polaris

What's New in Polaris

8.2

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Clarivate

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Polaris Installation Notes

When the new Polaris release is installed on a workstation, the file path changes from 8.1 to 8.2 as in the following examples:

C:\ProgramData\Polaris\8.2

C:\Program Files\Polaris\8.2

C:\Program Files (x86)\Polaris\8.2

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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 8.2.

Setting	Purpose	Level
New Settings		
Automatically clear location notes in PO line items	Specifies whether Polaris automatically clears the Location Note value on PO line items when associated items are no longer in On Order or In Process status. When disabled, Location Notes must be cleared manually by staff.	System, Library, Branch
Categorization of ESource targets	Organizes e-source targets into categories and subcategories. You can add, rename, delete, or rearrange categories and targets.	System, Library, Branch
ESource targets: Configuration	Defines connection, authentication, and access settings for an e-source target. You can create a new target or modify existing ones. You can also delete a target.	System, Library, Branch
Holds options: Restricted patron codes	Enables selecting one or more patron codes to assign as restricted. When a patron is assigned a restricted patron code, hold requests can only be filled with items from the patron's assigned library.	System
PO line item workslips: Print location note barcode	Specifies whether the Location Note entered on a PO line item is printed on PO workslips as a scannable barcode. Supports acquisitions storage workflows by allowing staff to scan the printed barcode to identify or retrieve the associated storage location.	System, Library, Branch

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Setting	Purpose	Level
Remote databases: Categorization of target databases	Organizes remote databases into categories and assigns search targets to each category. You can add, rename, delete, or rearrange categories and targets.	System, Library, Branch
Remote databases: Usage settings	Configures usage settings for remote database search targets.	System, Library, Branch
Web app: Enable local hold indicator	Enables a visual indicator to appear in the Picklist workform when a pending item (not covered by trapping preferences) can also fulfill a local hold request.	System
Web app: Staff can enable/disable reading history	Disables editing of the reading history field so that staff cannot change its value.	System
Web App: Suppress verify patron data block in patron imports	Controls the default state of the Suppress Verify Patron Data Block option when staff import patron records in Leap.	System, Library, Branch
Modified Settings and Tables		
Tables > Circulation Statuses	A Lost and Paid row was added to the table, allowing staff to identify lost items for which all associated fees have been paid without navigating to the patron record.	System, Library, Branch
Settings > Polaris API and ExpressCheck: Item blocks	The name of the setting "Polaris ExpressCheck: Item blocks" was changed to "Polaris API and ExpressCheck: Item blocks".	System, Library, Branch
Settings > Polaris API and ExpressCheck:	The name of the setting "Polaris ExpressCheck: Patron blocks" was changed to "Polaris API and ExpressCheck:	System, Library, Branch

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Setting	Purpose	Level
Patron blocks	Patron blocks".	
Settings > Patron Services > Fine receipt options	A Tax option was added to the settings dialog, allowing organizations to include tax information on fine receipts. When enabled, fine receipts display the total tax amount included in a payment. Tax information appears on printed (both browser and direct-to-printer) and emailed fine receipts.	System, Library, Branch
New Tables		
Exchange Rates	Enables users to configure exchange rates for currencies used by suppliers who require payment in a foreign currency.	System, Library, Branch
PAC Entities	Provides a read-only list of all bibliographic metadata entities that the PAC Title Display configuration tables can use. You can also select an entity to navigate to its associated Entity Definition and view MARC materialization rules that populate it, such as data-field, control-field, and virtual-field rules.	System
PAC Title Display: Brief Monograph	Controls which metadata elements appear in the Brief PAC view for monographs and the order in which they are displayed. Users with the Access tables and Modify PAC title display tables permissions can add, delete, or reorder the display elements.	System, Library, Branch

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Setting	Purpose	Level
PAC Title Display: Brief Serial	Controls which metadata elements appear in the Brief PAC view for serials and the order in which they are displayed. Users with the Access tables and Modify PAC title display tables permissions can add, delete, or reorder the display elements.	System, Library, Branch
PAC Title Display: Summary Monograph	Controls which metadata elements appear in the Summary PAC view for monographs and the order in which they are displayed. Users with the Access tables and Modify PAC title display tables permissions can add, delete, or reorder the display elements.	System, Library, Branch
PAC Title Display: Summary Serial	Controls which metadata elements appear in the Summary PAC view for serials and the order in which they are displayed. Users with the Access tables and Modify PAC title display tables permissions can add, delete, or reorder the display elements.	System, Library, Branch
PAC Title Display: Full Monograph	Controls which metadata elements appear in the Full PAC view for monographs and the order in which they are displayed. Users with the Access tables and Modify PAC title display tables permissions can add, delete, or reorder the display elements.	System, Library, Branch
PAC Title Display: Full Serial	Controls which metadata elements appear in the Full PAC view for serials and the order in which they are displayed. Users with the Access tables and Modify PAC title display tables permissions can add, delete, or reorder the display elements.	System, Library, Branch
New Permissions		

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Setting	Purpose	Level
Access PAC tools: Allow	Allows users with this permission to access PAC tools in Polaris System Administration (web-based).	System
Language Editor Access: Allow	Allows users with this permission to access Language Editor in Polaris System Administration (web-based).	System, Library, Branch
Modify exchange rates table: Allow	Allows users with this permission to modify the Exchange Rates table.	System
Modify PAC title display tables: Allow	Allows users with this permission to modify all PAC Title Display tables.	System

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Polaris API Changes

The following methods have been added or updated:

Method Name	Purpose
New endpoints	
FeeReasonsGet	Returns the list of available fee reasons for the specified branch.
ItemInventoryDateUpdate	Update the inventory date for a single item.
NameTitleListGet	Returns available Patron Name Titles configured in Polaris, including ID, value, and display status. Used by client applications to populate valid title selections.
PatronAccountFeeCreate	Creates a fee on a patron account.
PatronPcdfListGet	Returns all available Patron Custom Defined Data fields for a branch.
VegaExportPost	Enqueues a new Vega bulk export job for the entity type supplied in the route. Currently only the 'patron' entity type is supported. Requires an authenticated staff account with the 'Vega Export: Allow' permission and the Vega Discover license.
Modified endpoints	
AuthenticatePatron	Added security enhancements including audit/statistical transaction logging and configurable patron-account lockout after repeated failed authentication attempts.
HoldRequestGetList	Now includes a new optional PII masking security feature.
PatronBasicDataGet	Expanded to return PCDF values, Year-to-Date Saved amount, Lifetime Saved amount, and the

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Method Name	Purpose
	EnableSMS patron preference. Now includes a new optional PII masking security feature.
PatronCirculateBlockGet	Now includes a new optional PII masking security feature.
PatronILLRequestsGet	Returns Pickup Area ID in addition to pickup location information, enabling consuming applications to translate and display pickup area values.
PatronNotes	Added authentication audit/statistical transaction logging. Now includes a new optional PII masking security feature.
PatronRegistrationCreate v2	Expanded to support Patron Preferences, PCDF values, Patron Name Titles, and Suffix values during registration. Updated validation behavior and removed automatic assignment of a default password when no password is supplied.
PatronRegistrationUpdate v2	Expanded to support Patron Preferences, PCDF values, Patron Name Titles, and Suffix values during patron updates.
PatronSearchGet	Now includes a new optional PII masking security feature.
Synch_ItemsByBibIDGet	Updates LoanableOutsideSystem logic to account for Days Past First Available restrictions. Items that cannot yet be requested are reported as unavailable.
Synch_ItemsByIDGet	Updates LoanableOutsideSystem logic to account for Days Past First Available restrictions. Items that cannot yet be requested are reported as unavailable.

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

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Masking PII in PAPI Key Management

Polaris 8.2 provides greater control over patron personally identifiable information (PII) returned through Polaris API endpoints. In the **PAPI Key Management** section of Polaris System Administration (web-based), you can configure individual PAPI keys to restrict access to PII, allowing third-party applications to use supported patron APIs without exposing patron information they do not require.

When PII masking is enabled for a PAPI key, patron names, email addresses, mailing addresses, and phone numbers are masked in supported API responses. Birth dates are returned as `null`. The setting applies independently to each PAPI key and is disabled by default.

Access can be disabled for the following endpoints:

- **Public**
  - **GET** /patron/basicData
  - **GET** /patron/circulationBlocks
  - **GET** /patron/{PatronBarcode}/notes
- **Protected**
  - **GET** /{AccessToken}/search/patrons/boolean
  - **GET** /{AccessToken}/circulation/requests/list

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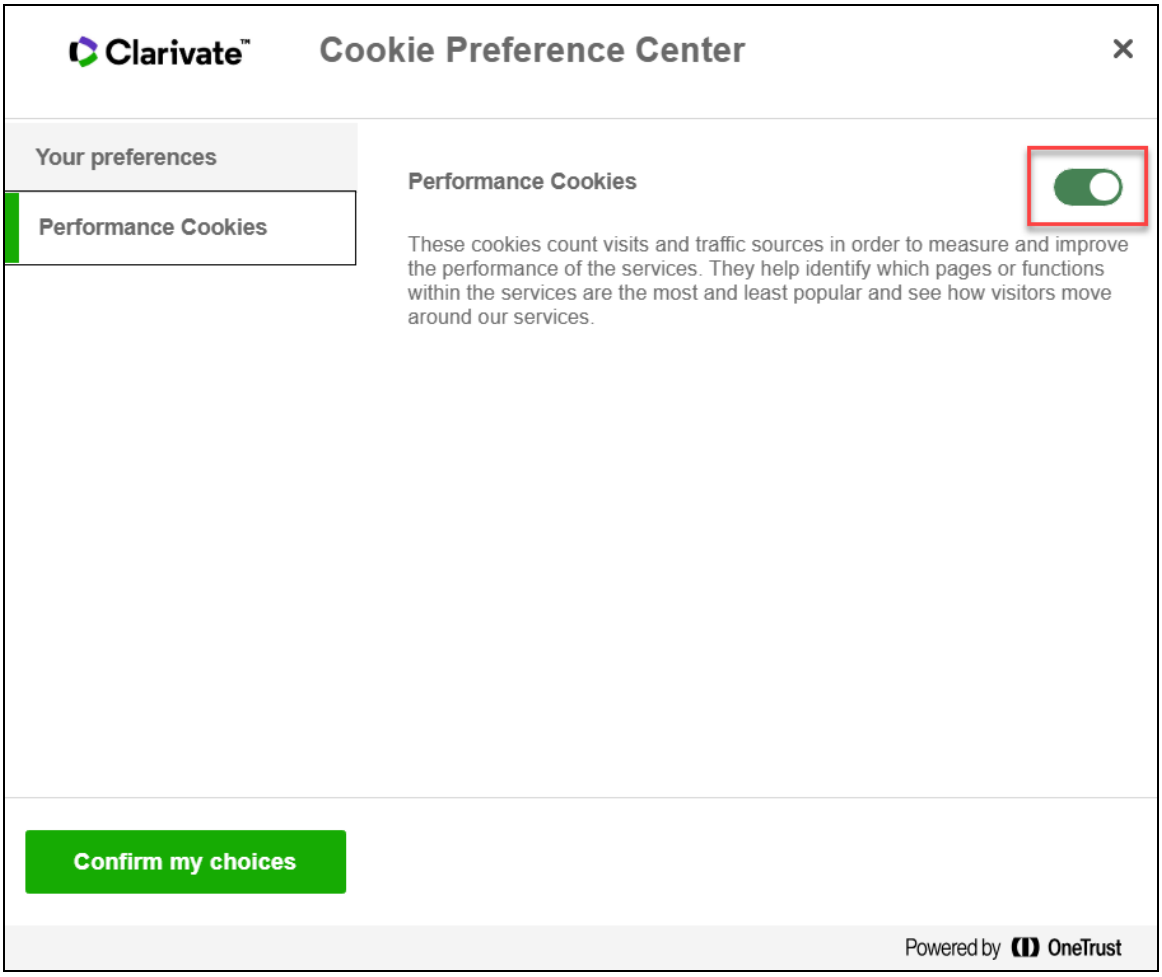
OneTrust Cookie Consent Management

Starting with Polaris 8.2, individual staff members can opt out of analytics tracking without affecting existing library-level analytics settings.

Previously, analytics tracking could be managed only at the library level in Polaris System Administration (web-based). Now, Polaris Leap includes **OneTrust** cookie consent management, allowing individual staff members to opt in or out of usage data tracking.

When users log in to Polaris Leap for the first time, they will see a cookie consent banner at the bottom of the page that includes an option to manage their preferences in the **Cookie Preference Center**. They can also access the **Cookie Preference Center** dialog to review and modify their consent choices at any time from the user menu in Polaris Leap or the side navigation menu in Polaris System Administration (web-based).

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User consent preferences are stored and reused in subsequent sessions, and applied consistently across Polaris Leap and Polaris System Administration (web-based).

Clarivate implemented **OneTrust** cookie consent management to ensure compliance with data privacy laws. Analytics behavior remains unchanged, tracking only interactions with Polaris code, such as page views and button clicks, to understand application usage. No library or patron data is collected.

