



What's New in Polaris and Leap

7.6

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Polaris Installation Notes

Important:

When the new Polaris release is installed on a workstation, the file path changes from 7.5 to 7.6 as in the following examples:

- C:\ProgramData\Polaris\7.6
- C:\Program Files\Polaris\7.6
- C:\Program Files (x86)\Polaris\7.6

New or Modified Polaris Administrative Settings

The system administration settings below have been added or modified to support the new features in Polaris 7.6.

Setting	Purpose	Level
New Parameters		
Notification > Notification options > Display SMS terms	Specifies whether Polaris displays an opt-in message in the PAC when a patron chooses to receive text message notifications. For details, see Enabling the SMS Opt-In Message .	System
Notification > Notification options > Enhanced profile	Determines whether Polaris uses the standard profile or the enhanced profile when exporting notices. For details, see Using the Enhanced Profile for Notices .	System
Patron Services > Overdues: Prompt for claimed items	Determines whether Leap displays the Claimed Item Overdue Charges dialog when you check in a claimed item that is also overdue. Users with permission can waive overdue fines for claimed items at check-in. For details, see Checking in Claimed Items without Charging Overdue Fines .	System, Library, Branch
Request > Holds options > Suppress none option	Determines whether the "None" option appears in pickup area lists. For details, see Suppressing the Pickup Area Option of None .	System
SelfCheck Unit > Polaris SelfCheck: Blocking conditions > Block the checkout if	Determines if the Polaris API endpoint ItemCheckoutPost continues to renew an item when the patron leaves an item on or near the RFID scanner. For details, see	System, Library, Branch

Setting	Purpose	Level
the item > Is a Renewal (API)	Polaris API Changes or search for "ItemCheckoutPost" in the Polaris API Guide.	
New Permissions		
Access bulk waive: Allow	Access the Bulk Waive Fines view of the Background Processing workflow in Leap. For details, see Bulk Waiving Fines in Leap .	System
Fines: Waive fines via claimed item charges prompt	Waive overdue fines when checking in a claimed item in Leap. This permission allows a user to select No on the Claimed Item Overdue Charges dialog. For details, see Checking in Claimed Items without Charging Overdue Fines .	System, Library, Branch
New Profiles		
Acquisitions/Serials > API: Use fund name	Determines if the Polaris API endpoint JobsPurchaseOrdersResultGet returns the Fund name (Yes) or the Alternate Fund name (No). The default is No. For details, search for "JobsPurchaseOrdersResultGet" in the Polaris API Guide.	System, Library, Branch
Staff Client > Web App: Patron External Database UDF	Used for linking from Leap patron records to external patron data. This setting determines which user-defined field (UDF) in the patron record stores the unique string that identifies the patron in the external database. For details, see Linking from Patron Records in Leap to External Patron Data .	System, Library, Branch
Staff Client > Web App: Patron External Database URL	Used for linking from Leap patron records to external patron data. This setting specifies the base URL of the external	System, Library, Branch

Setting	Purpose	Level
	database. For details, see Linking from Patron Records in Leap to External Patron Data .	
Staff Client > Web App: Suppress Link: Patron External Database	Used for linking from Leap patron records to external patron data. This setting determines whether links to external patron data appear on the patron record workform in Leap. For details, see Linking from Patron Records in Leap to External Patron Data .	System, Library, Branch
New Policy Table		
Patron Payment Methods	Defines the payment methods that are available when patrons pay charges in Leap or in the Polaris staff client. For details, see Using Additional Payment Methods .	System
Modified Parameters		
Notification > Notification options	You can now configure the Notice interval setting to send the first overdue notice on the same day an item becomes overdue. For details, see Sending Same Day Overdue Notices .	System, Library, Branch
Request > Holds: Enable asynchronous RTF routing threshold	This parameter determines whether Polaris performs asynchronous or real-time RTF processing on titles with a high volume of hold requests. The parameter is now set to Yes by default, and Polaris performs asynchronous RTF processing (that is, processing takes place in a background job). This improves performance for handling titles with many active or pending hold requests. If your	System

Setting	Purpose	Level
	library wants to use real-time RTF processing for all hold requests, set this parameter to No.	
Modified Policy Table		
Transaction Logging	You can now configure Polaris to log transactions when staff members create, modify, or delete bulk waive criteria. The Transaction Logging database table contains the following new transaction types: Bulk waive criteria deleted, Bulk waive criteria created, Bulk waive criteria modified. For details, see Bulk Waiving Fines in Leap .	System, Library, Branch
Modified Profile		
Acquisitions/Serials > Route List Defaults	The Printing setting, which determines whether route slips are printed in batch or automatically, now applies to Leap as well as to the Polaris staff client. For details, see Printing a Route Slip for Serials .	System, Library, Branch

Polaris API Changes

The following methods have been added or updated:

Method Name	Purpose
BibKeywordSearch	Return a list of bibliographic records that match the search criteria. Modified so that the "limit" query parameter is no longer restricted to the values returned by the LimitFiltersGet endpoint.
BibGet Version 1	Return bibliographic information for a specified record.
BibGetByType Version 2	Return bibliographic information for a specified item's key and type of key.
BibsPost	Import MARC records to create and overlay bibliographic records in Polaris. An import job is created for each post. By default, Polaris attempts to match the incoming 001 tag to an existing bibliographic record ID. If Polaris finds a match, it modifies the existing record. If Polaris does not find a match, it creates a new bibliographic record.
PatronRegistrationCreate Version 1	Create a new patron registration record.
PatronRegistrationCreate Version 2	Create a new patron registration record, modified to accept multiple patron addresses.
PatronRegistrationUpdate Version 1	Update patron registration information.
PatronRegistrationUpdate Version 2	Update patron registration information, modified to contain multiple patron addresses.
ILLRequestPost	Start the ILL request process. This process is based on a "messaging" system and will allow

Method Name	Purpose
	a Polaris patron to place an ILL request.
ItemCheckoutPost	<p>Check out an item as a patron.</p> <p>This endpoint is modified so that it automatically tries to renew an item if the specified patron currently has the item checked out, unless the transacting branch has renewals blocked in Polaris Administration (staff client). Parameters > SelfCheck Unit > Polaris SelfCheck: Blocking conditions > Item blocks tab > Block the checkout if the item > Is a renewal (API).</p> <p>The modification solves the problem of Polaris using all of a patron's renewals if the patron accidentally leaves the item on or near the RFID sensor for too long.</p>
NotificationUpdate	This endpoint is modified so that cancellation notices no longer require RequestID in the Details tag.

For more information, see the topic for the method in the PAPI documentation.

Polaris API Versions

Polaris API now includes version one and version two for certain endpoints. Version one is the original unchanged endpoint. Version two of the endpoint includes changes to the original endpoint that would otherwise break the original endpoint's functionality. For example, PatronRegistrationCreate version one creates a new patron registration record. PatronRegistrationCreate version two does the same thing, but the request body is modified to accept multiple patron addresses.

The following endpoints were split to create a version one and version two:

- BibGet version one: Return bibliographic information for a specified record.
- BibGetByType version two: new endpoint – Return bibliographic information for a specified record, and you can search by bibliographic ID or item barcode.
- PatronRegistrationCreate version one: Create a new patron registration record.
- PatronRegistrationCreate version two: new endpoint – Create a new patron registration record request body modified to accept multiple patron addresses.
- PatronRegistrationUpdate version one: Support patron requests to change their registration data, including address, former barcode, language preference, user-defined fields, and others.
- PatronRegistrationUpdate version two: new endpoint – Update patron registration request body modified to allow you to add multiple patron addresses.

Using Bibliographic Search API Endpoints with Ad Hoc Filters

You can now connect to the BibKeywordSearch and BibBooleanSearch endpoints in Polaris API and create a query that is not limited to values returned by the LimitFiltersGet endpoint. The queries you create must follow Common Command Language (CCL) syntax, but are no longer limited to predefined queries. This was a winner in the "Let's Connect API" challenge.

Bulk Waiving Fines in Leap

You can now waive multiple outstanding patron charges in a single bulk waive process.

You can bulk waive fines in Leap if you have the **Access bulk waive: Allow** permission enabled in Polaris Administration (staff client). For more information about permissions for waiving patron fines, search for "Circulation and Patron Services Workflow Permissions" in the Polaris staff client help.

This section covers the following topics:

- [Creating Bulk Waive Criteria and Scheduling the Waive Process to Run](#)
- [Previewing Bulk Waive Results](#)
- [Editing Bulk Waive Criteria](#)
- [Deleting Bulk Waive Criteria](#)
- [Viewing the Bulk Waive History](#)
- [About Bulk Waive Processing](#)
- [Logging Bulk Waive Criteria Transactions](#)

Creating Bulk Waive Criteria and Scheduling the Waive Process to Run

To perform a bulk waive, you must first create a set of bulk waive criteria that Leap uses to identify the charges to waive. For example, you could create a set of bulk waive criteria to waive all overdue fines that were charged before January 1, 2020 for patrons with a patron code of Juvenile.

