polaris

What's New in Polaris

8.0

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Polaris Installation Notes

Important:
When the new Polaris release is installed on a workstation, the file path changes from 7.8 to 8.0 as in the following examples:

- C:\ProgramData\Polaris\8.0
- C:\Program Files\Polaris\8.0
- C:\Program Files (x86)\Polaris\8.0

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New or Modified Polaris Administrative Settings

The system administration settings below have been added or modified to support the new features in Polaris 8.0.

Setting	Purpose	Level
New Settings		
Patron Services: Allow Patron Aging Job	Enables the patron aging process, allowing the system to automatically assign patrons to the next level of patron code after reaching the required age.	System, Library, Branch
Patron Services: Hold Slip Options > Request ID	In libraries with custom smart lockers, this option allows users to include **Request ID** on hold slips so they can easily look up the request at the locker, place an item inside, and update the request.	System, Library, Branch
Patron Services: Hold Slip Options > Request ID QR Code	In libraries with custom smart lockers, this option allows users to include **Request ID** on hold slips so they can easily look up the request at the locker, place an item inside, and update the request.	System, Library, Branch
Web app > Suppress view: Dated notes	Indicates whether the **Dated Notes** view is suppressed from display in the Leap **Patron Registration** workform.	System, Library, Branch
New Permissions		
Log Files: Access	Allows users with this permission to access all available log files for their organization through Polaris System Administration (web-based).	System
Modify patron code aging rules table	Add and modify entries in the Patron Code Aging Rules table that specify conditions	System, Library, Branch

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Setting	Purpose	Level
	for automatic changes to patron codes after reaching a certain age. All organizations use the settings in this table.	
PAPI key management	Allows users with this permission to Access PAPI key management in the Administration Explorer to create, modify, and delete PAPI keys.	System
Patron status: Display dated notes	Allows users with this permission to view dated notes.	Branch
Patron status: Create dated notes	Allows users with this permission to create dated notes.	Branch
Patron status: Delete dated notes	Allows users with this permission to delete dated notes.	Branch
SQL job status: Access	Allows users with this permission to access SQL Job Status from Polaris System Administration (web-based), view a list of all SQL jobs configured on the server, their statuses, and the history of selected job runs.	System

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Polaris API Changes

The following methods have been updated:

Method Name	Purpose
Api	Returns PAPI version information. Improved health check.
UpdatePatronNotesData	Provides the ability to prepend, append, or replace staff notes on patrons. Updated to work with dated patron notes.

For more information, see the topic for the method in the PAPI documentation.

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Accessing Polaris API Key Management

Polaris API keys are no longer available through the legacy WebAdmin interface. PAPI Key Management is now accessible only through Polaris System Administration (web-based) for users with the **PAPI key management** access permission. This system-level permission is automatically enabled for administrators, who can then add it to other permission groups.

For more information, see the System Administration Permissions topic.

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Newly Added Administrative Settings and Tables in Polaris System Administration (Web-Based)

In version 8.0, you can configure most administrative settings and tables on the **Settings and Tables** page in **Polaris System Administration (web-based)**, which in previous versions could only be configured in the **Polaris staff client**.

The following settings modules and tables have been added to **Polaris System Administration (web-based)**:

Settings modules

- **Credit Card** with settings for configuring and managing credit card payment options for your library's transactions
- **PowerPAC** with settings for customizing and managing your library's PowerPAC features

Tables

- **Aeon Special Collection Locations** table which specifies the shelf locations that are designated as Aeon special collection locations
- **Reading Level Ranges** table for modifying reading level ranges

The following settings modules have been updated with new settings in **Polaris System Administration (web-based)**:

- **Acquisitions** now includes settings like **Acq claim/cancellation defaults**, **Acq fund drop-down list setup**, **Generate purchase order number**, **Subscription renewal fund - deposit account**, **Subscription renewal fund - non-deposit account**
- **Serials** now includes settings like **Display of issues on check-in**

To learn more about each setting and table available in **Settings and Tables** in **Polaris System Administration (web-based)**, see Settings and Tables.

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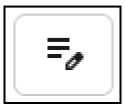
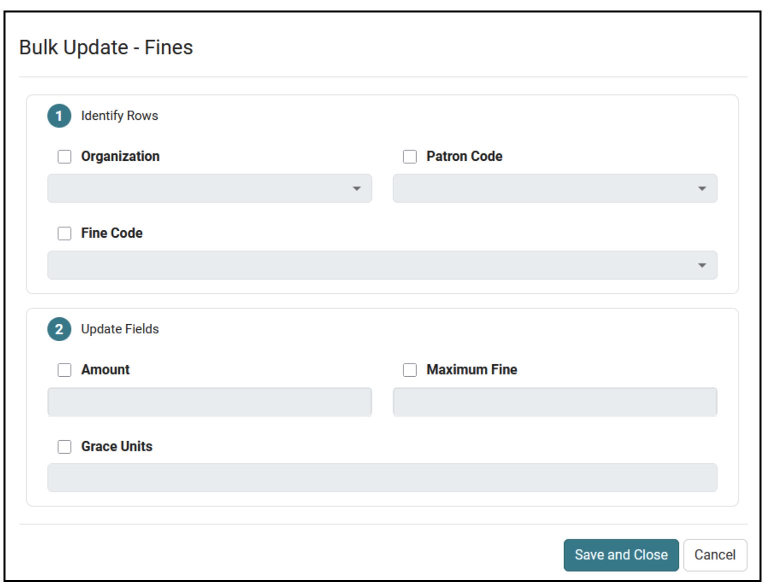
New Bulk Update Option for Tables in Polaris System Administration (Web-Based)

Polaris System Administration (web-based) now allows you to edit table rows by bulk. In the Settings and Tables section, some tables now display a **Bulk Update** button:



To update table rows by bulk

1. On the **Tables** tab of the Settings and Tables page, select the **Bulk Update** option in the table you want to edit.
2. A new window appears, displaying the table row fields you can include in the selection for bulk editing. The fields are divided into two sections:
   1. Identify Rows: filtering table row fields (e.g., Branch, Collection, Patron Code, etc.) and their corresponding values used to mark the table rows you want to edit.
   2. Update Fields: editable table row fields (e.g., Fine Amount, Maximum in Item Limit, etc.) you can mark for update and enter their new values.



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3. Select **Save and Close**, and a dialogue box displays the number of rows affected by edits. From here, you can either cancel or confirm the bulk update.

Tables Supporting Bulk Update

Tables with the Bulk Update functionality:

- Fines
- Floating: Collection Limits
- Floating: Material Type Limits
- Floating: Material Types
- Floating: To Branch
- Item Statistical Class Codes
- Loan Periods
- Material Type Loan Limit Blocks
- Patron / Material Type Loan Limit Blocks
- Patron Statistical Class Codes
- Shelf Locations

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Configuring Vendor Accounts in Polaris System Administration (Web-Based)

You can now configure vendor accounts in **Polaris System Administration (web-based)**. This means you can create, modify, or delete specific vendor accounts without signing in to the Polaris staff client.

This section covers the following topics:

- Creating a Vendor Account
- Editing a Vendor Account
- Deleting a Vendor Account

Creating a Vendor Account

You can create a vendor account if you have the following permissions in **Polaris System Administration (web-based)**:

- **Vendor Accounts:** Access
- **Vendor Accounts:** Create

For more information about system administration permissions, see System Administration Permissions Reference.

To create a vendor account

1. On the **Polaris System Administration (web-based)** Home page, select **Vendor Accounts**.

   The **Vendor Accounts** page appears, with a list of vendor accounts. Each vendor account is listed with an **ID, Name, Description, and Type.**

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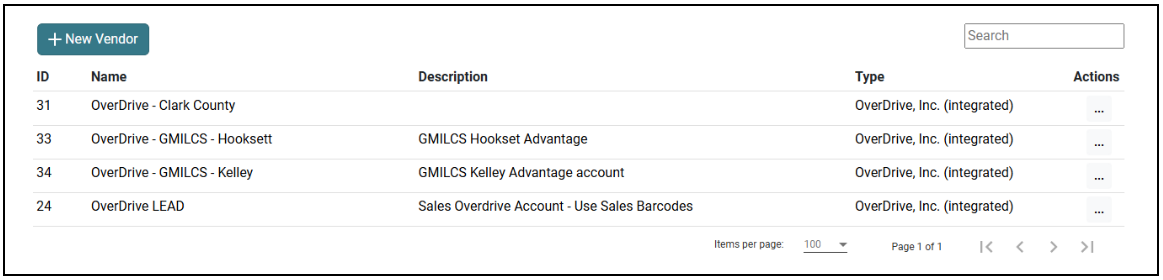

2. Select **New Vendor**.

   A **New Vendor** dialog appears.

   a. From the **Select vendor account type** dropdown list, select a vendor account type. The following account types are available:

      - **CloudLibrary**
      - **boundless**
      - **Generic**
      - **OverDrive non-integrated**
      - **OverDrive integrated**

   b. Select **OK**.

3. A new **Vendor Account** workform appears. Workform fields depend on the vendor account type.

   > **Note:**
   > Required fields are in bold. For example: **Vendor contract ID**.

