



Beyond the Stratosphere: Polaris Roadmap for Success

Samantha Quell



Agenda



Introductions and Polaris Team Updates



What's Next for Polaris and Leap

- LX Starter Update
-



Feedback Tools

- New Enhancement Platform – Idea Exchange



Samantha (“Sam”) Quell

- Senior Team Lead, Product Management
 - Polaris Product Manager

- MLS from University at Buffalo

- Been with Polaris/Innovative, since 2012

- Proud owner of a skinny pug, avid reader



Gabrielle Gosselin

- Polaris Product Manager

- MLIS from Syracuse University

- Joined the team in November 2022

- Food festival enthusiast



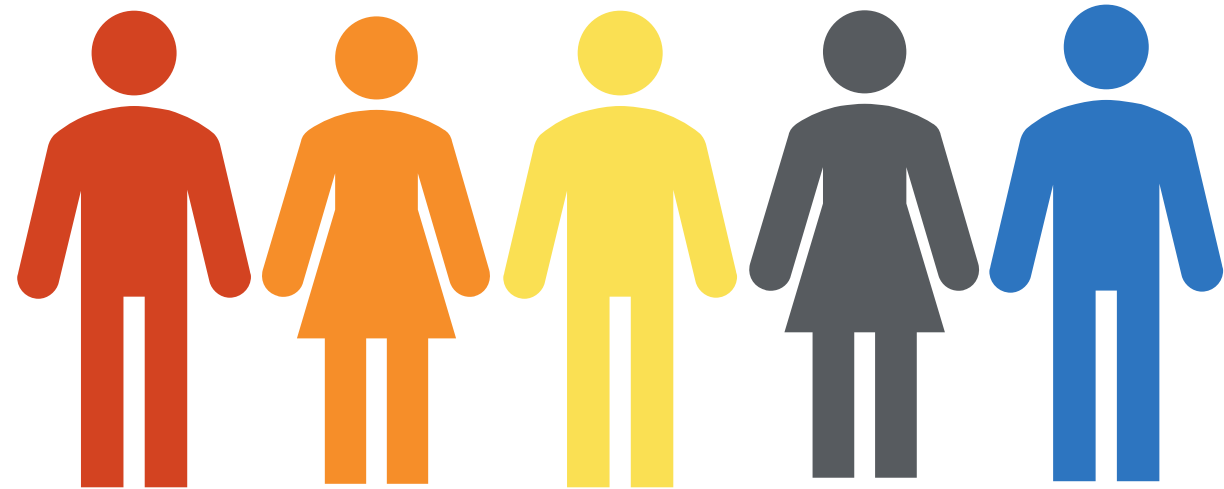
Whitney Murphy

- Director, Product Management
- MBA from Indiana University
- Joined the team in November 2022 & celebrating 15 years working with libraries
- Purple belt in karate, mother of 1 son & 1 amazingly sweet pit bull, obsessed with making ice cream & cakes

We've Grown!



New Polaris development resources have joined the team and are coming up to speed




What's next for Polaris?


Polaris 7.4 – General Availability

RELEASED: Polaris 7.4 (March 2023)


Multi-Factor Authentication (Leap) 8



Google Analytics API Changes 4




Circulation by Branch in Leap Bib Record 13




BRANCH	NUMBER OF COPIES	ISSUED	PREVIOUSLY ISSUED	ISSUES	PREVIOUSLY ISSUED	ISSUES
AMSTERDAM	10	5	10	5	10	5
BRUSSELS	10	5	10	5	10	5
PARIS	10	5	10	5	10	5


Patron Bulk Change in Leap 16



Publication Patterns (Part 2) 9



Serials Labels (Leap) 5




Combined Picklist View 7


Picklist

AUTHOR	TITLE	MATERIAL TYPE	PATRON NAME
Woolf, E.M.	Flush	DNA	Clark, Catherine
Woolf, E.M.	Flush	DNA	Clark, Catherine


