



# BLACK GOLD

COOPERATIVE LIBRARY SYSTEM

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Arroyo Grande, CA 93420  
805 543 6082  
[Blackgold.org](http://Blackgold.org)

**AUTOMATION AND TECHNICAL SERVICES  
(ATS) OPERATIONS COMMITTEE AGENDA - REVISED**  
**September 1, 2021– 10:00 a.m.**  
**Video Webinar – ATS Ops**

<https://blackgold.webex.com/blackgold/j.php?MTID=mc6c00e9d264a125f0788425caca2d8a3>

Meeting number: 625 911 376

Join by phone

1-650-479-3208 Call-in toll number (US/Canada)

Access code: 625 911 376

\* Item accompanies the agenda

- 1) **10:00 A.M. CALL TO ORDER** Kim Hunter, Chair, Presiding  
Recorder; Kristina Uvalle (BG)
- 2) **ADOPT AGENDA** —
- 3) **\*APPROVE MINUTES** — August 4, 2021, by Kristina Uvalle (BG)
- 4) **CIRCULATION** —
  - a) Circulation Manual review (Click [here](#) for most recent version)
  - b) \* Unique ID Field Patron Reg Data Entry Standard (SLO)
  - c) \*SUSPEND Patron types (PR)
- 5) **ILL** —
- 6) **TECHNICAL** —
  - a) Discuss/Review Aspen installation
  - b) \*Aspen Transitional Web Pages
  - c) \*Polaris upgrade training – review documentation  
[What's New Polaris 6.7](#)  
[What's New Polaris 7.0](#)  
[Polaris 7.0 – Known Issues](#)
  - d) Polaris upgrade Production - October 23<sup>rd</sup>
- 7) **ONGOING DISCUSSION ITEMS**
  - a) What Technology vendor(s) are you in discussions with for your library? —
  - b) Are any new installs of technology hardware planned? —
  - c) PCI Informational Minute
- 8) **BLACK GOLD UPDATE**
- 9) **ROUNDTABLE**
- 10) **ITEMS TO BE FORWARDED** — (To Council or other committees)
- 11) **AGENDA BUILDING**
- 12) **NEXT MEETING** — 10:00 a.m., Wednesday, October 6, 2021 – Webinar

### **13) ADJOURNMENT**

Distribution — email notice of web-posted agenda packet (available at [www.ats.blackgold.org](http://www.ats.blackgold.org)): Karen Christiansen, PR; Marci Cunningham, SLO; Selena Fierro, SM; Joanne Britton SM; Dominic Keen, Donn Adolfo, LM; Alain Dussert, Molly Wetta, SB; Marie Crusinberry GO; Justin Formanek SP; Kim Hunter, ATS; Matt Duhon, ATS; Glynis Fitzgerald, BG; Directors [File Copy];

**AUTOMATION AND TECHNICAL SERVICES  
(ATS) OPERATIONS COMMITTEE MINUTES  
August 4, 2021– 10:00 a.m.  
Video Webinar – ATS Ops**

Attending: Karen Christiansen, PR; Marci Cunningham, SLO; Selena Fierro, SM; Alain Dussert, Kathleen Kosiec, SB; Marie Crusinberry, Brent Field, GO; Justin Formanek SP; Kim Hunter, ATS; Matt Duhon, ATS; Glynis Fitzgerald, Kristina Uvalle, BG

\* Item accompanies the agenda

**1) 10:05 A.M. CALL TO ORDER** Kim Hunter, Chair, Presiding  
Recorder; Kristina Uvalle (BG)

**2) ADOPT AGENDA** — 1<sup>st</sup> SF/2<sup>nd</sup> KC

**3) \*APPROVE MINUTES** — July 7, 2021, by Kristina Uvalle (BG) – 1<sup>st</sup> AD/ 2<sup>nd</sup> SF

**4) CIRCULATION** –

a) Circ Manual review - [07.28.21 Update](#)

Additional changes to the Circ Manual were submitted by PR and others. Changes will be updated the Circ Manual DRAFT and reviewed at the September ATS meeting for approval and forwarding to the Admin Council for final approval.

b) Item Moratorium Update

PR - Opting out of the moratorium

SLO – Retroactive to the last 5 months. Has a new ordering plan in place to accommodate moratorium going forward. Including everything with a published date of 2021.

SM – No retroactive moratorium. Updated on-order templates to accommodate starting in July. Everything new except donations.

LM – n/a

GV – No retroactive moratorium. Updating templates and will start with July orders. Everything new.

SB – Retroactive to April. On-order templates in place. Everything new.

