



Oh, the Places We've Gone: Polaris Year in Review

Samantha Quell

Agenda

- What's new in Polaris and Leap since IUG 2022
 - Development
 - Documentation
- Resources

Development




- Three Polaris releases
 - Polaris 7.2 – May 2022
 - Polaris 7.3 – September 2022
 - Polaris 7.4 – March 2023
- Development initiatives
 - Improved Patron Experience
 - Leap
 - SSO/OAuth


Improved Patron Experience




Complex Password Support (7.3)

- Polaris passwords now support:
 - 4-64 characters
 - Alphanumeric and ASCII special characters (except pipe |)
- Polaris will still honor “numeric only”
- Includes a couple minor edits to PAC to better support patrons using password managers:
 - Support pasting in password update fields
 - Ability to show/hide the password while editing

Old Password:
  ←


New Password:
 

Verification:
 



Complex Password Support (7.3)

ExpressCheck - Password




Please enter your password. Select 'Done' when you are finished.

Password: Done Cancel

`	1	2	3	4	5	6	7	8	9	0	-	=	Back
	q	w	e	r	t	y	u	i	o	p	[]	\
Caps	a	s	d	f	g	h	j	k	l	;	'	←	→
	z	x	c	v	b	n	m	,	.	/			Space

ExpressCheck - Password



Please enter your password. Select 'Done' when you are finished.

Password: Done Cancel

~	!	@	#	\$	%	^	&	*	()	_	+	Back
	Q	W	E	R	T	Y	U	I	O	P	{	}	
Caps	A	S	D	F	G	H	J	K	L	:	"	←	→
	Z	X	C	V	B	N	M	<	>	?			Space



Cancel Held (7.3)

Hold options [QA-GIZMO 7.3 (sys)]

Requests Charges Preferred Pickup **Staff client & PAC** Terms RTF Queue

Trap at check-out

Display patron phone number when trapped

Alert in bulk check-in if the item will fill holds

Alert in bulk check-in if the item is held

Change due date based on ratio:

Of Requests

To Items

Loan period days

Permit patron notes from PAC

Permit suspended requests from PAC (system only)

Permit cancellation on: (system only)

Shipped

Held ←

If no items are attached:

Alert in Staff Client

Block in PAC

If patron is blocked:

Block in Staff Client

Block in PAC/SIP

Enable request status "Out"

PAC display patron contact info (PowerPAC only)

PAC block for patron verification

OK Cancel Apply Help



Cancel Held (7.3)

Picklist Quell Test Branch

🚧 Pending (0) 📍 Located (0) ⌚ Unclaimed (4) ⌚ Unclaimed ILL (0) 📦 Holds to Transfer (0) 🚫 Cancelled (1)

Total items | 1 total

<input type="checkbox"/>	AUTHOR	TITLE	MATERIAL TYPE	PATRON NAME	PATRON BRANCH	ITEM BARCODE	CANCELLED DATE
<input type="checkbox"/>	Maggitti, Phil.	Pugs : everything about purchase, care, nutrition, breeding, behavior, and training	Book	Quell, Sebastian	QTB	0000408125011	9/7/2022





Combined Picklist (7.4)

Picklist

Quell Test Branch REFRESH CLOSE

Pending (0) Located (0) **Holds to Action (7)** Unclaimed ILL (0)

Properties Filter requests

Total items | 7 total

<input type="checkbox"/>	AUTHOR	TITLE	MATERIAL TYPE	PATRON NAME	PATRON BRANCH	ITEM BARCODE	DATE	TYPE
<input type="checkbox"/>	Maggitti, Phil.	Pugs : everything about purchase, care, nutrition, breeding, behavior, and training	Book	Quell, Sebastian	QTB	0000408125011	9/7/2022	Cancelled
<input type="checkbox"/>	Wilbur, C. Keith, 1923-	The New England Indians	Book	Quell, Chris	BRL	0000203096698	4/19/2022	Unclaimed
<input type="checkbox"/>	Cole, Joanna.	A dog's body	Book	Quell, Tester	QTB	0000401577572	4/19/2022	Unclaimed
<input type="checkbox"/>	Henrie, Fiona.	Dogs	Book	Quell, Sebastian	QTB	0001900128123	12/27/2022	Unclaimed
<input type="checkbox"/>	Silverstein, Alvin.	Dogs, all about them	Book	Brooks, Ryan R	SAR	0000401111398	4/19/2022	Unclaimed

Visiting Patron Functionality (7.3)

New ▾ Utilities ▾

- Holds Queue
- Outreach Services
- Picklist Processing
- Request Manager
- Serials Check In
- Visiting Patron Check Out (INN-Reach) ←

Print Notices

- Cataloging Processing
- Create Unlinked Bibliographic Record Set
- Create Unlinked Authority Record Set
- Label Manager
- MARC Import

leap Scan or search Q FIND New ▾ Utilities ▾ Help ▾ PolarisExec (SAR) ▾

↓

LEEDY, JEFF CLOSE

JEFF
POLARIS QA-FALCON MVLS

Check Out (0)