To create a set of bulk waive criteria

1. Select **Utilities > Background Processing**.
The Background Processing workform appears.
2. Select the **Bulk Waive Fines** view.
3. Select **+ NEW**.
The New Bulk Waive Criteria workform appears.

New Bulk Waive Criteria - 1 SAVE CLOSE

<p>Name</p> <input style="width: 95%;" type="text"/>	<p>Owner</p> <input style="width: 95%;" type="text" value="QA-JADE 7.6 (sys)"/>
<p>Waive Note</p> <input style="width: 95%;" type="text"/>	<p>Scheduled</p> <input style="width: 95%;" type="text"/>

[Details](#)

Fine Details

Fee Reason <input type="checkbox"/>	Fine Age Older Than <input type="checkbox"/>	Owning Branch <input type="checkbox"/>
<input style="width: 95%;" type="text" value="(None)"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text" value="(None)"/>

Associated Patron Details

Patron Code <input type="checkbox"/>	Patron Last Activity Date Before <input type="checkbox"/>	Patron Branch <input type="checkbox"/>
<input style="width: 95%;" type="text" value="(None)"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text" value="(None)"/>

Associated Item Details

Collection <input type="checkbox"/>	Material Type <input type="checkbox"/>	Item Branch <input type="checkbox"/>
<input style="width: 95%;" type="text" value="(None)"/>	<input style="width: 95%;" type="text" value="(None)"/>	<input style="width: 95%;" type="text" value="(None)"/>

SQL Search

SQL Search Criteria

4. Enter a unique name for the bulk waive criteria set in the **Name** box.
5. Select an organization from the **Owner** list.

Note:
The organization you select appears in the list of saved bulk waive criteria on the **Bulk Waive Fines** view. Otherwise, this field is for your information only.

6. (Optional) Enter a note in the **Waive Note** box.

Note:
When you perform a bulk waive, Leap logs a transaction in the patron account for each charge waived. The note you enter here is

included in the waive transaction that appears on the **Transaction Summary** view of the patron account.

7. To schedule Leap to waive fines for this set of bulk waive criteria, select the **Scheduled** checkbox and select a date. Leap performs the bulk waive in an overnight process on the date you select. For more information about the processing that occurs, see [About Bulk Waive Processing](#).
8. Define the criteria that Leap uses to identify the charges to waive. To be waived by the bulk waive process, a charge must meet all the criteria you define. Select one or more of the following options:
 - **Fee Reason** – Waive charges associated with a particular fee reason. Select the **Fee Reason** checkbox and select one or more reasons from the list.
 - **Fine Age Older Than** – Waive charges applied before a particular date. Select the **Fine Age Older Than** checkbox and select a date.
 - **Owning Branch** – Waive charges associated with a particular owning branch. Select the **Owning Branch** checkbox and select one or more branches from the list.
 - **Patron Code** – Waive charges for a particular patron code. Select the **Patron Code** checkbox and select one or more patron codes from the list.
 - **Patron Last Activity Date Before** – Waive charges for patrons whose last activity was before a particular date. Select the **Patron Last Activity Date Before** checkbox and select a date.
 - **Patron Branch** – Waive charges associated with a particular patron branch (that is, the branch where a patron is registered). Select the **Patron Branch** checkbox and select one or more branches from the list.
 - **Collection** – Waive charges associated with a particular collection. Select the **Collection** checkbox and select one or more collections from the list.
 - **Material Type** – Waive charges associated with a particular material type. Select the **Material Type** checkbox and select one or more material types from the list.
 - **Item Branch** – Waive charges associated with a particular item branch. Select the **Item Branch** checkbox and select one or more branches from the list.

- **SQL Search Criteria** – Waive charges defined by the SQL search criteria you enter. Enter a SQL query in the **SQL Search Criteria** box. The SQL query must be a select statement that returns charge transaction IDs. For more information, search for "Setting Up SQL Searches" in the Polaris staff client help.

Sample SQL query:

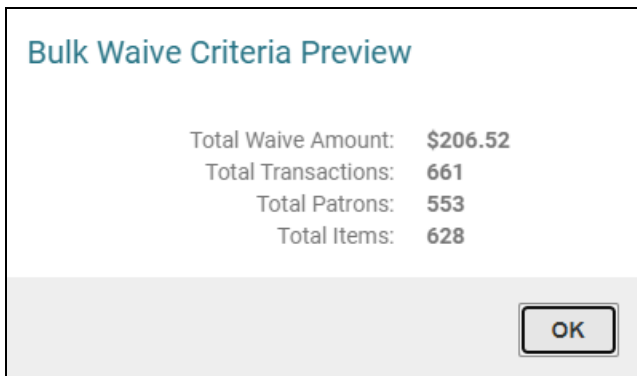
```
SELECT TxnID FROM PatronAccount WHERE  
OutstandingAmount > 0
```

9. (Optional) If you entered SQL search criteria in the **SQL Search Criteria** box, select **TEST CRITERIA** to test your SQL query.

Leap displays a message that tells you whether your SQL query is valid.

10. Select **SAVE**.

Leap saves the bulk waive criteria and displays a quick preview of the charges that would be waived if you ran the bulk waive process immediately.



Note:

You can also see a more detailed preview of bulk waive results. For more information, see [Previewing Bulk Waive Results](#).

Previewing Bulk Waive Results

You can preview the results of a bulk waive process before you run it. The preview shows you the total number of charges that would be waived, the total value of the

charges that would be waived, and provides additional details about each charge.

Note that the preview shows you information about the charges that would be waived if you ran the bulk waive process immediately. When the bulk waive process actually runs, it waives the charges that meet the bulk waive criteria at that time.

To preview bulk waive results

1. Select **Utilities > Background Processing**.

The Background Processing workform appears.

2. Select the **Bulk Waive Fines** view.
3. (Optional) Enter text in the **Filter** box to filter the list of bulk waive criteria.
4. Select the checkbox next to the bulk waive criteria you want to preview.
5. Select **PREVIEW**.

Leap displays a preview of the bulk waive results.

Bulk Waive Processing Preview					
Criteria ID: 177		Preview Date: 4/4/2024 10:29:56 AM		Job ID: 609	
Criteria Name: April 2024 bulk waive			Total Waive Amount: \$21.74		
Criteria Note:			Total Transactions: 8		
Owner: QA-JADE 7.6			Total Patrons: 8		
			Total Items: 1		
			Total Errors: 0		
Txn ID	Txn Date	Waive Amount	Fee Reason	Patron Barcode	Item Title
3810587	11/8/2016 11:08:19 AM	\$2.50	Hold Request	1001900149870	Shackleton.
3589231	10/24/2008 11:51:30 AM	\$3.00		1000201004560	
3018567	11/3/2007 3:58:01 PM	\$5.00		1000800062720	
862486	12/6/2005 11:10:11 AM	\$0.25		1000200051075	
3616265	8/9/2010 11:02:22 AM	\$3.69		1000200023470	
3616114	8/6/2010 9:44:42 AM	\$2.00		1000500071567	
3589359	10/29/2008 3:52:20 PM	\$4.30		1001600024076	
3589328	10/28/2008 3:17:59 PM	\$1.00		1004100027060	

Editing Bulk Waive Criteria

To edit bulk waive criteria

1. Select **Utilities > Background Processing**.
The Background Processing workform appears.
 2. Select the **Bulk Waive Fines** view.
 3. Edit bulk waive criteria. See [Creating Bulk Waive Criteria and Scheduling the Waive Process to Run](#) for more information about bulk waive criteria fields.
 4. Select **SAVE**.
-

Deleting Bulk Waive Criteria

To delete bulk waive criteria

1. Select **Utilities > Background Processing**.
The Background Processing workform appears.
 2. Select the **Bulk Waive Fines** view.
 3. Select the checkbox next to the bulk waive criteria you want to delete.
 4. Select **DELETE**.
Leap displays the Delete Bulk Waive Criteria Record dialog that prompts you to confirm the deletion.
 5. Select **YES**.
Leap deletes the bulk waive criteria.
-

Viewing the Bulk Waive History

You can view information about bulk waive processes that have been run in the past. There are two ways to view bulk waive history:

- [Viewing the Most Recent Bulk Waive Processing Report](#)
- [Viewing the Complete Bulk Waive History](#)

Viewing the Most Recent Bulk Waive Processing Report

To view the most recent bulk waive processing report

1. Select **Utilities > Background Processing**.
The Background Processing workform appears.
2. Select the **Bulk Waive Fines** view.
3. Select the checkbox next to a set of bulk waive criteria.
4. Select **REPORT**.

Leap displays a report that lists the fines that were waived the last time a bulk waive process was run using this set of bulk waive criteria.