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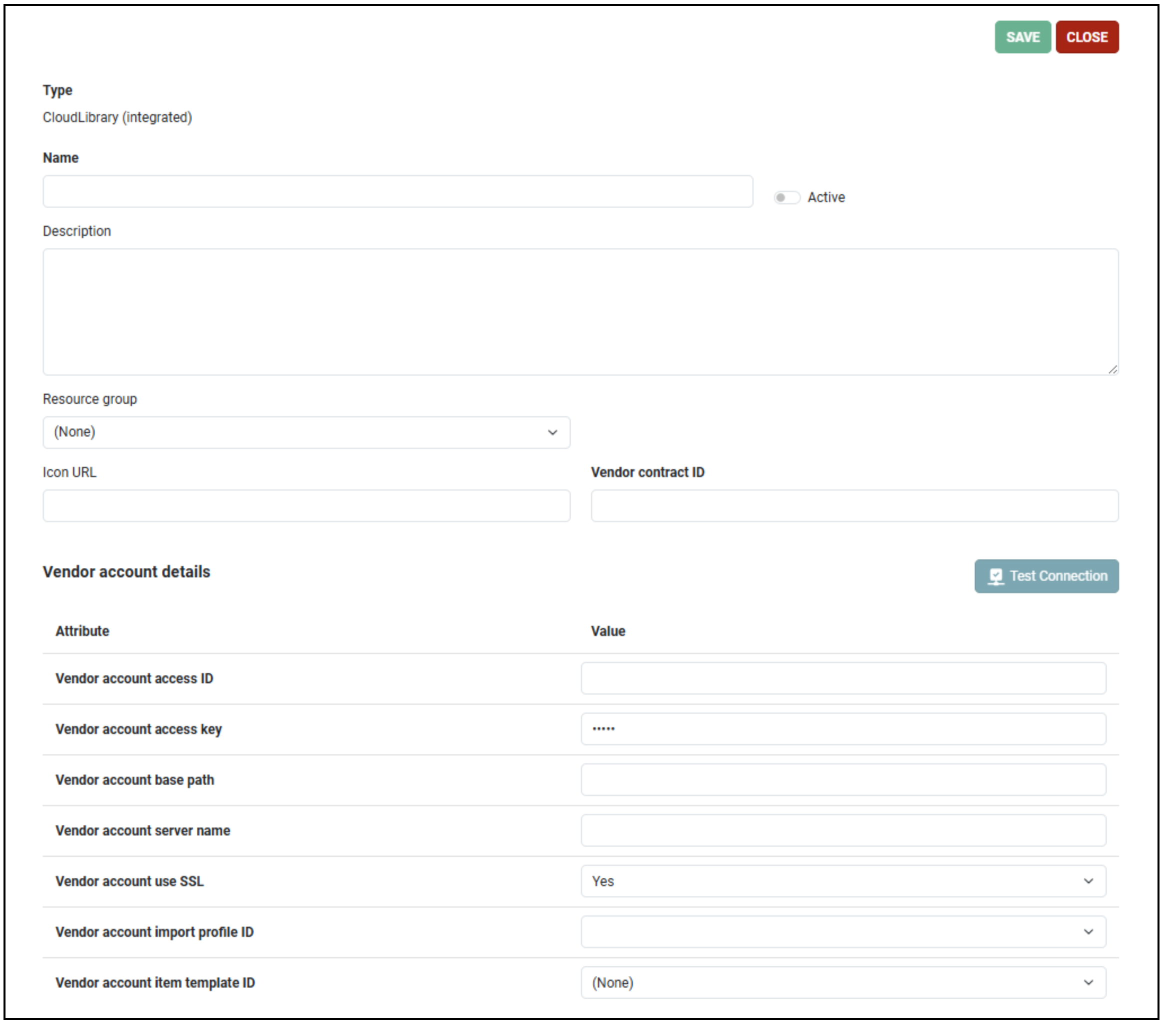

For instructions on how to complete a workform for each vendor account type, see the following sections:

- Create a CloudLibrary Vendor Account
- Create a boundless Vendor Account
- Create a Generic Vendor Account
- Create an OverDrive non-integrated Vendor Account
- Create an OverDrive integrated Vendor Account

> **Note:**
> If your library uses the cloudLink feature for sharing

CloudLibrary titles among multiple libraries, you can set a preferred vendor account per organization in the **Preferred Vendor Accounts** table in **Settings and Tables**.

Create a CloudLibrary Vendor Account

To create a CloudLibrary vendor account

1. In the **Name** field, enter a unique vendor account name.
2. Turn on the **Active** toggle.
3. (Optional) In the **Description** box, enter a description of the vendor account.
4. (Optional) From the **Resource group** dropdown list, select a resource group. For more information about resource groups, see Resource Groups.
5. (Optional) In the **Icon URL** field, add a URL location of the icon that represents the eContent vendor.
6. In the **Vendor contract ID**, enter the vendor's contract ID. The contract ID must be unique, and it can contain up to 255 characters.
7. In the **Vendor account details** section, define the following attribute values:
    a. **Vendor account access ID** - Enter the library's access ID for the eContent vendor account.
    b. **Vendor account access key** - Enter the library's access key for the eContent vendor account.
    c. **Vendor account base path** - Enter the URL path to the library's resources at eContent vendor.
    d. **Vendor account server name** - Enter the vendor account server name.
    e. **Vendor account use SSL -** Select **Yes** or **No** to indicate whether Secure Socket Layer is used.
    f. **Vendor account import profile ID** - Select the import profile for automatic API-driven imports for the integrated eContent vendor.

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   g. **Vendor account item template ID -** Select the item template used during the automatic API-driven import process.

8. Select **SAVE**.
9. Click the **Test Connection** button to test the API settings in the vendor account and ensure that a connection is made to the vendor's service. If the test was successful, a success notification appears.

Create a boundless Vendor Account

To create a boundless vendor account

1. In the **Name** field, enter a unique vendor account name.
2. Turn on the **Active** toggle.
3. (Optional) In the **Description** box, enter a description of the vendor account.
4. (Optional) From the **Resource group** dropdown list, select a resource group. For more information about resource groups, see Resource Groups.
5. (Optional) In the **Icon URL** field, add a URL location of the icon that represents the eContent vendor.
6. In the **Vendor contract ID**, enter the vendor's contract ID. The contract ID must be unique, and it can contain up to 255 characters.
7. In the **Vendor account details** section, define the following attribute values:
   a. **Vendor account access ID** - Enter the library's access ID for the eContent vendor account.
   b. **Vendor account access key** - Enter the library's access key for the eContent vendor account.
   c. **Vendor account base path** - Enter the URL path to the library's resources at eContent vendor.
   d. **Vendor account server name** - Enter the vendor account server name.
   e. **Vendor account use SSL -** Select **Yes** or **No** to indicate whether Secure Socket Layer is used.

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   f. **Vendor account item template ID** - Select the account item template ID. The library creates the item template used during the API-driven processes. For Boundless, this template is used for added copies only. The item template name must begin with Ebook automatic import or E-book automatic import.
   g. **Content cafe cover image user name** - Enter the content cafe cover image user name.
   h. **Content cafe cover image password** - Enter the content cafe cover image password.
   i. **Library OAuth URL** - Enter the URL used to grant the Polaris ILS an access token, which is used to access the Boundless API.
   j. **Default URL link text** - Enter the value that identifies the URL link text and is also used as hover text for the vendor icon.
8. Select **SAVE**.
9. Click the **Test Connection** button to test the API settings in the vendor account and ensure that a connection is made to the vendor's service. If the test was successful, a success notification appears.

Create a Generic Vendor Account

To create a Generic vendor account

1. In the **Name** field, enter a unique vendor account name.
2. Turn on the **Active** toggle.
3. (Optional) In the **Description** box, enter a description of the vendor account.
4. (Optional) From the **Resource group** dropdown list, select a resource group. For more information about resource groups, see Resource Groups.
5. (Optional) In the **Icon URL** field, add a URL location of the icon that represents the eContent vendor.
6. (Optional) In the **Vendor contract ID**, enter the vendor's contract ID. The contract ID must be unique, and it can contain up to 255 characters.
7. In the **Vendor account details** section, define the following attribute values:

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a. **Vendor account identifier value** - Enter the value that identifies the vendor's account.
b. **Vendor account identifier tag number -** Enter the value that identifies the bib tag where the vendor account ID is located.
c. **Vendor account identifier subfield** - Enter the value that identifies the bib tag subfield where the vendor account identifier is found.
d. **Vendor object identifier tag number** - Enter the value that identifies the tag where the eContent object identifier is found.
e. **Vendor object identifier subfield** - Enter the value that identifies the tag subfield where the eContent object identifier is found.
f. **(Optional) Vendor object identifier start value** - Enter the value that specifies where the string that identifies the eContent object starts.
g. **(Optional) Vendor object identifier end value** - Enter the value that specifies where the string that identifies the eContent object ends. If the object identifier appears at the end of the subfield, this field can be left blank.
h. **Vendor account URL and link text tag number** - Enter the value that identifies the tag where the URL for the eContent and link text are found. These need to be in the same tag. This is the tag that becomes the resource entity for the non-integrated eContent bibliographic record.
i. **Vendor account URL and link text indicator two** - Enter the value that identifies the MARC second indicator value for the tag containing the URL and link text.
j. **Vendor account URL subfield** - Enter the value that identifies the subfield where the URL is located.
k. **Vendor account link text subfield -** Enter the value that identifies the subfield where the link text is located.
l. **(Optional) Vendor account public note subfield** - Enter the value that identifies the subfield for the public note.
m. **(Optional) Vendor account nonpublic note subfield -** Enter the value that identifies the non-public note subfield.

8. Select **SAVE**.

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Create an OverDrive non-integrated Vendor Account

To create an OverDrive non-integrated vendor account

1. In the **Name** field, enter a unique vendor account name.
2. Turn on the **Active** toggle.
3. (Optional) In the **Description** box, enter a description of the vendor account.
4. (Optional) From the **Resource group** dropdown list, select a resource group. For more information about resource groups, see Resource Groups.
5. (Optional) In the **Icon URL** field, add a URL location of the icon that represents the eContent vendor.
6. In the **Vendor contract ID**, enter the vendor’s contract ID. The contract ID must be unique, and it can contain up to 255 characters.
7. In the **Vendor account details** section, define the following attribute values:
    a. **Vendor account identifier value** - Enter the value that identifies the vendor’s account.
    b. **Vendor account identifier tag number -** Enter the value that identifies the bib tag where the vendor account ID is located.
    c. **Vendor account identifier subfield** - Enter the value that identifies the bib tag subfield where the vendor account identifier is found.
    d. **Vendor object identifier tag number** - Enter the value that identifies the tag where the eContent object identifier is found.
    e. **Vendor object identifier subfield** - Enter the value that identifies the tag subfield where the eContent object identifier is found.
    f. **(Optional) Vendor object identifier start value** - Enter the value that specifies where the string that identifies the eContent object starts.
    g. **(Optional) Vendor object identifier end value** - Enter the value that specifies where the string that identifies the eContent object ends. If the object identifier appears at the end of the subfield, this field can be left blank.

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h. **Vendor account URL and link text tag number** - Enter the value that identifies the tag where the URL for the eContent and link text are found. These need to be in the same tag. This is the tag that becomes the resource entity for the non-integrated eContent bibliographic record.

i. **Vendor account URL and link text indicator two** - Enter the value that identifies the MARC second indicator value for the tag containing the URL and link text.

j. **Vendor account URL subfield** - Enter the value that identifies the subfield where the URL is located.

k. **Vendor account link text subfield -** Enter the value that identifies the subfield where the link text is located.

l. **(Optional) Vendor account public note subfield** - Enter the value that identifies the subfield for the public note.

m. **(Optional) Vendor account nonpublic note subfield -** Enter the value that identifies the non-public note subfield.