Enter item barcode ↵ Find Tool Special Loan

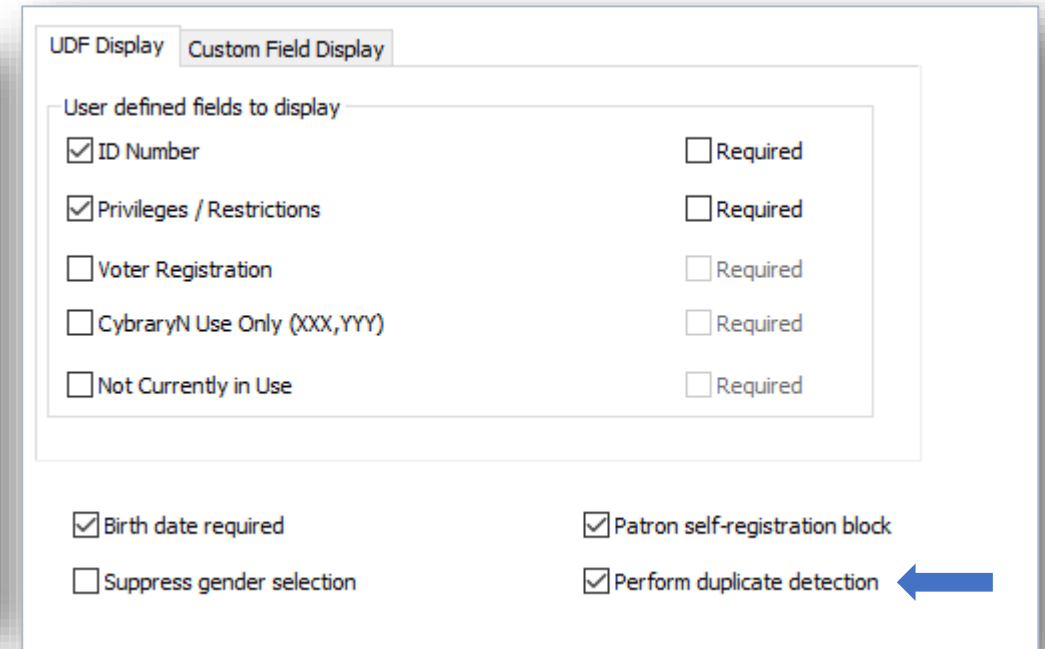
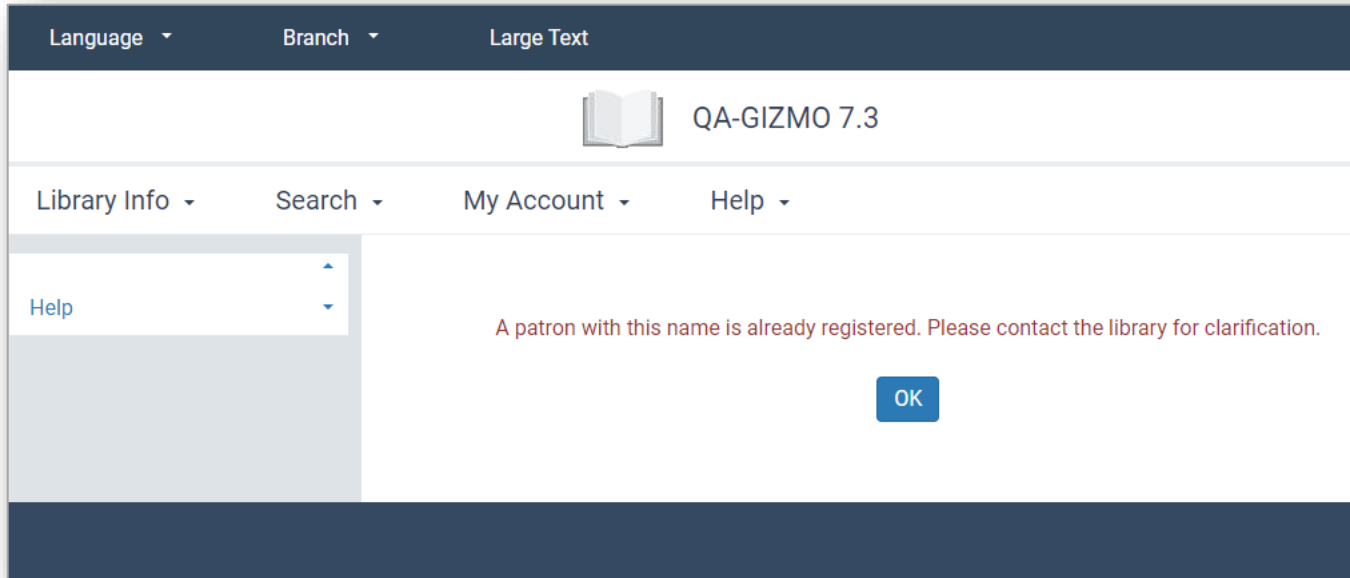
TITLE	DUE DATE	MATERIAL TYPE	BARCODE	ACTION	ASSIGNED BRANCH	CALL NUMBER	SHELF LOCATION
-------	----------	---------------	---------	--------	-----------------	-------------	----------------

Renewal Calculation Based on Due Date (7.4)

The screenshot shows the Administration Explorer interface for System: QA-HOTH. The left pane displays a tree view of system components, with 'Parameters' selected. The right pane shows a table of parameters. A blue arrow points to the parameter 'Renewal: Calculate based on due date', which is currently set to 'No'.

Parameter	Value
Patron message text: Expiration period	14 day(s)
Patron registration options	Setup ...
Patron Registration: Filter genders	Setup ...
Patron registration: Filter patron codes	Setup ...
Patron registration: First name required	Yes
Quick-circ: Material type	Book
Reading history	Setup ...
Registration fee options	Setup ...
Remove patron ID from circ transactions	Setup ...
Renewal: Auto-renew	Yes
Renewal: Block if there are holds	Yes
Renewal: Calculate based on due date	No
Replacement fee options	Setup ...
Shelving status options	Setup ...

Opt-Out of Duplicate Detection at Self-Registration (7.3)



Aeon Special Collections Link In PowerPAC (7.4)

Language ▾ Branch ▾ Large Text Log In

1. If you give a mouse a cookie [sound recording], Numeroff, Laura Joffe. (1994)

Call Number	Shelf Location	Status	Circ Date	Type
▼ Long Lake Library (2 of 2 available)				
▼ Children's Audiovisual				
RC JP Fict Num book	Hanging Bags	In	11/14/2006	Kit - Audiovisual
Request to view in reading room RC JP FICT NUM CASS	Hanging Bags	In	11/14/2006	Kit - Audiovisual

[Click here to see items from all branches...](#)

Aeon Special Collections Link In PowerPAC (7.4)

Long Lake Library x Aeon - New Request x +

bpltest.aeon.atlas-sys.com/aeon/aeon.dll?Action=10&Form=20&Value=GenericRequestMonograph&ItemTitle=If+you+give+a+mouse+a+cookie+%5Bsound+recording%5D&ItemAuthor=Nu... ←

Request Books or Bound Manuscripts

You currently have 0 active requests from your available limit of 20.

To schedule a visit to the reading room, fill out this form with as much information as possible, select a date for your appointment, and press submit. For assistance in identifying materials to see, contact our staff at rarebooks@bpl.org or arts@bpl.org.

Item Information

Call Number

RC JP Fict Num

If unknown, please include Author and Date or a link to the catalog record. For additional assistance, contact staff

Title *(required)*

If you give a mouse a cookie [sound recording]

Author

Numeroff, Laura Joffe.