Bulk Waive Processing Report					
Criteria ID: 150	Run Date: 3/14/2024 8:23:10 AM	Job ID: 365			
Criteria Name: Multiple Item Branches test			Total Waive Amount: \$10.25		
Criteria Note: Mix Waiver Criteria			Total Transactions: 5		
Owner: QA-JADE 7.6			Total Patrons: 5		
			Total Items: 5		
			Total Errors: 0		
Txn ID	Txn Date	Waive Amount	Fee Reason	Patron Barcode	Item Title
121029	8/14/2002 12:00:00 AM	\$0.25	Hold Request	1000600811011	Desecration : [large print] Antichrist takes the throne
3915511	2/26/2020 9:52:55 AM	\$2.00	Hold Request	1000401630412	The bee sneeze.
3859176	3/12/2019 9:18:40 AM	\$2.50	Hold Request	357575	Hoppy the toad
3950105	10/4/2023 3:54:51 PM	\$5.25	Borrow By Mail Charge	PACREG383132	At the plate with-- Mark McGwire
2299273	3/22/2007 7:59:51 PM	\$0.25	Hold Request	1000601036600	Jeremy Bean's St. Patrick's Day

Viewing the Complete Bulk Waive History

To view the complete bulk waive history

1. Select **Utilities > Background Processing**.

The Background Processing workflow appears.

2. Select the **Bulk Waive Fines** view.

3. Select a set of bulk waive criteria.

The Bulk Waive Criteria workflow appears.

4. Select the **History** tab.

Leap displays a table that lists information about each time a bulk waive process was run using this set of bulk waive criteria.

RUN DATE	AMOUNT	NUMBER OF FINES	NUMBER OF PATRONS	NUMBER OF ITEMS	NUMBER OF ERRORS
3/25/2024 2:36:02 PM	\$0.00	0	0	0	0
3/25/2024 2:29:50 PM	\$10.50	3	2	3	0
3/25/2024 2:28:12 PM	\$0.00	0	0	0	0
3/25/2024 2:26:44 PM	\$42.50	17	3	17	0
3/25/2024 2:24:28 PM	\$126.00	63	28	62	0
3/25/2024 2:22:54 PM	\$1.50	1	1	1	0
3/1/2024 4:40:56 AM	\$2.90	17	15	7	0

5. Select a row to view the bulk waive processing report for a particular process run

date.

Bulk Waive Processing Report					
Criteria ID: 150	Run Date: 3/14/2024 8:23:10 AM	Job ID: 365			
Criteria Name: Multiple Item Branches test	Total Waive Amount: \$10.25				
Criteria Note: Mix Waiver Criteria	Total Transactions: 5				
Owner: QA-JADE 7.6	Total Patrons: 5				
	Total Items: 5				
	Total Errors: 0				
Txn ID	Txn Date	Waive Amount	Fee Reason	Patron Barcode	Item Title
121029	8/14/2002 12:00:00 AM	\$0.25	Hold Request	1000600811011	Desecration : [large print] Antichrist takes the throne
3915511	2/26/2020 9:52:55 AM	\$2.00	Hold Request	1000401630412	The bee sneeze.
3859176	3/12/2019 9:18:40 AM	\$2.50	Hold Request	357575	Hoppy the toad
3950105	10/4/2023 3:54:51 PM	\$5.25	Borrow By Mail Charge	PACREG383132	At the plate with-- Mark McGwire
2299273	3/22/2007 7:59:51 PM	\$0.25	Hold Request	1000601036600	Jeremy Bean's St. Patrick's Day

About Bulk Waive Processing

When you schedule a bulk waive, Leap waives charges in an overnight process on the date you select. For more information, search for the "CJ Bulk Waive Processing" SQL job in the Polaris staff client help.

The system does the following during bulk waive processing:

- Waives all charges that meet the bulk waive criteria.
- Logs a **Patron accounting waive** transaction for each charge that was waived.
- Logs each waive transaction in the **Transaction Summary** view of the patron account. If the bulk waive criteria include a waive note, the note appears in the transaction summary.
- Clears the **Scheduled** checkbox on the Bulk Waive Criteria workform. The bulk waive process does not run again until you schedule it again.

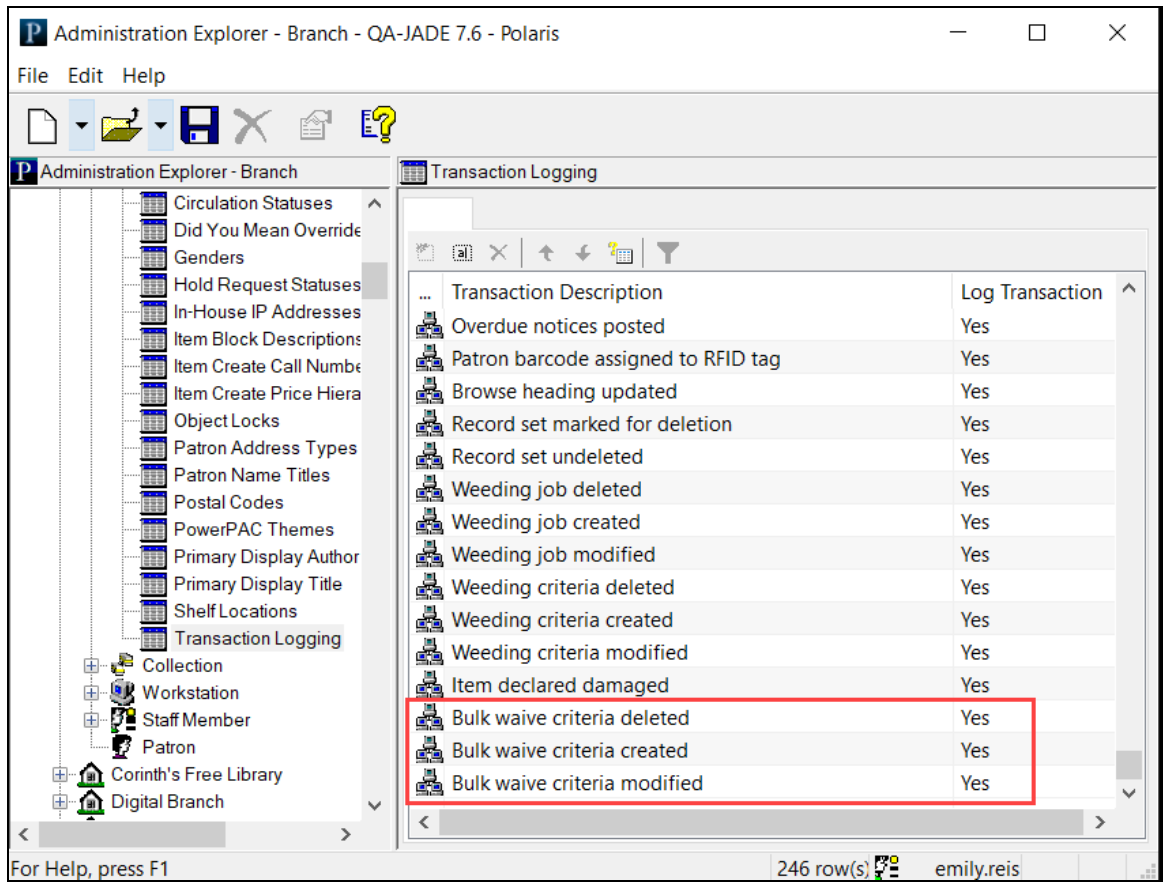
Logging Bulk Waive Criteria Transactions


You can now configure Polaris to log transactions when staff members create, modify, or delete bulk waive criteria in Leap.

To configure transaction logging for bulk waive criteria

1. In Polaris Administration (staff client), go to **Administration > Explorer**.
2. Select an organization level (**System, Library, or Branch**).
3. In the Administration Explorer, double-click the system, library, or branch name to expand the list.
4. Double-click **Database Tables** to expand the list.
5. Select **Transaction Logging**.

Polaris displays a list of transaction types. You can select the **Transaction Description** column heading to sort the list.



6. Double-click the **Bulk waive criteria deleted** transaction type, and set the **Log Transaction** value to **Yes** or **No**. By default, the value is set to Yes.
7. Double-click the **Bulk waive criteria created** transaction type, and set the **Log Transaction** value to **Yes** or **No**. By default, the value is set to Yes.
8. Double-click the **Bulk waive criteria modified** transaction type, and set the **Log Transaction** value to **Yes** or **No**. By default, the value is set to Yes.
9. Select **Save** .

Support for In-Line Editing for MARC Records in Leap

Leap now supports in-line editing for MARC records, which allows you to catalog bibliographic or authority records without using the mouse. (You can also still edit records using the mouse, if you prefer.)

Version 7.6 also includes an improved workflow for enabling or disabling the display of MARC format hints in the MARC editor.