CKO API Endpoint 12




Patron Usernames in Leap 3




Patron's Preferred Pickup Branch in Leap 4




Aeon Special Collections System Integration 0




Renewal Due Date Calculation Options 2




Receive POLI Segments in Leap 9



Single Name Field Required 3



Default Fee Descriptions in Leap 3



Enhancement Requests in Polaris 7.5 (Tentative Q3 2023)



Multiple Pickup Options



Declare Damaged



Customizable Leap Menu Options

Multiple Pickup Options (Mocks)

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

REGISTRATION ACTIONS REFRESH RESULTS CLOSE

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

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

Activation: 3/24/2023 Expiration: 9/20/2023 Pickup: Quell Test Branch **Curbside** Borrow by Mail **PLACE HOLD** UNLOCK CANCEL

Title
Search for a title **FIND TOOL** **Barcode**
Enter item barcode


Author ISBN ISSN **Format**

Series **Edition** **Pages**


Publisher **Call NO** **Issue**

Multiple Pickup Options (Mocks)

Place a request:



Inspection
Author: Malerman, Josh, author.



Barcode: *****0706

Pickup Library:

Special Pickup Instructions: ←

Please mail this to me.

If your request is filled you may be charged to check out the item according to the policy of the library owning the item. Do you want to place this request?

Activation Date:
(ex: m/d/yyyy)

Note:

Declare Damaged (Mocks)

The screenshot shows the LEAP library system interface. At the top, there is a dark teal header with the 'leap' logo, a search bar containing 'Scan or search', and a 'FIND' button. To the right of the search bar are dropdown menus for 'New', 'Utilities', and 'Help', and a user profile indicator for 'gabrielle.gosselin (TB5L3)'. Below the header, there are buttons for 'CHECK IN', 'NEW PATRON', and 'PRINT'. The main content area is titled 'Check In' and includes a 'CLOSE' button. Below the title, there are filters for 'Normal (0)', 'Bulk (0)', 'In House (0)', 'Inventory (0)', 'Missing Part', 'Damaged', and 'Shelf-Ready'. A search input field with the placeholder 'Enter item barcode' and a 'FIND TOOL' button are present. An 'ACTIONS' dropdown menu is also visible. At the bottom, a table header is shown with columns: 'BARCODE', 'STATUS', 'TITLE', 'MATERIAL TYPE', and 'PATRON NAME'.

Declare Damaged (Mocks)

Declare Item Damaged

Barcode: **2080002927352** Material Type: **Book**

Status: **Out** Patron: **Gabrielle Gosselin**

Title: **History of New York state grange**

Declare damaged: charge & notify Declare damaged: update item only

Optional: Special item check-in note (will appear on the item record and patron notice)

Indicate the damage here (for example, 'water damage', 'ripped cover', 'broken DVD')

OK CANCEL

Declare Damaged (Mocks)

LOU LECHAT ⓘ

200804257245824708
GOSSELIN TEST BRANCH 2

BLOCKS **NOTES**

REGISTRATION ACTIONS ▾ REFRESH **CLOSE**

Check Out (0) Out (1) / Overdue (0) Account (\$21.89) Claims (1) / Lost (1) Holds (5) / Held (4) ILL (0) / Held (0) Reader Services More ▾

Renew Special Renew Reset Due Date Estimate Fines Make A Claim Declare Lost **Damaged** More ▾ Filter Items

<input checked="" type="checkbox"/>	TYPE	DUE ON ▾	BARCODE	TITLE	AUTHOR	RENEWALS LEFT	FILLS HOLD	CALL NO.	BRANCH
<input checked="" type="checkbox"/>	Music	4/7/2023	GG002928003	The Beatles on guitar [sound recording]	Jezzro, Jack.	2 of 2	No	RC Fict Dic	Gosselin Test Branch 2

Improved Workflows in Polaris 7.5 (Tentative Q3 2023)



