

Polaris 7.0 Upgrade

Sunday, Aug 29, 2021

General

On August 29, 2021, Pinnacle will be upgrading to Polaris 7.0. We are currently on Polaris 6.6, so this upgrade will include updates from versions 6.7 and 7.0.

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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Place Multiple Patrons on Hold for a Single Title

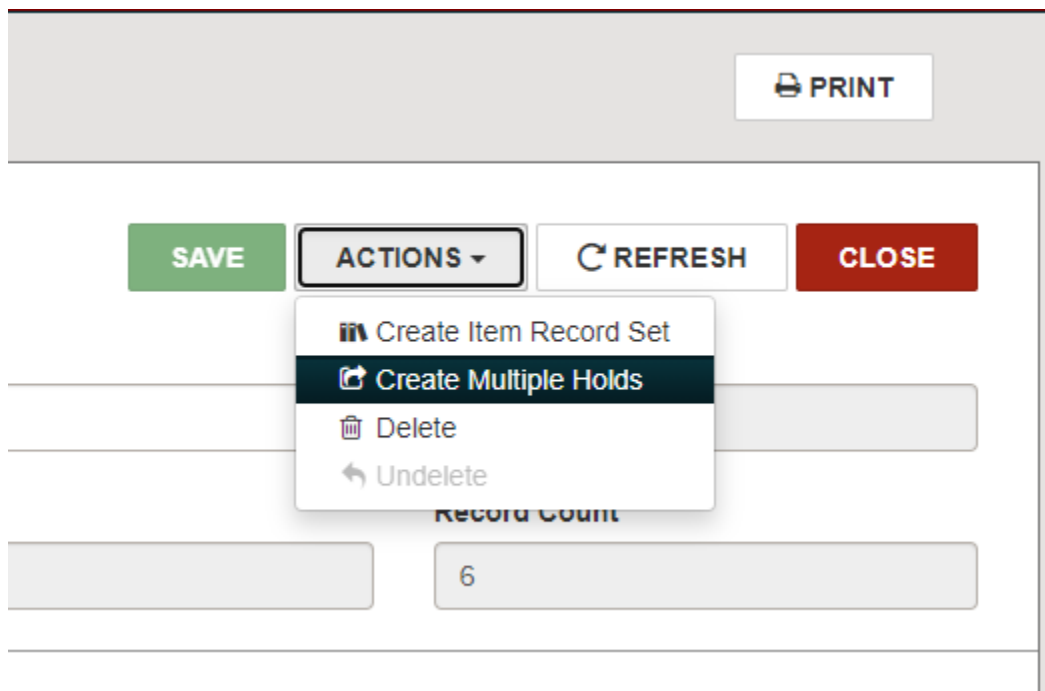
Staff can now bulk-create hold requests in Leap when multiple patrons are looking for the same title. This is useful for book clubs or author subscription services.

A similar feature already exists in the Polaris client. However, in Leap, there are two new conveniences that are not available in the Client:

- Patron's Preferred Pickup Location - Using the new "[preferred pickup location](#)," staff can now select each patron's preferred location. This is useful for libraries with multiple branches or pickup locations.
- Randomized Order - When bulk requests are created, they are placed in random order in the holds queue.

To place multiple patrons on hold for a single title in Leap:

1. Create a patron record set that contains the list of patrons to be placed on hold.
2. From the patron record set, select **ACTIONS** -> **Create Multiple Holds**



3. In the Find Tool that opens, search for the bibliographic record. Select **Open**.
4. The "Create Multiple Holds" window will appear. If necessary, change the "Activation" or "Expiration" Dates.

5. In the "Pickup" drop down, select one of the following options:
- To set the pickup location to the same branch for all requests, select a single branch.
 - To set the pickup location to each patron's preferred pickup location, use the new "Patron's Preferred Location" option.