This section covers the following topics:

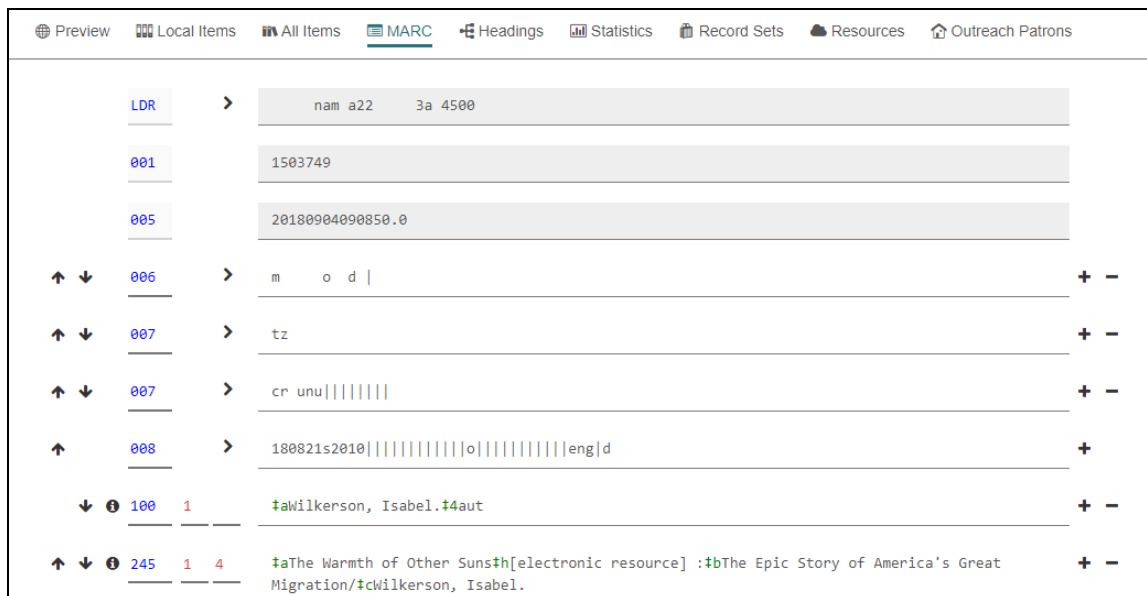
- [In-Line Editing in the Leap MARC Editor](#)
- [Configuring Leap to Display MARC Format Hints](#)

In-Line Editing in the Leap MARC Editor

Note:

You can edit bibliographic records in Leap if you have the **Bibliographic records: Modify permission** enabled in Polaris Administration (staff client). You can edit authority records if you have the **Authority records: Modify** permission. For more information about cataloging permissions, search for "Cataloging Permissions" in the Polaris staff client help.

In previous versions, you had to select a MARC field or tag and then select **Edit** to make changes. In version 7.6, you can place your cursor in the MARC field or tag you want to edit and immediately start typing to enter MARC data.



The table below lists the keyboard shortcuts you can use when editing bibliographic or authority records in version 7.6.

Action	Keyboard Shortcut
<p>Insert a new tag row below the current tag.</p> <p>If your cursor is currently in a control field (Leader, 006, 007, or 008), Leap adds a new control field row. If your cursor is in a data field tag (010–999), Leap adds a new data field tag row.</p>	Ctrl + I
<p>Delete the current tag.</p> <p>You cannot delete the 001 tag, the 005 tag, or any tag that your library has defined as a required tag. For more information about required tags, search for "Administering MARC Validation and Display" in the Polaris staff client help.</p>	Ctrl + D
<p>Move the current tag up.</p> <p>You cannot do the following:</p> <ul style="list-style-type: none"> • Move the Leader, the 001 tag, or the 005 tag • Move a control field (003, 006, 007, or 008) below a data field tag • Move a data field tag above a control field 	Shift + Up arrow

Action	Keyboard Shortcut
Move the current tag down. You cannot do the following: <ul style="list-style-type: none"> • Move the Leader, the 001 tag, or the 005 tag • Move a control field (003, 006, 007, or 008) below a data field tag • Move a data field tag above a control field 	Shift + Down arrow
Move your cursor up a row.	Ctrl + Up arrow
Move your cursor down a row.	Ctrl + Down arrow
Insert a subfield delimiter (‡).	Ctrl + Q
Open or close the current expanding field (Leader, 006, 007, or 008).	Ctrl + E
Close and save the current expanding field (Leader, 006, 007, or 008) after selecting values.	Ctrl + S
Display or hide MARC format hints for the current tag. (MARC format hints must be enabled in order to use this keyboard shortcut. For more information, see Configuring Leap to Display MARC Format Hints.)	Ctrl + H

Configuring Leap to Display MARC Format Hints

In previous versions, you had to modify a setting in Polaris Administration (staff client) to enable or disable the display of MARC format hints in the Leap MARC editor. In version 7.6, you can set this preference in Leap.

To configure Leap to display MARC format hints


1. In the Leap header, select your username.
2. Select **Settings**.

The Settings page opens.

3. Select the **Workform User Defaults** tab.
4. In the **Workforms: Default view** section, select the **Display hints** checkbox.

The screenshot shows the 'Settings' page with the 'Workform User Defaults' tab selected. The 'MARC Editor' section is highlighted with a red box, showing the 'Display hints' checkbox. Other settings include 'Check in' (Normal), 'Item record' (Circulation), 'Bibliographic record' (Preview), 'Background processing' (Bibliographic Bu), 'Request manager: Default status' (Active), 'Holds' (Active), 'ILL' (Not active), 'INN-Reach' (Active), 'Approval dashboard: Default status' (All), 'Weeding Requests' (All), 'Workform tracker: Recent records' (Patron: 2, Bibliographic: 2, Item: 2), 'Workforms: New item record' (Young Adult Non-fiction (Stillwater Public Library)), and 'Workforms: Item bulk change' (None).

5. Select **SAVE**.

When the **Display hints** setting is enabled, Leap displays an information icon  next to each tag number in the MARC editor. Select the icon to see information about the valid MARC subfield definitions for a tag. For example, when you select the information icon for the 245 tag in a bibliographic record, the following MARC hints appear.

(#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 / (#7) Data provenance / (#8) Field link and sequence number

Indicator One:
 (0) No added entry / (1) Added entry

Indicator Two:
 (0) Number of nonfiling characters / (1) Number of nonfiling characters / (2) Number of nonfiling characters / (3) Number of nonfiling characters / (4) Number of nonfiling characters / (5) Number of nonfiling characters / (6) Number of nonfiling characters / (7) Number of nonfiling characters / (8) Number of nonfiling characters / (9) Number of nonfiling characters

CLOSE CTRL+Q - Insert subfield delimiter (#)

Working with Item Templates in Leap

Using item templates, you can create item records quickly by reducing the number of fields you need to modify. The information in the item template is copied into every item record created with the template.

For example, if you identify the owning branch in the item template as Community Library and the assigned collection as Children's, a new item record based on the template has the same owning branch and assigned collection information.

This section covers the following topics:

- [Creating a New Item Template](#)
- [Finding an Existing Item Template](#)
- [Creating Items Using an Item Template](#)
- [Copying an Item Template](#)
- [Deleting an Item Template](#)

Creating a New Item Template

Note:

To create an item template, you need the following permissions:

- **Item Templates: Create** for the template-owning branch, allows you to save or copy the template
- **Use 'own' item templates** allows you to maintain the templates you create

To create a new item template

1. Select the **New** menu.
A dropdown menu appears.
2. Select **Template > Item**.

A blank New Item Template workflow appears with the Details view open.

3. Fill in the required fields: **Name** and **Owner**.
4. (Optional) Enter other values you'd like to duplicate when you create items from this template.

The Item Template workflow contains the same fields as the Item Record workflow. For information on the available fields, see [Modify an Item Record](#) in Leap help.

Note:

To be consistent with the Item Workflow, the Item Template workflow includes the Barcode field, but it is always disabled.

5. Select **SAVE**.

Finding an Existing Item Template

Note:

To find an item template, you need the following permissions:

- **Item Templates: Access** allows you to read the template.
- **Item Templates: Modify** allows you to open and edit the template.
- **Use 'own' item templates** allows you to maintain the templates you create.

To find an existing item template

1. Open the Find Tool.
2. Select **Item Template** as the search term.
3. Type a name in the search bar and select **Search**.
4. Select a line in the results and select **OPEN**.

Leap opens the Item Template workflow.

Creating Items Using an Item Template

You can use item templates to create items manually or automatically during background processes, such as:

- when an interlibrary loan (ILL) item is created. For more information, see [Create an item record from a bibliographic record](#).
- when a PO is released. For more information, see [Release a purchase order and generate on-order item records](#).

Copying an Item Template

Note:

To copy an item template, you need the following permissions:

- **Item Templates: Create** for the template-owning branch, this permission allows you to save or copy the template.
- **Use 'own' item templates** allows you to maintain the templates you create.

To copy an item template

1. [Find](#) or [create](#) an item template.
2. In the Item Template workflow, select the **ACTIONS** menu.
3. Select **Copy**.

