------------------------------|-----------------|
| TYPENAMEMODIFIED DATEImage: Fines1/10/20 4:50 AMImage: Fines1/10/20 4:50 AMImage: Fines1/10/20 4:50 AMImage: Fines0verduesImage: Fines1/10/20 4:50 AMImage: FinesCombined Notice Full Page MailImage: FinesCombined Notice Full Page MailImage: FinesCombined Notice Half Page MailImage: FinesCombined Notice Half Page Mail | QA-POI | ARIS > Notices | Filter |
| Image: Fines1/10/20 4:50 AMImage: Fines1/10/20 4:50 AMImage: Fines1/10/20 4:50 AMImage: Fines1/10/20 4:50 AMImage: FinesCombined Notice Full Page MailImage: FinesCombined Notice Half Page MailImage: FinesCombined Notice Half Page MailImage: FinesCombined Notice Half Page Mail | TYPE | NAME | MODIFIED DATE |
| Holds 1/10/20 4:50 AM Overdues 1/10/20 4:50 AM Combined Notice Full Page Mail 6/15/20 8:12 PM Combined Notice Half Page Mail 6/15/20 8:12 PM | | Fines | 1/10/20 4:50 AM |
| Image: Notice Full Page Mail 1/10/20 4:50 AM Image: Notice Full Page Mail 6/15/20 8:12 PM Image: Notice Half Page Mail 6/15/20 8:12 PM | | Holds | 1/10/20 4:50 AM |
| Image: Combined Notice Full Page Mail 6/15/20 8:12 PM Image: Combined Notice Half Page Mail 6/15/20 8:12 PM | | Overdues | 1/10/20 4:50 AM |
| Combined Notice Half Page Mail 6/15/20 8:12 PM | L. | Combined Notice Full Page Mail | 6/15/20 8:12 PM |
| | L. | Combined Notice Half Page Mail | 6/15/20 8:12 PM |
| Combined Notice Z Fold Mailer 6/15/20 8:12 PM | L. | Combined Notice Z Fold Mailer | 6/15/20 8:12 PM |

2. Select **Overdues**.

The available overdue notices, billing notices, and patron billing statements appear.

3. Select Patron Billing Statement by Organizations.

The Report Wizard appears.

| Report Wizard - Patron Billing Statement by Organizations | × |
|---|----|
| Parameters | |
| Organizations: | ^ |
| □ _Test Branch 1 (Library 8) (TB1L8) | |
| Adjacent Test Branch One (AD1) | |
| Adjacent Test Branch Three (AD3) | |
| □ Adjacent Test Branch Two (AD2) | |
| Amsterdam Free Library (AMS) | |
| □ Argyle Free Library (ARG) | |
| Ballston Spa Public Library (BAL) | |
| Rancroft Public Library (Salem) (SLM) | ~ |
| Minimum amount: 0.00 € Maximum amount: 0.00 € | |
| CANCEL SUBMIT REPO | RT |

- 4. Select the organization(s) for which you want to print billing statements.
- 5. Billing statements are generated for patrons with outstanding charges that fall between a minimum amount and a maximum amount that you specify.
 - In the **Minimum amount** box, enter the minimum outstanding charges amount.
 - In the Maximum amount box, enter the maximum outstanding charges amount.
- 6. Select Submit Report.

Leap generates patron billing statements and displays them in a preview window. This might take a few moments.

7. Review the statements in the preview window.

Note:

If you see problems or decide not to print the statements, close the preview window.

8. Select the printer icon to print the patron billing statements.

Generating and Printing Patron Billing Statements for Specific Patrons

To generate and print patron billing statements for specific patrons

1. Select Utilities > Print Notices.

The Notices workform appears.

| Notic | es | C CLOSE |
|-------|--------------------------------|-----------------|
| QA-PO | LARIS > Notices | Filter |
| TYPE | NAME | MODIFIED DATE |
| • | Fines | 1/10/20 4:50 AM |
| | Holds | 1/10/20 4:50 AM |
| | Overdues | 1/10/20 4:50 AM |
| L. | Combined Notice Full Page Mail | 6/15/20 8:12 PM |
| L. | Combined Notice Half Page Mail | 6/15/20 8:12 PM |
| L. | Combined Notice Z Fold Mailer | 6/15/20 8:12 PM |
| | | |

2. Select **Overdues**.

The available overdue notices, billing notices, and patron billing statements appear.

3. Select Patron Billing Statement by Patron Barcode.

The Report Wizard appears.

| Report Wizard - Patron Billing Statement by Patron Barcode | | × |
|--|--------|---------------|
| Parameters | | |
| Patron Barcodes: | | |
| | CANCEL | SUBMIT REPORT |

4. In the **Patron Barcodes** box, enter the patron barcode(s). You can type or scan patron barcodes.

Note:

- Separate multiple barcodes with commas.
- You can enter a maximum of 255 characters in the **Patron Barcodes** field.
- Leap does not validate the barcodes you enter in the Report Wizard. If you enter an incorrect barcode, a billing statement for that patron is not generated.