SP – No retroactive moratorium. Starting with July orders. Everything new.

c) \*eCard verbiage for Aspen – Agreed to use option #2 with the following changes: remove parenthesis, alphabetize the libraries, change to Goleta & Santa Ynez Valley Libraries. BG staff will make changes to Aspen.

d) \*Reading History verbiage for Aspen – Agreed to use option #2. BG staff will make changes to Aspen.

**5) ILL – N/A**

**6) TECHNICAL** —

a) Discuss/Review Aspen installation – KH reviewed status items for the Aspen upgrade. Discussing with Bywater the possibility of staggering updates to the training and production server to identify any problems before they affect patrons. Review how to create the Top 50 list using the 'sort' feature "number of holds". Prior Reading History has been updated PIN reset is working (Selena – SM verified during meeting), Masquerade is now working. Comprise is still in the testing phase. Teresa is currently working through format issues.

SLO – Using the Aspen checklist. So far positive feedback from staff. Still fine tuning some issues.

SM – Happy with it. Waiting for the greenlight from BG to go live.

GV – Still testing. Hoping to get it closer to perfect but waiting for BG to give the ok to go live.

SP – Ready. Waiting for ok from BG

SB – City of SB is requiring everything to have a Spanish translation. Feels there are too many items still in English. Number of “Unknown items” is still too high for comfort. Looking at months before ready to go live.

- b) Training upgrade date August 27<sup>th</sup> - ([Polaris 7.0](#))

KH(BG) reported documentation for Polaris 7.0 is up on the ATS website. Training up grade will happen in August and looking a production upgrade to happen in late September or early October.

## **7) ONGOING DISCUSSION ITEMS**

- a) What Technology vendor(s) are you in discussions with for your library? — PR is changing its print station set-up to allow for larger print jobs. Patrons will be able to pay with a credit card. SB received a Broadband grant that will allow them to upgrade the internet at both Central and Eastside locations. Retiring current Ubiquity systems.
- b) Are any new installs of technology hardware planned? —
- c) PCI Informational Minute – MD (BG) Review the importance of not sharing information, password security and to guard work credentials from social engineering threats.

## **8) BLACK GOLD UPDATE**

GF – No group meeting with Aspen tomorrow.

MD – Cuyama and Los Alamos are still in the works to receive Cenic connections. Possibly the end of August for Cuyama and the end of the year for Los Alamos.

KH – Working on Aspen testing and Polaris reports.

## **9) ROUNDTABLE N/A**

## **10) ITEMS TO BE FORWARDED — (To Council or other committees)**

## **11) AGENDA BUILDING – Circ Manual review**

## **12) NEXT MEETING — 10:00 a.m., Wednesday, September 1, 2021 – Webinar**

## **13) ADJOURNMENT – 11:59 am 1<sup>st</sup> KC/ 2<sup>nd</sup> AD**

Distribution — email notice of web-posted agenda packet (available at [www.ats.blackgold.org](http://www.ats.blackgold.org)): Karen Christiansen, PR; Marci Cunningham, SLO; Selena Fierro, SM; Joanne Britton SM; Dominic Keen, Donn Adolfo, LM; Alain Dussert, Molly Wetta, SB; Marie Crusinberry GO; Justin Formanek SP; Kim Hunter, ATS; Matt Duhon, ATS; Glynis Fitzgerald, BG; Directors [File Copy];

<b>TOPIC:</b>	Unique ID Field Patron Reg Data Entry Standard		<b>PRIORITY LEVEL: (1-Low 3 – High)</b>	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input checked="" type="checkbox"/> 3	
<b>SUBMITTED BY:</b>					
<b>TYPE OF ITEM:</b>	<input checked="" type="checkbox"/> For Discussion <input type="checkbox"/> For Recommendation <input type="checkbox"/> Other: _____				
<b>BACKGROUND STATEMENT</b>					
<b>BACKGROUND :</b> <i>Describe why you are bringing this item before the committee. What problem are you trying to solve?</i>	<p>Continue discussion on data entry standards for patron registration for unique ID to ensure efficient and accurate data entry, data security, and that the data is useful to help identify duplicate cards. I propose simplifying the data entry by using the last four digits and the alpha code to denote what type of ID.</p> <p>Examples next page.</p>				

**Driver's License**

1. Enter the last four digits of the number, followed by a space.
2. Enter the abbreviation of the issuing state, followed by **DL** to denote Driver's License, (with the exception of California which would be entered as CDL). Do not place a space between the two (i.e. AZDL, not AZ DL).