The copy opens in a new Item Template workflow.

4. (Optional) To create a unique template from the copy, change the values and update the **Name** field.
5. Select **SAVE**.

Leap saves the new item template.

Deleting an Item Template

Note:

To delete an item template, you need the following permissions:

- **Item Templates: Delete** allows you to delete the template.
- **Use 'own' item templates** allows you to maintain the templates you create.

To delete an item template

1. [Find](#) or [create](#) an item template.
2. In the Item Template workflow, select the **ACTIONS** menu.

3. Select **Delete**.

The Delete Item Template dialog opens.

4. Select **CONTINUE** to delete the item template.

Leap deletes the item template and confirms the deletion with a notification.

Leap's Bulk Item Processing Is Now in the Background

Now when you submit an item bulk change in Leap, a background process performs the changes. This is similar to what Leap does when you perform patron bulk changes. Because Leap uses background processing, you can bulk change more items at the same time. Now you can track bulk change requests using a new **Item Bulk Change** view of the **Background Processing** workflow, so you no longer have to download or access the bulk change reports and delete reports that are no longer needed. For more information about item bulk changes in Leap, see [Making Ad Hoc Bulk Changes to Items](#).

New Ordered and In-Process Statuses for Item Bulk Change

The following statuses now appear in the Circulation Status list on the Item Record Bulk Change and Item Bulk Change Template workforms:

- In-Process
- On Order

The screenshot shows the 'Item Bulk Change Template' form. At the top, there is a title 'Item Bulk Change Template' with an information icon, and buttons for 'SAVE', 'ACTIONS', a refresh icon, a print icon, and 'CLOSE'. Below the title, there are two input fields: 'Name' (containing 'Bulk Change Template 171717') and 'Owner' (a dropdown menu showing 'Amsterdam Free Library (br)').

Below these fields is a navigation bar with tabs: 'Location', 'Circulation' (which is active), 'Call Number', 'Blocks and Notes', and 'Miscellaneous'. The main content area is divided into two columns. The left column contains a 'Circulation Status' dropdown menu, which is highlighted with a red box. The dropdown menu is open, showing a list of options: 'In', '(No change)', 'Basement', 'In', 'In-Process' (which is highlighted in blue), 'In-Repair', 'Missing', 'On Order', 'Unavailable', and 'Withdrawn'. The right column contains three input fields: 'Fine Code' (containing '1.00/5.00'), 'Statistical Code' (containing 'Adult/YA Nonfiction'), and 'Renewal Limit' (containing '10' and a checked checkbox).

This change makes it easier to process item records when you order materials from suppliers that do not support EDI ordering workflows.

Making Ad Hoc Bulk Changes to Items

Using Leap, you can now change details in multiple item records as necessary without creating a record set first. You can bulk-change item records from the following places:

- [Bibliographic Record](#)
- [Find Tool](#)

After you submit an ad hoc bulk change for items, Leap creates a bulk change report. For more information, see:

- [Viewing the Bulk Change Report](#)
- [Deleting a Bulk Change Report](#)

Bibliographic Record

To bulk-change item records from the bibliographic record

1. In Leap, go to the Find Tool.
2. Search for a bibliographic record and select one in the search results.
3. Select **OPEN**.

The Bibliographic Record workflow appears.

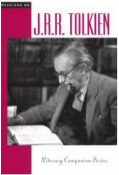
4. Select the **All Items** view.

The All Items view displays a table listing each item linked to the bibliographic record.

Bibliographic Record ⓘ

SAVE ACTIONS LINKS REFRESH RESULTS CLOSE

Readings on J.R.R. Tolkien



Control number: 419083 Owner: QA-JADE 7.6 (sys)

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

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

NEW ITEM BULK CHANGE Filter Items

<input type="checkbox"/>	ASSIGNED BRANCH	COLLECTION	MATERIAL TYPE	SHELF LOCATION	CALL NUMBER	STATUS	BARCODE	LAST ACTIVITY	RECORD STATUS	CONTROL NUMBER
<input checked="" type="checkbox"/>	Saratoga Springs Public Library	Adult Nonfiction (ANF)	Book		828.09 Rea	In	0000202543641	6/23/2005	Final	165996
<input checked="" type="checkbox"/>	Schenectady Branch - Central	Adult Nonfiction (ANF)	Book		823 T64zrea	In	0000410562243	2/20/2007	Final	696754
<input type="checkbox"/>	Waterford Public Library	Adult Nonfiction (ANF)	Book		828 Rea	In	0000900341439		Final	1371712

Items per page: 100 1 - 3 of 3 |< < > >|

5. Select the checkbox beside each item in the table that you want to change.

6. Select **BULK CHANGE**.

The Item Record Bulk Change workform appears.

7. Edit data on the Item Record Bulk change workform.

For details, see [Edit Data on the Item Record Bulk Change Workform](#).

8. Select **UPDATE ITEMS**.

The Summary of Changes dialog appears.

Summary of Changes

This bulk change process will attempt to change 2 item record(s).

Record set name:	Ad Hoc bulk change: no record set selected
Record set owner:	Ad Hoc bulk change: no record set selected
Error record set name:	
Error record set owner:	

Assigned collection: Young Adult Fiction (YAF)

Once made, these changes cannot automatically be undone.

CONTINUE CANCEL

9. Select **CONTINUE**.

Leap schedules the changes, enters a Bulk Change report, and returns you to the Bibliographic Record workform. You might need to refresh the Bibliographic Record workform before you see your most recent changes.

Find Tool

To bulk-change item records from the Find Tool

1. In Leap, go to the Find Tool.
2. Search for item records and select several in the search results.
3. Select **BULK CHANGE**.
The Item Record Bulk Change workform appears.
4. Edit data on the Item Record Bulk change workform.
For details, see [Edit Data on the Item Record Bulk Change Workform](#).
5. Select **UPDATE ITEMS**.
The Summary of Changes dialog appears.

Summary of Changes

This bulk change process will attempt to change 2 item record(s).

Record set name:	Ad Hoc bulk change: no record set selected
Record set owner:	Ad Hoc bulk change: no record set selected
Error record set name:	
Error record set owner:	

Assigned collection: Young Adult Fiction (YAF)

Once made, these changes cannot automatically be undone.

CONTINUE CANCEL

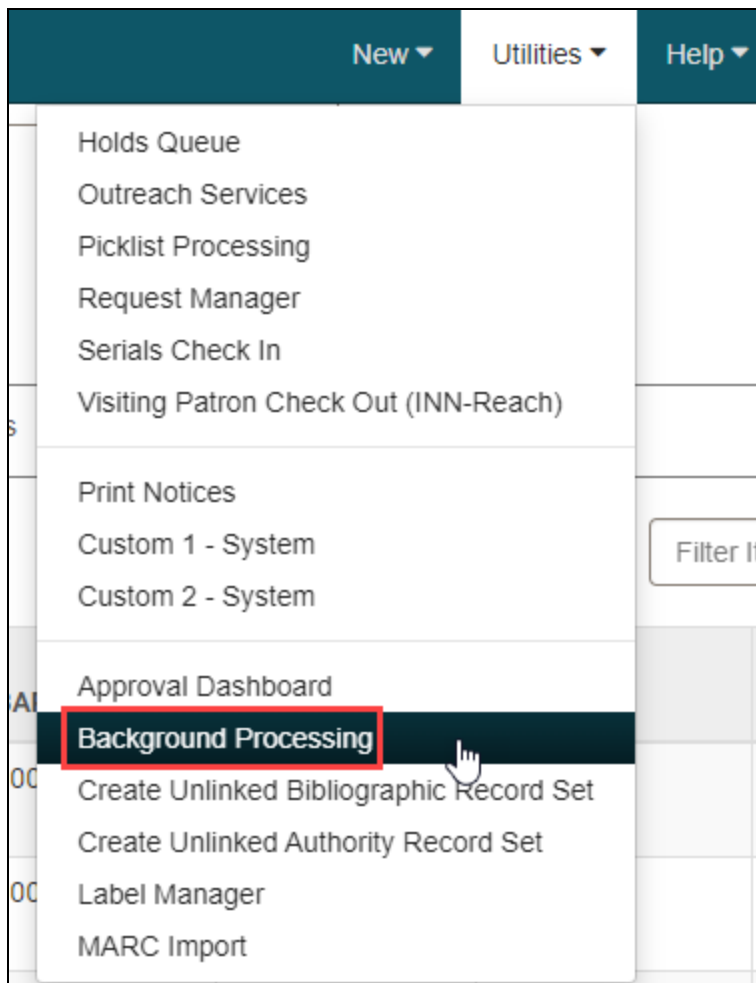
6. Select **CONTINUE**.

Leap schedules the changes, enters a Bulk Change report, and returns you to the Find Tool.