5. Select Submit Report.

Leap generates patron billing statements and displays them in a preview window. This might take a few moments.

6. Review the statements in the preview window.

Note:

If you see problems or decide not to print the statements, close the preview window.

7. Select the printer icon to print the patron billing statements.

View or Print Recently Generated Notices

When you generate notices in Leap, a copy of the notice file remains temporarily available. For each notice type, the most recently generated notice file remains available. Files are cleared after 24 hours. You can view or print recently generated notices.

Note:

To display recently generated notices, Leap uses the credentials specified in the **Override default Report Server authentication** setting. Leap uses credentials from the lowest organizational level defined (for example, system, library, branch, or staff user).

If you want the **Recent** tab to display only recently generated notices for your branch, your library must configure unique credentials for your branch using this setting.

For more information about the **Override default Report Server authentication** setting, see "Specify a Server for Reporting Services" in the Polaris Administration help. Contact your Site Manager if you have questions about how to configure this setting for your library's needs.

To view or print recently generated notices

1. Select Utilities > Print Notices.

The Notices workform appears.

2. Select Recent.

Leap displays the recently generated notice files.

Note:

Leap displays the most recently generated notice file for each notice type. For example, if you generated overdue notices twice during the past 24 hours, only the most recent copy of the notice file is available.

| Notices | C CLOSE | | |
|-------------------------------|-----------------|--|--|
| Notices ORecent | | | |
| NAME | DATE | | |
| Billing Full Page Mailer_pdf | 7/14/20 2:58 PM | | |
| Overdues Full Page Mailer_pdf | 7/14/20 2:32 PM | | |
| | | | |

3. Click on the notice file you want to view or print.

The notice file opens in a preview window.

4. To print notices, select the printer icon.

Leap Default Quote Text Updated

The quotes displayed on the Leap home page have been updated to include more diverse sources.

Your library can customize default text using the Language Editor in the Web Admin Tool. The updated default language strings are as follows:

- SW_CI_RANDOM_QUOTE1 = "If there's a book that you want to read, but it hasn't been written yet, then you must write it."
- SW_CI_RANDOM_AUTH1 = "Toni Morrison"
- SW_CI_RANDOM_QUOTE2 = "A word after a word after a word is power."
- SW_CI_RANDOM_AUTH2 = "Margaret Atwood"
- SW_CI_RANDOM_QUOTE3 = "If you only read the books that everyone else is reading, you can only think what everyone else is thinking."
- SW_CI_RANDOM_AUTH3 = "Haruki Murikami"
- SW_CI_RANDOM_QUOTE4 = "To build up a library is to create a life. It's never just a random collection of books."
- SW_CI_RANDOM_AUTH4 = "Carlos María Domínguez"
- SW_CI_RANDOM_QUOTE5 = "When we read we are able to travel to many places, meet many people and understand the world."
- SW_CI_RANDOM_AUTH5 = "Nelson Mandela"
- SW_CI_RANDOM_QUOTE6 = "A book is a dream you can hold in your hand."
- SW_CI_RANDOM_AUTH6 = "Neil Gaiman"

International Date and Time

The Polaris product suite has been updated to expand support for different locales and improve handling of different date formats. Polaris products continue to use the server's configuration to determine the date and time format to display. For instance, servers configured for Canada use the date and time format most common in Canada.

This update provides the following advantages:

- increases consistency in date and time display across Polaris products
- improves date validation in Leap
- adds a new date picker in PAC, Web Admin, and SimplyReports

Prompting PowerPAC Users to Accept Cookies

You can now configure PowerPAC to display a message that informs patrons that the site uses cookies and prompts them to agree to the use of cookies.

When you enable this feature, the following message appears at the bottom of each PowerPAC screen. The message formatting matches your PowerPAC theme.

This site uses cookies and other technologies to provide you with an optimal experience. By continuing use of this website you are agreeing to use of our cookies. To learn more, see our privacy policy and services privacy policy.

When a patron clicks **Accept**, the message disappears.

By default, the cookie policy message is not enabled.

To enable and manage the cookie policy message:

- Enabling the Cookie Policy Message
- Customizing the Cookie Policy Message Text
- <u>Configuring How Frequently the Cookie Policy Message Appears</u>

Enabling the Cookie Policy Message

You can enable or disable the appearance of the cookie policy message at the system level.

To enable the cookie policy message

- 1. In the Administration Explorer, select System > Profiles > PowerPAC.
- 2. On the PowerPAC tab, set the **Cookie acceptance: Enable** profile to **Yes**.