Weeding Workflow



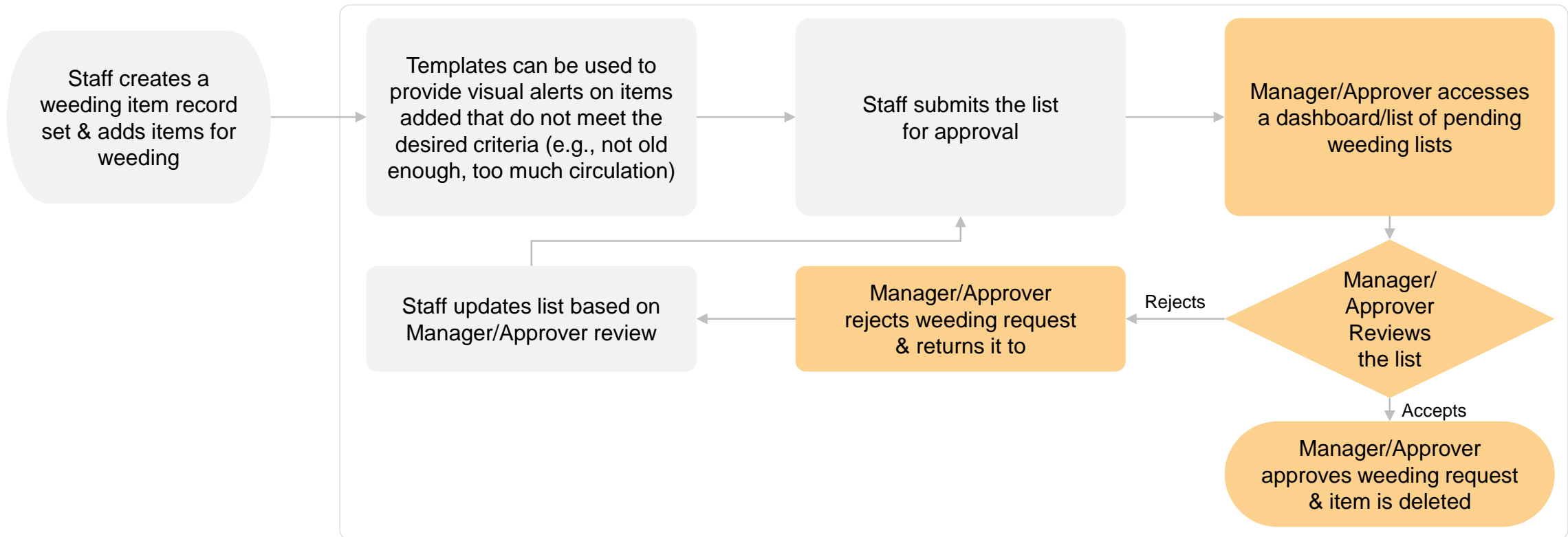
Waiver Workflow



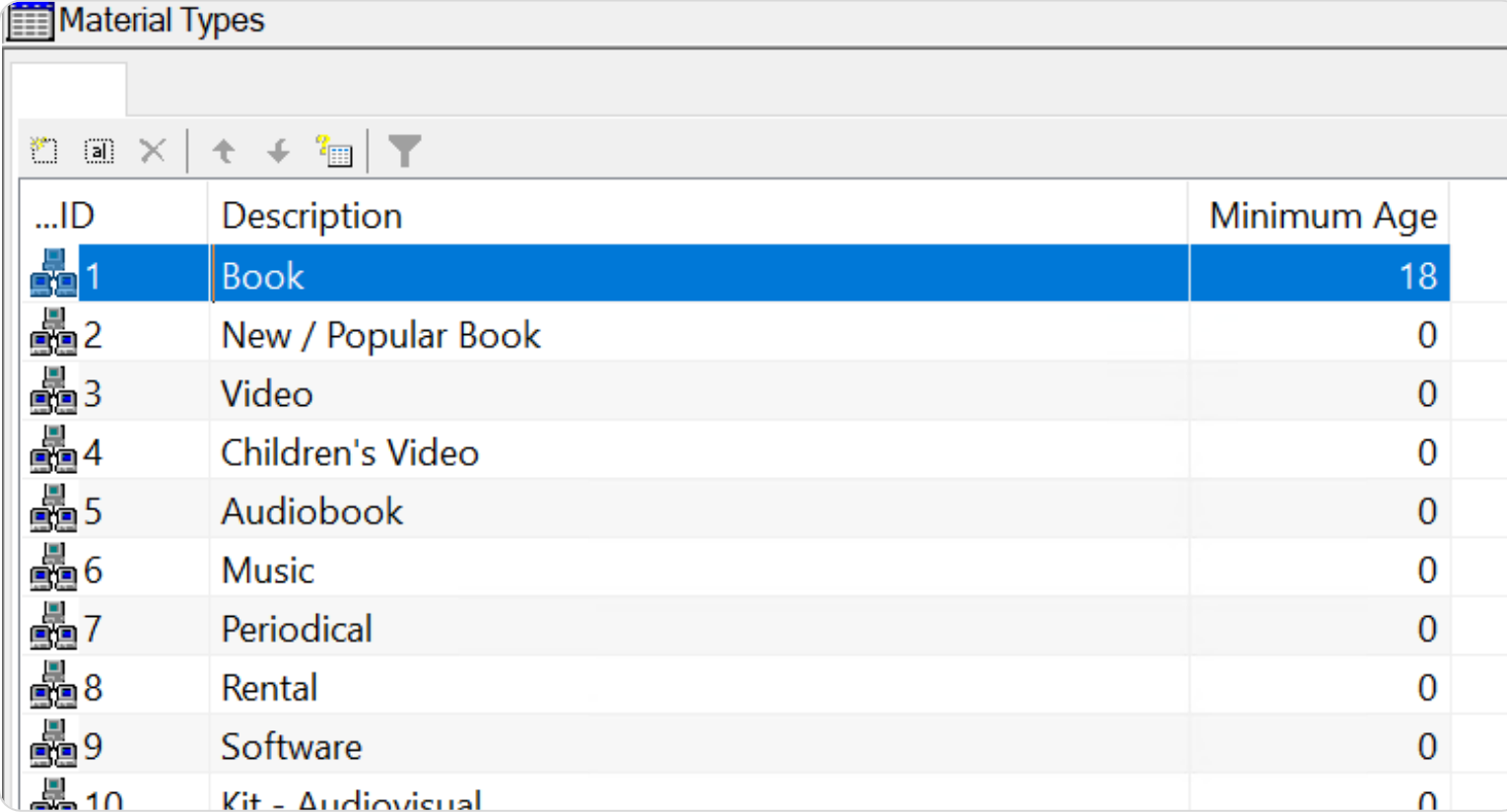
Age-Related Loan Policies

Weeding Workflow

Improved workflow coming soon!



Age-Related Loan Policies



The screenshot displays a window titled "Material Types" containing a table with the following data:

...ID	Description	Minimum Age
1	Book	18
2	New / Popular Book	0
3	Video	0
4	Children's Video	0
5	Audiobook	0
6	Music	0
7	Periodical	0
8	Rental	0
9	Software	0
10	Kit - Audiovisual	0

Planning for 2024



Advanced MARC Editor



Item Templates in Leap



Bulk Waive Fines

Advanced MARC Editor (DESIGN WORK IN PROGRESS)

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

INSERT COMPARE

LDR		cam 22 a 4500	+	-
001 1			+	-
005		20220808170442.0	+	-
:: 010		‡a 77006284 ‡o02912113	+	-
:: 010		‡a 77006284 ‡o02912113	+	-
:: 035	00	‡aAAA-0015	+	-
:: 020	1	‡a0698107144 :‡c\$9.95	+	-
:: 082	0	‡a942.05/2/0924	+	-
:: 092		‡a92‡bHenry	+	-

Advanced MARC Editor (DESIGN WORK IN PROGRESS)

leap Scan or search FIND New Utilities Help vegastaffuser (TB1L8)

