Polaris Acquisitions/Serials User Group Meeting

Wednesday April 6th, 2022

Updates:

* Polaris 7.1 installed in Training 3/16/22
* Polaris 7.1 to be installed in Production 4/12/22
* Library Updates

7.1 Release Notes

* <https://documentation.iii.com/product-documentation/polaris.php>

“What’s New in Polaris 7.1” Webinar

* <https://vimeo.com/684327553/593f3acd8e?mkt_tok=MzkzLUpZTy02ODcAAAGDf69U9fTZKlJMHW_B9wQ632I7VWxBi6lmmxcVdFBaXTzWMCKBRk9myukvYLTMVMpnr4U70C8ggYZHbMHDew_4fc_FDmI3H1Mpocv93xs>

New features added to Leap in version 7.1

* Printing/Configuring Spine Labels
  + Completely web-based (no additional software needed)
  + PDF-based, will only add padding to margins if printer requires it
  + Item Record🡪Actions🡪Print Label; Utilities 🡪 Label Manager; Print Settings🡪Print Options🡪Label Options
  + Serial label printing is planned for future release
* Modify Serial Holdings Records
  + Serials Check In🡪Serial Holdings Record ID hyperlink🡪SHR Workform
  + Publication Patterns are currently read-only
* Supplier Records Workform
  + New🡪 Supplier
* Fiscal Years Workform (Edit Funds or Add New)
  + New🡪Fiscal Year
  + Existing Funds🡪Fund History (new table)
  + Funds Adjustment (Add & Transfer)
* Fund Workform
  + Fiscal Year🡪New Fund
* Purchase Orders
  + Bulk add to PO from Record Set (Add to new or Existing)
  + Edit Existing PO’s/PO Line Items
  + Send via EDI
* Invoices
  + Invoice Workform to edit existing invoices/invoice line items

Innovative Product Status Board (Public Roadmap)

* <https://portal.productboard.com/iii/6-innovative-product-status-board-new/tabs/23-polaris>
* Used by Samantha Quell (Innovative Project Manager) to design upcoming releases based on customer feedback

Coming to Leap in Polaris 7.2

* Manually Create Serial Holdings Record
* Publication Patterns Workform
* Cancel & Credit actions for PO Line Items and Invoice Line Items
* EDI Integration w/ Blackstone
* Acquisitions API for B&T (Titlesource 360)

Coming to Leap in Polaris 7.3

* Manually create PO’s & Invoices

Vote for & Comment on Upcoming features!!