The screenshot shows a web form titled "Create Multiple Holds" with a close button (X) in the top right corner. The form has three main sections: "Title", "Activation", and "Expiration". The "Title" section contains a text input field with the value "From here to infirmary". The "Activation" section contains a date input field with the value "7/15/2021". The "Expiration" section contains a date input field with the value "7/15/2022". The "Pickup" section contains a dropdown menu that is currently open, showing a list of library branches. The dropdown menu has a header "Patron's Preferred Location" and a list of branches including Fountaindale Library - Bolingbrook, Fountaindale Library - Drive-Thru Window, Fountaindale Library - Outreach, Joliet Public Library - Black Road, Joliet Public Library - Drive-Thru Window, Joliet Public Library - Ottawa St, Joliet Public Library - Outreach, Lemont Public Library District, Plainfield Library, Plainfield Library - Plainfield East HS Lockers, Shorewood - Troy Public Library, White Oak Library - Crest Hill, White Oak Library - Lockport, White Oak Library - Outreach, White Oak Library - Romeoville, and X-External Libraries (Library Use Only).

Create Multiple Holds

Title

From here to infirmary

Activation

7/15/2021

Expiration

7/15/2022

Pickup

Patron's Preferred Location

- Patron's Preferred Location
- Fountaindale Library - Bolingbrook
- Fountaindale Library - Drive-Thru Window
- Fountaindale Library - Outreach
- Joliet Public Library - Black Road
- Joliet Public Library - Drive-Thru Window
- Joliet Public Library - Ottawa St
- Joliet Public Library - Outreach
- Lemont Public Library District
- Plainfield Library
- Plainfield Library - Plainfield East HS Lockers
- Shorewood - Troy Public Library
- White Oak Library - Crest Hill
- White Oak Library - Lockport
- White Oak Library - Outreach
- White Oak Library - Romeoville
- X-External Libraries (Library Use Only)

6. Select **Continue**. Leap will attempt to place all of the hold requests. If a patron is blocked or unable to place the item on hold, Leap will display a warning:

The screenshot shows a warning dialog box titled "Patron is blocked". The dialog box contains the text "TEST CARD LEMONT is blocked. Do you want to continue with this operation?". Below this text are two input fields: "Registration Has Expired" and "Address Check Required". At the bottom right of the dialog box are two buttons: "CONTINUE" and "CANCEL".

Patron is blocked

TEST CARD LEMONT is blocked. Do you want to continue with this operation?

Registration Has Expired

Address Check Required

CONTINUE **CANCEL**

Patron is blocked

ILS MANAGER TESTING is blocked. Do you want to continue with this operation?

Patron owes money. Amount due: \$1.00
Address Check Required

CONTINUE **CANCEL**

7. If necessary, select **Continue** to place the request for the patron or **Cancel** to stop the request.
8. Once completed, Leap will display a summary message:

Hold request is created for 6 patron(s). 

Notes:

- Patrons can specify their [preferred pickup location in the catalog](#).
- If a patron has not yet set a preferred pickup location, the patron's registered branch is used as the pickup location.

Patron Preferred Pickup Location

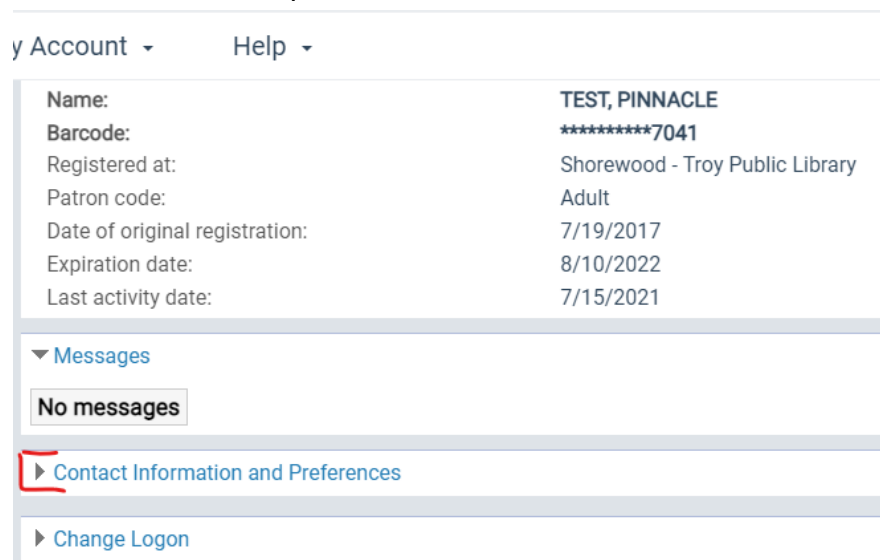
Previously, patrons could specify their default pickup location for holds by selecting the "Always use this pickup location" option when placing a hold request. However, this setting only appeared when placing a new hold and could not be changed via the patron account.