8. Select **SAVE**.

Create an OverDrive integrated Vendor Account

To create an OverDrive integrated vendor account

1. In the **Name** field, enter a unique vendor account name.
2. Turn on the **Active** toggle.
3. (Optional) In the **Description** box, enter a description of the vendor account.
4. (Optional) From the **Resource group** dropdown list, select a resource group. For more information about resource groups, see Resource Groups.
5. (Optional) In the **Icon URL** field, add a URL location of the icon that represents the eContent vendor.
6. In the **Vendor contract ID**, enter the vendor’s contract ID. The contract ID must be unique, and it can contain up to 255 characters.
7. In the **Vendor account details** section, define the following attribute values:

a. **Vendor account access ID** - Enter the library's access ID for the eContent vendor account.
b. **Vendor account access key** - Enter the library's access key for the eContent vendor account.
c. **Vendor account base path** - Enter the URL path to the library's resources at eContent vendor.
d. **Vendor account server name** - Enter the vendor account server name.
e. **Vendor account import profile ID**- Select the import profile for automatic API-driven imports for the integrated eContent vendor.
f. **Vendor account item template ID** - Select the account item template ID. The library creates the item template used during the API-driven processes. For Boundless, this template is used for added copies only. The item template name must begin with Ebook automatic import or E-book automatic import.
g. **Library OAuth URL** - Enter the URL used to grant the Polaris ILS an access token, which is used to access the Boundless API.
h. **Patron OAuth URL** - Enter the URL used to grant the Polaris ILS an access token for patron circulations.
i. **Patron API URL** - Enter the URL used to perform circulation functions.
j. **Library web-site ID** - Enter the web site ID used by OverDrive to identify the library's collection for circulation purposes.
k. **Default URL link text** - Enter the value that identifies the URL link text and is also used as hover text for the vendor icon.
l. **ILS name** - Enter the name that identifies the ILS.
m. **(Optional) OverDrive Advantage account ID** - This field is required only for OverDrive Advantage accounts.

8. Select **SAVE**.
9. Click the **Test Connection** button to test the API settings in the vendor account and ensure that a connection is made to the vendor's service. If the test was successful, a success notification appears.

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Editing a Vendor Account

You can edit a Vendor Account if you have the **Vendor Account: Modify** permission in **Polaris System Administration (web-based)**. For more information about system administration permissions, see System Administration Permissions Reference.

To edit a vendor account

1. On the **Polaris System Administration (web-based)** Home page, select **Vendor Accounts**.

   The **Vendor Accounts** page appears, with a list of vendor accounts. Each vendor account is listed with an **ID, Name, Description, and Type.**

2. Find the vendor account you want to edit. You can filter the list of vendor accounts by typing in the **Search** box.

3. In the **Actions** column, select **Options** ..., and select **Edit**.

   The vendor account workform appears.

4. Edit the vendor account information. See Creating a Vendor Account for more information about vendor account fields.

5. Select **SAVE**.

Deleting a Vendor Account

You can delete a vendor account if you have the **Vendor Account: Delete** permission in **Polaris System Administration (web-based)**. For more information about system administration permissions, see System Administration Permissions Reference.

To delete a vendor account

1. On the **Polaris System Administration (web-based)** Home page, select **Vendor Accounts**.

   The **Vendor Accounts** page appears, with a list of vendor accounts. Each vendor account is listed with an **ID, Name, Description, and Type.**

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2. Find the vendor account you want to delete. You can filter the list of vendor accounts by typing in the **Search** box.

3. In the **Actions** column, select **Options** ..., and select **Delete**.

   The system prompts you to confirm that you want to delete the vendor account.

   > **Note:**
   > You can't delete a vendor account if it's linked to bibliographic record resource entities.

4. Select **Continue**.

   The system deletes the vendor account and displays a success message.

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Configuring Resource Groups in Polaris System Administration (Web-Based)

You can now configure resource groups in **Polaris System Administration (web-based)**. This means you can create, modify, or delete resource groups without using the Polaris staff client.

This section covers the following topics:

- Creating a Resource Group
- Editing a Resource Group
- Deleting a Resource Group

Creating a Resource Group

You can create a resource group if you have the following permissions in **Polaris System Administration (web-based)**:

- **Resource Groups:** Access
- **Resource Groups:** Create

For more information about system administration permissions, see System Administration Permissions Reference.

To create a resource group

1. On the **Polaris System Administration (web-based)** Home page, select **Resource Groups**.

   The **Resource Group** page appears, with a list of resource groups. Each resource group is listed with an **ID, Name, Description,** and **Number of Branches.**

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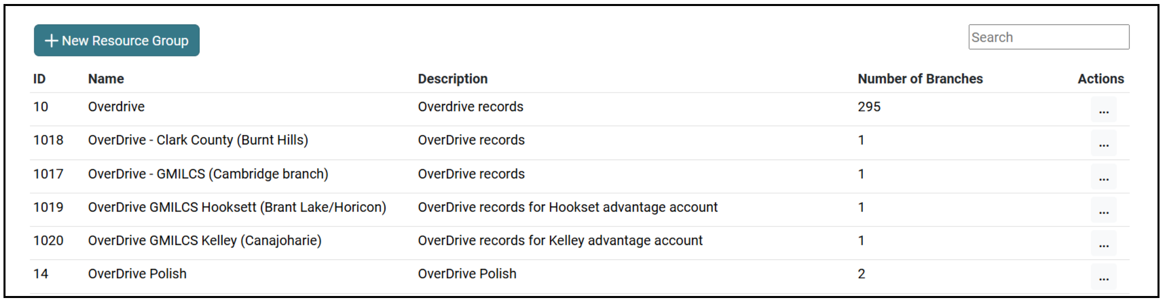
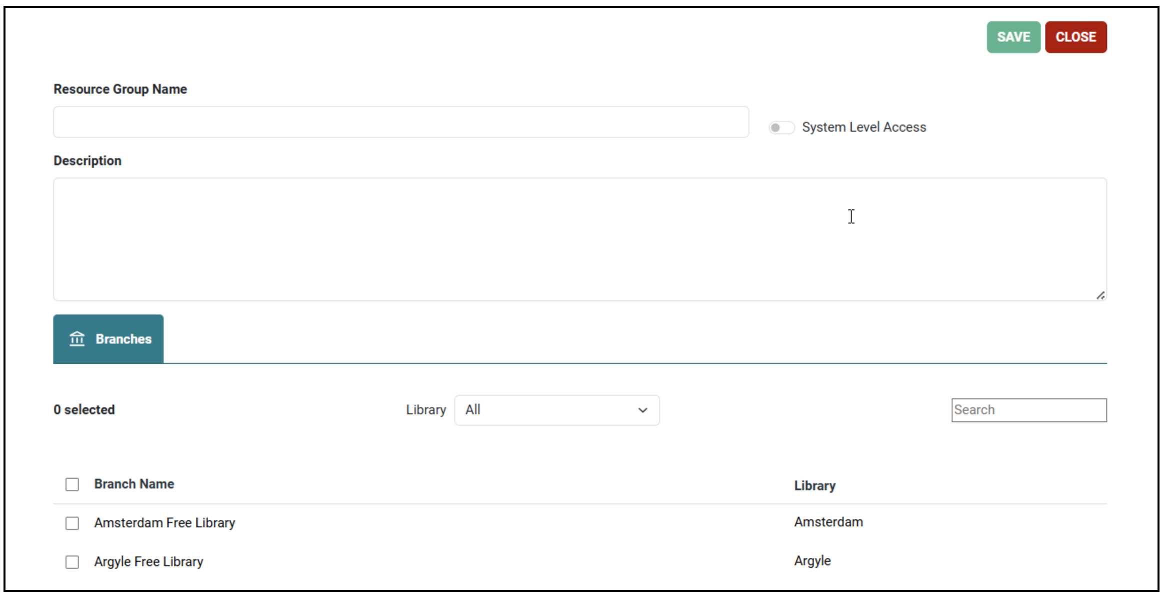


2. Select **New Resource Group**.

   A **Resource Group** workform appears.



To create a Resource Group

1. In the **Name** field, enter a unique resource group name.
2. (Optional) Turn on the **System Level Access** toggle to give PAC users access to the resources associated with this Resource Group when the PAC connection organization is the system.
3. In the **Description** box, enter a description of the resource group.
4. From the **Branches** tab, do following:

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   a. Select the **Branches** checkbox to select all branches. Resources which this Resource Group is associated with are available when the PAC connection organization is any library-level organization or any branch-level organization.

   or

   b. Select the checkbox next to a branch name to select specific branches. In the **Library** dropdown list you can select a library to filter the list of branches to only those associated with the selected library. You can also filter the list of branches by typing in the **Search** box. The number of branches selected is displayed in the upper-left corner of the **Branches** tab. PAC users connected at any of the selected branches have access to the resources (databases) associated with the resource group.

   c. To remove a branch from a Resource Group, clear the checkbox next to the branch name.

5. Select **SAVE**.

Editing a Resource Group

You can edit a Resource Group if you have the **Resource Group: Modify** permission in **Polaris System Administration (web-based)**. For more information about system administration permissions, see System Administration Permissions Reference.

To edit a resource group

1. On the **Polaris System Administration (web-based)** Home page, select **Resource Groups**.

   The **Resource Group** page appears, with a list of resource groups. Each resource group is listed with an **ID, Name, Description,** and **Number of Branches.**

2. Find the resource group you want to edit. You can filter the list of resource groups by typing in the **Search** box.

3. In the **Actions** column, select **Options** , and select **Edit**.

   The resource group workform appears.

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4. Edit the resource group information. See Creating a Resource Group for more information about resource group fields.
5. Select **SAVE**.

Deleting a Resource Group

You can delete a resource group if you have the **Resource Group: Delete** permission in **Polaris System Administration (web-based)**. For more information about system administration permissions, see System Administration Permissions Reference.

To delete a resource group

1. On the **Polaris System Administration (web-based)** Home page, select **Resource Groups**.

   The **Resource Group** page appears, with a list of resource groups. Each resource group is listed with an **ID, Name, Description,** and **Number of Branches.**
2. Find the resource group you want to delete. You can filter the list of resource groups by typing in the **Search** box.
3. In the **Actions** column, select **Options** ..., and select **Delete**.