This section covers the following topics:

- Managing cookie consent preferences from OneTrust cookie consent banner
- Managing cookie consent preferences from the user menu in Polaris Leap
- Managing cookie consent preferences from Polaris System Administration (web-based)

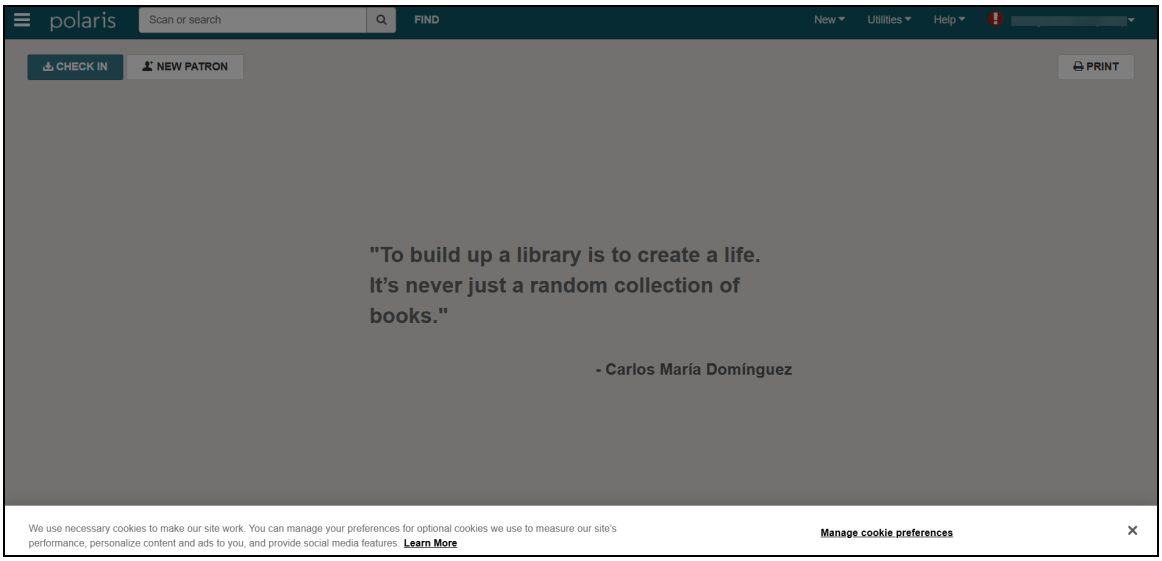
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Managing cookie consent preferences from OneTrust cookie consent banner

To manage cookie consent preferences from OneTrust cookie consent banner:

1. Sign in to Leap.

   The Leap main page appears with the cookie consent banner at the bottom.



2. Select **Manage cookie preferences** on the right side of the banner.

   The **Cookie Preference Center** dialog appears.

3. Select **Performance Cookies**.
4. Turn the toggle in the upper-right corner on to enable analytics tracking, or off to disable it.
5. Select **Confirm my choices** to complete the settings.

The cookie consent banner appears only the first time you log in and set your cookie consent preferences. Once your preferences are set, the dialog will not appear the next time you log in.

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Managing cookie consent preferences from the user menu in Polaris Leap

To manage cookie consent preferences from the user menu in Polaris Leap:

1. Select your username from the upper-right corner of the Leap header.
2. Select **Cookie Preferences** from the drop-down menu.

   The **Cookie Preference Center** dialog appears.
3. Select **Performance Cookies**.
4. Turn the toggle in the upper-right corner on to enable analytics tracking, or off to disable it.
5. Select **Confirm my choices** to complete the settings.

Managing cookie consent preferences from Polaris System Administration (web-based)

To manage cookie consent preferences from Polaris System Administration (web-based):

1. Select **Manage cookie preferences** from bottom of the side navigation menu.

   The **Cookie Preference Center** dialog appears.
2. Select **Performance Cookies**.
3. Turn the toggle in the upper-right corner on to enable analytics tracking, or off to disable it.
4. Select **Confirm my choices** to complete the settings.

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Stacked Sorting in Find Tool

Polaris 8.2 introduces the option to sort tables in the **Find Tool** results by multiple columns at once. This enhancement provides greater control over how the search results are organized, without needing to export data or re-run searches.

With stacked sorting, you select columns using Shift+click or **Shift+Space** in order to create a hierarchical sort. Each additional column sorts records within the groups created by the preceding columns.

To sort Find Tool results by multiple columns:

1. Click on a column header to select the primary sorting column; the arrow icon will indicate ascending/descending sort order.
2. While holding the **Shift** key, **click** or press **Space** on one or more subsequent column headers to add secondary, tertiary, etc. sort criteria to the table (numbers will appear next to column names to indicate the sort hierarchy); clicking the same column header twice will change the sort order from ascending to descending and vice versa.

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Improvements to Multi-Column Table Sorting

In Polaris 8.2, Leap tables **MARC Import queue**, **Shelf-Ready Check In**, **Import Profiles**, and **Serials Check In** now also support more consistent, intuitive multi-column sorting.

When you sort by multiple columns, Leap retains previously selected sort columns. The most recently selected column becomes the primary sort, while previously selected columns remain as secondary sort criteria. This provides an additional way to create and refine multi-column sorts alongside the existing Shift+click method.

This improvement standardizes the sorting behavior of these tables to match that of other Leap tables, ensuring a more consistent user experience.

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More Optional Find Tool Columns and Filters

Polaris 8.2 expands Find Tool functionality with additional filters and optional display columns across several record types. These enhancements make it easier to locate, identify, and manage records without running SQL queries, using SimplyReports, or opening individual records.

Find Tool	New Filters and Columns
Bibliographic Record	• Edition Statement column • Literary Form column • OCLC Number column • Series column • Series Volume column • Target Audience column • Item Call Number filter • Last Modified Date filter • Material Type filter • Modified User filter • Standard Identifier filter
ILL Request	• Pickup Area filter and column
Item Record	• Fine Code filter • Last Activity Date filter • Last Modified Date filter • Loan Period filter • Modified User filter • PO Number filter • Volume filter

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Find Tool	New Filters and Columns
Item Template	• Assigned Branch filter • Collection filter • Material Type filter • Shelf Location filter • Statistical Class filter
Hold Request	• Pickup Area filter and column
Patron Record	• Last Modified Date filter • Modified User filter • Notification Option filter
Record Set	• Record Set ID column • Last Modified Date filter • Modified User filter

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Additional Workform Views and Links in Polaris Leap

In Polaris 8.2, in several workfoms in Leap additional views and links were added making it easier to navigate between related records. These enhancements provide direct access to associated records and views from within the current workform, reducing the need to open the **Find Tool** and minimizing the number of navigation steps to perform circulation, cataloging, acquisitions, serials, and patron management tasks.

The additions are listed in the following table:

Workform	Additions
Bibliographic Record	• Purchase Orders view (now available as a workform default view) • Purchase Order Lines view • Invoices view (now available as a workform default view) • Invoice Lines view • Serial Holdings Record view
Invoice	• Purchase Order Lines view • Supplier in the Links dropdown
Invoice Line Item	• Holds Queue and Supplier in the Links dropdown
Supplier	• Purchase Orders view • Purchase Order Lines view • Invoices view • Invoice Lines view
Purchase Order	• Supplier in the Links dropdown
Purchase Order Line Item	• Holds Queue and Supplier in the Links dropdown

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Workform	Additions
	• Invoice Lines view
Funds	• Purchase Orders view • Purchase Order Lines view • Invoices view • Invoice Lines view

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Local Hold Visual Indicator in the Picklist

Polaris 8.2 introduces a visual indicator in the **Picklist** workform that helps staff identify when a pending item (not covered by trapping preferences), can also fulfill a local hold request. By providing immediate visibility into these opportunities, this enhancement makes it easier for libraries to prioritize local holds and decide whether to use **Fill Now** to fulfill them, bypassing the existing request queue.

A new setting **Web app: Enable local hold indicator** was added to Polaris System Administration (web-based), allowing staff to enable the visual indicator in the **Picklist** workform. A local hold request is defined as having a pickup branch that matches the item's branch (or parent library). By default, this option is disabled.

This section covers the following topics:

- How to Fill Now Using the Visual Indicator in the Picklist
- Configuring the Local Hold Visual Indicator in the Picklist

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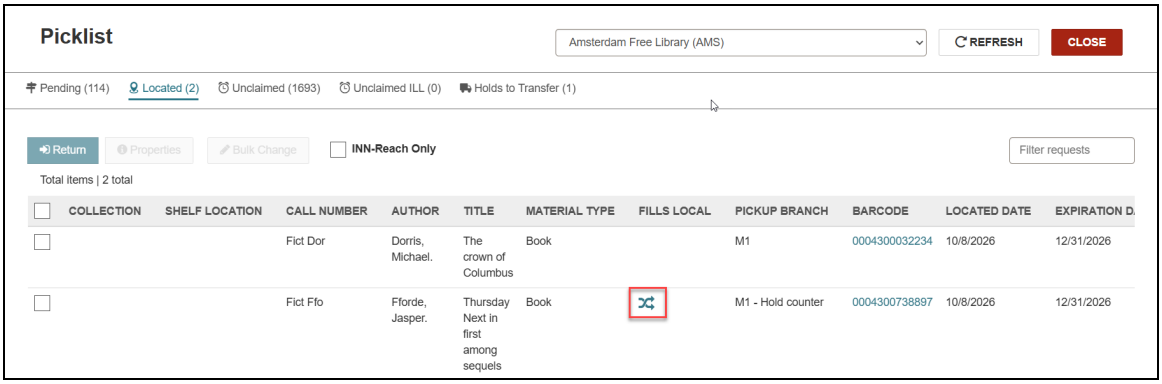
How to Fill Now Using the Visual Indicator in the Picklist



When a pending item can also fulfill a local hold request, a visual indicator appears before the **PICKUP BRANCH** row in the **Picklist** workform. Clicking the indicator takes you to the first local hold request, where you can select **Fill Now** to fulfill it.

> The indicator will only appear on the **Pending** and **Located** views of the **Picklist** workform.

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Configuring the Local Hold Visual Indicator in the Picklist

To enable the local hold visual indicator in the Picklist

1. On the **Home** page, select **Settings and Tables**.

   The **Settings and Tables** page appears.

2. Select the **Settings** tab.

   The list of settings appears.

3. Find the **Web app: Enable local hold indicator** setting. You can filter the list by typing "**Web app: Enable local hold indicator**" in the Search box, or select **Request** from the Module dropdown, then find the **Web app: Enable local hold indicator** in the list.

   The setting's default value is **No**.

4. **Toggle to Yes to enable the setting.**

Web app: Enable local hold indicator setting is available at the System, Library, and Branch levels.

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Restricting Non-Resident Holds

In Polaris 8.2, you can now restrict which items can fulfill a hold to only those from the patron's assigned library. This feature helps consortia with libraries that offer non-resident borrowing to limit fulfillment of non-resident holds to items that belong solely to patron's assigned library and it's branches.

A new Polaris System Administration (web-based) setting, **Holds options: Restricted patron codes**, enables selecting one or more patron codes to assign as restricted. When a patron is assigned a restricted patron code, hold requests can only be filled with items from the patron's assigned library. Items from other libraries in the consortia are excluded from the Request-to-Fill (RTF) processing for hold fulfillment. Branches within the same library remain eligible to fulfill the request.

Holds options: Restricted patron codes is a system-level setting.

Example

A patron is registered at the Branch 1, which belongs to the Salem Library. The Salem Library also includes Branch 2 and Branch 3. If the patron's code is configured as a restricted patron code, eligible hold-filling items can come from any branch within the Salem Library, but not from branches outside the Salem Library, or other libraries within the consortia.

To configure restricted patron codes

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

   The **Settings and Tables** page appears.

2. Select the **Settings** tab.

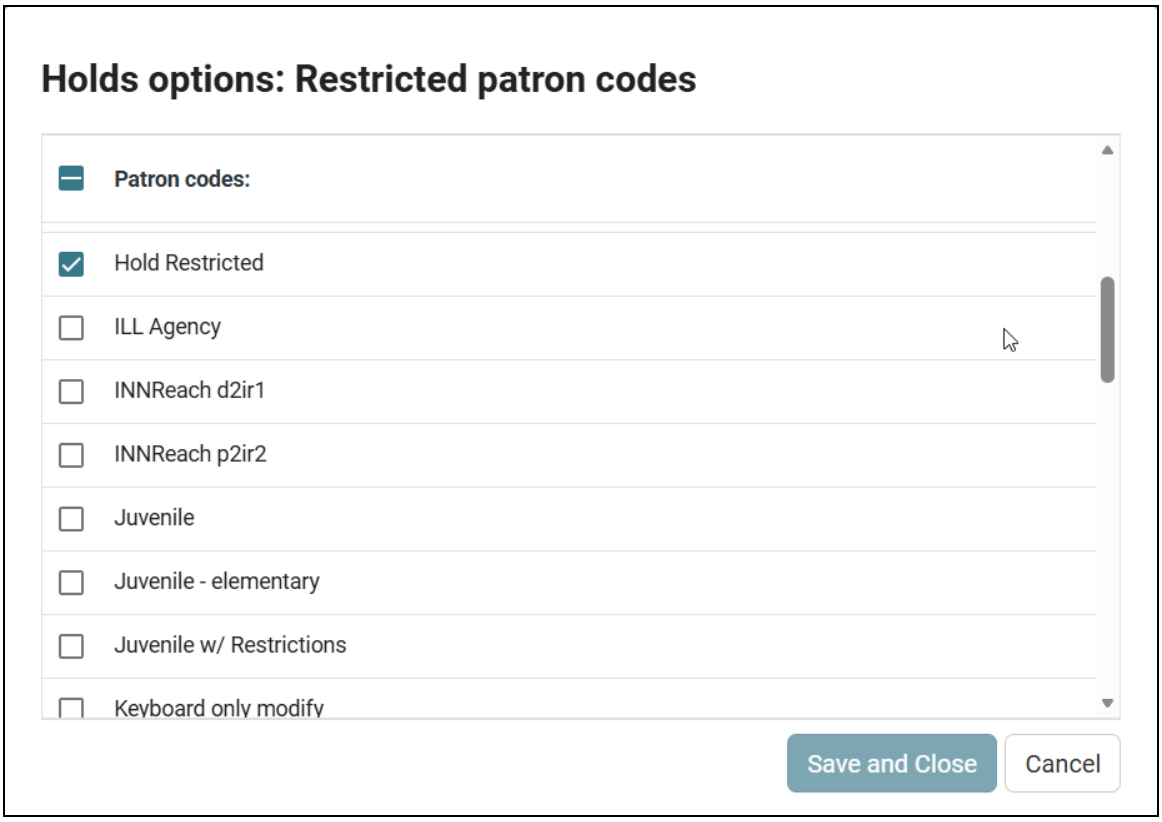
   The list of settings appears.