Patrons can now select or modify their preferred pickup location by editing their account in the public catalog. A new "Preferred pickup location" setting is available on the My Account screen.

The preferred pickup location setting will be used as the default option when placing requests in the catalog. It can also be used by staff when [bulk-creating hold requests](#) in Leap.

To set the preferred pickup location:

1. Log into the catalog with the patron barcode and PIN
2. Select **My Account** -> **My Record**
3. Scroll down and expand the **Contact Information and Preferences** panel

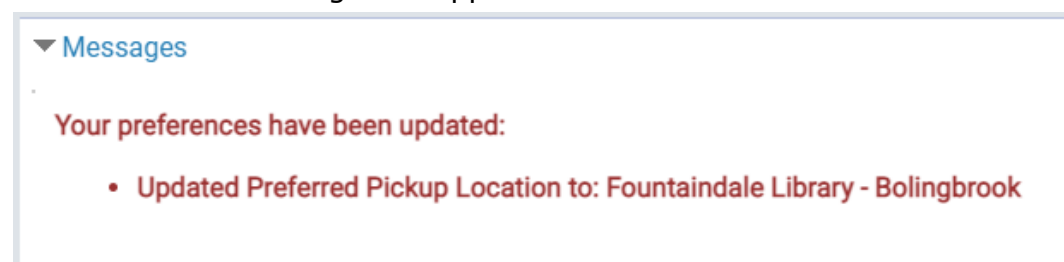


The screenshot shows the 'My Account' page with a navigation bar at the top containing 'My Account' and 'Help'. Below the navigation bar is a table with the following information:

Name:	TEST, PINNACLE
Barcode:	*****7041
Registered at:	Shorewood - Troy Public Library
Patron code:	Adult
Date of original registration:	7/19/2017
Expiration date:	8/10/2022
Last activity date:	7/15/2021

Below the table is a section titled 'Messages' with a 'No messages' button. Below that is a section titled 'Contact Information and Preferences' which is highlighted with a red box. Below this section is a 'Change Logon' link.

4. In the **Preferred pickup location** box, select a branch.
5. Select **Submit Change Request**.
6. A confirmation message will appear.



The screenshot shows a confirmation message with the following text:

Your preferences have been updated:

- Updated Preferred Pickup Location to: Fountaindale Library - Bolingbrook

Bulk Update Item Due Dates

Staff can now bulk update the due dates for all checked out items in a record set in Leap. This can be useful for unexpected branch closures or cancellations of a scheduled bookmobile stop.

Bulk updating due dates requires the permission "Reset Due Date: Allow." For information about this permission, please contact Pinnacle staff.

It's recommended that bulk due date updates contain **no more than 1,000 records at a time**. If you need to update due dates for a larger number of items, please break them up into separate batches or contact Pinnacle staff.

To bulk update item due dates:

1. Add the checked out items to a new item record set.
2. From the Item record set, select **ACTIONS** -> Reset Due Dates

