What’s New in 4.1 R2

Count on us.
Highlights from 4.1 R2

- Administration/System-wide
- PowerPAC and Mobile PAC
- Circulation
- Cataloging
- Acquisitions
What’s New in 4.1 R2 Documentation

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• PolarisTown:  http://www.polarislibrary.com/polaristown/
  • 90+ projects included in this release
  • Includes PUG enhancements
  • Includes I.Trac enhancements—put in the software as a benefit
to most of the client base regardless of enhancement voting
Administration/System-Wide

- New and modified Administration settings

  - Staff Client Profiles
  - Acquisitions Parameters
  - Cataloging Profiles
  - Cataloging Parameters
  - Cataloging Permissions
  - Patron Services Profiles
  - Patron Services Parameters
  - Circulation Permissions
  - PAC Profiles

  - PowerPAC/Mobile PAC Profiles
  - Community Profiles
  - SelfCheck Unit Parameters
  - Policy Tables
  - Database Tables
  - Administration Permissions
Multi-domain support for single systems

- User and workstation names in a single Polaris system are no longer required to be unique across multi-domain environments
- Entries in the Network Domain table appear in a drop-down list and can be attached to staff member or workstation workflows
Administration/System-Wide

- Things to know about multi-domain support for single systems
  - Set at the System level only
  - Database Table/Network Domains
  - System Administration permission Modify network domains table: Allow
Limit by values in Find Tool user defaults
- A selected Limit by value may be saved as a user default in the Find Tool
- If the Limit by option selected has a corresponding list from which a value is selected, the selected value(s) will be saved
- User defaults continue to be user ID specific
Administration/System-Wide

- Permissions interface changed
  - Customers with many libraries and branch organizations will see improvement in system performance when working with permissions
• Things to know about the permissions interface change
  • The left side lists the currently assigned permissions (Control Records)
  • When you select a permission that is organization-specific, the organizations are loaded on the right side
  • When you select a permission that is not organization-specific (Task Control Record) the organization list on the right side displays a not applicable message
PowerPAC and Mobile PAC

- Polaris Social with ChiliFresh Connections
  - With Polaris Social, the library’s catalog becomes a gateway to a worldwide network of readers, allowing patrons to share the books they read, see what others are reading and discover new books based on the social network connected to a title
  - Navigation to and from each ChiliFresh Connections feature is seamless and users enjoy a single, unified interface embedded in PowerPAC
  - Features include single sign-on through PAC, the ability to set up a patron profile, create lists of books that other readers can see, follow what readers with similar tastes are reading, see the network of patrons connected to a title, adding recommendations, reviews and tags to titles and more
PowerPAC and Mobile PAC

- Things to know about Polaris Social with ChiliFresh Connections
  - This is a separately licensed product that is set up at the Branch level
  - Records must be exported from your database and sent to ChiliFresh periodically
  - Patrons must link their library account to their ChiliFresh account
  - While ChiliFresh provides the library SA options for controlling feature display and functionality, Polaris designates the placement of the ChiliFresh Connections features in the PowerPAC
- Profiles/PAC/Enriched data
PowerPAC and Mobile PAC

- Relevancy rank in most popular sort
  - In previous versions of Polaris relevancy ranking did not effect the popularity sort
  - This will change upon upgrade to a default 50/50 setting
  - To restore the popularity sort, slide the bar to 100% Popularity
  - If the bar is slid to 100% Relevance, the sort will be the same as a relevance sort
PowerPAC and Mobile PAC

- Things to know about the relevancy rank in most popular sort
  - Popularity is based on the number of check outs and holds attached to a title in the past 120 days
  - System level setting only
  - Affects both PowerPAC and Mobile PAC
  - The default setting is 50% Relevance and 50% Popularity
  - Profiles/PAC/Most popular sort settings
PowerPAC and Mobile PAC

- Display and indexing of the 264 tag
  - To support RDA, the 264 tag is now included in the default Publisher display entries
  - The Publisher keyword index was updated to include the 264 $b$ as a default
PowerPAC and Mobile PAC

- Things to know about display and indexing of the 264 tag
  - Profiles/PowerPAC/Title: Display configure
  - Profiles/Mobile PAC/Title: Display configure
  - PowerPAC and Mobile PAC are configured separately

- The latest statement on RDA is available on the Supportal
PowerPAC and Mobile PAC