Viewing the Bulk Change Report

To view the bulk change report

1. In Leap, go to the **Utilities** menu.
2. Select **Background Processing**.



The Background Processing workflow appears.

3. Select the **Item Bulk Change** view.

The Item Bulk Change view appears displaying a table of the item bulk change jobs.

Background Processing						
Bibliographic Bulk Change Bulk Waive Fines Item Bulk Change MARC Import Patron Bulk Change						
DELETE Filter by Column Filter						
<input type="checkbox"/>	RECORD SET NAME	RECORD SET OWNER	TOTAL RECORDS	STATUS	STARTED	ENDED
<input type="checkbox"/>	ItemBulkChange_rhonda_2/23/2024 11:15:30 AM		4	Succeeded	2/23/2024 11:15:30 AM	2/23/2024 11:15:31 AM
<input type="checkbox"/>	ItemBulkChange_luka_2/23/2024 5:32:30 AM		1	Succeeded	2/23/2024 5:32:30 AM	2/23/2024 5:32:31 AM
<input type="checkbox"/>	ItemBulkChange_luka_2/23/2024 5:30:55 AM		2	Succeeded	2/23/2024 5:30:57 AM	2/23/2024 5:30:58 AM
<input type="checkbox"/>	ItemBulkChange_samantha_2/22/2024		2	Succeeded	2/22/2024	2/22/2024

- To open a Bulk Change report, select a row in the table.
The Bulk Change report opens in a new browser tab.

Deleting a Bulk Change Report

To delete a bulk change report

- In Leap, go to the **Utilities** menu.
- Select **Background Processing**.
- Select the **Item Bulk Change** view.
The Item Bulk Change view appears displaying a table listing the item bulk changes.
- Select the checkbox beside each Bulk Change report you want to delete.
- Select **DELETE**.

Background Processing REFRESH CLOSE

Bibliographic Bulk Change Item Bulk Change MARC Import Patron Bulk Change

DELETE Filter by Column Filter

	RECORD SET NAME	RECORD SET OWNER	TOTAL RECORDS	STATUS	STARTED	ENDED
<input checked="" type="checkbox"/>	ItemBulkChange_rhonda. 2/9/2024 2:03:23 PM		2	Succeeded	2/9/2024 2:03:24 PM	2/9/2024 2:03:24 PM
<input type="checkbox"/>	ItemBulkChange_JoAnne 2/9/2024 9:50:21 AM		14	Succeeded	2/9/2024 9:50:21 AM	2/9/2024 9:50:22 AM
<input type="checkbox"/>	Ebook Import, final_20160516060427_0	QA-JADE 7.6	18	Succeeded	2/9/2024 8:31:13 AM	2/9/2024 8:31:14 AM
<input type="checkbox"/>	Item RS 2 - Org 406	milena.	6	Succeeded	2/9/2024 7:12:12 AM	2/9/2024 7:12:13 AM
<input type="checkbox"/>	Community Items - Circ Status IN_20171127153048	Community Library	41390	Succeeded	2/8/2024 5:29:13 AM	2/8/2024 5:32:58 AM

6. Select **YES** in the confirmation dialog.

Leap deletes the Bibliographic Bulk Change report.

Support for Working with Lists of ISBNs in Leap


Leap now contains the following new features that make it easier to search for and work with lists of ISBNs:

- [Enabling the Display of ISBNs in Find Tool Search Results](#)
- [Performing a Basic Search for a List of ISBNs](#)
- [Adding Bibliographic Records to a Record Set from a File of ISBNs](#)

Enabling the Display of ISBNs in Find Tool Search Results

You can now configure Leap to display ISBNs in bibliographic or item Find Tool search results.

To enable the display of ISBNs in the bibliographic or item Find Tool search results

1. In the bibliographic or item record Find Tool, select **Options**  > **Column Settings**.

The Column Settings configuration options appear.

Find Tool - Bibliographic Record

Column Settings

Title
 Author
 Format
 Publication Date
 Call Number
 ISBN
 Linked Items
 Holds
 Control Number
 Author (Native Script)
 Title (Native Script)

MOVE UP MOVE DOWN

Display Position	1
Folded	False
Name	Title
Pinned	False
Visible	True
Width	22.48

Display Position
The order of the column in the display.

SAVE CANCEL

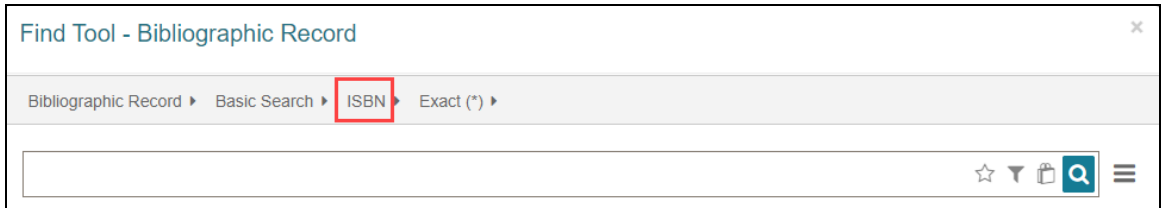
2. Select **ISBN**.
3. (Optional) Edit other column configuration settings, if desired. For more information, see [Specify Columns for Search Results](#).
4. Select **SAVE**.

Performing a Basic Search for a List of ISBNs

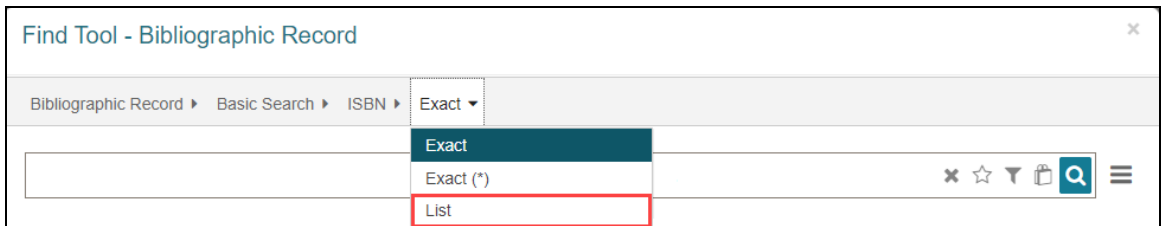
You can now use the Leap bibliographic Find Tool to perform a basic search for a list of ISBNs.

To search for a list of ISBNs

1. Go to the bibliographic record Find Tool.
2. Select **ISBN** from the list of search qualifiers.



3. Select the **List** search option.



4. Enter a list of ISBNs in the search box. ISBNs must be separated by commas.

5. Select **Search** .

Leap returns a list of all bibliographic records that contain one of the ISBNs in the list.

Find Tool - Bibliographic Record

Bibliographic Record ▶ Basic Search ▶ ISBN ▶ List ▶

9780915230389, 9798212340007, 9780915230365, 9781582615769, 9780077422370, 9780786714308, 9781890087470 ✕ ☆ ▼ 📄 🔍 ☰

* <input type="checkbox"/>	Title	Author	Format	Publica...	Call Number	ISBN
<input checked="" type="checkbox"/>	Common or garden crime : an Irish villag...	Pim, Sheila. 1909...	Book	2001	Fict Pim Myst...	9780915230365
	A Hive of suspects : an Irish village mystery	Pim, Sheila, 1909...	Book	2001	Fict Pim Myst...	9780915230389
	Aquarium corals : selection, husbandry, a...	Borneman, Eric, ...	Book	2001	593 Bor	9781890087487, 9781890087470
	No man's river	Mowat, Farley.	Book	2004	971.2 Mow	9780786714308
	Ozzie Smith : the road to Cooperstown	Smith, Ozzie.	Book	2002	796.357 Smi	9781582615769
	And no birds sang	Mowat, Farley.	Book	1979	940.54/81/71 B	9780077422370
	No man's river	Mowat, Farley.	Book	2004	971.271	9780786714308
	And no birds sang	Mowat, Farley.	Book	1979	940.54/81/71 B	9780077422370
	And no birds sang	Mowat, Farley.	Book	1979	940.54/81/71 B	9780077422370
	The Moon Represents My Heart [electron...	Wangtechawat, Pim	Ebook	2023		9798212340007

Ready 10 result(s)

Count Only

Note:

The ISBN column displays normalized, 13-digit ISBNs. This means that:

- Extra text that might be present in the 020 tag subfield \$a (for example, "(paperback)") does not appear.
- 10-digit ISBNs appear as the equivalent 13-digit ISBN.

Adding Bibliographic Records to a Record Set from a File of ISBNs

You can now add bibliographic records to a record set from a file that contains a list of ISBNs.

The file of ISBNs must:

- Contain a column of ISBNs that match bibliographic records that are already in the database.
- Be in one of the following formats: .txt, .csv, .xls, or .xlsx.

Note:

If the file of ISBNs is an Excel file, Leap assumes that the first row of the file contains heading information. If the first row contains an ISBN instead, the bibliographic record that matches the ISBN is not added to the record set.