Patron's Preferred Pickup Location (7.4)

Attributes

- Email
- Address
- Phone/Fax
- Notifications**
- Preferences
- Image
- Misc. Info

Preferences

Preferred Pickup Branch:

Language:

Exclude from Notices and Reminders

- Overdue
- Hold
- Billing
- Almost Overdue/Auto-Renew
- Patron Record Expiration
- Inactive Patron

- Maintain Reading History
- Do Not Delete Record
- E-mail Notices in Plain Text
- Exclude from Collection Agency



Patron Username (7.4)

<ul style="list-style-type: none">🏠 Address📞 Phone/Fax🔔 Notifications⚙️ Preferences🖼️ Image📄 Misc. Info	Title	Suffix	Statistical Class
	<input type="text"/>	<input type="text"/>	(None) <input type="text"/>
	Name on Identification		Gender
	Last Name		Female <input type="text"/>
	<input type="text" value="Quell"/>		Username
	First Name		<input type="text"/>
Middle Name	<input type="text"/>		
			<input type="checkbox"/> Use Name on Identification for Print and Telephone Notices





Support a Single Name for Patrons (7.4)

Administration Explorer - System - QA-HOTH 7.4 - Polaris

File Edit Help

Administration Explorer - System

System: QA-HOTH

- Parameters
- Profiles
- Permissions
- Security
- Policy Tables
- Database Tables
- Notification Tables
- Server
- Library
- Branch
- Collection
- Workstation
- Staff Member
- Patron

Parameter	Value
Patron Account: Charge Alert Threshold	\$999.00
Patron delete options	Setup ...
Patron message text: Configure	Setup ...
Patron message text: Expiration period	14 day(s)
Patron registration options	Setup ...
Patron Registration: Filter genders	Setup ...
Patron registration: Filter patron codes	Setup ...
Patron registration: First name required	Yes
Quick-circ: Material type	Book
Reading history	Setup ...
Registration fee options	Setup ...
Remove patron ID from circ transactions	Setup ...
Renewal: Auto-renew	Yes
Renewal: Block if there are holds	Yes

For Help, press F1

samantha.qu NUM

Last Name *
Quell

First Name
Sebastian

Middle Name

Title
Suffix

Name on Identification
Last Name
Quell
First Name
Middle Name

Date of Registration
6/5/2000

Expiration Date *
12/2/2025

Birth Date
6/8/2012

Statistical Class
(None)

Gender *
Female

Username

Use Name on Identification for Print and Telephone Notices

Use Single Name Field



Support a Single Name for Patrons (7.4)

The screenshot shows a patron profile form with a left-hand navigation menu and a right-hand action menu. The form fields are as follows:

- Barcode ***: 10006080706
- Former Barcode**: QuellSITest
- Last Name ***: Quell
- First Name**: (empty)
- Middle Name**: (empty)
- Title**: (empty)
- Suffix**: (empty)
- Name on Identification**:
 - Last Name: Quell
 - First Name: (empty)
 - Middle Name: (empty)
- Registered At ***: Otten test @2 display
- Patron Code ***: Outreach
- Date of Registration**: 6/5/2000
- Expiration Date ***: 12/2/2025
- Birth Date**: 6/8/2012
- Statistical Class**: (None)
- Gender ***: Female
- Username**: (empty)
- Use Name on Identification for Print and Telephone Notices
- Use Single Name Field

Annotations include a blue arrow pointing to the 'Misc. Info' menu item and another blue arrow pointing to the 'Use Single Name Field' checkbox.

Right-hand Action Menu: SAVE, RENEW, RESET PASSWORD, COPY, MERGE, DELETE, SECURE



PAPI ItemCheckout (7.4)

- New ItemCheckout API Endpoint
 - Honors the Selfcheck Material Types Policy Table
 - Honors the renamed SelfCheck: Block Conditions

Material Type	Self Check Media Type	Is Magnetic	Can Desensitize	Is Blocked	Double Sided	Unlocker
Book	Book	No	Yes	No	Yes	No
New / Popular B...	Book	No	Yes	No	Yes	No
Video	Video Tape	Yes	No	No	No	Yes
Children's Video	Video Tape	Yes	No	No	No	Yes
Audiobook	Audio Tape	Yes	No	No	No	No
Music	CD/CDROM	No	No	No	No	Yes
Periodical	Magazine	Yes	Yes	No	Yes	Yes

Polaris SelfCheck: Blocking Conditions

Patron Blocks | Item Blocks

Block the check-out if the item...

- Has a free text block
- Is held for a different patron
- Fills a request for a different patron
- Is checked out to a different patron
- Is from another library

Block the check-out if the item has a status of...

- Binding
- In-process
- In-repair
- Lost
- Missing
- Claim missing parts
- On order
- In-Transit
- Unavailable
- Withdrawn
- Routed

Block the check-out for selected library assigned blocks:

Charge for check-out

- Check out and charge patron account
- Stop item check-out, display message

OK Cancel Help

Leap



Borrow By Mail (7.3)

➔ New Hold Cancel Reactivate Delete Suspend/Reactivate Fill Now Convert To ILL Deny Ask Me Later Return More ▾ Filter Holds

Activation: 10/4/2022 Expiration: 4/2/2023 Pickup: Quell Test Branch Borrow by Mail ←

PLACE HOLD UNLOCK CANCEL

Title
Search for a title FIND TOOL

Barcode
Enter item barcode

Author ISBN ISSN

Series **Edition**

Publisher **Call NO**

Date **LCCN**

Format

Pages

Issue

Serial Copy

Volume



Borrow By Mail (7.3)

Hold Request ⓘ

SAVE

The shining

Request ID: **961426** Bib control number: **18177** Patron barcode: **10006080706**

Status: **Shipped 10/4/2022** This item only Patron name: **Sebastian Quell**

Request date: **7/7/2022** Borrow by Mail Registered at: **Quell Test Branch**

Origin: **Library** Tracking number: Notification option: **Phone 1**

[Details](#) [Notes](#) Satisfied By [History](#) [All Hold Requests](#)

Pickup	Activation	Expiration
<input type="text" value="Amsterdam Free Library"/>	<input type="text" value="7/7/2022"/>	<input type="text" value="1/3/2023"/>
<input checked="" type="checkbox"/> Borrow by Mail ←	→ <input type="text" value=""/>	



Borrow By Mail (7.3)

Request Manager

REFRESH CLOSE

Branch: Amsterdam Free Library (AMS) | Status: Shipped | By: Pickup

[Holds](#) [ILL](#) [INN-Reach](#)

Cancel Reactivate Delete Convert To ILL Check Out Print Checklist Print Mailer Properties

Filtered items | 1 of 96 total

<input checked="" type="checkbox"/>	AUTHOR	TITLE	FORMAT	PATRON NAME	PATRON BRANCH	BARCODE	SHIPPED DATE
<input checked="" type="checkbox"/>	✉ King, Stephen, 1947-	The shining	Book	Quell, Sebastian	QTB	0004300522952	10/4/2022

Patron Bulk Change (7.4)

Patron Record Set ?