CHECK IN NEW PATRON PRINT

Compare Records

Select New Record REFRESH CLOSE

Current Record				Control Number: 1	Compared Record				Control Number: 43488764
Tag 1	Ind	Ind2	Data		Tag 1	Ind	Ind2	Data	
LDR			cam 22 a 4500		LDR			cam 99 a 4300	
001	1		1		001	1		1	
005			20220808170442.0		005			5022084440442.0	
010			‡a 77006284 ‡o02912113		010			‡a 77006284 ‡o02912113	
010			‡a 77006284 ‡o02912113		010			‡a 44568901 ‡o02912113	
035	00		‡aAAA-0015						
020	1		‡a0698107144 ‡c\$9.95						
082	0		‡a942.05/2/0924		082	0		‡a942.05/2/0924	
092			‡a92‡bHenry		092			‡a92‡bHenry	

Advanced MARC Editor (DESIGN WORK IN PROGRESS)

The screenshot displays the 'Compare Records' interface in the Leap system. The top navigation bar includes a search field, a 'FIND' button, and user information for 'vegastaffuser (TB1L8)'. Below the navigation, there are buttons for 'CHECK IN', 'NEW PATRON', and 'PRINT'. The main content area is titled 'Compare Records' and features two side-by-side tables for comparison. The left table, 'Current Record -- Control Number: 1', shows MARC tags and their data. The right table, 'Compared Record -- Control Number: 43488764', shows the same tags with input fields for editing and comparison icons. A 'Save' button is visible in the top right of the compared record panel.

Tag 1	Ind	Ind2	Data
LDR			cam 22 a 4500
001	1		1
005			20220808170442.0
010			⌘a 77006284 ⌘o02912113
010			⌘a 77006284 ⌘o02912113
035	00		⌘aAAA-0015
020	1		⌘a0698107144 ⌘c\$9.95
082	0		⌘a942.05/2/0924
092			⌘a92⌘bHenry

Tag 1	Ind	Ind2	Data
LDR			cam 22 a 4500
001	1		1
005			20220808170442.0
010			⌘a 77006284 ⌘o02912113
010			⌘a 77006284 ⌘o02912113
035	00		⌘aAAA-0015
020	1		⌘a0698107144 ⌘c\$9.95
082	0		⌘a942.05/2/0924
092			⌘a92⌘bHenry

LX Starter

LX Starter Launch Waves

Launched

Wave 1

- Select Development Partners to provide feedback and refine our processes before GA
- Low-Medium volume
- Started in September 2022

Launched

Wave 2

- Available to libraries that schedule a release upgrade to Sierra 5.5 or Polaris 7.3 or Polaris 7.4
- Low-Medium volume
- English-only notifications
- Started in November 2022

Launched

Wave 3 – Part 1

- Large Single System Libraries in the US
- Multi- language notice templates
- Libraries upgraded to Sierra 5.6 or Polaris 7.3 or Polaris 7.4

Pending

Wave 3 – Part 2

- Additional Notice Types
- International Libraries
- Consortia Support

Requirements to Get Started Today



Same Email Design for Notices

All locations sharing your ILS use the same notice designs



United States Libraries

Your library is in the U.S.



On Most Recent Sierra or Polaris Release

Your library is upgraded to Sierra 5.6+ or Polaris 7.3+

Non-consortia libraries in the U.S. are invited to register at this time

Feedback Tools

Feedback Tools – IUG 2022



Leap Analytics

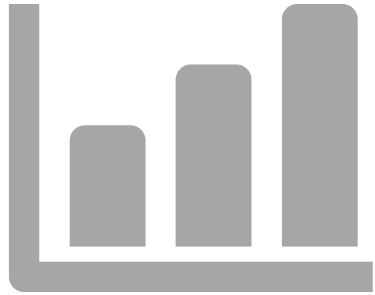


Idea Lab



Product Board

Feedback Tools – IUG 2023



Leap Analytics



Idea Exchange



Product Board



Innovate with us

Submit your ideas to the community, explore and support others ideas and be a part of defining a better future.



Have an Idea?

Submit your idea for the community to vote on.



Vote your favorite ideas!

Help promote the ideas that will be most impactful for you and your users.

We're glad you found us. We are working on making some updates to the site so some parts of the website are under construction. You can still review, vote, and leave ideas.