**9760 CDL****1721 WADL****State ID**

Follow the same entry procedure as Driver's License; use **ID** to denote identification.

**9760 CID****Military ID**

1. Enter the last four digits of the number, followed by a space, then **MLID**

**0628 MLID****Alien Resident Number**

1. Enter the last four digits of the number, followed by a space
2. Enter **INSID** (Immigration & Naturalization Identification) and the issuing country.

**0497 INSID Mexico****Passport Number**

1. Enter the last four digits of the number, followed by a space.
2. Enter **PPN**, followed by a space.
3. Enter the country of origin, or the country's abbreviation (e.g. **USA**).

**9023 PPN USA****4568 PPN FRA****Border Crossing Card**

1. Use the back of the card (no photo)
2. Use the last four digits of the number at the bottom on the first line beginning with MEX

**MEX 6789****Matricula Consular**

1. Enter the last four digits of the number in the lower right corner on the picture side of the ID location below the expirations date followed by a space
2. Enter the country abbreviation followed by a space then **MAT CON**

**1244 MX MAT CON****Employment Authorization Document**

1. Use the front of the card (photo)
2. Under the name is a USCIS number. Enter the last four digits of the number followed by a space, then **USEA**

**1244 USEA**

<b>TOPIC:</b>	New Patron Type(s)	<b>PRIORITY LEVEL:</b> (1-Low 3 – High)	<input type="checkbox"/> 1 <input checked="" type="checkbox"/> 2 <input type="checkbox"/> 3
<b>SUBMITTED BY:</b>			
<b>TYPE OF ITEM:</b>	<input type="checkbox"/> For Discussion <input checked="" type="checkbox"/> For Recommendation <input type="checkbox"/> Other: _____		
<b>BACKGROUND STATEMENT</b>			
<b>BACKGROUND:</b> <i>Describe why you are bringing this item before the committee. What problem are you trying to solve?</i>	<p>Sometimes we want to limit a patron's access to certain services such as the public internet computer or the ability to check out items (or both) without removing their account from our patron database. We do not want to remove the account for a variety of reasons, but mainly so they can't turn around and get a new account the next day (thereby beginning the behavior that led to their access being limited in the first place). Polaris does not have a good way to do this that would prevent them from logging on to the public internet computers while still allowing them to use library materials. We would like to propose that a new patron type (or perhaps several patron types to accommodate various scenarios) be created for the purpose of limiting patron's library account access.</p> <p>We propose these patron types:          SUSPENDED: The patron account is inactive for all library activity.          SUSPENDED INTERNET: The patron is able to use library materials, but will not be able to access the public internet computers. (This is the patron type we are MOST interested in here in Paso Robles)          SUSPENDED MATERIALS: The patron is able to use the public internet computers, but cannot check out materials.</p> <p>These SUSPENDED patron types do not prevent patrons from using the eLibrary.</p>		
<b>OUTCOME(S)</b>			
<b>DESIRED OUTCOME(S):</b> <i>Describe your desired outcome(s)</i>	At a minimum, the SUSPEND INTERNET patron type will be accepted by the group so that patrons who are exempt from public internet computer use are denied access. To cover all possible types of suspensions, SUSPEND and SUSPEND MATERIALS patron types are also accepted.		
<b>OTHER COMMENTS:</b>			

<b>OUTCOME(S)</b>	
<b>DESIRED OUTCOME(S):</b> <i>Describe your desired outcome(s)</i>	Update data entry standards in Circ Manual with clear, easy to follow standards.
<b>OTHER COMMENTS:</b>	