SAVE **ACTIONS** **REFRESH** **RESULTS** **CLOSE**

Name
Quell Test Patrons (mixed)

Note

Owner
samantha.quell

Record Status
Final

Record Set ID
96628

Record Count
7

ACTIONS
Bulk Change
Create Item Record Set
Create Multiple Holds
Delete
Undelete

Scan or enter barcode **FIND TOOL** **ACTIONS** Filter Records

<input type="checkbox"/>	BARCODE ▼	NAME	STREET	CITY	STATE	POSTAL CODE	LIBRARY
<input type="checkbox"/>	10006080706	Quell, Sebastian	125 Fake St	SYRACUSE	NY	13206	Quell Test Branch
<input type="checkbox"/>	922337203685499	Quell, Sam Test	1034 Commerce Blvd	Liverpool	NY	13090	Otten test @2

Patron Bulk Change (7.4)

Patron Bulk Change

Quell Test Patrons (mixed)

samantha.quell

Error Record Set

Name

Owner

[Profile](#) [Attributes](#) [Address](#) [Preferences](#) [Blocks and Notes](#)

Registered Branch	Patron Code
<input type="text" value="(No change)"/>	<input type="text" value="(No change)"/>
Statistical Class	Gender
<input type="text" value="(No change)"/>	<input type="text" value="(No change)"/>
Expiration Date <input type="checkbox"/>	Date of Registration <input type="checkbox"/>
<input type="text"/>	<input type="text"/>

UPDATE PATRONS

CANCEL

Patron Bulk Change (7.4)

Background Processing

REFRESH CLOSE

Bibliographic Bulk Change MARC Import Patron Bulk Change ←

DELETE Filter by Column

<input type="checkbox"/>	RECORD SET NAME	RECORD SET OWNER ↓	TOTAL RECORDS	STATUS	STARTED	ENDED
<input type="checkbox"/>	Quell Test	samantha.quell	1	Succeeded	1/25/2023 1:36:39 PM	1/25/2023 1:36:40 PM
<input type="checkbox"/>	Quell Test Patrons (mixed)	samantha.quell	8	Succeeded	12/9/2022 11:33:55 AM	12/9/2022 11:33:56 AM

Items per page: 100 1 – 2 of 2



New Workform Defaults (7.4)

Settings

[Print Options](#) [Special Loan](#) [Workform User Defaults](#)

SAVE REFRESH CLOSE

Workforms: Default view	Request manager: Default status	Workform tracker: Recent records
Check in: Normal	Holds: Active	Patron: 2
Item record: Details	ILL: Not active	Bibliographic: 2
Bibliographic record: MARC	INN-Reach: Active	Item: 2
Background processing: MARC Import		

Workforms: New item record

Item Template: (None)

Workforms: Item bulk change

Item Bulk Change Template: (None)

Authority Record Create/Edit (7.3)

New Authority Record - 1

SAVE

CLOSE

Control number:

Kind of record:

Main or added entry use:

Record status:

Descriptive cataloging rules:

Subject use:

Linked bib count:

Subject heading system:

Series use:

 MARC

 EDIT TAG

 INSERT ▾

 DELETE TAG

 MOVE TAG UP

 MOVE TAG DOWN

LDR nz 22 n 4500

008 230322||||||| || ||| ||

Authority Record Create/Edit (7.3)

Authority Record ?

SAVE **ACTIONS** **REFRESH** **RESULTS** **CLOSE**

Malerman, Josh

Control number: **1312884** Kind of record: **Established heading** Main or added entry use: **Appropriate**
Record status: **Final** Descriptive cataloging rules: **Other** Subject use: **Appropriate**
Linked bib count: **20** Subject heading system: **Library of Congress Subject Headings** Series use: **Not appropriate**

[MARC](#) [Bibliographic Records](#) [See Also](#) [Record Sets](#)

EDIT TAG **INSERT** **DELETE TAG** **MOVE TAG UP** **MOVE TAG DOWN**

- LDR cz 22 n 4500
- 001 1312884
- 005 20221004161626.0
- 008 140211n| azannaabn |n aaa c
- 010 †ano2014018411
- 035 †a(0CoLC)oca09680925
- 035 †a(DLC)no2014018411
- 035 †a14021312
- 035 †a17321090
- 040 †aMiFliG†beng†erda†cMiFliG†dDLC
- 053 0 †aPS3613.A43535
- 100 1 †aMalerman, Josh
- 670 †aBird box, 2014:†bt.p. (Josh Malerman, author and professional musician)

Replace During Duplicate Detection (7.3)

The image shows a screenshot of a library system interface. In the foreground, a modal dialog box titled "Authority Record Duplicate Detection Results" is displayed. The dialog contains a table with the following data:

Record to Replace	
CONTROL#	REASON
<input type="checkbox"/> 1255186	Heading/Thesaurus

Below the table are three buttons: "REPLACE" (highlighted in teal), "CONTINUE" (bordered), and "CANCEL".

In the background, the "Authority Record" for "Malerman, Josh" is visible. It shows a control number of 1312884, a status of "Final", and a linked bib count of 20. At the bottom of the screen, a MARC record is partially visible:

```
 LDR      cz  22  n  4500
 001     1312884
 005     20221004161626.0
 008     140211n| azannaabn      |n aaa  c
```

Replace During Duplicate Detection (7.3)

Bibliographic Record Duplicate Detection Results

Record to Retain

CONTROL#	TITLE	AUTHOR	FORMAT	ITEMS	STATUS
1569770	Inspection	Malerman, Josh, author.	Book	17	Final

Record(s) to Replace

<input checked="" type="checkbox"/>	CONTROL#	TITLE	AUTHOR	FORMAT	ITEMS	STATUS	REASON
<input checked="" type="checkbox"/>	1527743	Inspection [electronic resource]	Malerman, Josh	Ebook	0	Final	Author/Title

ADD TITLES

REPLACE **CONTINUE** **CANCEL**



Updated Bib Statistics View (7.4)

Preview Items MARC Headings Statistics Record Sets Resources Outreach Patrons

Number of holds: 0 First available date: 4/9/2003 Grand total circulation: 4662

ASSIGNED BRANCH	NUMBER OF ITEMS	CIRCULATION			IN-HOUSE USE		
		YTD	PREVIOUS YTD	LIFETIME	YTD	PREVIOUS YTD	LIFETIME
TOTAL	92	0	19	4662	0	0	0
Ballston Spa Public Library (BAL)	1	0	0	99	0	0	0
Bancroft Public Library (Salem) (SLM)	1	0	0	57	0	0	0
Bolton Free Library (BOL)	2	0	0	77	0	0	0
Burnt Hills - Town of Ballston Community Library (BUR)	1	0	0	107	0	0	0

Creating Purchase Orders (7.3)

