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# Polaris 7.4 Upgrade

Sunday, Aug 27, 2023

## General

On August 27, Pinnacle will be upgrading to Polaris 7.4. At the same time, Innovative will be [migrating our servers to a new environment](#).

The upgrade will begin in the evening after all libraries have closed for the day. While the upgrade work is being performed, the production database will be unavailable to patrons and staff, including:

- Staff Client / Leap
- Public Catalog (PowerPAC)
- SimplyReports
- SIP and API-connected tools

## New Features

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# Renewal Due Date Calculation Changes

After the upgrade, Polaris will begin calculating the due dates for renewals differently. Previously, Polaris calculated due dates by adding the loan period to *today's date*. Going forward, Polaris will add the loan period to the *due date*. This method mirrors how auto-renewals are calculated.

For example, if an item with a 3 week loan is due back on 9/6 and a renewal is requested on 9/1

<b>Existing (Based on Today's Date)</b>	<b>New (Based on Due Date)</b>
Today's Date: 9/1 Renewal: Add 3 weeks New Due Date: 9/22	Existing Due Date: 9/6 Renewal: Add 3 weeks New Due Date: 9/27

## Canceling Holds in Held Status

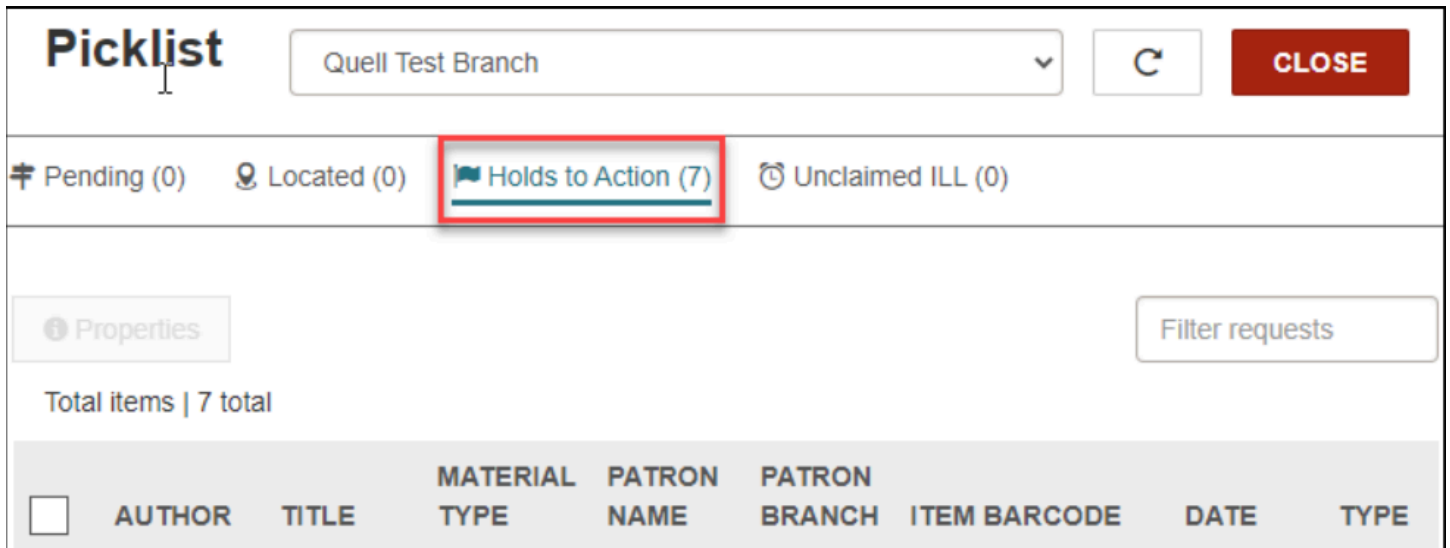
Polaris 7.3 added functionality to allow patrons to cancel hold requests that have a status of "Held." Unfortunately, in initial user-testing, we identified inconsistencies that prevented us from enabling it then. These issues have been addressed in this release - we will now enable this feature.

Staff and patrons can now cancel hold requests that have a status of "Held." This can be performed in Polaris, Leap, the public catalog, and through API-connected tools like a mobile app.

When a patron initiates a cancellation through the public catalog or mobile app, the request will change to a status of "Canceled" but the item will still be "on hold" until library staff retrieve the item and check it in. A new section has been added to the Picklist in Leap.

# New Picklist View - "Holds to Action"

The picklist in Leap will now have a new combined "Holds to Action" view that combines Unclaimed and Canceled items. The combined holds view appears in Leap's Picklist workflow.