3. Find the **Holds options: Restricted patron codes** setting. You can filter the list by typing “Holds options: Restricted patron codes” in the **Search box**, or select **Request** from the **Module** dropdown, then find the **Holds options: Restricted patron codes** in the list.

4. Select **Configure**.

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The **Holds options: Restricted patron codes** dialog appears.



5. Select patron codes whose hold requests should be restricted.
6. Select **Save and Close** to confirm and close the dialog.

   You can verify that the setting was applied as expected by going to the **Satisfied By** view on the **Hold Request** workform and checking that only items from the patron's assigned library appear as eligible to fill the request.

Fill Now remains unaffected and will continue to accept any item to fulfill a hold request.

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Placing Holds on All Items in an Item Record Set

In Polaris 8.2, you can now place holds on all items in a record set at once directly from the **Item Record Set** workform in Polaris Leap. The **Create Multiple Holds** option has been added to the **ACTIONS** menu in the **Item Record Set** workform, allowing staff to place item-level holds for a selected patron on every eligible item in the record set without placing holds individually.

To create multiple holds from an item record set, you must have the following permissions:

- Hold requests: Create
- Access cataloging subsystem: Allow
- Cataloging record sets: Access
- Access patron services: Allow
- Patron registration: Access
- Patron registration: Modify

Additional override permissions may be required when placing holds for patrons with request blocks or request limits.

- Override request blocks: Allow
- Override request limits: Allow

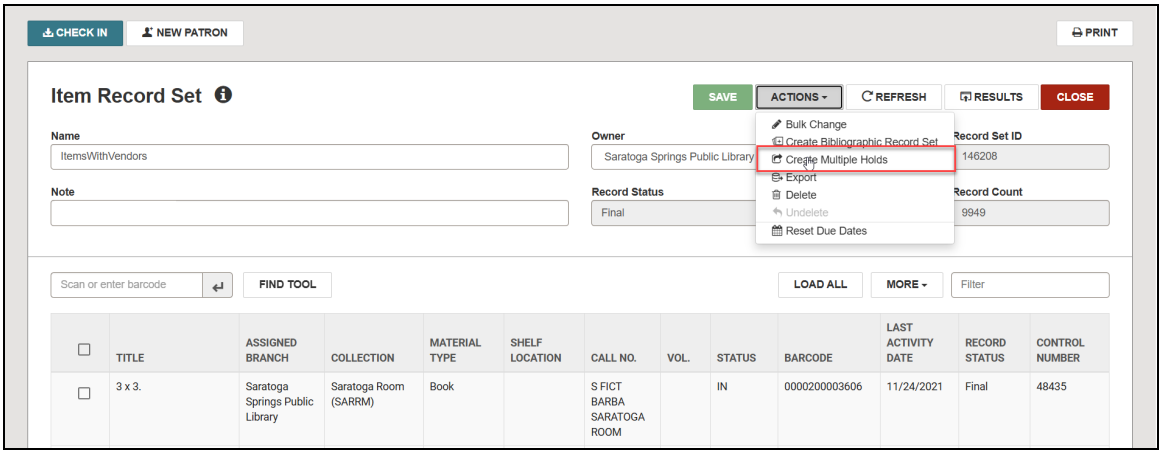
For more information on the required permissions, see Cataloging Permissions Reference and Circulation Permissions Reference.

To place holds on all items in an item record set

1. Open a desired item record set.
2. From the **ACTIONS** menu, select **Create Multiple Holds**.

   The **Select a patron** dialog opens, where you can select a patron or use the **FIND TOOL** to search for a patron.

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Multiple holds can be created for one patron at a time.

3. Select a patron and select **OPEN**.

   If the selected patron is blocked, Leap displays a message asking whether you want to continue creating holds. If you have the appropriate override permissions, you can proceed despite the block.

   The **Create Multiple Holds** dialog appears.

4. In the designated fields in the **Create Multiple Holds** dialog, specify:

   a. Activation date.

   b. Expiration date.

   c. Pickup branch.

      This field also allows you to choose the patron's preferred pickup branch. If the patron has a preferred branch configured, that branch is assigned as the pickup branch. If the patron doesn't have a preferred branch configured, the patron's registered branch is used instead. When the patron's preferred branch is excluded from the **Holds options: Pickup branches** setting, the patron's registered branch is used.

      To select Patron's preferred branch as the pickup location, the Polaris System Administration (web-based)setting **Web App: Use patron's preferred branch for multiple holds from record set** must be enabled.

5. Select **CONTINUE**.

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Leap places a hold on every eligible item in the record set, applying the selected patron and hold settings.

If one or more items in the record set are not eligible for an item-level hold, Leap displays a notification listing items for which holds could not be created.

The same activation date, expiration date, and pickup branch are applied to all created holds.

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Lost and Paid Item Status

In Polaris 8.2, a new **Lost and Paid** circulation status was added in Leap, allowing staff to identify lost items for which all associated fees have been paid without navigating to the patron record. Staff can also generate reports in SimplyReports that include this status to compare the number of lost-and-paid items with the number of lost items that have outstanding charges in the library.

The **Lost and Paid** status is available throughout Leap on all workforms where the item circulation status is displayed, including **Item Record**, **Bibliographic Record**, **Purchase Order**, **Hold Request**, and **Item Record Set** workforms. It can also be used when searching for items in the Leap **Find Tool** and for filtering and generating reports in SimplyReports.

In Polaris System Administration (web-based) a new **Lost and Paid** row was added to the **Circulation Statuses** table, allowing staff with the Modify circulation status table permission to change the **Description** and **Banner Text**.

This section covers the following topics:

- Lost and Paid Status in Leap Workforms
- Searching for Lost and Paid Items in the Leap Find Tool
- Reporting on Lost and Paid Items in SimplyReports
- Configuring the Lost and Paid Status in Polaris System Administration (Web-Based)

Lost and Paid Status in Leap Workforms

When an item is lost and all fees associated with the item have been paid, Leap displays its circulation status as **Lost and Paid**. This is a display status only. The item continues to follow the circulation logic for an item with a **Lost** status, including the applicable lost-item recovery options and lost-item transition settings.

The **Lost and Paid** status is available in all Leap workforms that display an item circulation status, including:

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- **Item Record**
    - Circulation status
    - Item Record History view

      When an item's circulation status changes from **Lost** to **Lost and Paid**, this change is displayed in the item circulation history.
- **Bibliographic Record**
    - Local Item view
    - All Items view
- **Purchase Order**
    - Items view
- **Hold Request**
    - Satisfied By view
- **Item Record Set**

Searching for Lost and Paid Items in the Leap Find Tool

The **Find Tool** in Leap includes **Lost and Paid** as a selectable keyword field when searching for item records, allowing staff to locate items with this status. For example, staff can find lost items whose associated charges have been paid when reviewing items for possible replacement.

The **Lost and Paid** status is selectable when running both basic and power searches.

Lost and Paid is available as a separate search filter in the **Find tool > Keyword fields**. It is not included under the **Circulation status** search parameter.

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Reporting on Lost and Paid Items in SimplyReports

SimplyReports now supports **Lost and Paid** in report output and filters. This allows libraries to distinguish items that are lost and paid for from items that remain lost with unresolved charges.

Lost and Paid status appears in report output when **Item circ** status or **Item status** is selected as an output column.

As an **Item circ status** it can appear in the following reports:

- Item list
- Item count

As an **Item status** it can appear in the following reports:

- Patron account list
- Hold list
- Hold count
- Serials list
- Serials count
- Fund list
- Fund summary
- Invoice list
- Invoice summary
- Purchase order list
- Purchase order summary

Staff can also select **Lost and Paid** status in the **Item General Filter** of **Circ status** to limit report results to items with this status.

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Configuring the Lost and Paid Status in Polaris System Administration (Web-Based)

The system-level **Circulation Statuses** table in Polaris System Administration (web-based) now includes a **Lost and Paid** row. Its default **Name**, **Description**, and **Banner text** values are 'Lost and Paid'.

Staff with the Modify circulation status table permission can change the **Description** and **Banner Text**.

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Creating Multiple Item Records from a Bibliographic Record

In Polaris 8.2, you can now create multiple item records at once from a **Bibliographic Record** workform in Leap. Selecting the **NEW ITEM** button from the **Local Items** or **All Items** view now opens the **New Item Records** workform where you can choose item templates, specify the number of items to create with the chosen template, review and edit item information, add items manually, and assign barcodes.

You can also access the **New Item Records** workform from the **ACTIONS** menu by selecting **Create Items**.

The workform for single item creation is now available from the New menu in the Leap header. Select New > Item Record to open the Find Tool - Bibliographic Record, select a bibliographic record, and select OPEN to access the New Item Record workform. The rest of the workflow for creating an item record remains the same.

You need the following permissions to create multiple item records from a bibliographic record:

- **Item records: Create**
- **Item templates: Access.** Without this permission, the template drop-down list in the **New Item Records** workform is empty.

This section covers the following topics:

- New Item Records Workform
- Creating Multiple Item Records from a Bibliographic Record

New Item Records Workform

New Item Records workform displays the following:

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- Bibliographic title, author, and cover image, when available.
- **Use Template** drop-down list where you can select the item template.

  > The initial template selection follows your user settings **Workforms: New item record > Item template** configuration. If a default item template is configured, that template is initially selected. If a default item template is not configured, the first available template is displayed in the list.

- **Number of Items** field where you can specify the number of items to create with the chosen template.
- **ADD ITEMS** button to add items to the table that lists all the items queued for creation.

  > The item records are not created until you select **CREATE ITEMS** button in the upper-right corner of the workform.

- **Items table** where you can add, edit or delete queued items before creating the item records.

  The table includes the following columns:

  Selection – here you can select the item table rows for editing or deletion; multiselecting is also available

  Items - displays the item quantity

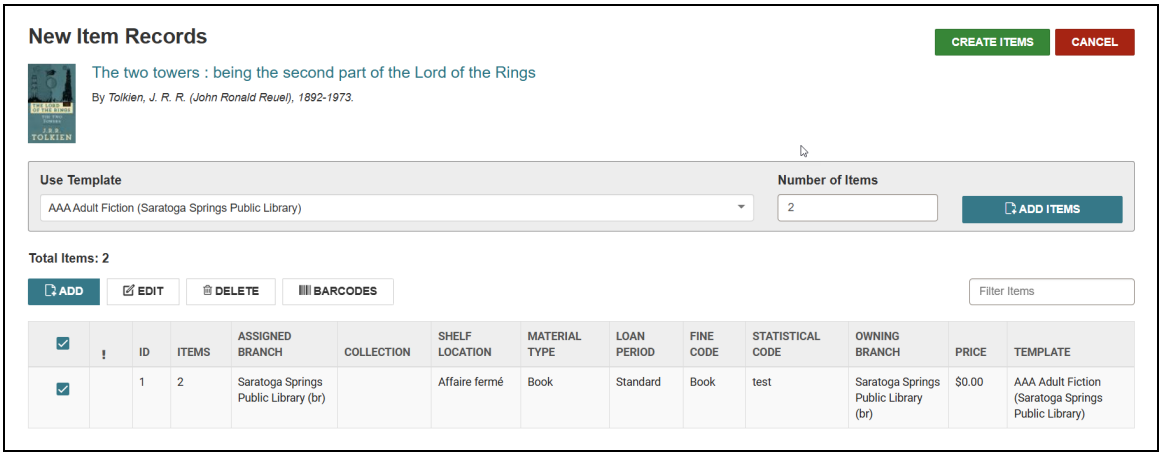
  - **Assigned Branch**
  - **Collection**
  - **Shelf Location**
  - **Material Type**
  - **Loan Period**
  - **Fine Code**
  - **Owning Branch**
  - **Price**
  - **Template**

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- **ADD** button for adding item table rows manually.
- **EDIT** button for editing a selected item table row.
- **DELETE** button for deleting selected item table rows.

> Multiselecting is only supported for the **DELETE** action.

- **BARCODES** button for assigning a barcode to a selected table row.
- **CREATE ITEMS** button for creating item records from the table.