New Purchase Order - 1

SAVE **CLOSE**

Number **Suffix** **Lines** **Type**

Status **Status Date** **Prepaid** **Total** **Method**

[Details](#)

Account Identifiers

Owner **Supplier** **FIND**

SAN : **SAN** :

Plan **Account**

Creating Purchase Orders (7.3)

Purchase Order ⓘ

SAVE **ACTIONS** ▾ **REFRESH** **RESULTS** **CLOSE**

Number **Suffix** **Lines** **Type** ▾

Status **Status Date** **Prepaid** **Total** **Method** ▾

[Details](#) [Line Items](#) [Charges](#) [Instructions to Supplier](#) [Claims](#) [Bibliographic Records](#) [Items](#) [Invoices](#) [Funds](#)

NEW LINE ITEM **RECEIVE** **UNDO RECEIPT** **COPY TO** ▾ **CANCEL** **DELETE**

<input type="checkbox"/>	LINE	!	TITLE	AUTHOR	ISBN/ISSN	AMOUNT	ORDERED	RECEIVED	INVOICED	FUND	STATUS
<input type="checkbox"/>	1	!	Harlem Shuffle : A Novel	Whitehead, Colson, 1969-author.	9780593455548 (sound recording)	\$6.60	1	0	0	ASP level 1	Pending

Creating Purchase Orders (7.3)

Purchase Order Line Item 📄 SAVE ACTIONS ▾ 🔄 REFRESH CLOSE

Guide to Pugs
By Quell, Seb

Purchase order number: _____
Suffix: _____
ISBN/ISSN: 4587348

[Details](#) [Segments](#)

Total Order Quantity: 1

+ NEW SEGMENT

Add Segment

Quantity

Destination

Collection

Fund

OK CANCEL

<input type="checkbox"/>	SEGMENT								
<input type="checkbox"/>	1	1	Quell Test Branch	ASP level 1 (asp1)	ASP FY	Pending	Open		

View: Order: _____
PAYMENT STATUS

Additional Purchase Order Views (7.3)

Purchase Order i

SAVE
ACTIONS ▾
↻ REFRESH
📄 RESULTS
CLOSE

Number

Suffix

Lines

Type

 ▾

Status

Status Date

Prepaid

Total

Method

 ▾

Details
Line Items
 Charges
 Instructions to Supplier
 Claims
 Bibliographic Records
 Items
 Invoices
 Funds

←

+ NEW LINE ITEM
📄 RECEIVE
↶ UNDO RECEIPT
📄 COPY TO ▾
⊖ CANCEL
🗑️ DELETE

Filter

	LINE	!	TITLE	AUTHOR	ISBN/ISSN	AMOUNT	ORDERED	RECEIVED	INVOICED	FUND	STATUS
<input type="checkbox"/>	1	!	Harlem Shuffle : A Novel	Whitehead, Colson, 1969-author.	9780593455548 (sound recording)	\$6.60	1	0	0	ASP level 1	Pending

Receive/Undo Receipt for PO Lines (7.3)

Purchase Order ⓘ

SAVE **ACTIONS** ▾ **REFRESH** **RESULTS** **CLOSE**

Number **Suffix** **Lines** **Type** ▾

Status **Status Date** **Prepaid** **Total** **Method** ▾

[Details](#) [Line Items](#) [Charge](#) [Instructions to Supplier](#) [Claims](#) [Bibliographic Records](#) [Items](#) [Invoices](#) [Funds](#)

NEW LINE ITEM **RECEIVE** **UNDO RECEIPT** **COPY TO** ▾ **CANCEL** **DELETE**

<input type="checkbox"/>	LINE	!	TITLE	AUTHOR	ISBN/ISSN	AMOUNT	ORDERED	RECEIVED	INVOICED	FUND	STATUS
<input type="checkbox"/>	1	!	Harlem Shuffle : A Novel	Whitehead, Colson, 1969-author.	9780593455548 (sound recording)	\$6.60	1	0	0	ASP level 1	Pending

Receive/Undo Receipt for PO Lines (7.3)

Purchase Order ⓘ

SAVE **ACTIONS** ▾ **REFRESH** **RESULTS** **CLOSE**

Number **Suffix** **Lines** **Type** ▾

Status **Status Date** **Prepaid** **Total** **Method** ▾

[Details](#) [Line Items](#) [Charge](#) [Instructions to Supplier](#) [Claims](#) [Bibliographic Records](#) [Items](#) [Invoices](#) [Funds](#)

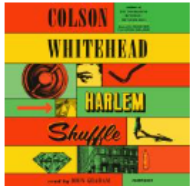
NEW LINE ITEM **RECEIVE** **UNDO RECEIPT** **COPY TO** ▾ **CANCEL** **DELETE**

<input type="checkbox"/>	LINE	!	TITLE	AUTHOR	ISBN/ISSN	AMOUNT	ORDERED	RECEIVED	INVOICED	FUND	STATUS
<input type="checkbox"/>	1	!	Harlem Shuffle : A Novel	Whitehead, Colson, 1969-author.	9780593455548 (sound recording)	\$6.60	1	0	0	ASP level 1	Pending

Receive/Undo Receipt for PO Line Item Segments (7.4)

Purchase Order Line Item i

SAVE
ACTIONS ▾
REFRESH
CLOSE



Harlem Shuffle : A Novel

By Whitehead, Colson, 1969- author.

Purchase order number: **Quell Test** Status: **On Order** Line no.: 1

Suffix: Status date: **3/16/2023** Bib control number: **1733106**

ISBN/ISSN: **9780593455548 (sound recording)** Other no.: **TestID2** Material type:

Details
Segments
Notes
Instructions To Supplier
Claims
Invoices
Funds

Total Order Quantity: 16

+ NEW SEGMENT
EDIT
DELETE
RECEIVE
SPLIT RECEIVE
UNDO RECEIPT
COPY TO ▾


View: Orders ▾

Filter

<input type="checkbox"/>	SEGMENT	QUANTITY	DESTINATION	COLLECTION	FUND	FISCAL YEAR	STATUS	PAYMENT STATUS
<input type="checkbox"/>	1	8	Quell Test Branch		ASP level 1 (asp1)	ASP FY	On Order	Open
<input type="checkbox"/>	2	8	Otten test (仙逆)		Adult Fiction - A (AF-A)	OttenTest	On Order	Open

Split Receive PO Line Item Segments (7.4)

Purchase Order Line Item



Harlem Shuffle : A Novel
By *Whitehead, Colson, 1969-* author.