The screenshot shows the Leap Picklist interface. At the top, there is a header with the word "Picklist" on the left, a dropdown menu showing "Quell Test Branch", a refresh button, and a red "CLOSE" button. Below the header is a navigation bar with four tabs: "Pending (0)", "Located (0)", "Holds to Action (7)", and "Unclaimed ILL (0)". The "Holds to Action (7)" tab is highlighted with a red box. Below the navigation bar is a section with a "Properties" button on the left and a "Filter requests" button on the right. Underneath, it says "Total items | 7 total". At the bottom, there is a table header with the following columns: a checkbox, "AUTHOR", "TITLE", "MATERIAL TYPE", "PATRON NAME", "PATRON BRANCH", "ITEM BARCODE", "DATE", and "TYPE".

The "Holds to Action" tab includes:

- Unclaimed Holds
- Canceled Holds

In both cases, the workflow is the same. Staff should pull the items from the hold shelves and check them in through Polaris/Leap.

# Setting or Viewing a Patron's Preferred Pickup Location in Leap

Staff can now view the patron's preferred pickup location in the patron registration workflow. This field only displays in Leap.

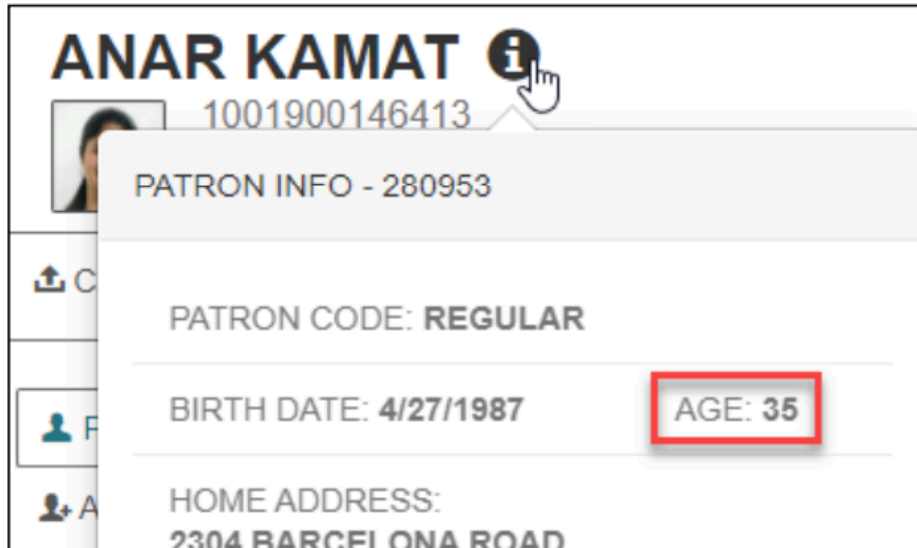
The screenshot shows a 'Preferences' section with the following elements:

- Preferred Pickup Branch:** A dropdown menu currently set to '(None)', highlighted with a red border.
- Language:** A dropdown menu set to 'Spanish'.
- Exclude from Notices and Reminders:** A group of checkboxes:
  - Overdue
  - Hold
  - Billing
  - Almost Overdue/Auto-Renew
  - Patron Record Expiration
  - Inactive Patron
- Other checkboxes:**
  - Maintain Reading History
  - Do Not Delete Record
  - E-mail Notices in Plain Text
  - Exclude from Collection Agency

The preferred pickup location determines the patron's default pickup location when placing holds through the catalog. Previously, this field could only be changed by the patron in the "My Account" section of the catalog.

## Patron Age Displays in Leap

Leap will now display the patron's age in the information section of the patron's account. The patron's age is calculated based on the patron's birth date and today's date.



To display the patron's age, click the black "i" button next to the patron's name.

# Bulk Change Patron Records in Leap

Staff with the correct permissions can now make bulk changes to patron records in Leap. The functionality in Leap mirrors how the feature works in the Polaris client.

To bulk change patron records in Leap

1. Add the patron records to a patron record set
2. Select **Actions** -> Bulk Change
3. Make the desired changes in the bulk change workflow
4. Click **Update Patrons**
5. Review the summary of changes.
6. Select **Continue**

To better handle large bulk changes, Leap-based patron bulk changes make use of a new Polaris jobs service to schedule and process the change. This allows the user to avoid the "locking up" behavior that the Client experiences when performing large bulk changes.

Submitted bulk changes are added to the **Background Processing** page. To access the list of patron bulk changes,

1. Select **Utilities – Background Processing**
2. Select **Patron Bulk Change**
3. From this page, staff can view the status of bulk changes and print or save bulk change reports.