ILS - Polaris

Explore the 118 ideas submitted



ILS - Sierra

Explore the 84 ideas submitted



Search



Recently updated ideas

ILS - Sierra

Updated 04/07/23

Better Load Table Editing Platform

Cataloging & Metadata Management

PLANNED

ILS - Sierra

Updated 04/10/23

Protect Global Updates on Server from accidental overwrite

Cataloging & Metadata Management

PLANNED

Migrated Forums

ILS - Polaris

Explore the 118 ideas submitted



ILS - Sierra

Explore the 84 ideas submitted



INN-Reach

Explore the 2 ideas submitted



Innovative Mobile

Explore the 1 ideas submitted



Innovative Phone Alerts

Explore the 2 ideas submitted



LX Starter

Explore the 0 ideas submitted



Vega Discover

Explore the 2 ideas submitted



Vega Program

Explore the 0 ideas submitted



Vega Promote

Explore the 0 ideas submitted



New Forums

Coming Soon!

How can we improve Polaris?

CATEGORIES
All ideas
My feedback
Acquisitions, Serials & Item/Issue/Inventory Management 15 ideas
Cataloging & Metadata Management 21 ideas
Circulation, Access Services & Fulfillment 48 ideas
Customer Relationship & Account Management 17 ideas
Discovery & OPAC 21 ideas
Reporting & Analytics 5 ideas
System Administration (incl APIs) 7 ideas

JUMP TO ANOTHER FORUM

- ILS - Polaris** 134 ideas
- ILS - Sierra** 94 ideas
- INN-Reach** 1 idea

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VOTE



Full support for emoji in Polaris Label Manager

Many libraries like to call attention to their genre fiction through the use of spine label stickers and icons. For instance, science fiction items may feature an image of a grey alien, mysteries have a magnifying glass or a skull and crossbones, and westerns use a cowboy or a horse or something similar. The thing is, there's no reason a library couldn't print the icons on the spine labels themselves using emoji.

👽 = Science Fiction

🤠 = Western

🔍 = Mystery

🐉 = Fantasy

🏰 = Historical Fiction

And so on. However, the Polaris Label Manager barely supports any emoji. Instead of displaying and printing the emoji, it displays a broken character code. Could we please get full emoji support for Label Manager?



Daniel Messer shared this idea · April 04, 2023 · [Report...](#)

How important is this to you?

Nice to Have

Important

Critical



Add a comment...



We're glad you're here

Please sign in to leave feedback

 Microsoft

or

Email address

Password

I was active in Idea Lab



Forgot Password?

New here? [Create an account](#)