   The system prompts you to confirm that you want to delete the resource group.
4. Select **Continue**.

   The system deletes the resource group and displays a success message.

   > **Note:**
   > If the resource group is in use by a vendor account, the deletion process stops, and a dialog appears with the message "This resource group is assigned to [number of linked vendor accounts]. It cannot be deleted."

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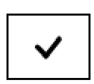
Accessing SQL Job Status in Polaris System Administration (Web-Based)

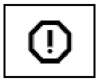
Now you can access **SQL Job Status** from **Polaris System Administration (web-based)** to view a list of all SQL jobs configured on the server, their statuses, and the history of selected jobs. This allows you to see the status of a job for troubleshooting purposes without having to use SQL Server Management Studio (SSMS). If you share a server, you will only see the SQL jobs configured for your organization.

> **Note**:
> **SQL Job Status** is read-only and doesn't allow modifications to the jobs, job schedules, or the addition of new jobs.

To access SQL Job Status in Polaris System Administration (web-based)

> **Note**:
> This requires administrative-level permissions. To enable access, the Access SQL job status permission needs to be manually added to the staff member's permission group in **Polaris System Administration (web-based)**.

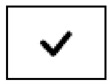
1. On the Home page, select **SQL Job Status**.
    a. The **SQL Job Status** page appears, displaying a table of all SQL jobs configured on the server with the following information about each job:
        i. **Name** – The name of the SQL job.
        ii. **Enabled** – Shows  if the job is enabled or blank if the job is disabled.
        iii. **Status** – Describes the job's current state (Idle, Executing, etc.) at the time the page was loaded. To see the updated status, refresh the page in your browser.

iv.  (Failed icon) – A blank space indicates that the job was successful, while the red icon indicates that the job failed.

v. **Last Run Outcome** – Shows the result of the most recent job run (Succeeded, Canceled, etc.).

vi. **Last Run Date** – Displays the date and time of the most recent job run.

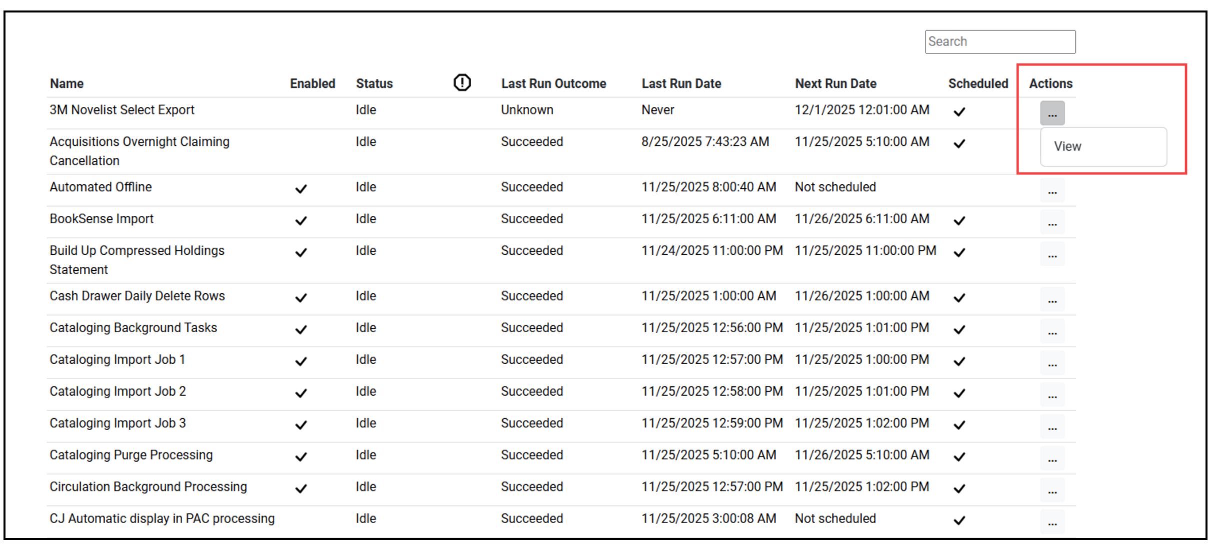
vii. **Next Run Date** – Shows the date and time of the next scheduled job run. If the job run wasn't scheduled, **Not scheduled** appears.

viii. **Scheduled** – Shows  if the job is scheduled or blank if the job is not sheduled.

b. (Optional) To filter the list of jobs or find a specific job, enter your search criteria in the search box at the upper-right corner of the page.

c. (Optional) To sort a column in the table, click its header.

2. In the **Actions** column of the job, click  and select **View** to see the history of the selected jobs.


Search

Name	Enabled	Status	ⓘ	Last Run Outcome	Last Run Date	Next Run Date	Scheduled	Actions
3M Novelist Select Export		Idle		Unknown	Never	12/1/2025 12:01:00 AM	✓	...
Acquisitions Overnight Claiming Cancellation		Idle		Succeeded	8/25/2025 7:43:23 AM	11/25/2025 5:10:00 AM	✓	View
Automated Offline	✓	Idle		Succeeded	11/25/2025 8:00:40 AM	Not scheduled		...
BookSense Import	✓	Idle		Succeeded	11/25/2025 6:11:00 AM	11/26/2025 6:11:00 AM	✓	...
Build Up Compressed Holdings Statement	✓	Idle		Succeeded	11/24/2025 11:00:00 PM	11/25/2025 11:00:00 PM	✓	...
Cash Drawer Daily Delete Rows	✓	Idle		Succeeded	11/25/2025 1:00:00 AM	11/26/2025 1:00:00 AM	✓	...
Cataloging Background Tasks	✓	Idle		Succeeded	11/25/2025 12:56:00 PM	11/25/2025 1:01:00 PM	✓	...
Cataloging Import Job 1	✓	Idle		Succeeded	11/25/2025 12:57:00 PM	11/25/2025 1:00:00 PM	✓	...
Cataloging Import Job 2	✓	Idle		Succeeded	11/25/2025 12:58:00 PM	11/25/2025 1:01:00 PM	✓	...
Cataloging Import Job 3	✓	Idle		Succeeded	11/25/2025 12:59:00 PM	11/25/2025 1:02:00 PM	✓	...
Cataloging Purge Processing	✓	Idle		Succeeded	11/25/2025 5:10:00 AM	11/26/2025 5:10:00 AM	✓	...
Circulation Background Processing	✓	Idle		Succeeded	11/25/2025 12:57:00 PM	11/25/2025 1:02:00 PM	✓	...
CJ Automatic display in PAC processing		Idle		Succeeded	11/25/2025 3:00:08 AM	Not scheduled	✓	...

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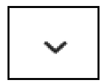
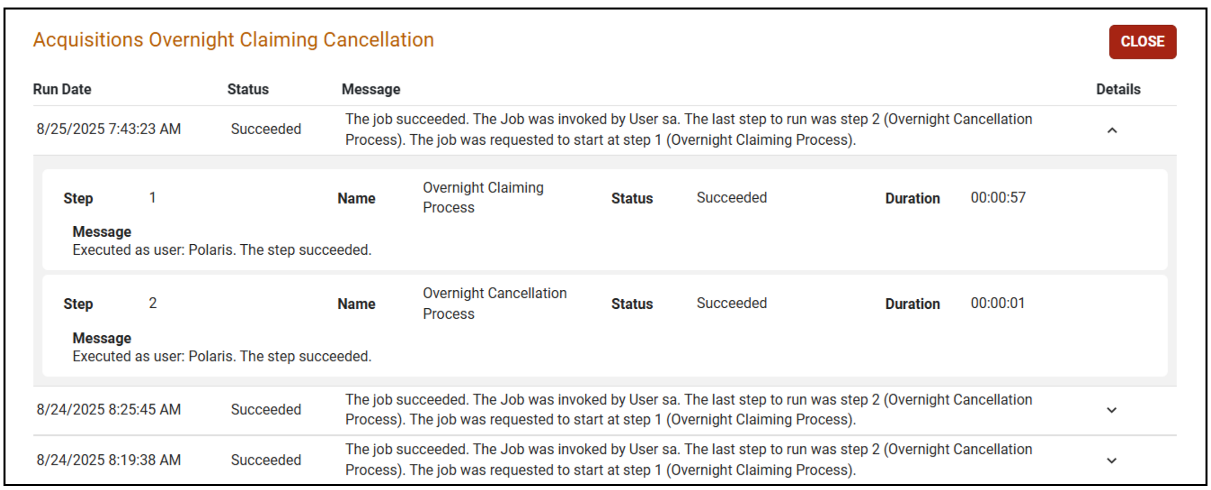
a. The page of the selected job appears, displaying the table of all job runs with the following information about a specific run:

   i. **Run Date** - Displays the date and time of the job run.

   ii. **Status** - Shows the outcome of the most recent job run (Succeeded, Canceled, etc.)

   iii. **Message** – The summary of relevant information about the job run status and its steps.

   iv. **Details** – Clicking on the  expands the job run row to display the details about each step of the run: **Number, Name, Status, Duration and Message.**



b. Select **CLOSE** to exit the job page and get back to the **SQL Job Status** page.

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Accessing Log Files in Polaris System Administration (Web-Based)

You can now access all available log files for your organization through Polaris System Administration (Web-Based). This new feature eliminates the need to connect to servers or use terminal services, allowing for faster and more convenient troubleshooting.

> **Note:**
> Users must have the **Log Files: Access** permission enabled to access this section.

To view log files:

1. Log in to Polaris System Administration (Web-Based).
2. Select the **Log Files** option from the Home page or the upper-left navigation menu.
3. Enter the desired parameters and run **Search**.

To filter the logs, use the following parameters:

- **Service**: Allows you to select the service for which you want to view logs (SIP, SQL Jobs, Leap Web App, etc.)

  > **Note:**
  > Choosing a service is mandatory.

- **Minimum Log Level**: Allows you to filter messages by their minimum log level, showing only those marked as the selected level and higher.

  > **Note:**
  > This field is available only for services that support log levels (LeapWebApp, PAPIService, Polaris Jobs, etc.)

- **Contains**: Search messages by text across all logs. This search parameter will take into consideration the message, as well as tags such as Host, File name, etc.
- **Start Time**: Allows you to filter log files by server time. Defaults to the beginning of the current date.

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- **End Time**: Allows you to filter log files by server time. Defaults to the current server time.