Accept

| P Administration Explorer - System - QA-BINGO 6.6 - Polaris | | | | _ | | × | |
|---|---|--|------------------|----------------|------------|---------------|--------------|
| File Edit Help | | | | | | | |
| D - 🚅 - 🖯 🗙 🖆 | 7 😰 | | | | | | |
| P Administration Explorer - System | Profiles | | | | | | |
| Administration Explorer - System | Children's PAC Acquisitions / Serials | Staff Client Patron Services | Mol Catalogin | oile PAC Ig | PAC | Commu Powe | nity rPAC |
| Permissions Security | Profile | | | Value | | | ^ |
| Database Tables | Ask us: Require login | ng: Enable | | Yes | | | |
| 🗄 📲 🚺 Server | Bookmarking & Shari | ng: Profile ID for "Add | This" ana | | | | |
| Branch Collection | P Branch switching: Ena | ble urce targets | | Yes Setup. | | | |
| Workstation | Cookie acceptance: En | nable | | Yes | | | |
| Patron | Dashboards: Expande | tternal workstation re d | tention p | 1 day(s No |) | | |
| | Dashboards: Narrow your search & related searches | | Setup. | | | | |
| | Dashboards: Web pag | Dashboards: Web page / web part assignment | | Setup. | | | |
| | Dashboards: Web par | Dashboards: Web part construction | | Setup. | | | |
| | 📇 Did you mean: Sugge | stions are to display e | ven when | No | | | |
| | P Enable logging of tra | nsactions | | Yes | | | ~ |
| < > | < | | | | | | > |
| For Help, press F1 | | | | 20 2 | emily.reis | ; | |

Customizing the Cookie Policy Message Text

Two new strings in the Polaris Web Admin Tool allow you to customize the cookie policy message:

- PACML_PRIVACY_POLICY Cookie policy message text
- PACPROF_COOKIE_ACCEPT_BUTTON Accept button label

By default, the cookie policy message includes links to Innovative's privacy policy and services privacy policy. You can edit the message to include links to your library's policies.

Configuring How Frequently the Cookie Policy Message Appears

When a patron clicks **Accept**, the cookie policy message disappears and does not reappear for a configurable period of time. You can configure different "cookie acceptance" periods for different types of users:

- In-house patrons (patrons accessing PowerPAC at public workstations in the library)
- External patrons (patrons accessing PowerPAC from home)

For In-house Patrons

For in-house patrons, PowerPAC uses the existing **PowerPAC: Patron inactivity timeout** profile setting to determine when to display the cookie policy message.

When an in-house patron clicks **Accept**, the cookie policy message disappears and does not reappear until one of the following conditions causes it to reappear:

| If the patron is | And | The following occurs |
|------------------|--|--|
| Signed in | Signs out of Power- PAC | The cookie policy message appears. |
| Signed in | Leaves the work- station without sign- ing out | The cookie policy message appears when the Patron inactivity timeout period elapses. If this profile is not enabled in Polaris Administration, the cookie policy message appears when the session timeout period elapses. |
| Not signed in | Leaves the work- station | The cookie policy message appears when the session timeout period elapses. |

Notes:

 For more information about the Patron inactivity timeout profile setting, see "Set inactivity timeout for in-house workstations" in the Polaris ILS help. • PowerPAC's default session timeout period is 20 minutes. Contact Innovative Support to change the timeout period.

For External Patrons

For external patrons, PowerPAC uses the new system-level **PowerPAC: Cookie acceptance: External workstation retention period** profile setting to determine when to display the cookie policy message.

To configure how frequently the cookie policy message appears for external patrons

- 1. In the Administration Explorer, select System > Profiles > PowerPAC.
- 2. On the PowerPAC tab, double-click the value beside the **Cookie** acceptance: External workstation retention period profile.



3. Enter a value in days.

When an external patron accepts the cookie policy, the message disappears and does not reappear until the specified **External workstation retention period** elapses. By default, this profile is set to 365 days.

Note:

The cookie policy message reappears before the **External workstation retention period** elapses if the patron clears their browser cache and cookies.

New Variable in Postal Codes

Polaris postal code validation now supports a single character to represent a number or a letter in postal codes. In the countries table, you can use "A" in the postal code format field to represent an alphanumeric character. For detailed information on configuring postal codes, search "Add a Postal Code Format" in the Staff Client help.

My Lists Now under My Account in PowerPAC

In PowerPAC, the **My Lists** option in the navigation menu in both the header and footer has moved from **Search** to **My Account**.

| My Account 🕞 |
|-------------------|
| My Record |
| Items Out |
| Requests |
| Fines & Fees |
| Saved Searches |
| My Lists |
| Log In / Register |

MARC Technical Updates in Polaris 6.6

The updates specified in the following links were implemented in Polaris 6.6.

- MARC Technical Notice January 17, 2020
- MARC Technical Notice February 21, 2020
- MARC Technical Notice March 13, 2020

Changes to Supported Web Browsers

Firefox

As of version 6.6, Polaris products include beta-level support for Firefox.

Internet Explorer

Polaris products no longer support Internet Explorer. We recommend that you use the Edge browser instead.

Web Admin Tool Updates

The tables below lists the most important new strings added in Polaris 6.6.

PowerPAC Strings

| Mnemonic String | Text |
|------------------------------|---|
| PACML_PRIVACY_POLICY | This site uses cookies and other tech- nologies to provide you with an optimal experience. By continuing use of this web- site you are agreeing to use of our cookies. To learn more, see our <u>privacy policy</u> and <u>services privacy policy</u> . |
| PACPROF_COOKIE_ACCEPT_BUTTON | Accept |