Purchase order number: **Quell Test** Status: **On Order**
Suffix: Status date: **3/16/2023**
ISBN/ISSN: **9780593455548 (sound recording)** Other no.: **TestID2**

[Details](#) [Segments](#) [Notes](#) [Instructions To Supplier](#) [Claims](#) [Invoices](#) [Orders](#)

Total Order Quantity: 16

[+ NEW SEGMENT](#) [EDIT](#) [DELETE](#) [RECEIVE](#) [SPLIT RECEIVE](#) [UNDO RECEIPT](#) [COPY](#)

<input type="checkbox"/>	SEGMENT	QUANTITY	DESTINATION	COLLECTION	FUND
<input type="checkbox"/>	1	8	Quell Test Branch		ASP level 1 (asp1)
<input type="checkbox"/>	2	8	Otten test (仙逆)		Adult Fiction - A (AF-A)

Line Item Segment Receiving

You have chosen to receive the selected segments. The status of the segments will now become 'Received'. Copies not received will remain 'On-Order'.

Quantity ordered

Enter the number of copies received

Quantity received

[OK](#) [CANCEL](#)

Copy PO Lines to Invoice (7.3)

Purchase Order ⓘ

SAVE ACTIONS ▾ ↻ REFRESH 📄 RESULTS CLOSE

Number: Quell Test Suffix: Lines: 4 Type: Firm Order ▾

Status: Pending Status Date: 3/28/2022 Prepaid Total: \$59.38 Method: Purchase ▾

Details | Line Items | Charges | Instructions to Supplier | Claims | Bibliographic Records | Items | Invoices | Funds


NEW LINE ITEM RECEIVE UNDO RECEIPT COPY TO ▾ CANCEL DELETE Filter

<input type="checkbox"/>	LINE	!	TITLE	AUTHOR	ISBN/ISSN	AMOUNT	ORDERED	RECEIVED	INVOICED	FUND	STATUS
<input type="checkbox"/>	1	!	Harlem Shuffle : A Novel	Whitehead, Colson, 1969-author.	9780593455548 (sound recording)	\$6.60	1	0	0	ASP level 1	Pending

Copy PO Line Item Segments to Invoice (7.4)

Purchase Order Line Item i

SAVE
ACTIONS ▾
REFRESH
CLOSE



Harlem Shuffle : A Novel
By *Whitehead, Colson, 1969-* author.

Purchase order number: **Quell Test**

Suffix:

ISBN/ISSN: **9780593455548 (sound recording)**

Status: **On Order**

Status date: **3/16/2023**

Other no.: **TestID2**

Line no.: **1**

Bib control number: **1733106**

Material type:

Details Segments Notes Instructions To Supplier Claims Invoices Funds

↓

Total Order Quantity: 16 View: Orders ▾


+ NEW SEGMENT
EDIT
DELETE
RECEIVE
SPLIT RECEIVE
UNDO RECEIPT
COPY TO ▾

Filter

<input type="checkbox"/>	SEGMENT	QUANTITY	DESTINATION	COLLECTION	FUND	FISCAL YEAR	STATUS	PAYMENT STATUS
<input type="checkbox"/>	1	8	Quell Test Branch		ASP level 1 (asp1)	ASP FY	On Order	Open
<input type="checkbox"/>	2	8	Otten test (仙逆)		Adult Fiction - A (AF-A)	OttenTest	On Order	Open

#IUG2023

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Creating Invoices (7.3)

New Invoice - 1

[SAVE](#) [CLOSE](#)

Number **Suffix** **Lines** **Type**

Invoice Date **Status** **Status Date** **Total** **Method**

[Details](#)

Account Identifiers

Owner

Supplier [FIND](#)

SAN :

Plan

Account

Creating Invoices (7.3)

Invoice i

SAVE **ACTIONS** **REFRESH** **RESULTS** **CLOSE**

Number **Suffix** **Lines** **Type**

Invoice Date **Status** **Status Date** **Total** **Method**

[Details](#) [Line Items](#) [Charges](#) [Payment History](#) [Bibliographic Records](#) [Items](#) [Purchase Orders](#) [Funds](#)

NEW LINE ITEM **RECEIVE** **CREDIT** **DELETE**

<input type="checkbox"/>	LINE	!	TITLE	AUTHOR	ISBN/ISSN	AMOUNT	RECEIVED	PAID	PO NO.	FUND	STATUS
<input type="checkbox"/>	1		Lie detectors : their history and use.	Block, Eugene B.	0679507550 :	\$0.00	0	0		[None]	Free

Creating Invoices (7.3)

The screenshot shows a web application interface for creating an invoice. The main form is titled "Invoice Line Item" and includes fields for "Quantity" (0), "Destination" (Quell Test Branch (QTB)), "Collection" ((None)), and "Fund" ((None)). A modal window titled "Add Segment" is overlaid on the form, containing the same fields. The modal has "OK" and "CANCEL" buttons at the bottom right. In the background, there are buttons for "SAVE", "REFRESH", and "CL".

Invoice Line Item ⓘ

SAVE REFRESH CL

Lie detectors : their history and use.

By Block, Eugene B.

Invoice number: Quell

Suffix:

ISBN/ISSN: 0679507

Details Segments

Line Item Total Quantity:

+ NEW SEGMENT

Add Segment

Quantity: 0

Destination: Quell Test Branch (QTB)

Collection: (None)

Fund: (None)

OK CANCEL

SEGMENT	QUANTITY	DESTINATION	COLLECTION	FUND	DATE
<input type="checkbox"/>	1	0	Quell Test Branch	Free	9/14/2023

Receive PO Lines (7.3)

Invoice ⓘ

SAVE **ACTIONS** ▾ **REFRESH** **RESULTS** **CLOSE**

Number **Suffix** **Lines** **Type** ▾

Invoice Date **Status** **Status Date** **Total** **Method** ▾

[Details](#) [Line Items](#) [Charges](#) [Payment History](#) [Bibliographic Records](#) [Items](#) [Purchase Orders](#) [Funds](#)

NEW LINE ITEM **RECEIVE** **CREDIT** **DELETE**

<input type="checkbox"/>	LINE	!	TITLE	AUTHOR	ISBN/ISSN	AMOUNT	RECEIVED	PAID	PO NO.	FUND	STATUS
<input type="checkbox"/>	1		Lie detectors : their history and use.	Block, Eugene B.	0679507550 :	\$0.00	0	0		[None]	Free

Additional Invoice Views (7.3)

Invoice i

SAVE **ACTIONS** **REFRESH** **RESULTS** **CLOSE**

Number **Suffix** **Lines** **Type**

Invoice Date **Status** **Status Date** **Total** **Method**

[Details](#) [Line Items](#) [Charges](#) [Payment History](#) [Bibliographic Records](#) [Items](#) [Purchase Orders](#) [Funds](#) ←

NEW LINE ITEM **RECEIVE** **CREDIT** **DELETE**

<input type="checkbox"/>	LINE	!	TITLE	AUTHOR	ISBN/ISSN	AMOUNT	RECEIVED	PAID	PO NO.	FUND	STATUS
<input type="checkbox"/>	1		Lie detectors : their history and use.	Block, Eugene B.	0679507550 :	\$0.00	0	0		[None]	Free

Copy Serial Holdings Records (7.4)

Serial Holdings Record ⓘ

Elle.