This section covers the following topics:

- [Required Permissions](#)
- [Adding a File of Bibliographic Records to a Record Set](#)

Required Permissions

To add a file of bibliographic records to a record set, you must have the following Cataloging permissions:

- Access cataloging subsystem: Allow
- Cataloging record sets: Access
- Cataloging Record Sets: Modify

You do not need access permissions for all the bibliographic records you are adding to a record set.

Adding a File of Bibliographic Records to a Record Set

To add a file of bibliographic records to a record set

1. Open the bibliographic record set you want to add records to.
2. On the Bibliographic Record Set workform, select the **ACTIONS** button above the list of bibliographic records.
3. Select **Add from File**.

A Select File dialog appears.

4. Click **SELECT FILE**.

A file explorer window appears.

5. Select the file of ISBNs.

6. Select **Open**.

7. Do one of the following:

- If the file you selected is an .xls or .xlsx file, a **Worksheet/Column Containing ISBN** list appears on the Select File dialog. Select an option from the list to specify the column in the Excel file that contains the ISBNs.
- If the file you selected is a .txt or .csv file, go to the next step.

8. Select **ADD FROM FILE**.

Leap adds the records from the file to the record set. New records appear at the top of the list on the Bibliographic Record Set workform.

Note:

If an error occurs (for example, if an ISBN in the list matches a record that is a duplicate of one that is already in the record set), Leap displays an error message and logs detailed information about the problem in an error report file. ISBNs with no matching record in the database are also listed in the error report file. Leap saves the error report file in your browser's download location.

Leap handles ISBN matching as follows:

- If an ISBN in the file matches multiple bibliographic records in the database, all matching records are added to the record set.
 - If multiple ISBNs in the file match the same bibliographic record in the database, the bibliographic record is added to the record set just once.
9. Select **SAVE**.

Leap saves the record set and logs a "9004 Record set modified" transaction.

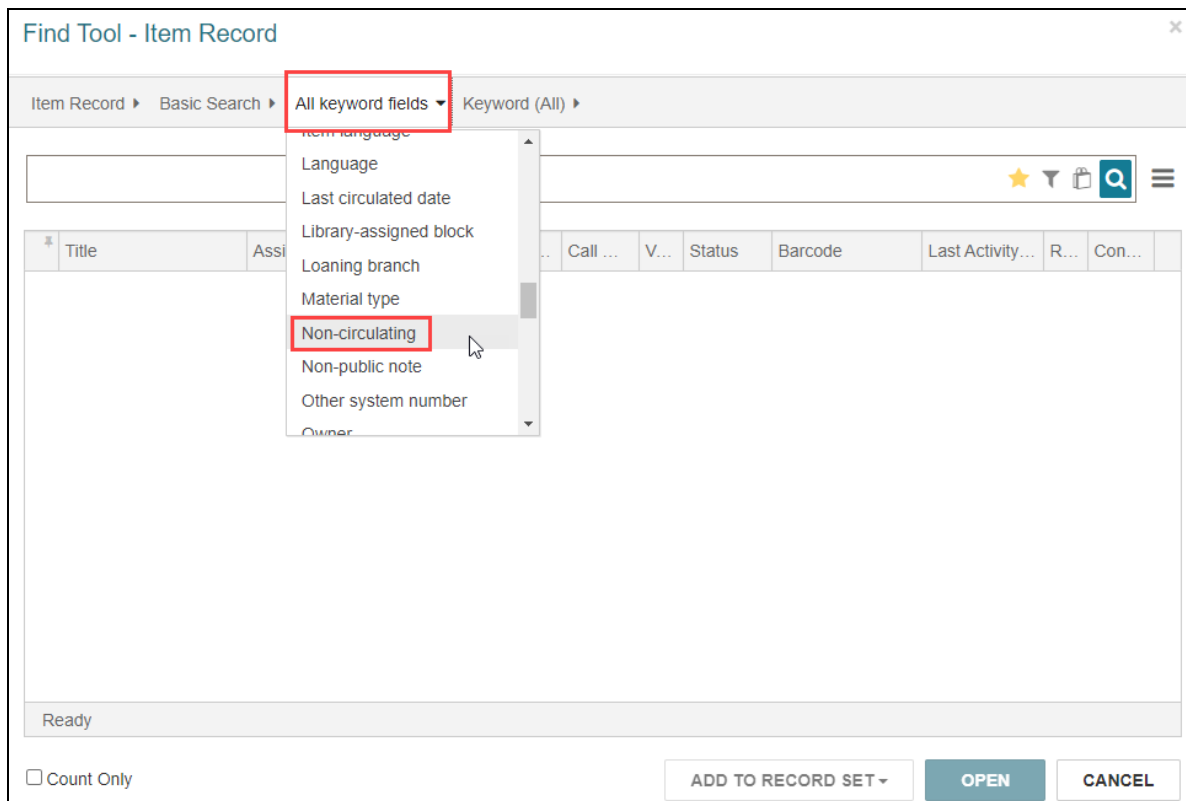
Searching for Non-Circulating Items

Now you have two ways to search for non-circulating items using Leap's Find Tool:

- [Selecting the Access Point](#)
- [Filtering by the Status](#)

Selecting the Access Point

You can now select the access point **Non-Circulating** when you are searching for Items:




The access point becomes Non-circulating, Keyword changes to Exact, and the search box offers two choices.

- To search for items that **are** flagged as "Non-circulating," enter **Yes** in the search box.
- To search for items that **are not** flagged as "Non-circulating," enter **No** in the search box.

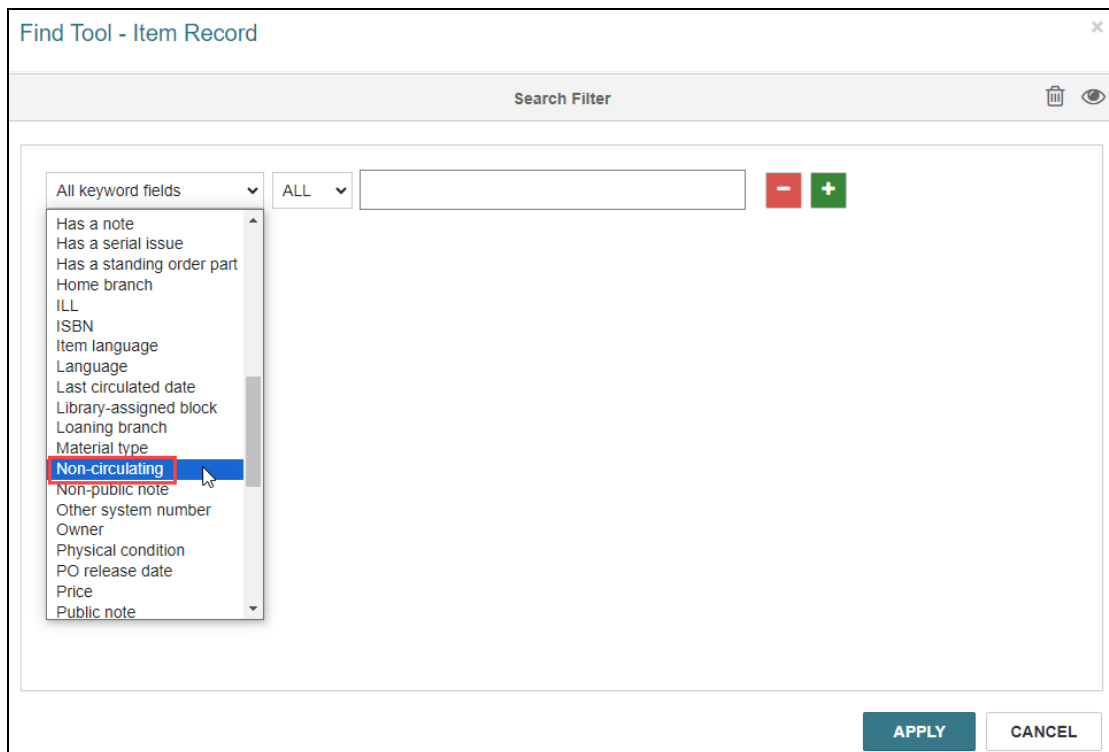
Filtering by the Status

To filter by the status Non-Circulating

1. Select **Filter** .

The Search Filter dialog opens.
2. Select **+ADD CONDITION**.

The search filter options appear.
3. In the **All keyword fields** list, select **Non-circulating**.



The Keyword changes to Non-circulating, the operator becomes an equal sign, and the search box appears as a dropdown list.

4. Select one of the following in the dropdown list:
 - To search for items that **are** flagged as "Non-circulating," select **Yes**.
 - To search for items that **are not** flagged as "Non-circulating," select **No**.
5. Select **APPLY**.

Displaying 880 Tag Data in the Leap Bibliographic Find Tool


You can now configure the Leap bibliographic Find Tool to display 880 tag data for titles and authors in search results. This makes it easier for catalogers working with foreign language titles to locate and compare bibliographic records using the native language of the material.