  > **Note:**
  > Server times may differ from your local time zone.

After performing a search, all available logs are listed on the screen below the form. Log messages are sorted by timestamp, displaying a brief preview of the message and a link to a more detailed view.

In the detailed view, you can see:

- Timestamp (server time)
- Host
- File name
- Service
- Message (complete)

  > **Note:**
  > If you set up all the required settings but still can't see the logs, please reach out to our support engineers for assistance.

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Updating Patron Codes by Age in Polaris System Administration (Web-Based)

You can now set up parameters for the Patron Processing SQL job in Polaris System Administration (Web-Based) to automatically update patron records according to their age. This process is managed through the new **Patron Code Aging Rules** table, available on all organization levels (System, Library, Branch).

The table allows you to define an age requirement after which the patron codes are automatically updated according to provided instructions. Additionally to patron codes, you can also update their statistical class, and apply a patron block.

To enable updating patron codes by age:

In Polaris System Administration (Web-Based), the **Allow Patron Aging Job** setting must be set to **Yes**. It is listed in the Settings tab of the Settings and Tables section, under the Patron Services module for all levels (System, Library, Branch).

Staff members will require the **Modify patron code aging rules table** permission in order to edit this table and configure code update rules.

After all requirements are met, rules can be added or edited for patrons on all organization levels. Entries in the table define the following:

- **ID**: automatically assigned.
- **Organization**: the level for which the rule is enabled; can be system-wide, or a specific library or branch.
- **Existing Patron Code**: old patron level; removed automatically when the patron reaches the required age.
- **Change To Patron Code**: new patron code; assigned automatically when the patron reaches the required age.
- **Patron Age**: the required age for the patron code update.
- **Exclude Before Date**: patrons born before the date set here will not be automatically updated.
- **Existing Statistical Class** (optional): when patrons meet the age criteria for the patron code update, you can also update their statistical class. Statistical class

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updates through this rule only if the patron meets both the required age criteria, and their current statistical class matches the one listed in this field.

- **Change To Statistical Class** (optional): when patrons reach the age required for automatic patron code update, their statistical class also updates to the value selected here, but only if their existing statistical class matches the one listed in the previous field.

  Note:
  Leaving both statistical class fields as "(None)" omits updating this value.

- **Patron Block** (optional): add a block to prevent circulation until any required additional steps are taken; can be left as "(None)" to omit blocking.

For more details, see the Settings and Tables section.

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Improvements to Display Shelf Location Processing

Polaris introduced a new **Display Processing** option in the Shelf Locations table in **Polaris System Administration (Web-Based)**, which allows you to mark a shelf location as a temporary display location. This ensures that when an item is checked in from temporary display areas, its location automatically updates to the original shelf location, eliminating the need for manual shelf location updates. The automatic shelf location update also occurs when items are checked in through Leap Offline, SIP or the Polaris API.

> **Example**:
> Item A's original shelf location is "Adult Fiction". Its location was temporarily updated to a display shelf location the "Front display table" and then checked out by a patron from that display location. When returned, item A's shelf location is automatically updated back to its original location the "Adult Fiction", ensuring correct reshelving.

> **Note**:
> If an item floats into the organization without an assigned original shelf location to return to, its location will be updated to "None". Shelf locations of items "In-Transit" will not be updated.

This topic covers the following:

- Enabling Display Processing for a Shelf Location in Polaris System Administration (Web-Based)
- Tracking Automatic Shelf Location Changes

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Enabling Display Processing for a Shelf Location in Polaris System Administration (Web-Based)

To enable Display Processing for a Shelf Location in Polaris System Administration (Web-Based)

1. On the **Polaris System Administration (web-based)** Home page, select **Settings and Tables**.

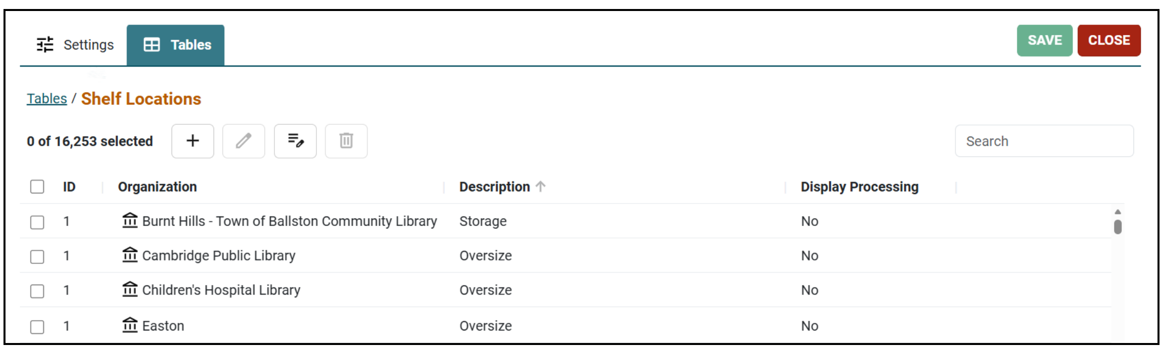
   The **Settings and Tables** page appears.

2. Select the **Tables** tab.

   The list of tables appears.

3. Find the **Shelf Locations** table and open it. You can filter the list by typing “Shelf Location” in the Search box.

   The **Shelf Locations** table appears with the **Display Processing** column indicating if the location is marked as a display location.



> **Note**:
> To make changes to the table you must have the system administration permission [Modify shelf locations table](#) set to "Allow".

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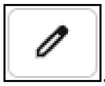
4. Select the checkbox next to the location you want to edit, and then select **Edit** .

   The **Edit - Shelf Locations** dialog appears.

5. On the **Edit - Shelf Locations** dialog, turn on the **Display Processing** toggle.
6. Select **OK** to confirm and close the dialog.

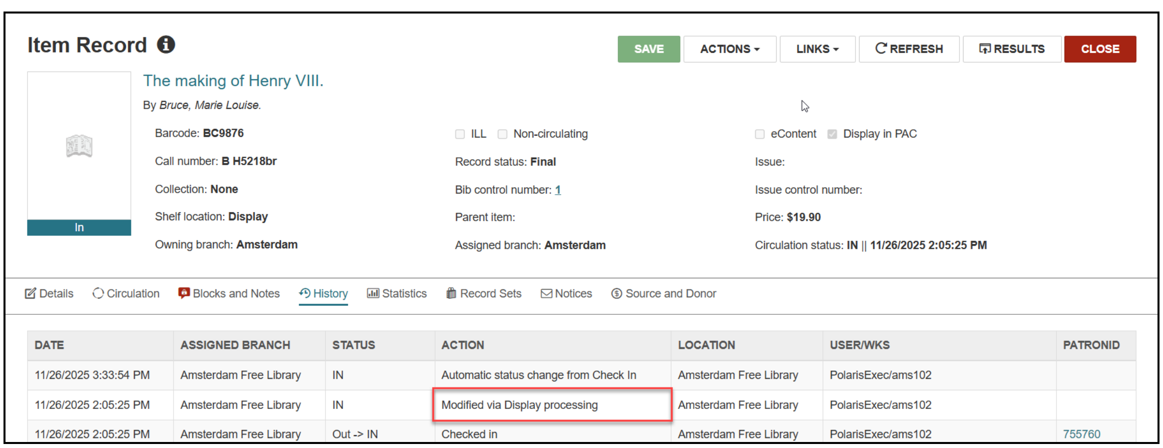
   In the **Shelf Locations** table, the **Display Processing** column now shows 'Yes.'

   > **Note**:
   > The **Display Processing** setting doesn't automatically update the **Shelf location** description in the **Item Record** in Leap. If you want to change the **Shelf location** label, you can update it manually to “Display Case” in the **Details** view of the [Item Record Workform](#).

Tracking Automatic Shelf Location Changes

Staff members can track automatic shelf location changes in the **History** view in the [Item Record Workform](#).

When a check-in triggers an automatic change from the display shelf location to the original shelf location, the **Action** column in the transaction history shows "Modified via Display processing".



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New Dated Patron Notes

Version 8.0 introduces a new Dated Notes view for patron records. Here the staff members can enter timestamped non-blocking notes through the Patron workform.

This topic covers the following:

- Enabling Dated Notes View
- Using the Dated Notes View
- Setting Permissions for Staff Members
- Using Bulk Actions with Dated Notes
- Searching by Dated Notes in the Find Tool

Enabling Dated Notes View

In Polaris System Administration (web-based), you can use the new setting to enable or suppress the Dated Notes view. They are located in the Staff Client settings module:

To enable the Dated Notes view Set the **Web App: Suppress view: Dated notes** setting to **No**.

> **Note:**
> To suppress previously used Notes tab view, set the **Web App: Suppress view: Notes** setting to **Yes**. Both views can be enabled or suppressed at the same time.

Using the Dated Notes View

Once enabled, the Dated Notes tab is visible in the right end of the patron record. Within this view, the dated notes are listed as a table, with each row containing:

- Note
- Creator

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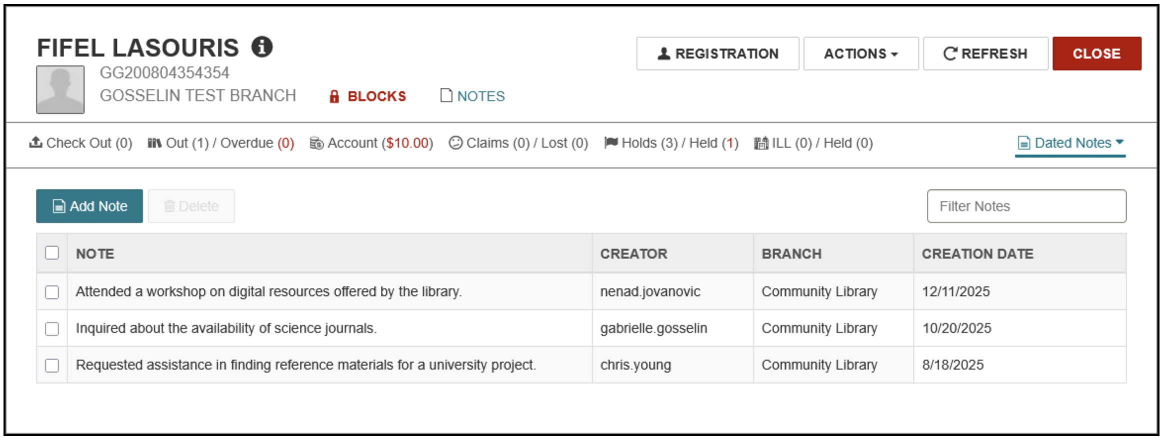
- Branch
- Creation Date



Staff members can add new notes to the table or delete them. Once a dated note is added, it cannot be edited.