Creating Multiple Item Records from a bibliographic record

To create multiple item records from a bibliographic record

1. Open the **Bibliographic Record** workform.
2. From the **Local Items** or **All Items** view, select **NEW ITEM**.
3. **New Item Records** workform appears.

> You can create up to 500 item records at a time. This limit corresponds to the **Label Manager** limit of 500 labels.

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This section covers the following parts of the creating multiple item records workflow:

- Adding Items to the Item Table
- Editing Items to the Item Table
- Deleting Items from the Item Table
- Assigning Barcodes to Items
- Creating and Saving Multiple Item Records

The item records are not created until you select CREATE ITEMS button in the upper-right corner of the workform.

Adding Items to the Item Table

Option 1

1. From the **Use Template** drop-down list select the item template.
2. The initial template selection follows your user settings **Workforms: New item record > Item template** configuration. If a default item template is configured, that template is initially selected. If a default item template is not configured, the first available template is displayed in the list.

   You can search for a template by typing in an item template name or a template owner, or you can also scroll through the list.
3. In the **Number of Items** field enter the number of items to create with the chosen template.
4. Select **ADD ITEMS**.

Or

Option 2

1. Select **ADD** button in the upper-left corner above the table to add items without using the **Item Template** and **Number of Items** fields. This option is useful when you want to enter item information directly instead of starting from a template.

   The **Add** dialog appears, and it includes the following fields:

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- **Template, Number of items**
- **Owning Branch, Assigned Branch, Collection, Shelf Location, Price, Circulation Status**
- **Display in PAC, Loanable Outside System, Non-circulating, Holdable**
- **Material Type, Loan Period, Renewal Limit, Statistical Code, Home Branch**
- **Call Number Scheme, Cutter, Volume, Prefix, Suffix, Copy, Classification, Language**

Required fields are marked with an asterisk.

When you add items manually, **Template field** in the dialog initially displays **None**, even if a default item template is configured in your Leap user settings.

Default values in the fields are initially blank except for values such as:

- **Price** – pre-populated when **Bring price from bib to item record when link is made** is enabled.
- **Call Number** – pre-populated when **Bring call number fields from bib to item record when link is made** is enabled.
- **Circulation Status**

2. Select **SAVE**.

If required information is missing, Leap indicates the field where the information is missing. Field validation applies when items are added from a template and when rows are edited or added manually.

Upon saving, the items now appear in the items table as item table rows where you can review and modify the values in the item fields before creating the records.

You can repeat the process as needed to add items that use different templates.

You can select a column heading to sort the table. You can also use Shift+click to sort by multiple columns.

The item records are not created until you select CREATE ITEMS button in the upper-right corner of the workform.

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Editing Items in the Item Table

1. To edit item table rows, select an item table row from the table and select **EDIT**.

   > You can only select one item table row for editing at a time.

2. The **Edit** dialog appears, and it includes the same fields as the **Add dialog**. Required fields are marked with an asterisk.

   > If you select a different item template while editing a row, Leap repopulates the item fields with values from the new template and overwrites any values that you entered manually. If you select **None**, Leap retains the existing field values.

3. Select **SAVE** to save the changes and return to the **New Item Records** workform. If you don't want to apply the changes, select **CANCEL** to return to the **New Item Records** workform.

   > If **Item records: Warning if changing assigned or home branch** setting is enabled, Leap warns you when the **Assigned Branch** and **Home Branch** values differ so you can edit the item table row before creating the items. The warning appears when the items are added to the table, not after you select **CREATE ITEMS**.

Deleting Items from Item Table

To delete an item table row, select an item table row from the table and select **DELETE**. You can select multiple item table rows for bulk deletion.

Assigning Barcodes to Items

1. To assign barcodes before creating the item records, select an item table row and select **BARCODES**.

   > You can only select one item table row at a time to assign barcodes to.

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The **Add Barcodes** dialog appears.

2. You can assign barcodes by scanning them manually, or by using system-assigned barcodes and defining the range.

   The dialog displays a barcode count so you can compare the number of barcodes entered with the number of items in the selected row.

   > If you provide fewer barcodes than the number of items in the selected row, Leap assigns the available barcodes. The remaining items can still be created without barcodes.

3. Select **SAVE** to save the changes.

   Leap validates barcode information for conditions such as duplicate barcodes, incorrect barcode formats, or not enough barcodes specified. Barcode information is validated again when the records are created in case a barcode has been assigned to another item after it was initially entered.

   > Barcode-related yellow toast notifications remain displayed until you dismiss them. Other toast notifications will disappear after a few seconds.

Creating and Saving Multiple Item Records

Select **CREATE ITEMS** to create item records from the items listed in the item table.

If item records were created successfully, Leap displays a green confirmation toast.

If the **Labels: Automatically generate label for each item record created** settings is set to **Yes**, Leap generates labels for the newly created items and queues them for printing. Otherwise, Leap returns you to the originating **Bibliographic Record** workform (the **Local Items** or **Items** view) from which you opened the multiple item creation workform.

The bibliographic record automatically refreshes to display the newly created item records. If unsaved changes prevent an automatic refresh, Leap notifies you that you must save your changes and manually refresh the bibliographic record to display the new items.

If some item records are created successfully while others encounter validation errors, the workform remains open and indicates the problems so that the unsuccessfully created items can be corrected.

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If the **Bibliographic Record** workform was closed while you were adding or editing items in the **New Item Records** workform, Leap will reopen the **Bibliographic Record** workform the next time you access it.

If you want to return to the bibliographic record workform without creating any new item records, select **CANCEL**.

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Checking In Multiple Serial Issues in the Find Tool

You can check in multiple serial issues from the **Serial Issue/Part Record** section in the Find Tool. Successfully processed issues are updated to a **Received** status.

> You must have the **Serial issues/standing order parts: Check-in** permission to check in issues.

To check in multiple serial issues:

1. Choose the following options in the Find Tool dropdown menus: **Serial Issue/Part Record** > **Basic Search**
2. Find and select the issue records to check in:
    - To select adjacent records, press **Shift** and select the first and last records in the range.
    - To select individual records, press **Ctrl** and select each record.
3. Select **CHECK-IN**.

    > **Only issue records can be checked in using the CHECK-IN action.**

4. In the confirmation dialog, select **Yes** to continue.

    The dialog then displays the number of selected issues that will be checked in.
5. If prompted, complete any additional check-in actions required by your library's serials configuration, such as entering item barcodes or responding to system messages.

    > If you do not have permission to check in one or more selected issues, a message appears during processing.

When processing is complete:

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- Successfully checked-in issues are updated to a **Received** status.
- A success message appears.
- If automatic serial label generation is enabled, labels are generated for successfully checked-in issues. Depending on your label configuration, the labels may be available in Label Manager or printed automatically.

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Bulk Delete and Undelete Item Records

Leap now supports bulk deletion and undeletion of item records through **Item Record Bulk Change** and **Item Bulk Change Template**. Staff can perform these actions from item record sets, from ad hoc bulk changes initiated in the **Find Tool**, and from bibliographic record item views.

The **Delete records** and **Undelete records** options are available on the **Miscellaneous** tab of the **Item Record Bulk Change** and **Item Bulk Change Template** workforms, and cannot be selected simultaneously. The Undelete option is available only when Polaris is configured to retain deleted item records.

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Managing Quick-Circ Items

You can now create and manage Quick-Circ item records in Polaris Leap. Quick-Circ items represent materials that are circulated without full cataloging, such as pamphlets or older paperbacks, while allowing libraries to track circulation statistics.

Use the **Quick-Circ Item Record Find Tool** to search for records by barcode, owner, collection, or material type. From the **Quick-Circ Item Record** workform, you can create, view, modify, copy, and delete records based on your permissions.

This section covers the following topics:

- About Quick-Circ Items
- Creating a Quick-Circ Item Record
- Modifying a Quick-Circ Item Record
- Using the Find Tool to search for Quick-Circ Item Records
- Copying a Quick-Circ Item Record
- Deleting a Quick-Circ Item Record

About Quick-Circ Items

Quick-Circ items are materials that circulate without full cataloging. Libraries can use Quick-Circ items for materials such as seed libraries, pamphlets, non-returnable paperbacks, and other collections that do not require complete bibliographic records but should be included in circulation statistics.

Unlike regular item records, Quick-Circ items:

- Do not have conventional Polaris item records.
- Do not have due dates, fines, or overdue processing.
- Cannot be used to fill hold requests.
- Do not count against patron borrowing limits.
- Do not appear in a patron's Items Out list or reading history.

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- Are identified by a barcode, owner, collection, and material type.
- Contribute to circulation statistics and reporting.

Polaris Leap provides tools for creating, finding, modifying, copying, and deleting Quick-Circ item records.

Permissions

The following permissions control access to Quick-Circ item records:

- Quick-circ item records: Access
- Quick-circ item records: Create
- Quick-circ item records: Modify
- Quick-circ item records: Delete

Creating a Quick-Circ Item Record

Users with the **Quick-circ item records: Create** permission can create Quick-Circ item records directly in Leap.

To create a Quick-Circ item record:

1. Select **New**, then **Quick-Circ Item Record**.
2. In the Quick-Circ Item Record workform:
    - Enter a unique **Barcode**.
    - Choose the **Owner** branch.
    - Select the appropriate **Collection** (if applicable) and **Material Type**.
3. Select **Save**..

The Owner field is automatically populated using the logged-in branch or the first branch available based on your permissions. Users without the required permission receive a permission error or override prompt.

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Modifying a Quick-Circ Item Record

You must have the **Quick-circ item records: Modify** permission to make changes. Users with Access permission only see the record in read-only mode.

To modify a Quick-Circ item record:

1. Open the desired Quick-Circ item record.
2. Update one or more fields as needed.
3. Select **Save**..

Duplicate barcode validation is performed when the record is saved. **Barcode**, **Owner**, and **Material Type** are required fields, and the Owner dropdown list is filtered according to the user's modify permissions.

Using the Find Tool to Search for Quick-Circ Item Records

You must have the **Quick-circ item records: Access** permission to search for Quick-Circ Item Records using the Find Tool.

To search for Quick-Circ item records:

1. Open the **Find Tool**.
2. Select **Quick-Circ Item Record**.
3. Search using one or more of the following access points: Barcode, Owner, Collection, Material Type.
4. Select a record from the result list to open it.

Search results can be filtered according to organizational permissions when the System Administration setting for permission-based filtering is enabled.

Users with Access permission can open records in read-only mode, while the users with Modify permission can open records for editing.

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Copying a Quick-Circ Item Record

You must have the **Quick-circ item records: Create** permission to create a new record with similar values.

To copy a Quick-Circ item record:

1. Open the Quick-Circ item record you want to copy.
2. Save or discard any pending changes.
3. Select **Actions**, then **Copy**.
4. Review the values copied over into the new record.
5. Enter a new barcode if necessary.
6. Select **Save**..

The copied workform is prepopulated with values from the original Quick-Circ item record, but it becomes a separate item after it is saved.

Users without required permissions receive a permission error or override response.

Deleting a Quick-Circ Item Record

If a Quick-Circ item record is no longer needed, you can delete it. To do so, you must have the **Quick-circ item records: Delete** permission.

To delete a Quick-Circ item record:

1. Open the Quick-Circ item record.
2. Select **Actions**, then **Delete**.
3. Confirm the deletion in the prompt.

If you cancel the confirmation prompt, the record remains unchanged. After successful deletion, a confirmation message is displayed, and the previous workform is restored.

Users without required permissions receive a permission error or override response.

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Improved Item Template Categories

Polaris 8.2 introduces an optional **Category** field for item templates. Item template matching workflows now use the assigned template category to identify item templates rather than relying solely on the English text in the template name. This improves support for multilingual environments and gives libraries greater flexibility when naming templates. Existing templates are assigned categories based on the template names during the upgrade process.

The **Category** field includes predefined template types such as **On the Fly**, **On Order**, **ILL**, **Serial**, and **Resource Sharing**. Rapido and INN-Reach templates should continue to use the template name format; the matching logic has not been updated to use the new Resource Sharing category for those workflows.

The **Item Template Find Tool** has also been enhanced with Category filtering and an optional **Category** column.

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Modifying Material Types and Changing Segments from the Purchase Order Line Item Workform in Polaris Leap

Polaris 8.2 introduces new options on the **Purchase Order Line Item** workform in Leap.

The new **Modify Material Type** action in the **ACTIONS** menu allows users to modify the material type for a purchase order line item.

Also, on the **Segments** view of the **Purchase Order Line Item** workform, the new **CHANGE SEGMENTS** button was added enabling users to change the destination, fund, or collection for selected purchase order line item segments.

> Both actions require the **Purchase Orders: Change fund, destination, collection** permission.