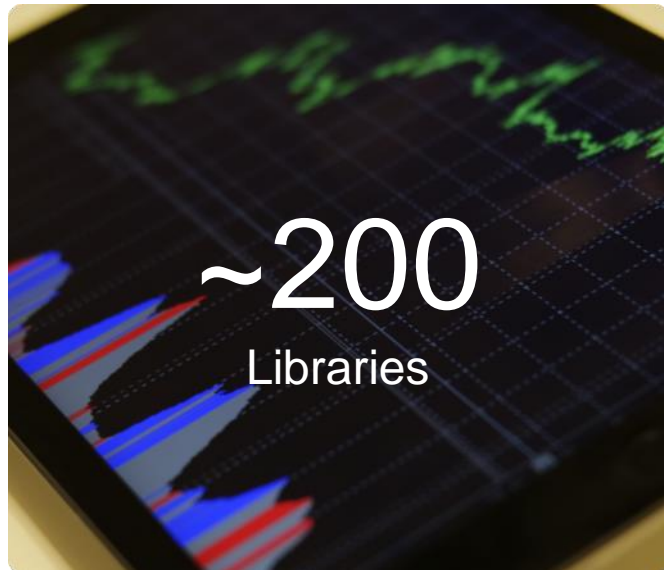
I'm new to submitting enhancements



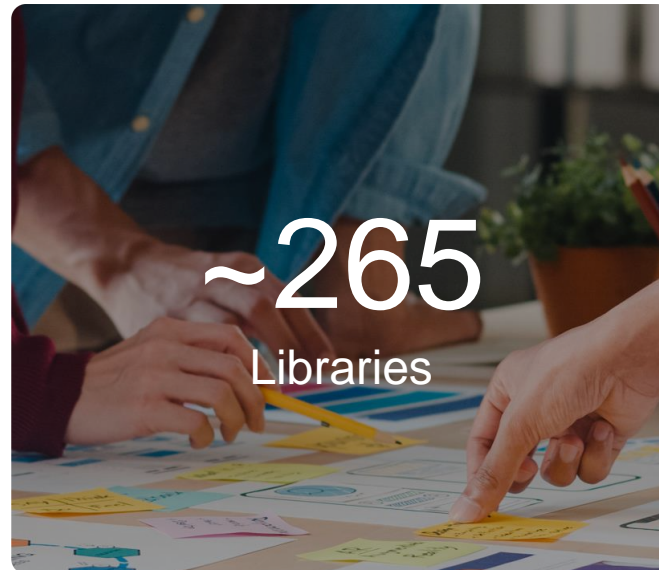
Call to Action

Feedback Tool Usage – IUG 2022

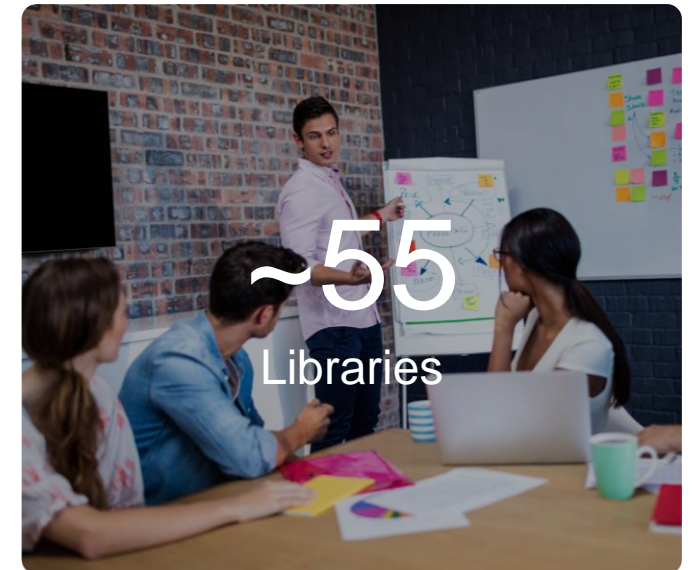
Leap Analytics



Idea Lab



Product Board



Public Roadmap

Innovative Product Status Board - New

Search for features or ideas...

SIERRA **POLARIS** INN-REACH DECISION CENTER MOBILE WORKLISTS VEGA

PAC Banner for Emergency Closures 19

Bulk Change Held Till Dates 15

Preferred ISBN/UPC for PO Creation 18

Unlock BibKeywordSearch Filter Options (PAPI) 5

Bulk Waive/Resolve Fines 13

Item Templates (Leap) 22

Additional System Administration 7

Ability to uncancel a POLI 7

Show All Option in Record Sets 8

Walter J...	Administrat...	Book	1000000000	1000000000	1000000000
Walter J...	Administrat...	Book	1000000000	1000000000	1000000000
Walter J...	Administrat...	Book	1000000000	1000000000	1000000000
Walter J...	Administrat...	Book	1000000000	1000000000	1000000000

RELEASED: Polaris 7.4 / March 2021



Additional System Administration

50 SAMANTHA QUELL | Posted on May 2021

Description:
Making high use System Administration functions accessible in the web

Value:
Allows system administrators to modify configuration settings anytime, anywhere.