- Patron inactivity timeout alert
  - A timeout warning is displayed in an alert box 30 seconds before the session is due to time out
  - The message can be edited using Language Editor, except for the “30 seconds” portion
  - The session countdown timer continues while the alert box displays
  - If the user clicks the continue session button, the alert box closes, the session timeout clock is restarted and the user remains on the current page
PowerPAC and Mobile PAC

- Things to know about the patron inactivity timeout alert
  - Set at the System, Library or Branch level
  - Must enable Profiles/PowerPAC/Patron inactivity timeout
  - This setting only applies to PowerPAC
  - If the user does not click the Continue session button, when the timeout limit is reached, the alert box is automatically closed, the session ends and the interface returns to the setting in “After logging out, return to”
PowerPAC and Mobile PAC

- Google Maps in Mobile PAC
  - Previously, Map It was only available in the PowerPAC
  - When a patron clicks Map It on the title product page, a map displays bubble markers for branch locations that have linked items
  - The patron can place the cursor over a marker bubble to see the branch name, or click the branch marker to see the branch’s address and hours
PowerPAC and Mobile PAC

- Things to know about Google Maps in Mobile PAC
  - The PowerPAC Profile Google Maps has been moved to the PAC Profiles tab and includes a new check box to enable Map It for Mobile PAC
  - Set at the System, Library or Branch levels
  - The link is automatically enabled for the Mobile PAC product page and placed by default at the end of the list of enabled product page categories
  - The link may be repositioned on the page by going to Profile/Mobile PAC/Product Page categories: Configure
  - Requires JavaScript to be enabled on mobile devices
Circulation

- Estimated fines in the staff client
  - Click the Estimated Fines icon on the Items Out view of a Patron Status record
  - By default, the current date and time is filled in
  - Calculate fines into the future by changing the date and clicking Recalculate
Circulation

- Estimated fines in the PAC
  - From the Items out View of a patron’s account, click the Estimated Overdue Fines button
  - By default, the current date and time is filled in
  - Calculate fines into the future by changing the date
Circulation

- Things to know about estimated fines
  - Set at the system level only
  - System/Parameters/Patron Services/Accrued Fine Options
  - Libraries can choose to block for estimated fines
  - Libraries can choose to include claimed and/or lost items in accrued fines
Circulation

• Things to know about estimated fines
  • If you have opted to included claimed items, and the system-level Patron Services parameter Overdue: Charge fines for claimed items is set to Yes, the following table summarizes the effects

<table>
<thead>
<tr>
<th>Include claimed items in accrued fine calculation</th>
<th>Overdues: Charge fines for claimed items</th>
<th>Include in estimated amount calculation and block?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Y</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>N</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
</tbody>
</table>

• If you have opted to included lost items, and the overdue item has not been charged, the following table summarizes the effects

<table>
<thead>
<tr>
<th>Include lost items in accrued fine calculation</th>
<th>Lost items charge options: Charge overdue</th>
<th>Include in estimated amount calculation and block?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Y</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>N</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
</tbody>
</table>
Circulation

- Second hold pick up notice
  - The second pick up notice is sent out with a time frame determined by the library
  - The default text is the same as the first notice, but may be edited using Language Editor

- Things to know about a second hold pick up notice
  - Set at the System/Library/Branch
  - The notice may be viewed in the patron’s notification history
  - Parameters/Notification/Notification Options/Hold Request and Cancellation tab
  - A new SQL job, Hold Notice Processing, processes hold email and text messages (first and second notices) separately from the print and phone notices—this job runs every 4 hours from 9:00 AM to 8:00 PM
• Grace period calculation
  • Libraries may now choose to include closed days and dates in grace period calculations
• Things to know about grace period calculation
  • Set at the system level only
  • Parameters/Patron Services/Overdues: Add closed days/dates to grace days—the default is No
  • A grace period exempts the patron from the fine, but if grace days are exceeded, the fine is calculated as if there were no grace period
Circulation

• Grace period calculation
  • If you set the option to Yes, and the grace period included one or more days closed (Parameter/Patron Services/Hours of Operation and Policy Table/Dates Closed) according to the governing library for the fine calculation, the grace period will be extended by the number of closed days and dates
  • For example, an item has two grace days and is due on a Friday and returned to the library on a Monday—the library is closed on Sunday
    • Yes—no fine will be assessed—2 grace days + one closed day = 3 non-fineable days
    • No—1 day’s fine will be assessed—2 grace days regardless of closed days = 2 non-fineable days
Circulation