Tech Services in Leap

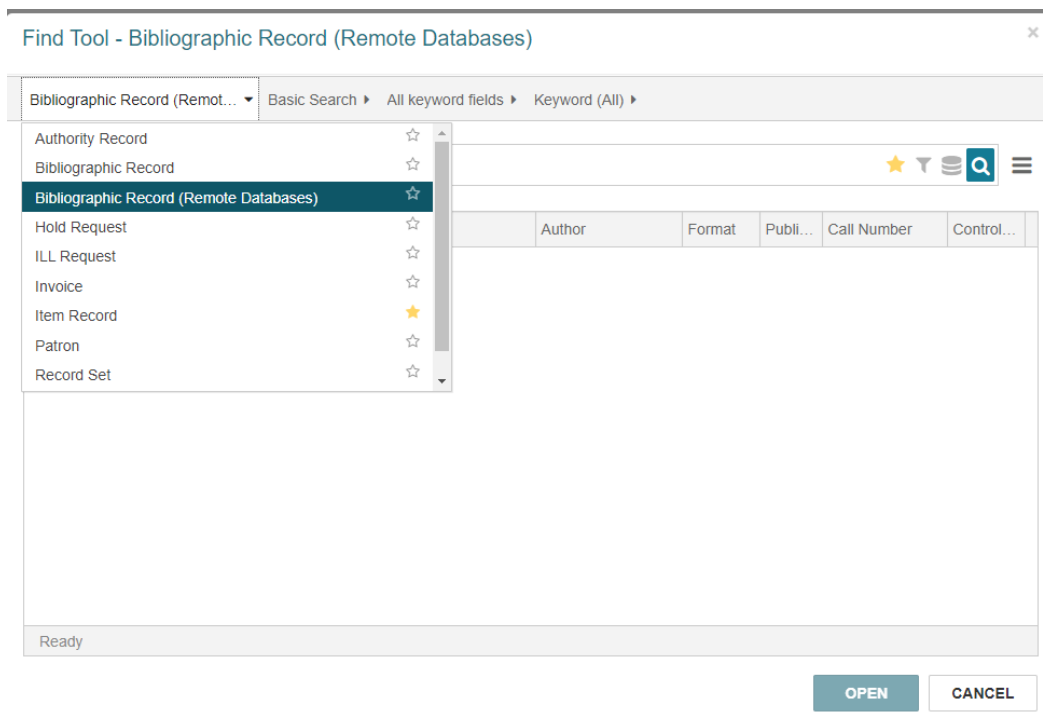
Several preliminary Technical Services functions have been added to Leap. When cataloging in Leap, the system performs the same validation, duplicate checking, and authority control as it does in the staff client. Some Technical Services functions are still missing and will be added in the future.

Copy Cataloging - Search OCLC via z39.50

Cataloging staff can now search OCLC through z39 to add records to the catalog.

To search OCLC through Leap:

1. Open the Find Tool in Leap and select "Bibliographic Record (Remote Databases)"



2. Select the Database Icon 
3. Select the OCLC WorldCat database for your library. Click Apply.
4. Perform the search in OCLC to retrieve records.
5. Once the correct record has been identified and edited, click Save.

Note: At this time, Leap will perform automatic authority control and duplicate detection identification, but does not have the ability to merge or overlay bibliographic records.

Bibliographic Cataloging - Edit Bibliographic Records

Staff with the appropriate permissions can now edit MARC records in Leap. To edit MARC tags, open the bibliographic record and select the "MARC" tab.

Edit Existing Tags

1. Select the checkbox next to the tag to be edited
2. Select **EDIT TAG** (or use the keyboard shortcut "e")
3. The edit tag dialog box will appear

The screenshot shows a dialog box titled "245 - TITLE STATEMENT". It has a "Tag" field with the value "245". Below it are two dropdown menus for "Indicator One" (set to "0 - No added entry") and "Indicator Two" (set to "0 - Number of nonfiling characters"). To the right is a large "Data" text area containing the text "‡aMatt is Testing Notices.". Below the data area is a small text label "CTRL+Q - Insert subfield delimiter (§)". At the bottom of the dialog is a yellow-highlighted box containing a legend: "(‡a) Title / (‡b) Remainder of title / (‡c) Statement of responsibility, etc. / (‡f) Inclusive dates / (‡g) Bulk dates / (‡h) Medium / (‡k) Form / (‡n) Number of part/section of a work / (‡p) Name of part/section of a work / (‡s) Version / (‡6) Linkage / (‡8) Field link and sequence number". At the bottom right are "OK" and "CANCEL" buttons.

4. Indicators can be selected from the dropdown boxes on the left.
5. Subfields and subfield data can be edited in the "Data" box on the right.
6. When finished, select **OK** to save the changes.

Add a New Tag

1. To add a new tag, select **INSERT -- Data Field** (or use the keyboard shortcut "I" then "F")
2. The Insert Data Field dialog box will appear

The screenshot shows a dialog box titled "Insert Data Field". It has a "Tag" input field, two dropdown menus for "Indicator One" and "Indicator Two", and a large "Data" text area. A tooltip "CTRL+Q - Insert subfield delimiter (\$)" is visible near the Data area. At the bottom right are "OK" and "CANCEL" buttons.

3. Enter the three digit tag number in the "Tag" box
4. If necessary, select the appropriate indicators in the Indicator boxes on the left
5. Enter subfields and subfield data in the "Data" box on the right.
6. Select **OK** to save the new tag.