# New Options for Default Workform Views in Leap

Two new options have been added to the **Workform User Defaults** tab of the user settings menu. Staff members can configure the first page that is displayed each time they open certain types of workforms for their specific account.

The two new options are **Bibliographic Records** and **Background Processing**.

The screenshot shows the 'Settings' page with the 'Workform User Defaults' tab selected. The page is divided into several sections:

- Workforms: Default view:** Includes dropdowns for 'Check in' (Normal), 'Item record' (Circulation), 'Bibliographic record' (Preview), and 'Background processing' (MARC Import). The 'Bibliographic record' and 'Background processing' options are highlighted with a red box.
- Request manager: Default status:** Includes dropdowns for 'Holds' (Active), 'ILL' (Not active), and 'INN-Reach' (Active).
- Workform tracker: Recent records:** Includes input fields for 'Patron' (2), 'Bibliographic' (2), and 'Item' (2).
- Workforms: New item record:** Includes a dropdown for 'Item Template' (Young Adult Non-fiction (Stillwater Public Library)).
- Workforms: Item bulk change:** Includes a dropdown for 'Item Bulk Change Template' (None).

At the top right of the settings page are buttons for 'SAVE', 'REFRESH', and 'CLOSE'. At the top left are links for 'Print Options', 'Special Loan', and 'Workform User Defaults'.

Cataloging staff might be interested in defaulting to the "MARC" view. Other staff might select the "Local Items" or "All Items" if these tabs are used more often.



# Bibliographic Statistics Now Include Circulation By Branch

Staff can now view circulation statistics per branch location in the bibliographic record workflow in Leap. This is similar to the "Show Usage Statistics" option in the Polaris client.

**Bibliographic Record** ⓘ

SAVE ACTIONS LINKS ↻ ↺ CLOSE

Mozart arias [compact audio disc]  
By Mozart, Wolfgang Amadeus, 1756-1791.

Control number: 373064 Owner: QA-HOTH 7.4 (sys)

Record status: Final  Display in PAC  Do not overlay  Host  ILL

Preview Items MARC Headings **Statistics** Record Sets Resources Outreach Patrons

Number of holds: 0 First available date: 10/2/1999 Grand total circulation: 30

Filter

ASSIGNED BRANCH	NUMBER OF ITEMS	CIRCULATION			IN-HOUSE USE		
		YTD	PREVIOUS YTD	LIFETIME	YTD	PREVIOUS YTD	LIFETIME
<b>TOTAL</b>	2	0	0	30	0	0	0
Niskayuna Branch - Schenectady County Public Libra (NIS)	1	0	0	20	0	0	0
Quaker Street-Duanesburg Branch - Schenectady Coun (QUADUA)	1	0	0	10	0	0	0

To view bibliographic statistics:

1. Open a bibliographic record in Leap.
2. Select the **Statistics** tab.

# New Language Field in Item Records in Leap

A new language field has been added to the **Details** tab of the item record workflow in Leap. This field will not display in the Polaris client.

If desired, library staff can record the specific items in their collection, separate from the bibliographic record:

<b>Call Number Scheme*</b> Dewey Decimal	<b>Cutter</b> Nix	<b>Volume</b>
<b>Prefix</b> J Fict	<b>Suffix</b>	<b>Copy</b>
<b>Classification</b>	<b>Name of Piece</b>	<b>Language</b> German

# MARC Technical Updates

Several updates were made to the MARC validation rules. These updates affect validation dialog boxes that appear when saving a bibliographic record.

- MARC Update Number 32 (June 2021)
  - [Bibliographic format updates](#)
  - [Authority format updates](#)
- [MARC Technical Notice](#) (February 5, 2021)
- [MARC Technical Notice](#) (February 26, 2021)
- [MARC Technical Notice](#) (March 15, 2021)
- [MARC Technical Notice](#) (April 15, 2021)
- [MARC Technical Notice](#) (April 26, 2021)
- [MARC Technical Notice](#) (May 10, 2021)
- [MARC Technical Notice](#) (June 14, 2021)
- [MARC Technical Notice](#) (July 30, 2021)
- [MARC Technical Notice](#) (September 23, 2021)
- [MARC Technical Notice](#) (October 21, 2021)
- [MARC Technical Notice](#) (November 26, 2021)
- [MARC Technical Notice](#) (December 7, 2021)
- [MARC Technical Notice](#) (December 9, 2021)
- [MARC Technical Notice](#) (December 9, 2021 - Revised)