This section covers the following topics:

- Modifying Material Types from the Purchase Order Line Item Workform in Leap
- Changing Segments from the Purchase Order Line Item Workform in Leap

---

Modifying Material Types from the Purchase Order Line Item Workform in Leap

You can modify the material type for purchase order line items with the following statuses:

- On Order
- Partly Rec
- Received
- Backordered
- Exceptional Condition

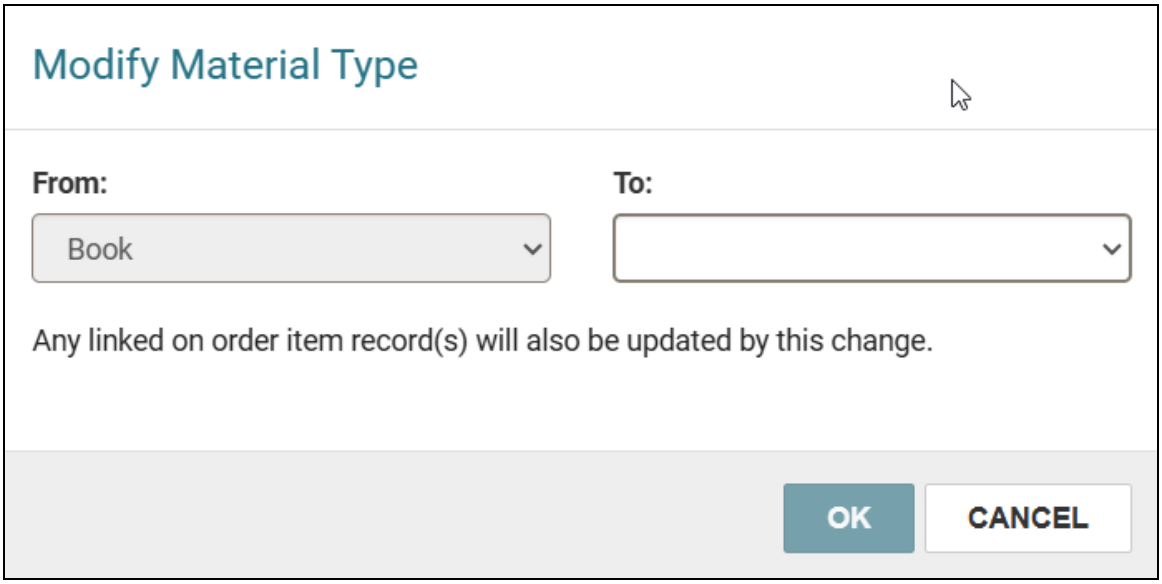
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- Never Published
- Not Yet Published
- Out of Print
- Return Requested
- Returned

To modify the material type from the Purchase Order Line Item Workform in Leap

1. Open the **Purchase Order Line Item** workform.
2. From the **ACTIONS** menu select **Modify Material Type**.

   The **Modify Material Type** dialog appears displaying the current material type and the dropdown with a list of available material types you can change it to.



3. From the dropdown, select the new material type.
4. Select **OK** to apply and save the changes.

   The change will be applied to any linked item records.

   The history of each linked item record logs the action **Modified via PO Line Change Fund processing**.

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Changing Segments from the Purchase Order Line Item Workform in Leap

The **CHANGE SEGMENTS** action is available for segments with the following statuses:

- On Order
- Received
- Backordered
- Exceptional Condition
- Never Published
- Not Yet Published
- Out of Print
- Return Requested
- Returned

It's also available for segments with an Open payment status.

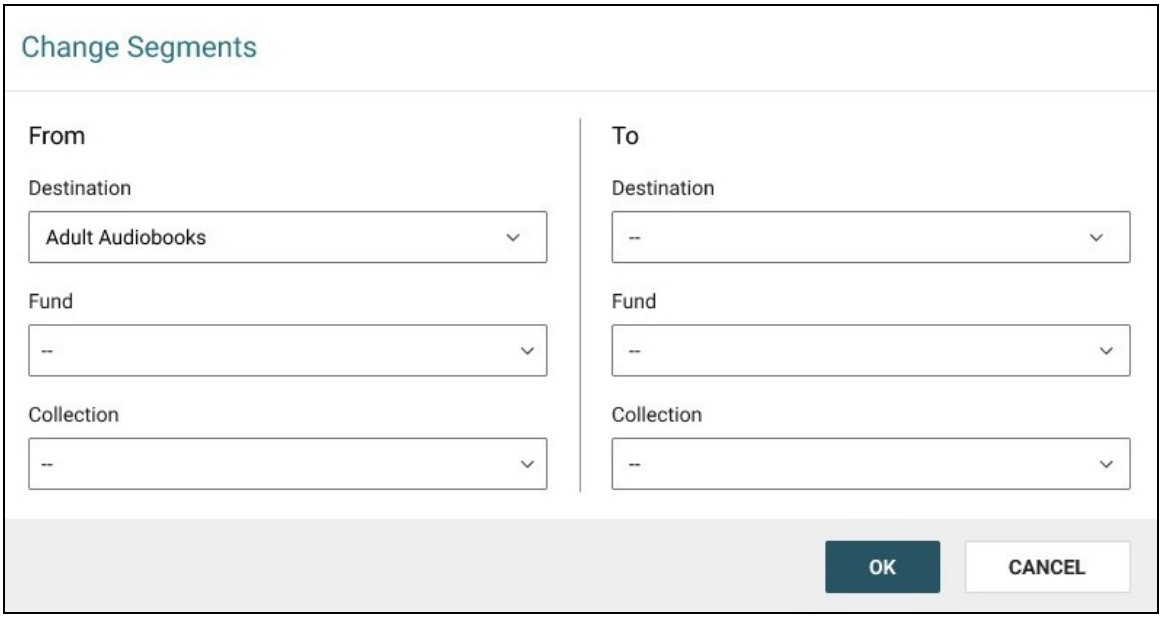
Segments linked to more than one fund are not supported by this action.

To change segments from the Purchase Order Line Item Workform in Leap

1. Open the **Purchase Order Line Item** workform and select the **Segments** view.
2. Select the segment you want to change and select the **CHANGE SEGMENTS** button.

   The Change Segments dialog appears displaying the current destination, fund, and collection values on the left, with dropdown lists for selecting new values on the right.

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3. You can change:
    - **Destination** by selecting a new value from the dropdown.

      The available **Fund** and **Collection** options will be updated to match the new destination organization.
    - **Fund** by selecting a new value from the dropdown.

      The **Fund** list honors the **Acq fund drop-down list setup** configuration.
    - **Collection** by selecting a new value from the dropdown.

> You can also select multiple segments. When changing multiple segments, only the selected segments that match the values specified in the **From** fields of the **Change Segments dialog** are updated. For example, if the selected segments have different destinations and funds, you can specify the destination and fund you want to replace, and only matching segments are updated with the new values.

4. Select **OK**.

   A confirmation dialog with a summary of the changes appears.
5. Select **CONTINUE** to save and apply the changes.

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The changes apply as follows:

- **Destination** updates the linked item's assigned branch.
- **Collection** updates the linked item's collection.
- **Fund** updates the linked item's **Funding source** field on the **Source and donor** view.
- Linked invoice line item segments are also updated.
- The history of each linked item record logs the action **Modified via PO Line Change Fund processing**.
- When the fund changes, Leap posts a disencumber transaction to the old fund and an encumbrance transaction to the new fund.
- If you want to return to the **Purchase Order Line Item** workform without making any changes to the selected segment, select **CANCEL**.

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Bulk Updating Days Past First Available in Item Records

Polaris supports limiting holds on an item to patrons from the item's owning library and branches for a specified number of days after the item first becomes available. This allows local patrons to have priority access to newly available items before they become available to a broader group.

In Polaris 8.2, staff can now update the **Days Past First Available** setting through **Item Record Bulk Change** in Leap. The option is available for bulk changes initiated from item record sets, the Find Tool, bibliographic record item views, and Item Record Bulk Change templates.

The setting is available in the **Circulation** tab under **Limit To** and can be applied when **Patrons from this library and branches** is selected. Staff can also remove an existing Days Past First Available value through the bulk change workflow.

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Managing Labels in Polaris Leap

In Polaris 8.2, you can now create, modify and delete labels directly in Leap without having to use Polaris Staff Client.

The **Label Manager** in Leap now includes **Create Label**, **Edit Label** and **Delete Label** options in the **ACTIONS** menu, allowing users to configure label formatting and content more efficiently within one workform.

This section covers the following topics:

- Creating a New Label in Leap
- Editing a Label in Leap
- Deleting a Label in Leap

Creating a New Label in Leap

You can create a new label in Leap if you have the **Label Manager Configuration: Create** permission in Polaris System Administration (web-based). For more information about cataloging permissions, see Cataloging Permissions Reference.

To create a new label in Leap

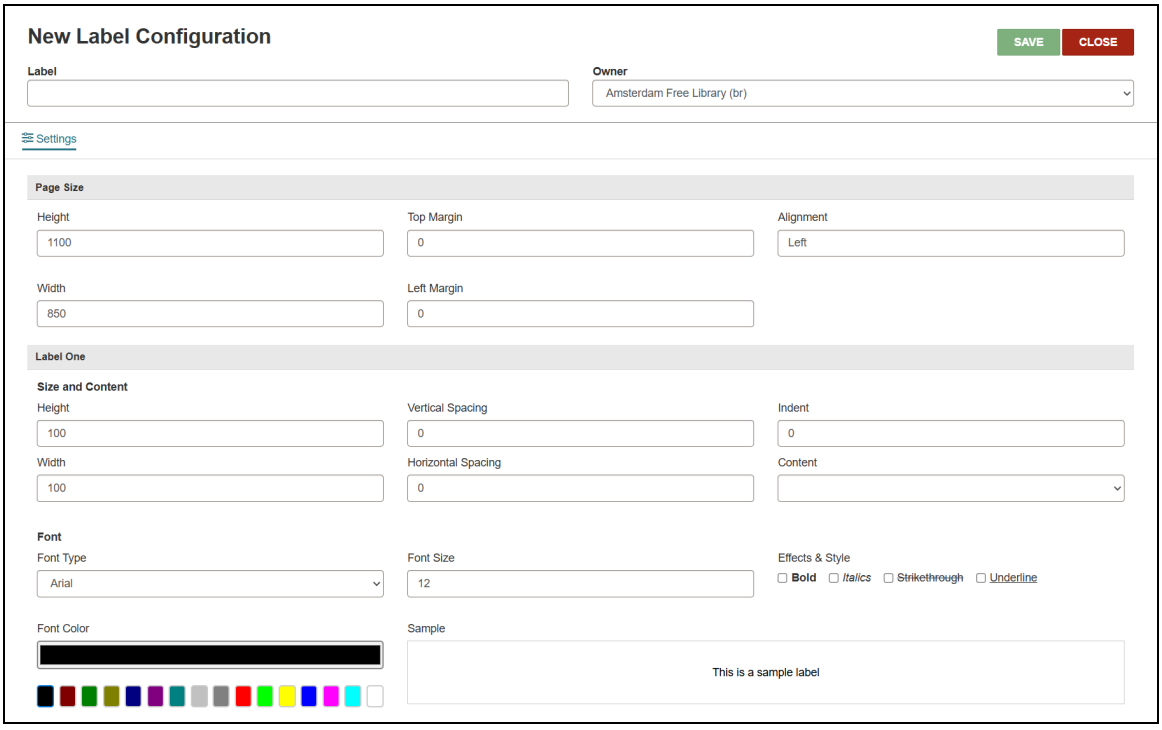
1. Select **Utilities** > **Label Manager**

   Label Manager workform appears.

2. From the **ACTIONS** menu, select **Create Label**.

   New Label Configuration workform appears displaying the following sections:

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a. **Header**

i. **Label** – In the **Label** field enter a label name.

> If the label name already exists, a toast message appears upon saving, prompting you to choose a different name.

ii. **Owner** – The **Owner** field displays the owner of the label. The owner information helps you identify whether a label is being configured at the system, library, or branch level. The default owner is the branch you logged in with. You can change the owner by selecting one of the owners from the drop-down list.

> The owner can be at the system, library or the branch level. However, when selecting a library, you can select only the library that is connected to the branch you are logged in with. Workstation-owned label configurations remain read-only and can't be modified.

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b. **Settings view**

   i. In the **Settings** view define the page size, label size, content type, and fonts.

   > You need to save the changes before you can configure label content.

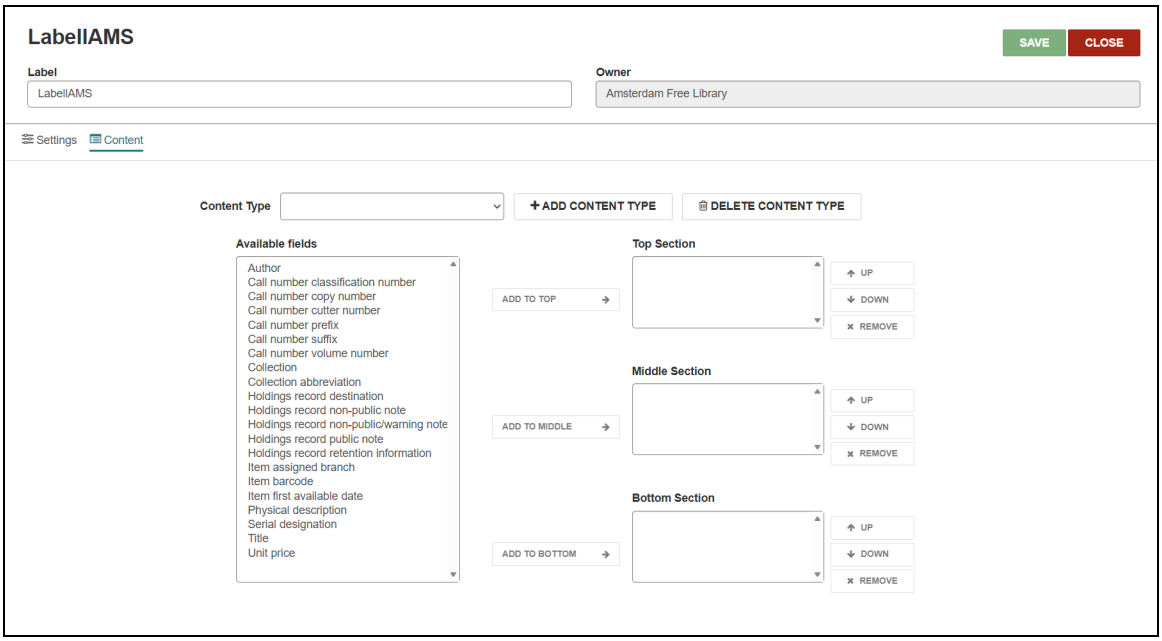
   ii. Select **SAVE** to save the changes.