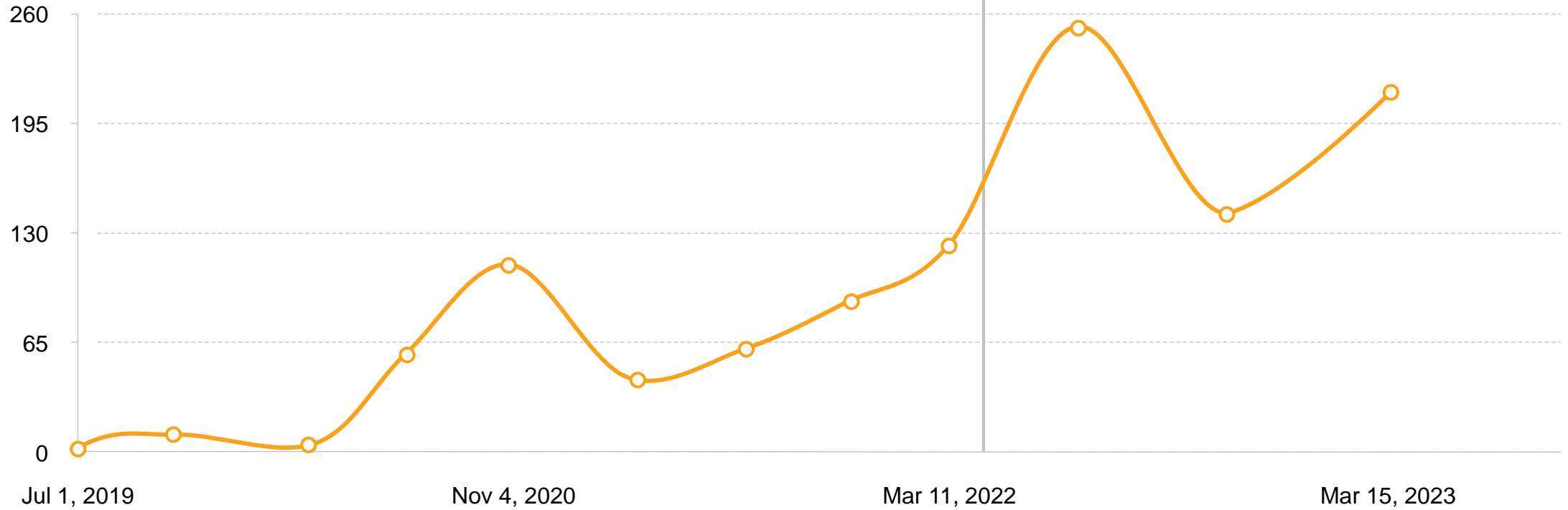
How important is this to you?

Product Board Insights – THANK YOU

1204 notes created

i NEW

Any time



Feedback Tool Usage – IUG 2023

Leap Analytics

~285
Libraries

Idea Exchange

~26
Libraries

Product Board

~165
Libraries

Idea Exchange – Please Vote, Comment, Rate Importance!

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VOTE

Display additional record types in "Recent" workform tracker

The "Recent" tab in the Leap Workform Tracker lists recently-accessed patron, item, and bibliographic records. Now that additional record types are available in Leap, it would be helpful to have additional record types listed in the "Recent" tab, including but not limited to: InvoicesPurchase OrdersRecord Sets

Idea Value

The "Recent" tab in the workform tracker is a helpful tool that allows staff to easily reopen records that have been recently closed. Adding additional record types to the recent tab would be helpful for all staff, especially technical services staff that are transitioning to Leap.

FUTURE POSSIBILITIES (IDEA LAB)

· 1 comment

· Circulation, Access Services & Fulfillment

How important is this to you?

Nice to Have

Important

Critical



Additional Resources



Sessions:

- Polaris Year in Review – Saturday, May 13 @ 9:00 am
- LX Starter: The Rise of ILS Notices – Friday, May 12 @ 4:30 pm
- If I Ran the Zoo or How an Idea Becomes a Product – Saturday, May 13 @ 9:00 am
- IUG Enhancements Forum – Saturday, May 13 @ 10:30 am



Public Roadmap: <https://portal.productboard.com/iii/>



Idea Exchange: <https://ideas.iii.com/>



Questions?

- Email: Samantha.quell@iii.com or Samantha.quell@clarivate.com



THANK YOU

Questions?