Status: **Currently Received** Destination: **Quell Test Branch (QTB)** Bib control number: **344250**
Serial holdings record ID: **92** Collection: **(None)** Order Type: **Subscription**
Copy no.: **1** Material type: **Periodical** ISSN/ISBN: **0888-0808**

[Details](#) [Notes](#) [Orders](#) [Claims](#)

SAVE **ACTIONS** ▾ **LINKS** ▾ **REFRESH** **RESULTS** **CLOSE**

Copy **Delete**

Status **Destination** **Copy no.** **Bib control number***

Currently Received Quell Test Branch (QTB) 1 344250 **FIND**

Order Type **Collection** **Material type**

Subscription (None) Periodical

Editing Publication Pattern Details (7.4)

Details Designation Regularity Pattern

Frequency: Daily (dropdown) Start Date: 1/1/2005 (calendar icon) End Date: 11/5/9999 (calendar icon)

Starting Designation: Vol. 20 No. 5 (January 2005)

Chronology Setup

+ ADD CHRONOLOGY (blue arrow) DELETE

<input type="checkbox"/>	LEVEL	CAPTION	FORMAT	START VALUE	DISPLAY
<input type="checkbox"/>	1	Year	Numeric	2005	2005
<input type="checkbox"/>	2	Month	Full Text	01	January

Enumeration Setup

+ ADD ENUMERATION (blue arrow) DELETE

<input type="checkbox"/>	LEVEL	CAPTION	FORMAT	UNITS	CONTINUITY	START VALUE	DISPLAY
<input type="checkbox"/>	1	Vol.	Number			20	Vol. 20
<input type="checkbox"/>	2	No.	Number	12	Restarts	5	No. 5

Editing Publication Pattern Details (7.4)

Regularity Pattern

+ ADD PATTERN

<input type="checkbox"/>	PUBLICATION DETAILS
<input type="checkbox"/>	pm 01
<input type="checkbox"/>	pm 02
<input type="checkbox"/>	pm 03
<input type="checkbox"/>	pm 04
<input type="checkbox"/>	pm 08
<input type="checkbox"/>	pm 09
<input type="checkbox"/>	pm 10
<input type="checkbox"/>	pm 11
<input type="checkbox"/>	pm 12
<input type="checkbox"/>	cm 05/06
<input type="checkbox"/>	om 07

Calendar Change

Calendar Unit: Codes:

Editing Publication Pattern Details (7.4)

Publication Pattern



Elle.

Status: **Open**


Category: **Basic Bib / 1**

ISBN/ISSN: **0888-0808**

[Details](#) [Designation](#) [Regularity Pattern](#)

 **SAVE**  **CLOSE**




Publication Pattern updated successfully. 

Predict Issues/Parts

The following issues/parts will be created:

DESIGNATION	PUBLICATION DATE	EXPECTED ARRIVAL DATE
Vol. 20 No. 5 (January 2005)	1/1/2005	1/6/2005
Vol. 20 No. 6 (March 2005)	3/1/2005	3/6/2005
Vol. 20 No. 7 (May 2005)	5/1/2005	5/6/2005
Vol. 20 No. 8 (July 2005)	7/1/2005	7/6/2005
Vol. 20 No. 9 (September 2005)	9/1/2005	9/6/2005
Vol. 20 No. 10 (November 2005)	11/1/2005	11/6/2005
Vol. 20 No. 11 (January 2006)	1/1/2006	1/6/2006
Vol. 20 No. 12 (March 2006)	3/1/2006	3/6/2006
Vol. 21 No. 1 (May 2006)	5/1/2006	5/6/2006

 **PREDICT** **SKIP**

Create a Publication Pattern (7.4)

Publication Patterns

+ NEW PATTERN **× CLOSE PATTERN** **↶ REOPEN PATTERN** **🗑️ DELETE**

<input type="checkbox"/>	CATEGORY	FREQUENCY	START DESIGNATION	REGULARITY PATTERN	CALENDAR CHANGE	STATUS
<input type="checkbox"/>	Basic Bib / 1	Daily	Vol. 20 No. 5 (January 2005)			Open
<input type="checkbox"/>	Basic Bib / 2	Monthly	(2023)	pm 01,02,03,04,05,06,07,08,09,10,11,12		Open
<input type="checkbox"/>	Supplement / 1	Annual	(Winter 1st Qtr)			Open

New Publication Pattern

Publication Pattern Template

(None) ▼

OK **CANCEL**

Serial Labels (7.4)

Settings

[Print Options](#) | [Special Loan](#) | [Workform User Defaults](#)

SAVE **REFRESH** **CLOSE**

Check in

- Fine receipt
 - only if no eReceipt
- In-transit slip
 - Holds only
- Hold slip
- Hold call slip
- Hold pickup slip
- INN-Reach Pickup Slip

Check out

- Check out receipt
 - only if no eReceipt
- Fine receipt
 - only if no eReceipt
- In-transit slip
 - Holds only
- Hold slip
- Hold call slip
- Hold pickup slip
- INN-Reach Pickup Slip

Patron status

- Check out receipt
 - only if no eReceipt
- Fine receipt
 - only if no eReceipt
- In-transit slip
 - Holds only
- Hold slip
- Hold call slip
- Hold pickup slip
- INN-Reach Pickup Slip

ILL requests

- In-transit slip
- Print ILL Slip
- Print ILL Pickup Slip

Hold requests

- In-transit slip
- Hold slip
- Hold call slip
- Hold pickup slip
- INN-Reach Pickup Slip

Item record

- Fine receipt
 - only if no eReceipt
- In-transit slip
 - Holds only
- Hold slip
- Hold call slip
- Hold pickup slip
- INN-Reach Pickup Slip

Label Options

Cataloging Label Options

Label Type:

Print Method:

Serials Label Options

Label Type:

Print Method:

Label Default:

Serial Labels (7.4)

Serials Check In ⓘ

Elle.