<b>TOPIC:</b>	Aspen Transitional Web Pages	<b>PRIORITY LEVEL:</b> (1-Low 3 – High)	<input type="checkbox"/> 1 <input checked="" type="checkbox"/> 2 <input type="checkbox"/> 3
<b>SUBMITTED BY:</b>			
<b>TYPE OF ITEM:</b>	<input type="checkbox"/> For Discussion <input checked="" type="checkbox"/> For Recommendation <input type="checkbox"/> Other: _____		
<b>BACKGROUND STATEMENT</b>			
<b>BACKGROUND:</b> <i>Describe why you are bringing this item before the committee. What problem are you trying to solve?</i>	<p>We need to think about the presentation on the current Polaris PAC for patrons to transition to the individual library Aspen PAC pages.</p> <p>How does each library intend to announce the new catalog to their patrons?</p> <p>Until all libraries begin using the Aspen PAC, we must maintain blackgold.org on the Polaris PAC. Assuming that patrons continue to go to the blackgold.org Polaris PAC after your library has started using the Aspen PAC, libraries need to think about what they want on their Polaris Branch page as well as the Polaris Black Gold home page to announce the new “catalog look” and to guide the patron to Aspen.</p> <p>We have included samples:</p> <ol style="list-style-type: none"> <li>1) A suggestion for what a Branch page might look like in Polaris once your Aspen page is live (Santa Maria Branch page sample attached)</li> <li>2) The current Black Gold home page in the Polaris PAC</li> <li>3) A suggested Black Gold home page for the Aspen PAC at what will be blackgold.org once all libraries have transitioned to Aspen</li> </ol>		
<b>OUTCOME(S)</b>			
<b>DESIRED OUTCOME(S):</b> <i>Describe your desired outcome(s)</i>	<p>We need a recommendation for the shared Black Gold home page.</p> <p>Each library will need to determine what it’s Polaris branch page should say. We can discuss at the Ops meeting but you can make your decision independently and give the request to Kristina Uvalle.</p>		
<b>OTHER COMMENTS:</b>			

Library Info ▾

Search ▾

My Account ▾

Digital Resources ▾

Help ▾

## Digital Resources ▴

- Hoopla Digital
- Overdrive eBooks/Audiobooks
- Overdrive Magazines
- Enki eBooks
- Luna Digital Collections
- eBook/Audiobook Help

## Patron Resources ▴

- Black Gold Home Page
- Get a Library Card
- Obtenga una tarjeta de la biblioteca
- Top 50 Holds List
- Book Recommendation Lists
- Book Club in a Bag
- Download the Mobile App
- News and Research Databases
- Contact Us
- Other Library Catalogs
- Popular Websites
- Dewey Decimal System
- Donate Now!

## Frequently Asked Questions ▴

- Auto-Renew FAQs
- Hotspot FAQs
- Online Catalog FAQs

## New Titles ▴

Quick library search:

Limit by:

All formats ▾

To see what's available at your Library, please click on your library's logo below.

County of SLO  
Public Libraries

Our digital library collections remain available for your convenience 24/7.

Start here to search our digital catalog.



Our Digital Magazine Collection  
has moved to Overdrive.



Library Info ▾

Search ▾

My Account ▾

Help ▾

#### Digital Resources ▴

- Hoopla Digital
- Overdrive eBooks/Audiobooks
- Overdrive Magazines
- Enki eBooks
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#### Patron Resources ▴

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- Book Club in a Bag
- Download the Mobile App
- News and Research Databases
- Contact Us
- Other Library Catalogs
- Popular Websites
- Dewey Decimal System
- Donate Now!

#### Frequently Asked Questions ▴

- Auto-Renew FAQs
- Hotspot FAQs
- Online Catalog FAQs

Quick library search:

Limit by:

All formats ▾

Welcome  
Our catalog has a brand new look!

Click the link below to get started:

[Santa Maria Public Library Catalog](#)

Questions? Please call the Circulation Desk at 805-925-0994 ext. 8563.

Thank you!

Please click on your local library's website for current information and updates.



Our digital library collections remain available for your convenience 24/7.



# Welcome!

Each of our member libraries have designed a unique look to enhance your patron experience.

You will continue to have access to the materials available from all of our member libraries.

To get started, please select your library logo:



Our digital library collections remain available for your convenience 24/7.

Start here to search our digital catalog:



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## Polaris Installation Notes

**Important:**

When the new Polaris release is installed on a workstation, the file path changes from 6.6 to 6.7 as in the following examples:

C:\ProgramData\Polaris\6.7  
C:\Program Files\Polaris\6.7  
C:\Program Files (x86)\Polaris\6.7

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# Known Issues for Polaris 7.0

## Known Issues List

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We consider the following conditions necessary when posting a new Known Issue:

- The issue was reported by a customer to the Help Desk and sent to our Software Engineering team as a product defect.
  - At minimum, one library has reported the issue and our staff can replicate on an Innovative test machine. In all cases, we aim to provide consistently updated information that includes a description of the issue, the software version in which the problem was found, and when applicable, the version including the coded resolution.
- 

### Issues Reported in This Release

#### LEAP (3)

##### **Leap allows 3-digit patron passwords when using the Reset Password option**

Description: While the help files state that patron passwords must be at least 4 characters, staff are able to save a patron record with a 3 character password when using the "reset password" option in Leap.

Reported In: Polaris 7.0

Reference: POL-11711

##### **Error message when updating Hold Request Expiration Date in Leap**

Description: Staff have reported that when they attempt to update the Expiration Date in the hold request workform via the calendar picker, Leap displays the "We're sorry. An unexpected error has occurred" message.