   > If any required fields are incomplete, a toast message appears upon saving, prompting you to provide the missing information.

   Once the changes are saved, the **Content** view becomes available, where you can configure label content.

c. **Content view**

   i. On the **Content** view configure the information that appears on labels. You can add or delete a content type and specify which information will be included on the label and in what order.



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ii. Select **SAVE** to save the changes.

The saved label will appear in the list of available label types.

Editing a Label in Leap

You can edit existing labels in Leap if you have the **Label Manager Configuration: Modify** permission in Polaris System Administration (web-based). For more information about cataloging permissions, see Cataloging Permissions Reference.

> Labels owned by the system, library, or branch can be edited, while workstation-owned label configurations are displayed as read-only in Leap. However, you can edit workstation-owned label configurations in Polaris System Administration (web-based) in **Workstations**.

To edit a label in Leap

1. Select **Utilities** > **Label Manager**

   Label Manager workform appears.

2. From the **Label type** field in the upper-left corner of the header, select the label you want to modify.

3. From the **ACTIONS** menu, select **Edit Label**.

   Label Configuration workform appears displaying the following sections:

   a. **Header**

      i. **Label** – In the **Label** field you can change the label name.

      > If the label name already exists, a toast message appears upon saving, prompting you to choose a different name.

      ii. **Owner** – The **Owner** field displays the owner of the label. The owner information helps you identify whether a label is being configured at the system, library, or branch level.

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> You can't change the owner in editing mode. The owner can only be selected when creating labels.

b. **Settings view**

In the **Settings** view you can change the page size, label size, content type, and fonts.

c. **Content view**

On the **Content** view configure the information that appears on labels. You can add or delete a content type and specify which information will be included on the label and in what order.

> Changes made to content types will affect all label types using that content, not only the one you are editing in the workform.

i. Select **SAVE** to save the changes.

The saved label will appear in the list of available label types.

> If any required fields are incomplete, a toast message appears upon saving, prompting you to provide the missing information.

Deleting a Label in Leap

You can delete labels in Leap if you have the **Label Manager Configuration: Delete** permission in Polaris System Administration (web-based). For more information about cataloging permissions, see Cataloging Permissions Reference.

> You can only delete custom labels. Polaris default label types can't be deleted.

To delete a label in Leap

1. **Select Utilities** > **Label Manager**

Label Manager workform appears.

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2. From the **Label type** field in the upper-left corner of the header, select the label type you want to delete.
3. From the **ACTIONS** menu, select **Delete Label**.

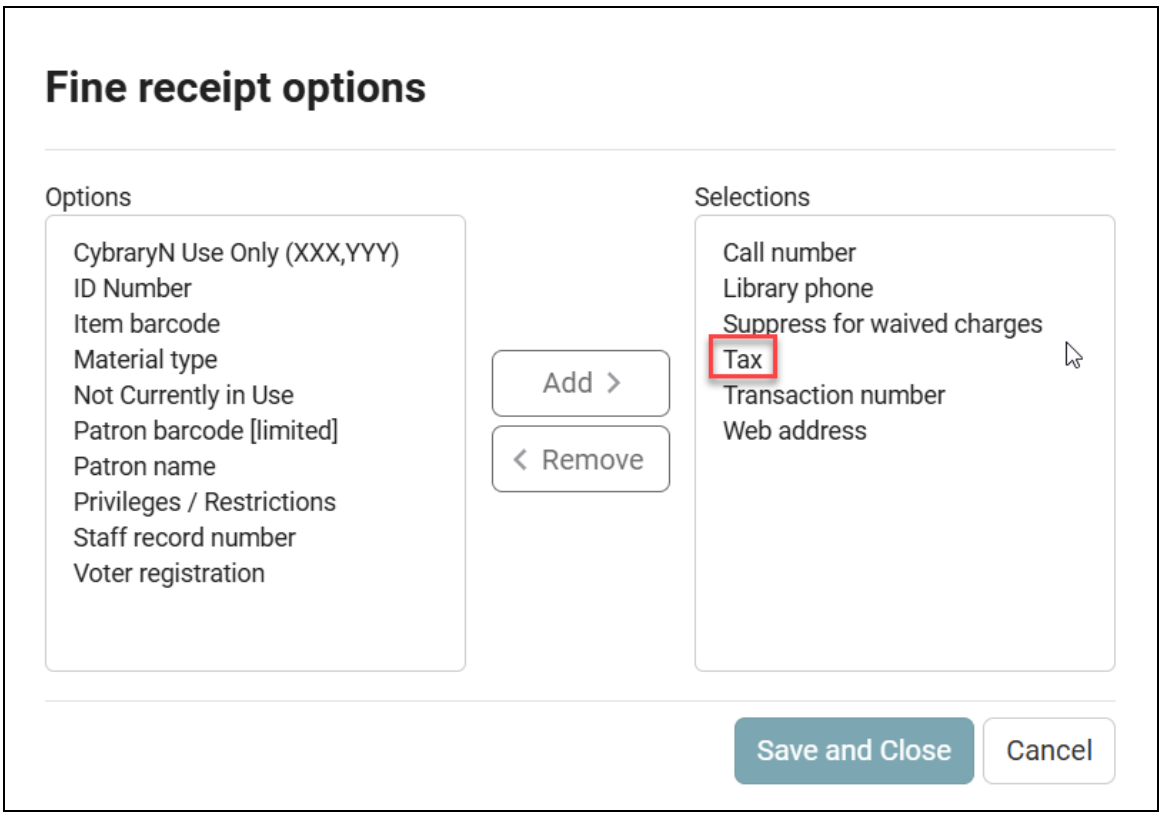
   A confirmation dialog appears informing you that all labels created for this label type will be deleted.
4. Select **CONTINUE** to confirm the deletion.

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Displaying Tax Information on Fine Receipts

In Polaris 8.2, organizations can include tax information on fine receipts by using the **Tax** option now available in the **Fine receipt options** setting in Polaris System Administration (web-based). When this option is enabled, fine receipts display the total tax amount included in a payment, helping patrons distinguish taxes from fines and fees. Tax information appears on printed (both browser and direct-to-printer) and emailed fine receipts.

You can configure this option in the **Fine receipt options** dialog by adding **Tax** from the **Options** section to the **Selections** section and then saving the configuration.



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Additional Amazon-Specific Data in EDI Purchase Orders

In Polaris Leap 8.2, additional fields were added to the EDI purchase order template for suppliers marked as **Amazon**. This ensures that Amazon receives the information needed to accurately process and deliver orders.

The following Amazon-specific fields are now included in EDI purchase orders:

Display Name

- The branch (organization) display name.
- Includes the N1 segment with an ST qualifier to specify the branch (organization) receiving the items.

Billing Address

- Includes N1, N3, and N4 segments with a BT qualifier that specify the billing address information associated with the order.

> If no billing address is configured, Leap defaults to using the organization's address.

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Data Explorer Available for Beta Testing

Polaris 8.2 introduces **Data Explorer**, a new optional beta feature available in Polaris System Administration (web-based). Data Explorer provides access to SQL-based data exploration capabilities within Polaris.

Data Explorer is disabled by default and is available only to libraries participating in the beta program. Additional functionality and documentation may be added in future releases based on beta feedback.

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Language Editor in Polaris System Administration (Web-Based)

Starting with Polaris 8.2, Web Admin Tool will no longer be in use. **Language Editor** previously managed in Polaris Web Admin Tool is now available in Polaris System Administration (web-based). This enhancement provides streamlined access to administrative tools from a centralized interface in Polaris System Administration (web-based) and helps users navigate administrative workflows without needing to switch between different management tools.

A new section **Language Editor** was added to Polaris System Administration (web-based). The section is available from both the Polaris System Administration (web-based) home page and the navigation menu.

Users with the **Language Editor Access: Allow** permission can:

- Load strings for each selected language at the system, library, or branch level.
- Search for strings by specific string ID or by string content.
- Filter the list to show only customized strings.
- Edit strings using the **Update string** dialog.
- Create custom string values.
- Identify inherited string values during editing to determine the appropriate level for changes.



If a user has the permission enabled for specific organizations, only those organizations will be available in the **Language Editor**. Users without the permission can't access **Language Editor**.

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PAC Tools in Polaris System Administration (Web-Based)

Starting with Polaris 8.2, Polaris Web Admin Tool will no longer be in use. **PAC Tools** previously managed in Polaris Web Admin Tool are now available in Polaris System Administration (web-based). This enhancement provides streamlined access to administrative tools from a centralized interface and helps users navigate administrative workflows without needing to switch between different management tools.

A new **PAC Tools** section was added to Polaris System Administration (web-based). The section is available from both the Polaris System Administration (web-based) home page and the navigation menu.

Users with the new system-level permission **Access PAC Tools** can open the **PAC Tools** page to:

- View configured PAC server connections
- Select individual PAC servers to perform **Compile theme(s)** action
- Select individual PAC servers to perform **Reload action**
- Monitor **Reload** and **Compile theme(s)** actions through real-time status updates

Users without permission can see the **PAC Tools** option but can't access it.

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PAC Title Display Configuration Tables in Polaris System Administration (Web-Based)

In Polaris 8.2, Polaris System Administration (web-based) now supports **PAC Title Display** configuration tables. These tables allow users to control which bibliographic metadata elements of a title are displayed in PowerPAC for each view without accessing Polaris Staff Client.

Polaris System Administration (web-based) also supports the **PAC Entities** table, a read-only table that provides a view of all entities available for PAC title display configuration.

> The **PAC Entities** table defines the metadata elements that the **PAC Title Display** configuration tables can use and how their values are populated from MARC data. While the **PAC Title Display** tables determine whether those elements are displayed in a PAC record and where they appear in the title display.

This section covers the following topics:

- PAC Title Display tables
- PAC Entities table

PAC Title Display tables

The following **PAC Title Display** configuration tables are now available in Polaris System Administration (web-based):

- PAC Title Display: Brief Monograph
- PAC Title Display: Brief Serial
- PAC Title Display: Full Monograph
- PAC Title Display: Full Serial

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- PAC Title Display: Summary Monograph
- PAC Title Display: Summary Serial

These tables are available at the System, Library, and Branch levels. Users with the **Access tables** and **Modify PAC title display tables** permissions can add, delete, or reorder table rows. For more information, see Administrative Tables Reference.

For more information on each PAC Title Display table, see New or Modified Polaris Administrative Settings.

PAC Entities table

The **PAC Entities** table is a read-only list of bibliographic metadata entities available for use in PAC title display configurations. For each entity, it shows its description together with metadata such as whether the entity is repeatable, system-generated, or system-synchronized.

Although the table is read-only, an entity can be selected so users can navigate to its associated **Entity Definitions** and view MARC materialization rules that populate them, such as data-field, control-field, and virtual-field rules.

The **PAC Entities** table is available only at the System level. To access the table, users need the **Access tables** permission. No modification permissions are required because the table is read-only.

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Filtering Staff Members and Workstations Lists in Polaris System Administration (Web-Based)

In Polaris 8.2, new filtering options were added to the **Staff Members** and **Workstations** pages in Polaris System Administration (web-based), allowing users to quickly filter the lists and search results to exclude inactive staff accounts and workstations that have not been enabled.

Previously, the **Staff Members** and **Workstations** pages displayed all records, including inactive staff accounts and disabled workstations. Although users could sort records by **Active** and **Enabled** status, there was no option to filter the list or search results to show only active staff members and enabled workstations.

This enhancement reduces list clutter, improves the relevance of search results, and helps users locate and manage active and enabled records more efficiently.

This section covers the following topics:

- Filtering Staff Members List in Polaris System Administration (Web-Based)
- Filtering Workstations List in Polaris System Administration (Web-Based)

Filtering Staff Members List in Polaris System Administration (Web-Based)

A new filter option on the **Staff Members** page lets you exclude inactive staff member accounts from the displayed results. When the filter is applied, inactive accounts are omitted from both the list view and search results.

To filter the Staff Members list in Polaris System Administration (web-based)

- On the **Staff Members** page, in the upper-right corner, select the **Active only** checkbox.

  The list of staff member accounts now displays only active accounts.

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Changing the filter resets pagination to the first page to ensure that results are displayed in the correct order.

Filtering Workstations List in Polaris System Administration (Web-Based)

You can use a new filter option on the **Workstations** page to exclude workstations that are not enabled from the list. When the filter is applied, disabled workstations are omitted from both the list view and search results.

To filter the Workstations list in Polaris System Administration (web-based)

- On the **Workstations** page, in the upper-right corner, select the **Enabled only** checkbox.

  The list of workstations displays only enabled ones.

Changing the filter resets pagination to the first page to ensure that results are displayed in the correct order.