Status: **Currently Received** Destination: **Quell Test Branch (QTB)** Non-Public Notes: Non-Public Warning Notes:

Serial holdings record ID: **92** Bib control number: **344250**

Copy no.: **1** Collection: **(None)**

Call number: Material type: **Periodical**

SAVE **ACTIONS** ▾ **REFRESH** **RESULTS** **CLOSE**

Issue/Part Status: Filter by Column:

	DESIGNATION	CATEGORY	EXPECTED	STATUS	STATUS DATE	PATTERN	ROUTE STATUS
<input checked="" type="checkbox"/>	Vol. 26 No. 6/12 (February/August 2011)	Basic Bib / 1	2/1/2011	Received	3/9/2022	Open	
<input type="checkbox"/>	Vol. 26 No. 10 (June 2011)	Basic Bib / 1	6/1/2011	Received	1/5/2022	Open	Routed
<input type="checkbox"/>	Vol. 26 No. 11 (July 2011)	Basic Bib / 1	7/1/2011	Received	1/5/2022	Open	Routed
<input type="checkbox"/>	Vol. 27 No. 1 (September 2011)	Basic Bib / 1	9/1/2011	Received	1/5/2022	Open	Routed

Serial Labels (7.4)

Issue Record ⓘ

Elle.

Status: **Received** Serial holdings record ID: **92** Bib control number: **344250**
Designation: **Vol. 26 No. 6/12 (February/August 2011)** Copy no.: **1** Collection: **(None)**
Item record: **12823102** Destination: **Quell Test Branch (QTB)** Material type: **Periodical**

[Details](#) [Notes](#)

Status	Status Date	Expected Arrival Date	Chronology Date
Received	3/9/2022	2/1/2011	8/1/2011

Title of	Issue Unit Price
	\$1.75

Enumeration

Vol.	No.
26	6/12

SAVE **ACTIONS** **REFRESH** **CLOSE**

Print Label

Serial Labels (7.4)

Label Manager

Label

SAVE **ACTIONS** **REFRESH** **CLOSE**

938743873	Elle. Vol. 26 No. 6/12 (February/August 2011)
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Page 1 of 1

Default Fee Amounts (7.4)

...	Fee Description	Default Amount	Tax Rate	Tax Rate Supported
	Overdue	\$15.00	(None)	No
	Case / Cover	\$0.00	Tax Rate 11	Yes
	Copy / Print	\$0.00	(None)	Yes
	Damage	\$0.00	Tax Rate 11	Yes
	ILL	\$2.00		Yes
	Manual Fine	\$1.00	Tax Rate 2	Yes
	New Card	\$99.99	Tax Rate 2	Yes
	Phone / Fax	\$0.00	(None)	Yes
	Postage	\$49.00	Tax Rate 2	Yes
	Rental	\$5.00	(None)	Yes
	Misc Charge	\$0.00	Tax Rate 11	Yes
	Misc test charge	\$0.00	(None)	Yes
	mm	\$0.00	(None)	Yes
	Misc	\$0.00	(None)	Yes
	'Z!@#\$%^&' Test 1	\$0.00	(None)	Yes
	Test 2	\$0.00	(None)	Yes

SEBASTIAN QUELL ⓘ
10006080706
QUELL TEST BRANCH **BLOCKS** **NOTES**

Check Out (0) Out (6) / Overdue (0) Account (\$52.00) Claims (0) / Lost (0) Holds (13) / Held (3) ILL (0)

Pay Waive Charge Add Charge Bill Charge Create Credit Refund Credit

Amount: ←

Fee Reason:

Item Barcode: **FIND TOOL**

Notes (for internal use):

Send a bill

Tax Rates (7.4)

SEBASTIAN QUELL ⓘ
10006080706
QUELL TEST BRANCH **BLOCKS** **NOTES**

REGISTRATION ACTIONS REFRESH CLOSE

Check Out (0) Out (6) / Overdue (0) Account (\$52.00) Claims (0) / Lost (0) Holds (13) / Held (3) ILL (9) / Held (0) Reader Services Reading History Associations Notices More ▾

Pay Waive Charge Add Charge Bill Charge Create Credit Refund Credit Print List History Notification History Properties Filter Charges

Amount:

Fee Reason: (plus \$10.60 tax) ←

Item Barcode: **FIND TOOL**

Notes (for internal use):

Send a bill

ADD CHARGE CANCEL

Tax Rates (7.4)

Charge Properties

Transaction Item About

Transaction type: **Charge**

Base amount: **\$0.95**

Tax amount: **\$0.05** ←

Total amount: **\$1.00**

Payment method:

Patron barcode: **10006080706**

Item barcode: **0000413633348**

Note:

CLOSE

SSO/OAuth

SSO/OAuth with Azure AD

- Support for direct connections to Azure AD in Leap and web-based system administration.
- Support for multi-factor authentication.



Documentation

The screenshot shows the Polaris Leap documentation interface. At the top left is the Polaris Leap logo. A search bar at the top right contains the text "Hold request" and a magnifying glass icon. Below the logo are two tabs: "Contents" and "Index". The "Contents" tab is active, showing a sidebar with a tree view of documentation topics. The main content area displays search results for "Hold request", indicating 51 results. The first result is titled "To place multiple holds at once for the same patron" and includes a numbered list of steps: 1. Go to the [Patron record > Holds view](#). The patron's holds list is displayed. 2. Select **More > Multiple Holds**. Below the list is a screenshot of a patron record for "MR. EUGENE J MUJICA" with a registration number "1000201318127" and a "BLOCKS" indicator. The record has buttons for "REGISTRATION", "ACTIONS", "REFRESH", "RESULTS", and "CLOSE". Below the screenshot is a link: [Place Multiple Hold Requests for the Same Patron](#) with the URL "LEAP1_0/Place_multiple_holds_for.htm#microcontent1". The second result is titled "Convert Hold Requests to ILL Requests" and includes a paragraph: "You can convert single or multiple Active, Inactive, Expired, or Not Supplied **hold requests** to ILL **requests** from the Patron Record or the **Request Manager** workflow, or you can convert a single **hold request** from **Hold Request** workflow. Note: The following permissions are required to convert **hold** ...".

Resources

- Polaris/Leap documentation and user guides
 - Documentation.iii.com
- Polaris/Leap roadmap
 - Support.iii.com
 - <https://portal.productboard.com/iii/6-innovative-product-status-board-new/tabs/23-polaris>



Multiple Pickup Options 💡

👤 18

SO SAMANTHA QUELL | Posted on January 10

Description:

Add support for the ability to select a pickup location within the library (without the need to create another branch). Use cases include curbside, smart lockers, drive-up windows.

Value:

Allows patrons to designate a pickup location within the library, without requiring the library to create additional branches for each "sub-location."

How important is this to you?

NOT IMPORTANT

NICE-TO-HAVE

IMPORTANT

CRITICAL



THANK YOU

Questions?