- Check in free days set by calendar date
  - A calendar may now be used to apply free days according to a selected date
  - A calendar is accessible in the Check In workform (Normal and Bulk), the Bookmobile workform or when offline transactions are being uploaded
Circulation

- Check in free days set by calendar date
  - When an item has been checked in using Free Days and a fine is charged, library staff can see that free days were used when the fine was calculated
- On the Patron Status workform, Account view, right click on the highlighted fine and select Properties
Circulation

• Renewal block if there are holds
  • In the past, the above block was seen when attempting to renew an item that had a bib level request that was Active, Inactive or Pending resulted in a renewal block
  • This block will no longer been seen if there are other holdable items available
Circulation

- Things to know about the renewal block if there are holds
  - When this parameter is set to No, the block message appears in the staff client when the item being renewed is the only item available to fill the request
  - If there are other holdable items, the item can be renewed
  - System level setting only
  - Parameters/Patron Services/Renewal: Block if there are holds
  - The default is set to Yes
  - This setting affects staff initiated renewals in the client and patron initiated renewal in the PAC
Circulation

- Only functional icons display in off-line circulation workforms
- When operating in off-line mode, the Check In, Check Out and Patron Registration workforms now display only the toolbar icons for tasks that can be done
Cataloging

- Ad hoc item bulk change available from all item lists
  - Any staff member that has permission to bulk change items, can now select multiple items wherever they appear in lists
  - For example, from a purchase order, POLI, Find Tool results list, bibliographic preview, etc.
Cataloging

- Character picker dialog improved
  - The dialog box is larger
  - More characters are included
  - Inserting a diacritic remains the same
Things to know about the character picker dialog improvements

- Characters in the MARC8 arrangement are saved as Unicode
- MARC8 Charts are displayed for convenience
- Unicode allows for more characters than MARC8
- If Unicode characters are exported back to MARC 8 the unrecognized Unicode characters will show up as a ?
Cataloging

- Do not overlay check box on bibliographic records
  - Specific bibliographic records may be flagged to protect them from being overlaid during duplicate detection when records are imported or an individually merge/replace is done
  - Once the feature is enabled, staff members with permissions can set the Do not overlay check box
  - Staff members with permissions can still change protected records by making changes to the individual workform or using bulk change
Cataloging

- Things to know about the do not overlay check box on bibliographic records
  - System level setting only
  - Parameters/Cataloging/Bibliographic record do not overlay feature enabled
  - A new system level permission Modify Do Not Overlay setting in bib records: Allow controls who can modify this setting in bibliographic records
  - Do Not Overlay is a new limit in the Bibliographic Record Find Tool
  - Any records skipped because of this feature will show on import job reports
  - Records with the Do Not Overlay check box enabled will appear in red in the Replace/Check for Duplicates check box
Cataloging

- Delete tags from bibs during import
  - Libraries can identify specific MARC tags for deletion when a record is saved to the database during import
  - Deletion of tags may also be done when an individual record is brought into the database via Z39.50
Cataloging

- Things to know about deleting tags from bibs during import
  - Policy table/MARC tags to Retain/Delete
  - Profile/Cataloging/Delete MARC tags when saving Z39.50 records to local database
- There are MARC tags that can not be set for deletion
- There are MARC tags used in duplication detection that should not be set for deletion
Cataloging

- Delete tags from bibs during import
  - During import, system defined deletion tags or profile defined deletion tags may be used
  - When bringing in a record via Z39.50, the Policy Table MARC tags to Retain/Delete is always consulted
Acquisitions

- Rapid Receipt for additional PO line item statuses
  - Claimed
  - Never Published
  - Pending claim
  - Returned
Acquisitions

• Default payment option for paying and crediting invoices
  • Libraries can now set a default payment option (Check or Voucher) to be selected automatically when staff prepay, pay or credit an invoice
• Things to know about the payment option
  • Can be set at the System, Library or Branch level
  • Parameters/Acquisitions & Serials/Default payment options when paying/crediting invoices
Acquisitions

• Prompt for holds when receiving multiple invoice lines
  • When receiving multiple titles manually, staff now receive an alert pop-up when titles with Active or Pending holds are present
• Things to know about receiving multiple invoice lines with holds
  • Can be set at the System, Library or Branch level
  • Profiles/Acquisitions & Serials/Receiving line items: Warn if linked hold requests
Other Topics

• Community Profiles
• Fusion
• Simply Reports

• Thank you everyone for helping Polaris make our products even better!!!