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Managing E-Sources and Remote Databases in Polaris System Administration (Web-Based)

Polaris 8.2 adds **E-Source target management** and **remote-database configuration** to Polaris System Administration (web-based). Administrators can now organize e-sources and remote databases in category trees, maintain resource-target properties and access restrictions, and configure remote-database usage and follow-on-search settings.

This topic covers:

- Managing E-Sources
  - Configuring E-Source targets
  - Categorizing ESource targets
- Managing Remote Databases
  - Configuring Remote Databases
  - Categorizing Remote Databases

Managing E-Sources

E-sources are subscription databases presented as search links on an e-sources page in Polaris PowerPAC. The library may limit access to specific e-sources, often to comply with the terms of the database subscription.

Unlike remote databases, which can be searched simultaneously along with the local catalog, e-source databases are searched separately. When the patron selects an e-source target, the patron uses the provider's interface for searching (not the PowerPAC interface). When the e-source session is finished, the Polaris PowerPAC session is resumed.

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Configuration of E-Source targets

To set up an e-source target in Polaris System Administration (web-based), you specify how the connection to the database is made, and set any authentication criteria and access restrictions.

The terms of your library's contract with the e-source provider may require authentication from your system when a patron attempts to connect to the e-source. Authentication identifies your library as a subscriber to the e-source provider. When a patron selects an e-source, and the access criteria are met, authentication data for the library is automatically passed to the e-source target for validation, bypassing the provider's login page.

You can allow access from in-house workstations, remote workstations, or both, and set separate login requirements for each location. You can further define access by preventing patrons with certain patron codes from accessing an e-source target, and by setting specific IP addresses for access.

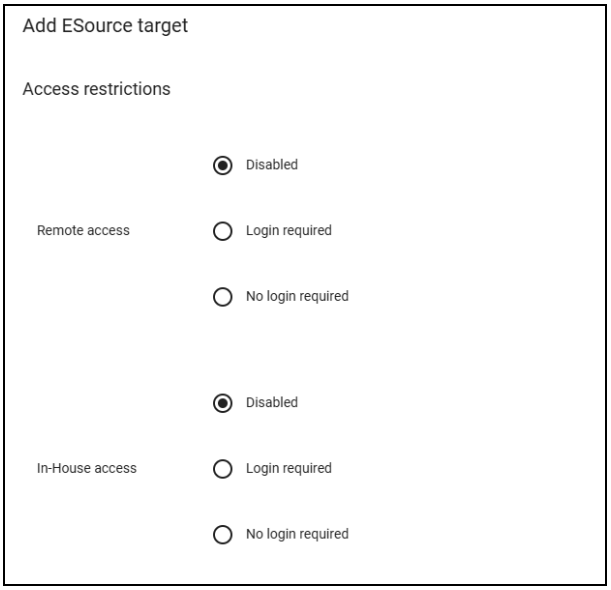
To set up a new e-source target:

1. In Settings and Tables, select **ESource targets: Configuration** located in the **Settings** tab. In the configuration window, select **Add**. The **Add Esource target** dialog box appears.
2. Set up general information for the target as follows:
    - **Name**: Type a name for the target.
    - **URL**: The complete URL for the target's login page (not the site's home page, or account setup page). Polaris automatically passes your library's authentication information to this URL.
    - **Description**: Brief description of the target.
    - **Message**: Brief message to patrons regarding the target.
    - **Transfer type**: The protocol for passing authentication data from your library to the e-source target. **Get** displays authentication information in the URL string, unless Secure Socket Layer (SSL) is enabled at the server level. **Post** does not display the authentication information. Most vendors can use the post method

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3. Set up **Access restrictions** to the target. By default, if a workstation is registered in Polaris Administration, it is automatically considered “in-house.” If the workstation is not registered in Polaris Administration, but the IP address is listed in the system-level In-House IP Addresses database table, it is considered to be in-house. If you use Polaris PowerPAC on workstations within the library, you may want to list them in the In-House IP Addresses database table. If neither the workstation nor the IP address is found in the system, the user is considered remote.



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- **Remote access**: Limits remote access to the target.
    - To make the e-source unavailable to remote users, select **Disabled**.

      ⚠ **If you disable access for both remote and in-house users (see step 6), the e-source will be displayed on the PowerPAC page as unlinked text.**

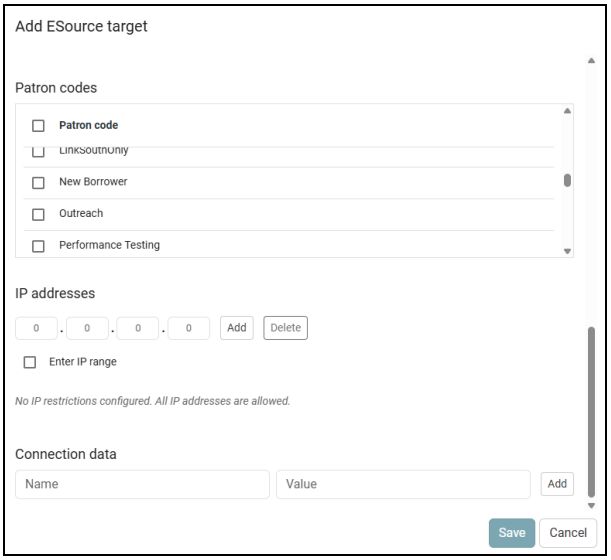
    - To make the e-source available from remote workstations only to registered patrons, select **Login required**. If you select this option, you can further restrict access by blocking selected patron codes.
    - To make the e-source available from remote workstations to anyone, select **No login required**.
- **In-House access**: Limits in-library access to the target.
    - To make the e-source unavailable to in-house users, select **Disabled**.

      ⚠ **If you disable access for both in-house and remote users (see step 7), the e-source will be displayed on the PowerPAC page as unlinked text.**

    - To make the e-source available from in-house workstations only to registered patrons, select **Login required**. If you select this option, you can further restrict access by blocking selected patron codes.
    - To make the e-source available from in-house workstations to anyone, select **No login required**.

4. Select the **Patron codes** you want to prevent from accessing the target. Patrons who are assigned these codes cannot access the e-source target.

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Your patron code settings are used only if you have required log-in for in-house or remote access.

5. Define **IP addresses** you want to prevent from accessing the target using one of the following methods:
    - To define IP addresses one at a time, type each IP address in the boxes and click **Add**. The addresses are displayed in the restricted list below.
    - To define a range of IP addresses, select the **Enter IP Range** checkbox. Then enter the first address of the range in the IP address boxes, and define the range in the boxes. Click the radio button below the appropriate End of IP Range box to specify if the last number in the range is in that address segment. Click Add to add the range to the restricted list.
6. In the **Connection data** section, enter parameters in sets consisting of Name and Value.
    - **Name** is the descriptive field name that the database provider uses to prompt for input.
    - **Value** is the actual text string that the database provider assigns to your library when the subscription is established.

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Type a name in the Name box, type a value in the Value box for the first parameter, and click **Add**. Repeat to add as many parameters as the e-source provider requires for connection authentication.

> **Example**:
> A vendor requires a user ID and a password to access a database, so you define two parameters (two sets of Name and Value data elements). For the first set, Name is **UserID**. Value is **WESTSIDELIBRARY**. For the second set, Name is **Password** and Value is **read**.

7. Select **Save** to finalize configuration of the e-source target. It is now visible in the Esource targets: Configuration list.

To modify an existing e-source target:

1. In **Settings and Tables**, select **ESource targets: Configuration** located in the **Settings** tab. In the configuration window, locate the target you wish to modify and select the **Edit** option. The Modify Esource target dialog box appears.
2. Edit the parameters for the target.
3. Select **Save** to finalize your changes.

To delete an e-source target:

1. In **Settings and Tables**, select **ESource targets: Configuration** located in the **Settings** tab. In the configuration window, locate the target you wish to modify and select the **Delete** option.
2. Select **Continue** to confirm target deletion.

Categorization of E-Source targets

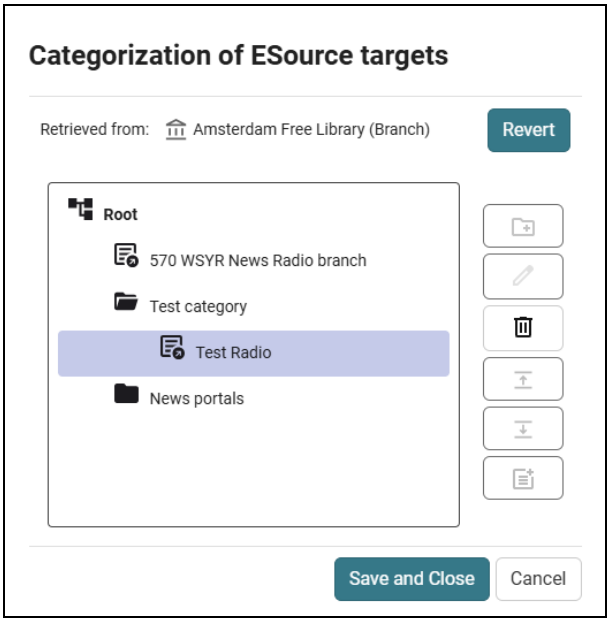
To make it easier for patrons to find e-source targets, you can organize the targets list into categories and subcategories. You can set up categories at the system, library, or branch level. If categories are not set up for an organization, the organization scheme from the parent level is used.

To organize e-source targets into categories and subcategories:

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1. In **Settings and Tables**, select **Categorization of ESource targets** located in the **Settings** tab.
2. Use the command buttons to add, rename, delete, or rearrange categories and targets in the organization tree.
3. Select **Save and Close** to save your changes, or **Cancel** to discard them.

Categorization of ESource Targets dialog box layout:



- **Retrieved from**: Identifies the organizational level from which the current organization tree is inherited.
- **Revert**: Restores the organization tree to the system-level default structure.
- **Add category**: Adds a category folder to the selected level.
- **Rename**: Changes the name of the selected category.
- **Delete**: Removes the selected item and its sub-items. Displays a dialog to confirm deletion.
- **Move up**: Moves the selected item up one position.
- **Move down**: Moves the selected item down one position.

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- **Add target**: Adds an e-source target to the selected category.

  One e-source target can be added to multiple categories.

Managing Remote Databases

Polaris features integrated federated searching, which enables users to simultaneously search local and remote databases, and retrieve merged search results. Libraries can offer federated searching of **Z39.50 databases** only, a feature included in Polaris at no additional cost. These search targets are remote databases or Web search engines that can be searched simultaneously with the Polaris database using the Z39.50 search protocol. If your library allows patrons to place interlibrary loan requests from PAC, you will likely provide Z39.50 search targets that patrons can choose using the Select Databases feature in Polaris PowerPAC. You can filter Z39.50 search target results to show only those materials that patrons can actually request.

To set up remote resources as federated search targets, you set up server records for the remote resources in Polaris Administration. See Adding Servers for more information. Then, using the procedures outlined here, you organize them in the way that is most convenient for your patrons, using the PowerPAC setting **Remote databases: Categorization of target databases**. You can set usage conditions on individual databases, and set a limit on the number of targets that can be searched at one time.

Configuring Remote Databases

To configure usage for each remote database:

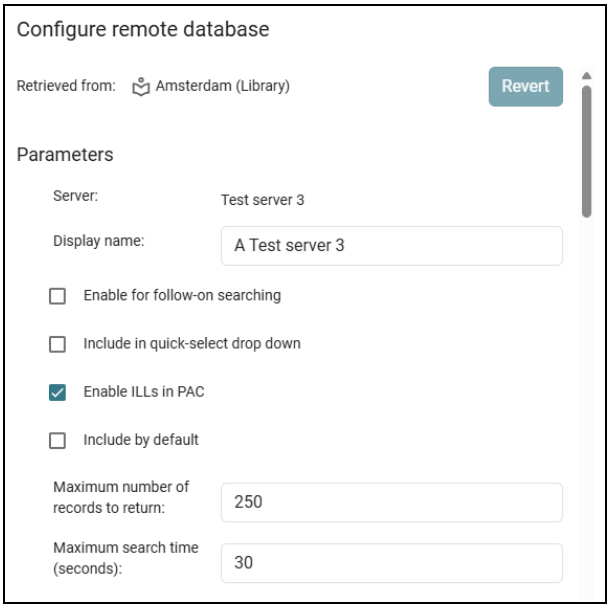
1. In **Settings and Tables**, select **Remote databases: Usage settings** located in the **Settings** tab.
2. In the Usage settings window, edit settings for your organization level:
   - **Revert**: Restores the organization tree to the system-level default structure.
   - **Enable follow-on search after zero hits in local database search**: Enable any remote databases to be suggested automatically if a search of the local database yields no results.

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- **Show total hits in follow-on search databases**: If the above is enabled, also shows the total number of hits in the follow-on search.

3. Select **Edit** next to the remote database you want to configure.
4. Configuration dialog opens with the following options:
    - **Retrieved from**: Identifies the organizational level from which the current settings are inherited.
    - **Revert**: Restores all settings to their system-level default values.
    - **Parameters**:
        - **Server**: Server name in the system.
        - **Display name**: Customizable patron-facing name.
        - **Enable for follow-on searching**: Designate this database for follow-on searching.
        - **Include in quick-select drop down**: Include the database in the Using drop-down list box in the PowerPAC.
        - **Enable ILLs in PAC**: Enable inter-library loan requests from the PowerPAC for this remote database.
        - **Include by default**: Include this database in PowerPAC searches by default.
        - **Maximum number of records to return**: Specify the retrieved records limit.
        - **Maximum search time (seconds)**: Specify the search time limit.