> **Note:**
> Dated note length is limited to 4,000 characters.

Setting Permissions for Staff Members

There are new permissions in Polaris System Administration (web-based), allowing staff members to view, add, and delete dated notes in patron records. The following can be found in the Circulation subsystem:

- **Patron status: Display dated notes**
- **Patron status: Create dated notes**
- **Patron status: Delete dated notes**

For more information, see Circulation Permissions Reference.

Using Bulk Actions with Dated Notes

In Leap version 8.0, you can add or delete dated notes in patron record sets by bulk.

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To bulk add or delete dated notes

1. In the **Find Tool**, choose the **Record Set** criteria and perform a search to find and open the desired Patron record set.
2. In the **Patron Record Set** workform, select **Bulk Change** from the **Actions** drop-down button.
3. In the **Patron Bulk Change** workform, under the **Blocks and Notes** tab, use the check box to enable the **Dated Notes** fields.
4. In the **Dated Notes** field, do one of the following:
    a. Enter text (up to 4,000 characters) in the left field and choose to Add a new note in the right drop-down. The note will be added to all patron records in the record set.
    b. Enter text in the left field and choose to Delete note in the right drop-down. Dated notes with the exact text match will be deleted from all patron records.
5. In the top of the workform, choose **Update Patrons** to finalize updates.

For more information, see Bulk Change Patron Records.

Searching by Dated Notes in the Find Tool

You can now use Dated Notes as the search qualifier. In the Find Tool, if you search Patron record sets, under Basic Search, select **Dated Notes** to find all patrons with matching dated notes.

Additionally, you can apply a filter to a **Find Tool** search with **Dated Notes** as a condition.

For more information, see the following:

- Do a Basic Search for Records or Record Sets
- Apply a Filter to a Find Tool Search

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Configuring the Use of the Initial Article Table in Leap

You can now set Leap to exclude initial articles when performing exact match searches in the **Find Tool**. This means that in the user settings, you can configure whether the words defined in the **Initial article table** will be omitted from the beginning of the search string.

For example, if you search for "The Shining" which is indexed as "Shining," you will get results when typing both "Shining" and "The Shining" because "the" is ignored in the search.

> **Note**:
> To specify the words that you want Leap to omit from the search string go to **Polaris System Administration (Web-Based) > Tables > Initial Articles**.

This section covers the following topics:

- Excluding initial articles when performing exact match searches
- Exact match searches affected by the Use initial article table setting

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Excluding initial articles when performing exact match searches

To exclude initial articles when performing exact match searches

1. In the Leap header, select your username.
2. Select **Settings**.

   The **Settings** page opens.
3. Select the **Workform User Defaults** tab.
4. Select the **Use initial article table** checkbox.

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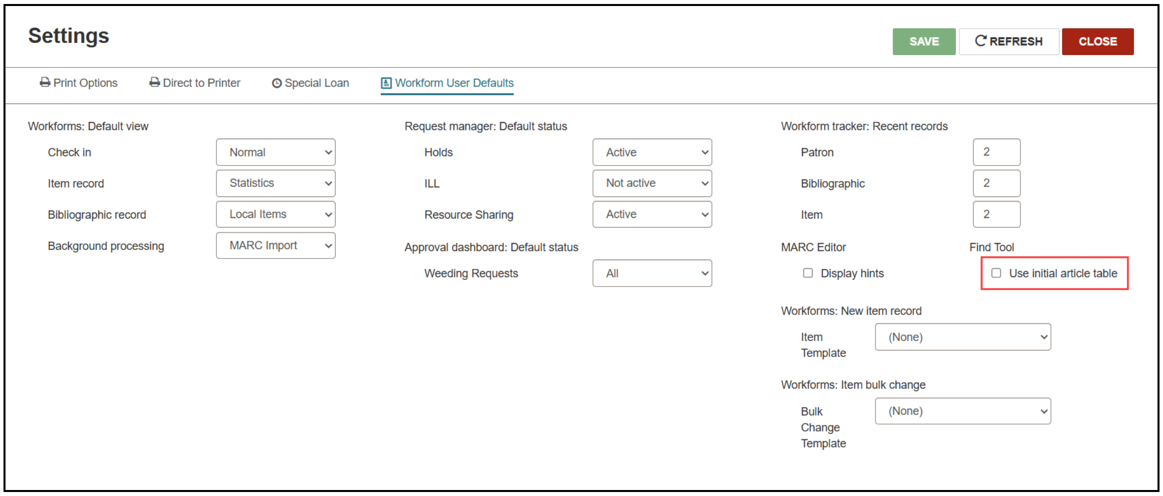

5. Select **SAVE**.

Exact match searches affected by the Use initial article table setting

The **Use initial article table** setting applies to the following exact match searches:

- Authority Record (Heading and Tracing/Reference)
- Bibliographic Record (Title and Series)
- Hold Request (Title)
- ILL Request (Title)
- Invoice Line Item (Title)
- Item Record (Title)
- Purchase Order Line Item (Title)
- Serial Holdings Record (Title)
- Serial Issue/Part Record (Title)

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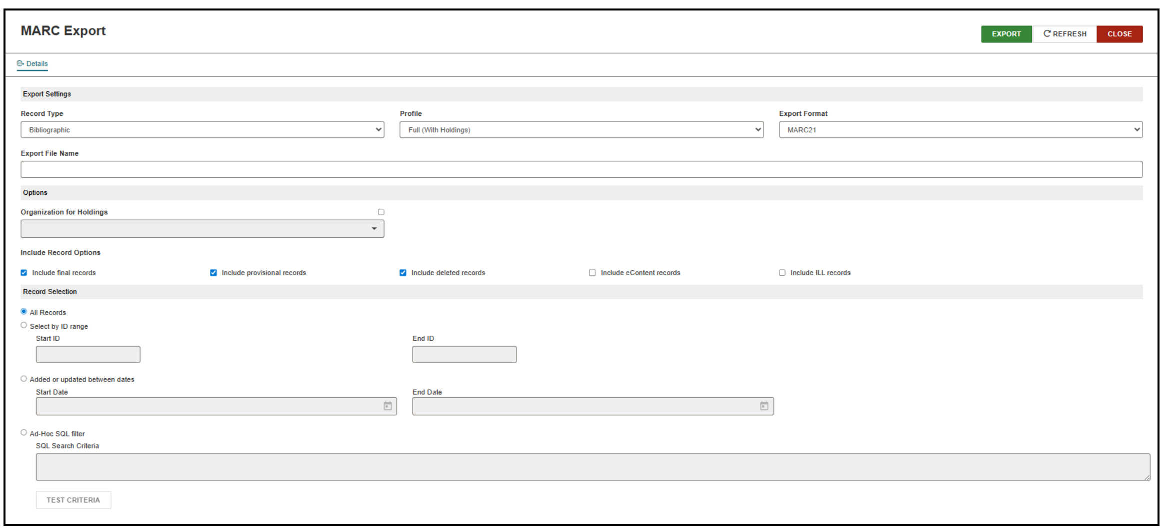
New MARC Export Option in Leap

Now you can perform ad-hoc exports of bibliographic records directly in Leap to provide data to third-party vendors. The **MARC Export** feature allows you to set export criteria to determine which records to include and in what format, or you can export the entire database. When you export files, they will be downloaded via the browser and saved in your Downloads folder.

> **Note**:
> To use **MARC Export** feature you must have the cataloging permission [Export bibliographic, item and authority records]() set to "Allow".

To export MARC Records using Leap

1. In the Leap header, Select **Utilities > MARC Export**.



The **MARC Export** workform appears. The **Details** view displays the following sections for **MARC Export** configuration:

a. **Export Settings** – Where you select the record type, export format, and the name of the export file. You can also choose to include or exclude holdings.

b. **Options** – Enables you to select an organization for holdings, and what records to include (final, provisional, ILL, etc.).

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   c. **Record selection** – Where you choose whether to export all records that meet the criteria you set in **Options** and **Export Settings**, or to export only a selected range. You can also define an SQL search criteria.

2. In the **Export Settings** section, set the following:
   a. **Record Type** – This version supports the export of bibliographic records.
   b. **Profile** – In the dropdown list, select "Full (With Holdings)" or "Brief (No Holdings)". "Full (With Holdings)" is the default value.
   c. **Export Format** - In the dropdown list, select one of the supported formats MARC21, MARCXML or JSON.
   d. **Export File Name** – In the input field, enter the name for the export file.
3. In the **Options** section, set the following:
   a. **Organization for Holdings** - If you want to restrict the holdings data being exported to specific organizations, select the checkbox and choose an organization from the dropdown list. You can choose more than one organization.
   b. **Include Record Options** – Select the checkbox next to the record types you want to include. Available options are:
      i. **Include final records**
      ii. **Include provisional records**
      iii. **Include deleted records**
      iv. **Include eContent records**
      v. **Include ILL records**
4. In the **Record Selection**:
   a. If you want to export all records that meet the criteria you set in **Options** and **Export Settings**, select **All Records**.
   b. If you want to export a specific range of records, you can define the range by:
      i. Record ID – Choose **Select by ID range**. In the **Start ID** field, enter the record ID that indicates the beginning value, and in the **End ID** field,

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input the record ID that indicates the end of the range.

ii. Date when the record was added or updated – Select **Added or updated between dates**. In the **Start Date** field, select the start date, and in the **End Date field**, choose the date that marks the end of the range.

iii. For a more specific range definition, you can use a custom SQL query to set the criteria. Select **Ad-Hoc SQL filter**. Enter your search query in the **SQL Search Criteria** box. You can test your query by clicking the **TEST CRITERIA** button, which performs a basic check of the SQL syntax. If the syntax is valid, a green success toast appears. If it's invalid, a yellow warning toast appears.

> **Note**:
> The SQL query expects "SELECT BibliographicRecordID FROM Polaris.Polaris.BibliographicRecords" as the starting point for queries.

5. Click the **EXPORT** button in the upper-right corner of the workform to generate the export file. The browser will start downloading the file based on the criteria you set in the workform. Once the download is complete, the export file will be saved in your downloads folder under the name you set in the workform.