Delete an Existing Tag

- Select the checkbox(es) next to the tag(s) to be deleted.
- Select **DELETE TAG** (or use the keyboard shortcut "d")

Note: Some Tags (LDR, 001, 005, 008 and any other tags that are "required") cannot be deleted

Import MARC Records

Staff can now import MARC records through Leap. The functionality is similar to the "Express" import feature in the Polaris client and performs the same record validation and duplicate detection.

1. Select **Utilities -- MARC Import**
2. The MARC Import Setup workform will display all import profiles available. Scroll through the list or use the search box to identify the correct import profile and select it.

MARC Import Setup

[IMPORT](#)[CLOSE](#)[Profile Setup](#)[Bibliographic Records](#)[Item Records](#)[Authority Records](#)[Record Sets](#)

Import Profile: Polaris default

PROFILE NAME	DESCRIPTION	CREATOR
Polaris default	Polaris default import profile (read only)	PolarisExec
Polaris default (with item creation)	Polaris default with item creation (read only)	PolarisExec
Shorewood Baker & Taylor Brief Order Records	Use when importing on-order records from B&T	jradzik
Shorewood Baker & Taylor xxGraphic Novels Brief Order Records	Use when importing on-order graphic novel records from B&T	llovato
Shorewood Midwest Tape import for order records	Used for importing MARC records from the website.	liling (Deleted)
STPL_Axis360_integrated ebook Bibs	This profile is used to import Axis360 ebook content (integrated). CHECK VENDOR ACCOUNT & TEMPLATE USED!	rchesko

Import Files: 0 files selected

[SELECT FILE](#)

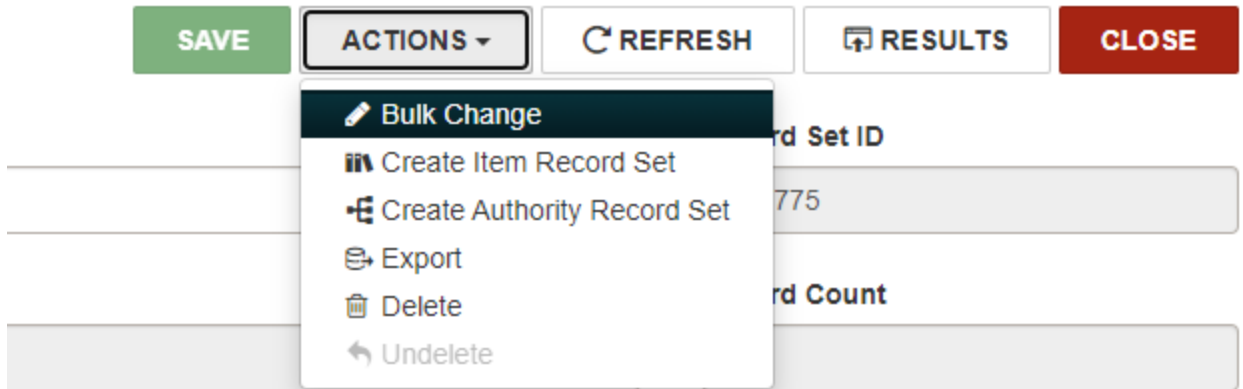
3. Click **SELECT FILE**
4. In the "Select File" dialog box, select **BROWSE**
5. Navigate to the .mrc file to be imported. Select **OPEN**
6. Select **CONTINUE**
7. Select **IMPORT**
8. Leap will upload the file to the server and begin importing it to the database. To track the progress, view the Import Jobs Queue by selecting **Utilities -- Cataloging Processing**, and selecting the **Marc Import** tab.

Bibliographic Bulk Change

Staff with the appropriate permissions can now perform bibliographic bulk changes in Leap.

To perform a bib bulk change

1. Open a bibliographic record set
2. From the **ACTIONS** menu, select **Bulk Change**



3. Using the "Non-MARC," "Data Fields," "Leader," "006 Tag," "007 tag" and "008 tag" tabs, select the appropriate changes to make to the bibliographic records.
4. Once changes are selected, select **UPDATE BIBS**. Leap will open a "Summary of Changes" dialog box.

Summary of Changes

This bulk change process will attempt to change 136 bibliographic record(s).

Record Set Name: Axis_eLoad_final_20210726124420
Record Set Owner: Pinnacle Library Cooperative

Non-MARC Changes:
Turn Display In PAC flag ON

Fixed Field Changes:
008 Books: Change position 22 from '[All Values]' to 'e'

Once made, these changes cannot be automatically undone.