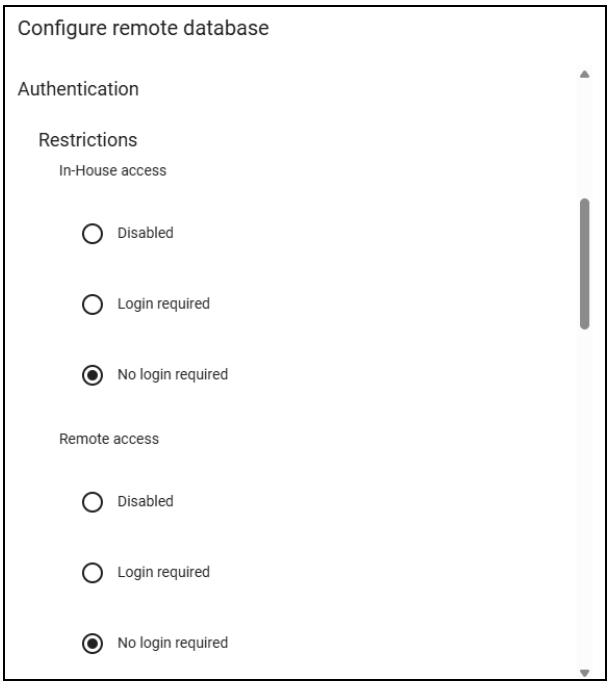
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- **Restrictions**:
  - **In-house access**:
    - **Disabled**: Prevents patrons from accessing the database from a library computer.
    - **Login required**: Requires patrons to log on with their library account credentials to access the database from a library computer.
    - **No login required**: Patrons can access the database from a library computer without logging on.
  - **Remote access**:
    - **Disabled**: Prevents patrons from accessing the database from a computer outside of the library.
    - **Login required**: Requires patrons to log in with their library account credentials to access the database from a computer outside of the library.

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- **No login required**: Patrons can access the database from a computer outside of the library without logging in.



- **Patron codes**: Control access to the database by selecting the patron codes to restrict. Patrons whose records have the selected patron code will be prevented from accessing the database.

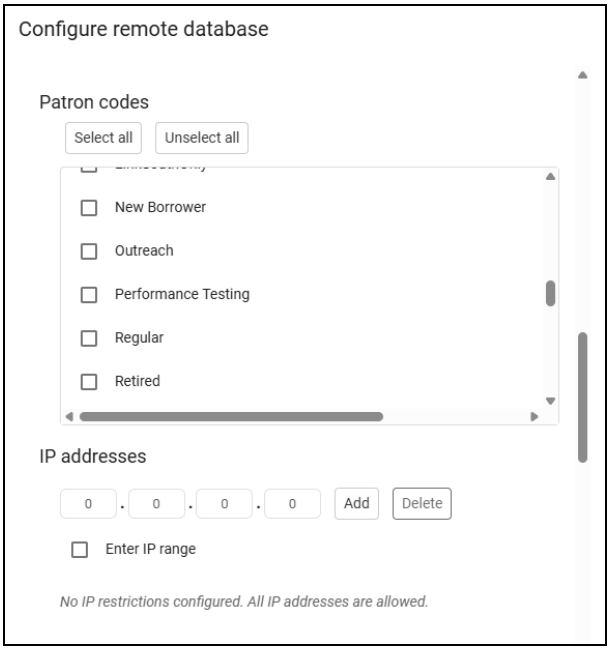
If you choose to restrict access by patron code, you must also require the patron to log in. If you do not require log-in, your settings for restricted patron codes are ignored.

- **IP Addresses**: To restrict access to the remote database by the IP address of the PAC search computer, do the following:
  - Type the IP address in the top boxes and select **Add**.
  - To include an IP address range, select Enter IP range, type the beginning IP address in the top boxes and the ending IP address in the bottom boxes.

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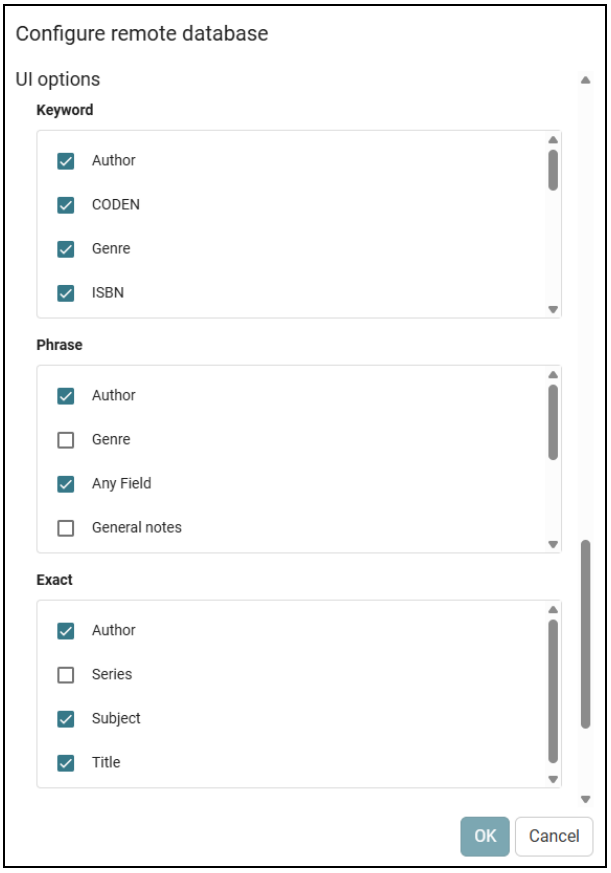
> The IP addresses allowed access are listed in the Allowed IP Addresses box.

- To remove an IP address, select it and then select **Delete**.



- **UI options**: Define the search access points that are available for the selected database and search type.
  - **Keyword**: Select the access points available for a keyword search with this database selected.
  - **Phrase**: Select the access points available for a phrase search with this database selected.
  - **Exact**: Select the access points available for an advanced search with this database selected.
  - **Advanced**: Select the access points available for an exact search with this database is selected.

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5. Select **OK** to save your configuration, and repeat previous step for additional remote databases if needed.
6. Select **Save and Close** to save all changes.

Categorizing Remote Databases

By default, all remote databases available for the connection organization's PowerPAC searches are displayed as a single list, which may be very long. You can organize the list into categories, add search targets, and specify which targets should be listed under each category heading. If categories are not set up for an organization, the organization scheme from the parent level is used.

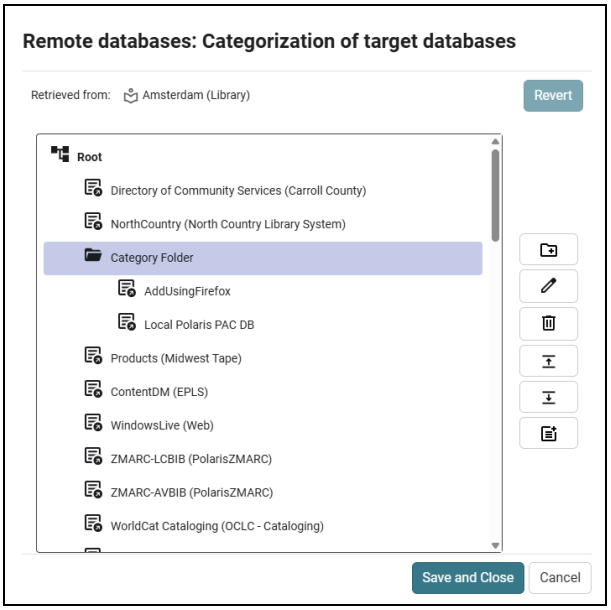
To organize remote databases into categories and subcategories:

1. In **Settings and Tables**, select **Remote databases: Categorization of target databases** located in the **Settings** tab.

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2. Use the command buttons to add, rename, delete, or rearrange categories and targets in the organization tree.
3. Select **Save and Close** to save your changes, or **Cancel** to discard them.

Categorization of target databases dialog box layout:



- **Retrieved from**: Identifies the organizational level from which the current organization tree is inherited.
- **Revert**: Restores the organization tree to the system-level default structure.
- **Add category**: Adds a category folder to the selected level.
- **Rename**: Changes the name of the selected category.
- **Delete**: Removes the selected item and its subitems. Displays a dialog to confirm deletion.
- **Move up**: Moves the selected item up one position.
- **Move down**: Moves the selected item down one position.
- **Add target**: Adds a remote search target to the selected category.

> A specific search target can be represented in multiple categories.

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Expanded GND Authority Support

Polaris 8.2 expands support for GND authority data by introducing SRU-based server connections, new GND import profile options, and automatic authority record retrieval during bibliographic record save workflows. These enhancements help libraries integrate GND authority data into both import-based and cataloging workflows.

Support for SRU Server Records in Polaris System Administration(Web-Based)

Libraries that use authority data from the GND access those records through an SRU (Search/Retrieve via URL) service rather than through the Z39.50 connections traditionally used by Polaris authority workflows. Polaris 8.2 adds support for SRU-based server records in the Polaris System Administration (web-based), enabling administrators to configure and manage connections to SRU authority services such as GND.

When creating a server record, administrators can define the SRU service connection details used to communicate with the remote authority database. SRU and Z39.50 connections are stored and managed through the same Polaris server and connection infrastructure, allowing SRU targets to be configured alongside existing remote data sources.

Once configured, SRU server records can be selected and used by Polaris workflows that retrieve authority data from remote sources. This enhancement provides the foundation for the new GND integration features introduced in Polaris 8.2, including GND authority importing and automatic authority control during bibliographic record save operations.

New Authority Import Option for GND Records

Polaris 8.2 adds a new **Reject new records** option to authority record import profiles in Leap. Libraries that import authority records from GND can use this option to prevent

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new authority records from being added to the database unless they match an existing authority record based on the configured duplicate-detection rules.

When the option is enabled, incoming authority records that do not match an existing authority record are rejected during import. When the option is disabled, authority records are processed normally and new records can be added to the database.

This option gives libraries greater control over authority record maintenance and can help limit database growth by allowing only updates to existing authority records while excluding unused records imported from external authority sources such as GND.

Remote Automatic Authority Control with GND

Polaris 8.2 extends Automatic Authority Control to support authority records from GND. Libraries can now configure a GND SRU connection as the remote authority source used by Automatic Authority Control.

When a bibliographic record is saved, Polaris examines headings that are not linked to local authority records and automatically searches the configured GND authority source for matching records. If matching authority records are found, Polaris creates the authority records in the local database and links them to the bibliographic record as part of the save process.

This enhancement allows libraries that use GND authority data to incorporate authority creation and linking directly into existing cataloging workflows, reducing the need to manually create or import authority records before cataloging.

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Acquisitions Storage System Integration

Polaris now supports tracking storage locations for purchase order line items. Libraries that use a storage system can record the temporary storage location of items while they await processing by technical services.

A new **Location Note** field is available in the Purchase Order Line Item workform, allowing staff to scan or enter a storage bin location. Purchase order workslips can also be configured to display the Location Note as a scannable barcode, making it easier to retrieve stored items for processing. Administrators can enable barcode printing using the **PO line item workslips: Print location note barcode** setting in Polaris System Administration (web-based). When enabled, the Location Note value is printed on the workslip as a barcode that staff can scan to identify or retrieve the appropriate storage bin.

To help maintain location data, Polaris also adds the **Automatically clear location notes** setting in **Acquisitions** module. When enabled, Polaris automatically removes Location Note values after associated items move beyond the **On Order** or **In Process** item statuses. Libraries that prefer to manage location information manually can leave this setting disabled.

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Updates to Reports in Leap

Polaris 8.2 expands report functionality in Leap. Libraries can configure Leap to provide access to all Polaris reports and notices, and users can select an output format when generating a report.

To make all reports available, enable the **`client_reportViewer_advancedMode_enabled`** option in the Leap **`appsettings.json`** file. When this option is enabled, the **Notices** option on the **Utilities** menu opens the root **Reports and Notices** folder. Because the menu label does not change automatically, libraries should also update the **Notices** language string to provide a more descriptive label. PDF remains the default report format, but users can optionally select another available format, including CSV or Excel.

Polaris 8.2 also adds support for translating internal reports used in Leap, including purchase order workslips and Fiscal Year Utility pre-processing reports. Internal reports generated from Leap display in the language selected when the user signed in.

To support translated reports, the internal report folder structure in Microsoft Reporting Services now includes a **Translated** folder. Libraries that maintain customized versions of internal reports should review their customizations after upgrading. A customized report used in both the staff client and Leap requires separate custom report files for the existing internal-report location and the new translated-report location.

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OAuth Authentication for SimplyReports

SimplyReports now supports OAuth authentication through Polaris Authentication Services. Libraries that use OAuth authentication with Leap and Polaris System Administration can also use OAuth to sign in to SimplyReports. The SimplyReports sign-in experience has been updated to support OAuth authentication, while existing basic authentication remains available.

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Call Number Added to SIP Item Information Response

Polaris 8.2 enhances item information responses by including the item's call number in the **Item Information (17/18)** message pair. The call number is returned in the CS field and follows the existing **SIP uses full call number** configuration. This improvement makes call number information available to third-party systems that use item information messages for inventory and reporting purposes.

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