Reported In: Polaris 7.0

Reference: POL-11710

##### **HTTPS Only SQL Server Reporting Services (SSRS) Not Loading Print Notices in Leap**

Description: If SSRS is set to HTTPS only and configured under the Report Server settings in System Administration, Leap is unable to load those reports so that they can be run by staff.

Reported In: Polaris 7.0

Reference: POL-11512

Fixed In: Polaris 7.1

## Issues Fixed in This Release

### API (1)

#### **PatronRegistrationCreate method no longer allows for creation of patron record when Postal Code does not exist in Polaris**

Description: When registering a patron through the API and the postal code utilized does not exist in Polaris, the API will return an error code stating the postal code / city (and county, if applicable) combination is incorrect.

Reference: POL-10785

### CATALOGING (4)

#### **Bulk changes to items tied to bibs with many items/holds slow to complete**

Description: Bulk editing items linked to bibliographic records linked to a large number of hold request or item records causes slowness in item editing via bulk or ad hoc bulk change.

Reference: POL-10937

#### **Unable to save updates to item records tied to bibs with large number of item records attached**

Description: When modifying an item record in Leap which is one of many items attached to a bib (1000+), and there are holds on the title (95+), the item record continues to load until it eventually times out.

Reference: POL-10782

#### **Slow item record creation when using the Create Item Records option within the bib record and using system assigned barcodes**

Description: When staff attempt to create new item records using the Create Item Records option in the Bibliographic Record and the option to utilize System Assigned barcodes is selected, Polaris is very slow to generate those items.

Reference: POL-10627

#### **Item bulk change error in Leap when Error record set is enabled**

Description: Item record bulk change in LEAP fails in record set if an error record set is defined. Several blank red toasts appear, and if user selects "Continue" more red toasts with no text appear, and the bulk change does not get processed.

Reference: POL-10416

### **ILL (1)**

#### **NCIP ILL requests generated with the default requesting branch instead of branch being passed**

Description: When a library is set to use decentralized processing and an ILL request is created, Polaris creates it using the default requesting branch rather than the branch passed by the third party.

Reference: POL-10993

### **LEAP (8)**

#### **Date filter in Find tool changes year when Month field is updated**

Description: When using the Patron Registration date filter date picker in the Patron Find Tool in Leap, selecting a different month will flip the year from the current year to 1900.

Reference: POL-11106

#### **Notes entered in the Reader Services view via Leap do not save**

Description: When a note is added to the Note field on the Readers Services / Outreach Services view of a patron record, the note does not save.

Reference: POL-11096

#### **Modification of Inactive ILL requests in Leap displays success message but does not save change**

Description: When modifying inactive ILL requests In LEAP, the system displays a success alert message, but modifications are not actually saved to the database.

Reference: POL-11088

#### **Save button displays in Leap for bibs pulled in over Remote Database connection even for those users without permission to create a bib record**

Description: The Save button is active and LEAP does not display a permission block when un-permissioned staff try to save a bibliographic record from a remote database.

Reference: POL-10809

#### **Pressing enter twice in Leap search results in 500 error**

Description: When conducting a search in Leap, if the user clicks the enter button twice, once to submit the search, and again immediately after while the search results are still loading, an error page will appear stating that the user was logged out.

Reference: POL-10625

### **Format dropdown disappears after unlocking a request in Leap**

Description: When placing a hold in Leap, if the hold request is unlocked, the Format dropdown list is missing.

Reference: POL-10549

### **Street Address field limited to 32 characters before save and refresh of record**

Description: The street address field in Leap is truncating at 32 characters when the street can support 64 characters.

Reference: POL-10474

### **Special Loan settings in Offline Leap do not apply to all check-outs in session**

Description: Special loan periods are not being applied to all patrons when configured in settings using Leap Offline.

Reference: POL-10462

## **REPORTING (1)**

### **SimplyReports returns errors when set to HTTPS and TLS 1.0 is disabled**

Description: When TLS 1.0 is disabled and SimplyReports URL are set to HTTPS. Reports will error with: The underlying connection was closed: An unexpected error occurred on a receive.

Reference: POL-11084

**Keywords** Acquisitions, Cataloging, Circulation, PAC, Known Issues

**Solution ID**

210618090116173

**Last Modified Date**

08/09/2021 04:05:20 PM

**Author**

jesse.jensen@iii.com

**Taxonomy**

- Known Issues > Polaris

**Collections**

- Polaris

[Go to Original Solution](#)