CONTINUE
CANCEL

5. If changes are correct, select **Continue**. Otherwise, select **Cancel**.
6. The bulk change will be added to the bibliographic bulk change queue. To view the status of the bulk change, select **Utilities -- Cataloging Processing**.

Serials - Combine Issues

Serials staff can now combine issues in Leap.

To combine serial issues:

1. Select **Utilities -- Serials Check In**
2. Using the Find Too, select the Serial Holding record, and select **Open**.
3. Select the two issues to be combined. Select **Combine Issues**.

Serials Check In ⓘ

SAVE
 ACTIONS ▾
 REFRESH
 RESULTS
 CLOSE

Bloomberg businessweek.

Status: **Currently Received**
 Serial holding record ID: **987**
 Copy no.: 1
 Call number: **MAG BUSINESS & FINANCE**

Destination: **Fountaindale Library - Bolingbrook (FPLD)**
 Bib control number: **4925**
 Collection: **Adult Magazines (A-MAG)**
 Material type: **Magazine**

Non-Public Notes
 THE VENDOR IS EBSCO RBDIGITAL 2020

Non-Public Warning Notes
 Use Basic Bib 2
 Claim made for ISSUE 4661 (June 22 2020) AA 6/24/2020

Check In

Combine Issues
 More ▾

Issue/Part Status: Not Received ▾
 Filter by Column ▾
 Filter

	DESIGNATION	CATEGORY	EXPECTED	STATUS	STATUS DATE	PATTERN	ROUTE STATUS
☒	ISSUE 4704 (June 21 2021)	Basic Bib / 1	6/21/2021	Expected	5/26/2021	Open	
☒	ISSUE 4705 (June 28 2021)	Basic Bib / 1	6/28/2021	Expected	5/26/2021	Open	

4. In the "Combine Issues" dialog box, input necessary information:
 - **Combine**
 - **Chronology** - lists the lower of the two volume numbers for the combined issue, and lists the expected dates of each issue separated by a slash.
 - **Enumeration** - lists the volume numbers of the issues with a slash to separate the two numbers and only list the first of the expected dates.
 - **<Both>** - lists the volume numbers of the issues with a slash to separate the two numbers and lists the expected dates of each issue separated by a slash.
 - **Designation** - shows the volume number based on the option selected in the Combine drop-down list. This text can be edited.
 - **Title of** - system supplied
 - **Public / Non-Public / Non-public/warning** - Enter optional notes
 - **Expected arrival date** - defaults to the earliest of the two dates. Can be edited
5. Select **Continue**

Acquisitions - Search, View, and Pay Invoices

Acquisitions staff can now view and pay invoices in Leap.

To view and pay an invoice:

1. In the Find Tool, change the search option to **Invoice**.
2. Enter the invoice number. Click **Search**.
3. Select **OPEN** to open the invoice.
4. From the **ACTIONS** menu, select **Pay**.

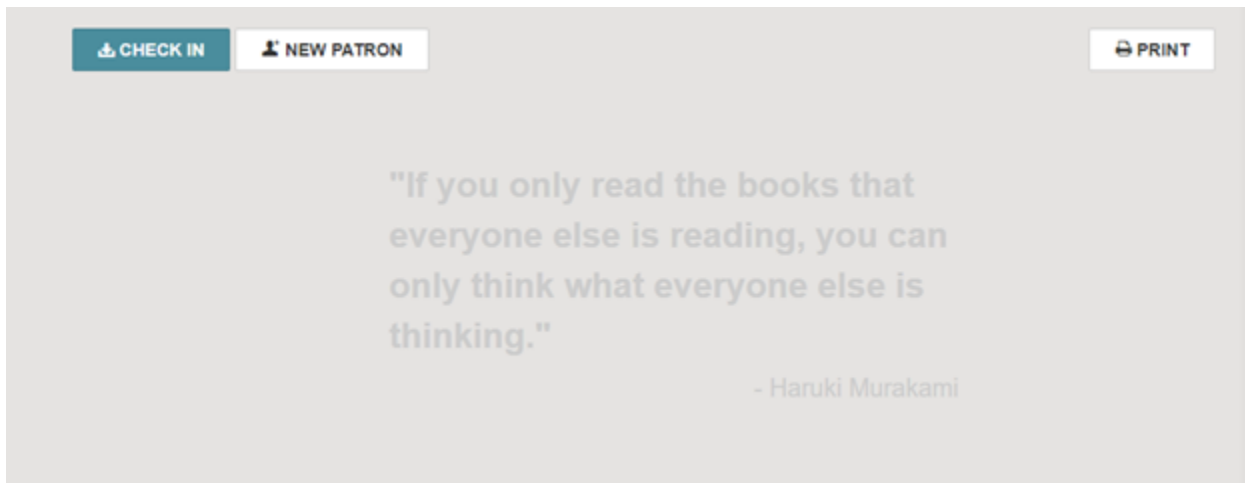
5. If necessary, enter the payment method and number. Select **OK**.