> **Note**:
> Large download files and files with complex export criteria may take a few seconds longer to appear in the browser download.

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Automatic MARC Records Import via FTP

This version of Polaris introduces a new automated process for importing MARC records. Libraries that order fully cataloged records from third-party suppliers now have the option to automatically import MARC records directly from vendors’ FTP servers without having to download and import them manually.

The automatic MARC import setup is done in the supplier records. A new **MARC Import** view has been added to the Supplier workform, where libraries can configure connections to the vendors' FTP servers and schedule automatic MARC imports. Each schedule defines when an import profile retrieves MARC data from the vendor’s FTP server. The imports are executed via the Polaris Jobs service. The Polaris connects to the FTP server configured in the supplier record, detects available files, and automatically adds them to the MARC import queue for processing. In the MARC import queue, files are processed using the import profile defined in the supplier record.

This section covers the following topics:

- Setting Up Automatic MARC Imports in Supplier Record Workform
- Tracking the Status of Automatically Imported MARC Records

Setting Up Automatic MARC Imports in Supplier Record Workform

This section covers the following:

- Adding an automatic MARC import connection in the Supplier record workform
- Editing an automatic MARC import connection in the Supplier record workform
- Deleting an automatic MARC import connection in the Supplier record workform

Adding an automatic MARC import connection in the Supplier record workform

To add a connection for automatic MARC import in the Supplier record workform

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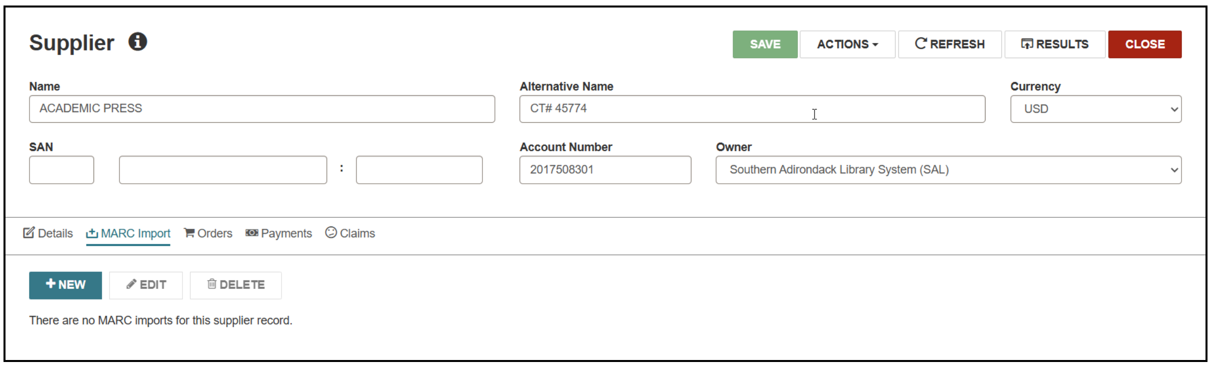
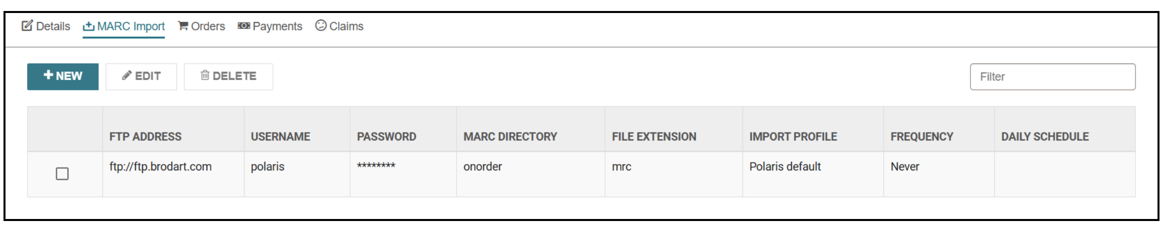
1. In the Leap header, select **FIND** to open the **Find Tool**.
2. Select **Supplier** to change the search database.
3. Select the supplier record you for the automatic MARC import and select **OPEN**.

   The **Supplier** workform appears.
4. Select the **MARC Import** tab.

   MARC Import view appears. If no MARC Import connections have been added, the view displays the message "There are no MARC imports for this supplier record."

   Otherwise, a table with a list of connections is displayed with the MARC import configuration details.

   You can add a new MARC import connection, edit or delete an existing one.
5. To add a MARC import connection, select **NEW**.

   Add MARC Import dialog appears, featuring the following fields for configuring automatic MARC import from a vendor's FTP server.

   a. **FTP Address** - Enter the vendor's FTP server address from which the records will be retrieved.

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b. **Username**

c. **Password**

d. **MARC Directory** - Enter the vendor's MARC directory from which the records will be retrieved.

e. **File Extention** - Enter the desired file extension for import.

f. **Frequency** - From a dropdown list of options, select the frequency of automatic imports:

- **Daily** (once per day)
- **Hourly**
- **Continuously** (each time the process runs, which is every 5 minutes)
- **Never**

g. **Daily Schedule** - Set the runtime of daily automatic imports. The data you enter is processed by the Polaris.Jobs schedule.

h. **Import Profile** - Select **FIND** to open the **Find Tool**. Choose the desired profile and select **OPEN**.

> **Note**:
> All fields are required for proceeding.

Once you complete all the fields, select **OK**.

6. The added connection appears in the table on the **MARC Import** view. To save the MARC import connection, select **SAVE** in the **Supplier** workform header.

> **Note**:
> Changes to the automatic import jobs may take a few minutes to reconcile in the Polaris.Jobs service.

Files found on the configured FTP site will be added to the standard MARC import queue for processing. In the MARC import queue, files are processed using the import profile defined in the supplier record.

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Editing an automatic MARC import connection in the Supplier record workform

To edit an automatic MARC import connection in the Supplier record workform

1. In the Leap header, select **FIND** to open the **Find Tool**.
2. Select **Supplier** to change the search database.
3. Select the supplier record you for the automatic MARC import and select **OPEN**.

   The **Supplier** workform appears.
4. Select the **MARC Import** tab.
5. Select the checkbox next to a connection you want to edit and select **EDIT**.

   The **Edit MARC Import** dialog appears.
6. Edit the MARC Import fields. See Adding an automatic MARC Import connection in the Supplier record workform for more information about the fields.
7. To save the changes to the MARC import connection, select **SAVE** in the **Supplier** workform header.

   > **Note**:
   > Changes to the automatic import jobs may take a few minutes to reconcile in the Polaris.Jobs service.

   Files found on the configured FTP site will be added to the standard MARC import queue for processing. In the MARC import queue, files are processed using the import profile defined in the supplier record.

Deleting an automatic MARC import connection in the Supplier record workform

To delete an automatic MARC Import connection in the Supplier record workform

1. In the Leap header, select **FIND** to open the **Find Tool**.
2. Select **Supplier** to change the search database.
3. Select the supplier record you for the automatic MARC import and select **OPEN**.

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The **Supplier** workform appears.

4. Select the **MARC Import** tab.
5. Select the checkbox next to a connection you want to delete and select **DELETE**

   The system prompts you to confirm that you want to delete the connection.
6. To save the changes to the MARC import connection table, select **SAVE** in the **Supplier** workform header.

> **Note**:
> Changes to the automatic import jobs may take a few minutes to reconcile in the Polaris.Jobs service.

Tracking the Status of Automatically Imported MARC Records

To check the status of an automatic MARC record import

1. Select **Utilities > Background Processing**.

   Background Processing page appears.
2. Select **MARC Import** tab.

   MARC Import view appears with the list of all MARC imports and their statuses. For more information about the **Backgorund Processing > MARC Import** view see **View the Status of a Record Import**.
3. Click on the MARC import record to see its **Import Report.**

Setting Up TCP/IP MARC Import

This version of Polaris introduces an option that allows libraries cataloging in **OCLC** to push MARC records directly to Polaris without having to download and import the records manually.

To use this option, you must enable a **TCP/IP** service during the Polaris installation. For more details, see the **Polaris Installation Guide**. Once the **TCP/IP** service is enabled, vendors that support **TCP/IP** MARC exports can send MARC files directly to Polaris for automatic import.

MARC records imported via this service will appear in the MARC import queue for processing, just like any other MARC import. For more information about tracking the status of the imported MARC record, see **View the Status of a Record Import**.

To configure the MARC import profile

- Open the appsettings file (C:\Program Files\Polaris\[version]\Polaris.MARC.Ingest.Server\appsettings.user.json). The import profile can be modified by providing a different import profile ID. Additionally, libraries can configure a user and workstation for the import logs.
- If no import profile has been configured, Polaris will use the default PAPI import profile, which matches on the 001 tag.

For the configuration on the vendor sites, the following information is necessary:

- **Host Name** – The base URL for your Polaris web services. For example: polaris.library.com
- **Port Number** – Configurable in appsettings. Default is 9090.
- **Authentication Method** – None. Recommended restricting via IP address.

> **Note**:
> You should restrict traffic through your firewall to specific IPs or an IP range for your chosen port. **OCLC** provides this information.

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Using Bibliographic Templates in Leap

You can now create bibliographic templates in Leap to use when creating bibliographic records. The information in the bibliographic template is copied into every bibliographic record created with the template, reducing the number of fields you need to modify. For example, you can create a bibliographic template specifically for creating bibliographic records for DVDs. Then, cataloging staff could use this template when they create bibliographic records for DVDs.

This section covers the following topics:

- Creating a New Bibliographic Template
- Finding an Existing Bibliographic Template
- Creating Bibliographic Templates from a Bibliographic Record
- Copying a Bibliographic Template
- Deleting a Bibliographic Template

Creating a New Bibliographic Template

> **Note**:
> To create a bibliographic template, you need the following permissions:
>
> - **Bibliographic templates: Access**
> - **Bibliographic templates: Create**
>
> or
>
> - **Use 'own' bibliographic templates**
>
> For more information about administration cataloging permissions, see Cataloging Permissions Reference.