Updated Contrast Settings

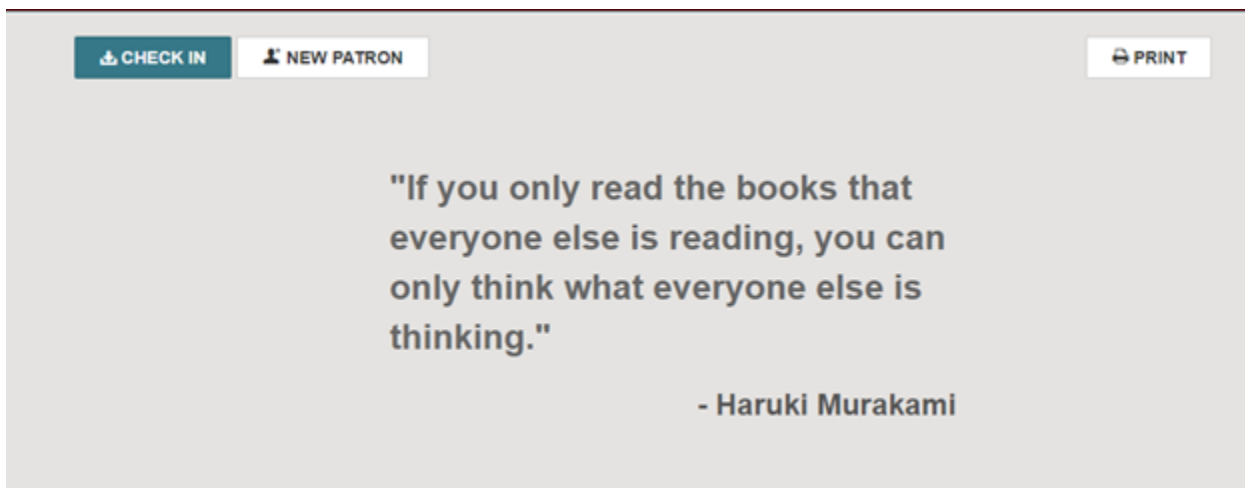
Innovative has partnered with a third-party vendor to analyze Leap for web accessibility according to WCAG 2.1 guidelines. As a result, Leap will continue to see several accessibility updates, including UI color changes to increase the visible contrast.

Here's a sample of one of the more noticeable changes in this update:

Before:



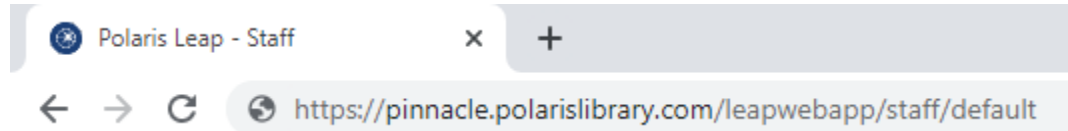
After:



Leap URL Change

Leap was initially designed as a web-based tool for circulation staff. However, over time, Leap has grown to become an all-encompassing tool for all library staff. In recognition of the advancements in Leap, the URL no longer uses the term "circulation" in it.

Previously, the Leap URL displayed as pinnacle.polarislibrary.com/LeapWebApp/circulation. The Leap URL will now display as pinnacle.polarislibrary.com/LeapWebApp/staff



Any staff bookmarks referring to the old "pinnacle.polarislibrary.com/LeapWebApp/circulation/default" should be updated accordingly.

Bookmarks to "pinnacle.polarislibrary.com/LeapWebApp" will redirect correctly and will not need to be changed.