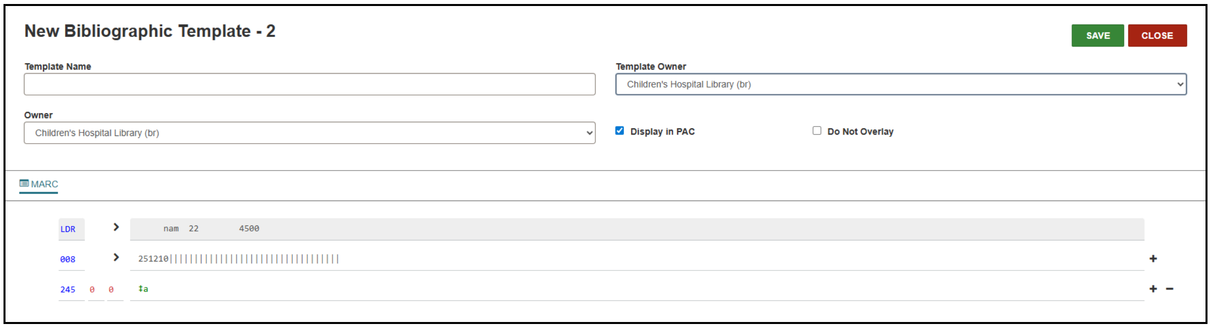
To create a new bibliographic template

1. Select the **New** menu.

   A dropdown menu appears.

2. Select **Template** > **Bibliographic**.

   A **New Bibliographic Template** workform appears with the MARC view.



3. In the **Template Name** field, enter the unique template name.
4. From the **Template Owner** and **Owner** dropdown lists, select the organization for which you want to create the template. Available organization on the lists depend on your **Bibliographic template: Create** permissions, and only organizations for which you have the permission will be visible on the list.

   > **Note**:
   > To create a bibliographic template and designate yourself (not the organization) as the owner, you need the following permissions:
   >
   > - **Use 'own' bibliographic templates**
   >
   > For more information about administration cataloging permissions, see Cataloging Permissions Reference.

5. (Optional) Select the **Display in PAC** checkbox if you want the bibliographic record using this template to be displayed in the PAC.
6. (Optional) Select the **Do Not Overlay** checkbox to prevent bibliographic records using this template from being overlaid.
7. In the **MARC** tab, update the values you would like to be applied when you create bibliographic records using this template. Starting values are LDR, 008, 245. You can add any tag that exists in a bibliographic record.
8. Select **SAVE**.

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Finding an Existing Bibliographic Template

> **Note**:
> To find a bibliographic template, you need the following permissions:
>
> - **Bibliographic Templates: Access**
>
> or
>
> - **Use 'own' bibliographic templates**
>
> For more information about administration cataloging permissions, see Cataloging Permissions Reference.

To find an existing bibliographic template

1. Open theFind Tool.
2. Select **Bibliographic Template** as the search term.
3. Type a name in the search bar and select **Search**.

   The list of available bibliographic templates appears.
4. Select the checkbox next to a bibliographic template you would like to access and select **OPEN**.

   Bibliographic template workform appears.

Creating Bibliographic Templates from a Bibliographic Record

You can create a bibliographic template from an existing bibliographic record.

> **Note**:
> To create a bibliographic template from an existing bibliographic record, you need the following permissions:
>
> - **Bibliographic templates: Access**
> - **Bibliographic templates: Create**

> or
>
> - **Use 'own' bibliographic templates**
>
> For more information about administration cataloging permissions, see Cataloging Permissions Reference.

To create a bibliographic template from an existing bibliographic record

1. Open theFind Tool.
2. Select **Bibliographic Record** as the search term.
3. Type a name in the search bar and select **Search**.

   The list of matching bibliographic records appears.
4. Select the checkbox next to a bibliographic record from which you would like to create a template and select **OPEN**.

   Bibliographic Record workform appears.
5. In the **Bibliographic Record** workform, select the **ACTIONS** menu.
6. Select **Create Template**.

   Bibliographic Template appears with all the fields pre-populated to match the original bibliographic record.
7. Select **SAVE**.

Copying a Bibliographic Template

> **Note**:
> To copy a bibliographic template, you need the following permissions:
>
> - **Bibliographic Templates: Create**
>
> or
>
> - **Use 'own' bibliographic templates**
>
> For more information about administration cataloging permissions, see Cataloging Permissions Reference.

To copy a bibliographic template

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1. Find a bibliographic template.
2. In the **Bibliographic Template** workform, select the **ACTIONS** menu.
3. Select **Copy**.

   The copy of the bibliographic template opens in a **New Bibliographic Template** workform.
4. (Optional) To create a unique template from the copy, change the values, update the **Name** field and select **SAVE**.

Deleting a Bibliographic Template

> **Note**:
> To delete a bibliographic template, you need the following permissions:
>
> - **Biblographic Templates: Delete**
>
> or
>
> - **Use 'own' item templates**

To delete an item template

1. Find a bibliographic template.
2. In the **Bibliographic Template** workform, select the **ACTIONS** menu.
3. Select **Delete**.

   The **Delete Bibliographic Template** dialog opens.
4. Select **CONTINUE** to delete the bibliographic template.

   If the bibliographic template was successfully deleted, a notification confirms the deletion.

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New Fiscal Year Rollover Utility

Leap now includes the **Fiscal Year Utility**, previously available only in the Polaris staff client. This feature enables libraries to manage fiscal year transitions directly in Leap, providing options to prepare and manage new fiscal years.

You can find the new Fiscal Year Utility in the **Utilities** drop-down menu. Selecting it opens the year rollover workform, allowing you to:

- **Run pre-processing reports**: This runs the Fiscal Year/Fund Balance report, displaying the balances of the funds in the selected fiscal year.
- **Rollover free balance**: Carry forward unspent funds into the new fiscal year. Encumbrances are disencumbered from the old year and re-encumbered in the new year, preserving outstanding commitments.
- **Zero-out free balance**: Create new fiscal year funds with a zero balance. Encumbrances still roll forward, allowing payment of outstanding orders while leaving unspent funds in the old year.
- **Replicate fiscal year hierarchy**: Create a new fiscal year by replicating the current fiscal year record and its fund structure.
- **Close fiscal year**: After you replicate a fiscal year, the status of the old fiscal year changes to Encumbrances closed, and you can then close the old fiscal year.
- **Increase percentages** for standing orders and subscriptions: This feature helps anticipate cost adjustments for recurring items.

  > **Note:**
  > To access the Fiscal Year Utility, users must have the **Run Fiscal Year Utility** permission set to **Allow**.

For more information, see the Working with Fiscal Years section.

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Leap Offline Updates

Offline Check-In

In version 8.0, Leap Offline includes the option for offline check-in. This will allow staff members to check-in returned items instead of back-dating them once the library is back online.

When using Leap Offline, you will now see the **Check-in** button displayed, leading to a check-in transaction workform, allowing you to scan or manually enter an item barcode.

The transaction counter in the header will now increment to include a sum of the check-in and check-out transactions performed while offline.

For more information, see the Leap Offline topic.

Leap Offline Language Strings

You can now customize the strings in your Leap Offline installation through the language string editor. This option will allow you to edit the interface to fit your organization, as well as localize it for other languages.

To update Leap Offline with the latest customized strings and translations, make sure to select **Refresh Offline Installation** after updating language strings. Your Leap Offline will always show customized strings in the currently selected language of your Leap interface.

For the complete list of new strings, see Polaris Web Admin Tool (Language Editor) Guide.

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Locale-Aware Sorting Enhancements

Polaris now supports locale-aware sorting for regions where letters with diacritics are treated as distinct characters in the alphabet. This ensures that characters with diacritics, such as umlaut **ä, ö, ü,** or special characters like German Eszett **ß** and Spanish and Catalan **ñ, ç, l·**l are sorted in the correct order. For example, **ß** will be sorted as **Ss**.

> **Note**:
> Language-specific sorting rules are configurable at the server level. For example, if your organization is located in Germany, the server will be configured for both English and German sorting rules. When you log in using English, English sorting rules will be applied. When you log in using German, German sorting rules will be applied.

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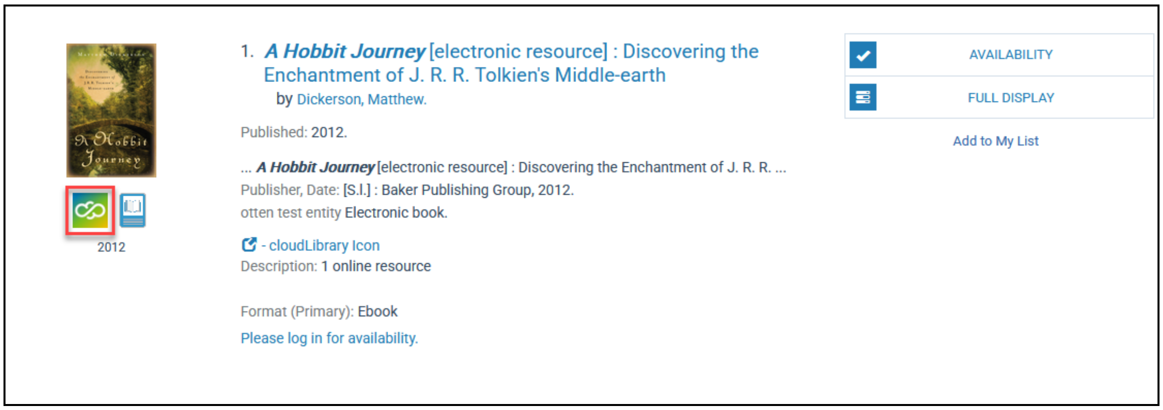
Support for CloudLibrary rebranding

OCLC has rebranded cloudLibrary to CloudLibrary. This release updates all the default strings in Polaris with the new capitalization, as well as the new logo. However, if your library was initially set up for the old capitalization, you might still see "cloudLibrary" in library-defined fields. Library-defined fields include the names in your vendor account records. You have the option to update these fields anytime.



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MARC Technical Updates in Polaris 8.0

The updates specified in the following links were implemented in Polaris 8.0.

- MARC Update Number 39 (December 2024)
  - Bibliographic format updates
- MARC Update Number 40 (June 2025)
  - Bibliographic format updates
  - Authority format updates
- MARC Technical Notice (November 19, 2024)
- MARC Technical Notice (November 22, 2024)
- MARC Technical Notice (December 12, 2024)
- MARC Technical Notice (February 06, 2025)
- MARC Technical Notice (February 14, 2025)
- MARC Technical Notice (March 05, 2025)
- MARC Technical Notice (April 03, 2025)
- MARC Technical Notice (June 04, 2025)
- MARC Technical Notice (June 05, 2025)
- MARC Technical Notice (July 02, 2025)

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