This section covers the following topics:

- [Enabling the Display of 880 Tag Data in the Bibliographic Find Tool](#)
- [How Leap Formats and Displays 880 Tag Data](#)

Enabling the Display of 880 Tag Data in the Bibliographic Find Tool

To enable the display of 880 tag data in the bibliographic Find Tool

1. In the bibliographic record Find Tool, select **Options**  > **Column Settings**.

The Column Settings configuration options appear.

Find Tool - Bibliographic Record

Column Settings

Title
 Author
 Format
 Linked Items
 Holds
 Publication Date
 Call Number
 Control Number
 Author (Native Script)
 Title (Native Script)

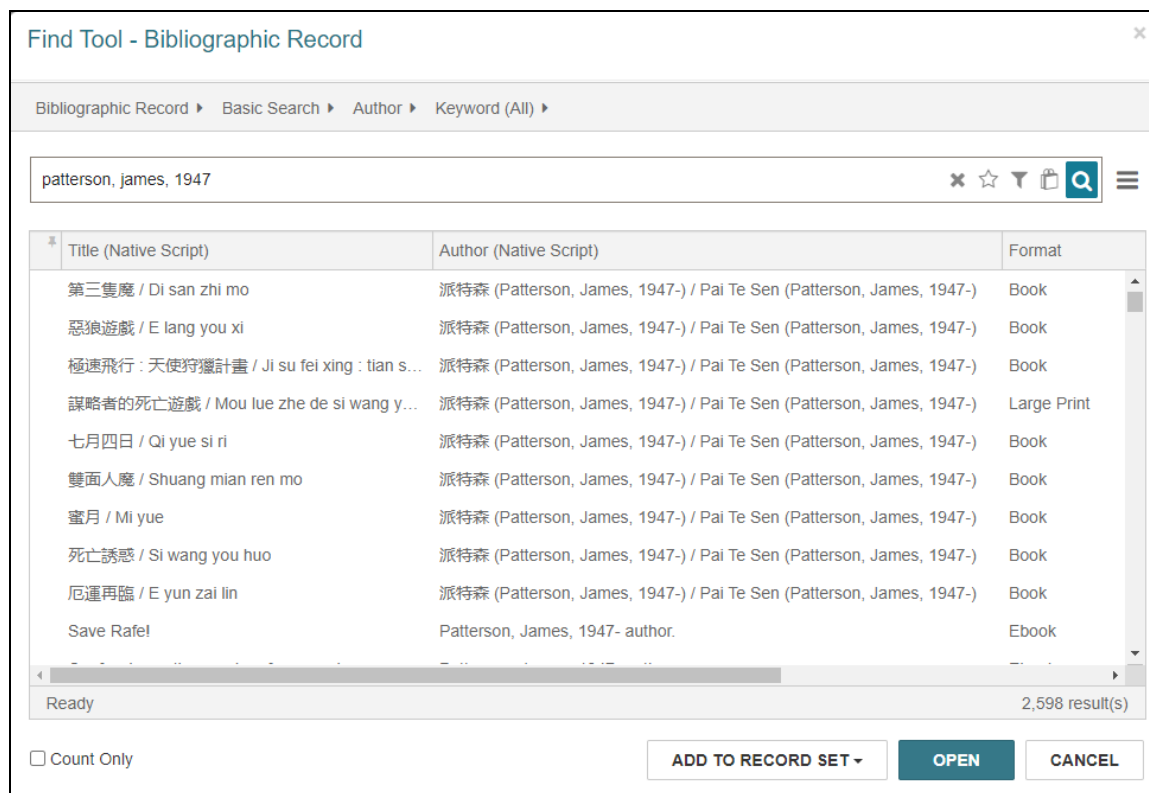
Display Position	1
Folded	False
Name	Title
Pinned	False
Visible	True
Width	27.237

Display Position
 The order of the column in the display.

2. Select one or both of the following options:
 - **Author (Native Script)** – Enables the display of author data from the 880 tag (that is, 880 tag data that's linked to a 1xx tag).
 - **Title (Native Script)** – Enables the display of title data from the 880 tag (that is, 880 tag data that's linked to the 245 tag).
3. (Optional) Edit other column configuration settings, if desired. For more information, see [Specify Columns for Search Results](#).
4. Select **SAVE**.

How Leap Formats and Displays 880 Tag Data

Leap displays 880 tag data in bibliographic record search results when one or both of the native script columns are enabled and records returned by the search contain relevant 880 tag data.



The following table explains how Leap displays 880 tag data in search results:

If a record contains	Leap displays
An 880 tag linked to the 245 tag	Title data as <880 tag data> / <245 tag data>
An 880 tag linked to a 1xx tag	Author data as <880 tag data> / <1xx tag data>
Multiple 880 tags linked to the 245 tag or to a 1xx tag	All 880 tag data. For example, Leap displays a title with three linked 880 tags as follows: <880 tag data> / <880 tag data> / <880 tag data> / <245 tag data>

Claiming Serial Issues in Leap

Version 7.6 includes support for managing serial claims in Leap.

This section covers the following topics:

- [Adding and Deleting Serial Holdings Record Claim Intervals](#)
 - [Claiming a Serial Issue from the Serials Check In Workform](#)
 - [Managing Serial Claims from the Claim Alert List](#)
 - [Managing Serial Claims from the Issue Record Workform](#)
-

Adding and Deleting Serial Holdings Record Claim Intervals

In previous versions, you could view claim intervals for a serial holdings record by entering the supplier's subscription number on the Claims view of the Serial Holdings Record workform. In version 7.6, you can now also add or delete claim intervals for a serial holdings record.

When a serial issue is not received by its expected date and the number of days specified in the Days After Release/Expected Arrival setting in the supplier record elapses, the claim cycle begins. Claim intervals determine when claim notices are generated (if your library uses automatic claiming) or when a serial issue appears in the Claim Alert List (if your library uses manual claiming). For more information, search for "Claiming in Serials" in the Polaris staff client help.

Note:

You can add and delete serial holdings record claim intervals if you have the **Serial holdings records: Modify** permission enabled in Polaris Administration (staff client). For more information, search for "Serials Workflow Permissions" in the Polaris staff client help.

This section covers the following topics:

- [Adding a Claim Interval for a Serial Holdings Record](#)
- [Deleting a Claim Interval for a Serial Holdings Record](#)

Adding a Claim Interval for a Serial Holdings Record

To add a claim interval for a serial holdings record

1. Use the Find Tool to search for and open the serial holdings record.
2. On the Serial Holdings Record workform, select the **Claims** tab.

The screenshot shows the 'Serial Holdings Record' interface for a record titled 'People and culture in southeastern Massachusetts'. At the top right, there are buttons for 'SAVE', 'ACTIONS', 'LINKS', a refresh icon, a print icon, and 'CLOSE'. The record details are as follows:

Status: Currently Received	Destination: Southern Adirondack Library System (SAL)	Bib control number: 172772
Serial holdings record ID: 15	Collection: SALS Bookable (SALBK)	Order Type: Subscription
Copy no.: 1	Material type: Periodical	ISSN/ISBN:

Below the details, there is a navigation bar with tabs for 'Details', 'Notes', 'Orders', and 'Claims'. The 'Claims' tab is selected. Underneath, there is a 'Subscription ID' input field. Below that, there are two buttons: 'ADD CLAIM' (highlighted with a red box) and 'DELETE'. At the bottom, there is a table header with columns: 'CATEGORY', 'CLAIM NUMBER', and 'CLAIM WAITING PERIOD'.

3. Select **ADD CLAIM**.

Leap displays the Add Claim Interval dialog.

4. From the **Categories** list, select a type of serial publication.
5. In the **Interval** box, enter the number of days for the claim interval.
6. Select **OK**.

Leap adds the claim interval and displays a success message. The new claim interval appears in the table on the Claims tab.

Deleting a Claim Interval for a Serial Holdings Record

To delete a claim interval for a serial holdings record

1. Use the Find Tool to search for and open a serial holdings record.
2. On the Serial Holdings Record workflow, select the **Claims** tab.
3. Select the checkbox next to the claim interval you want to delete. You can select multiple claim intervals.
4. Select **DELETE**.

Leap prompts you to confirm the deletion.

5. Select **CONTINUE**.

Leap deletes the claim interval and displays a success message. The table on the Claims tab refreshes to reflect your changes.

Claiming a Serial Issue from the Serials Check In Workflow

You can now claim an individual serial issue from the Serials Check In workflow.

Note:

You can claim serial issues if you have the **Serial issues/standing order parts: Claim** permission enabled in Polaris Administration (staff client). For more information, search for "Serials Workflow Permissions" in the Polaris staff client help.

To claim an issue from the Serials Check In workflow

1. Select **Utilities > Serials Check In**.

The serial holdings record Find Tool appears.

2. Use the Find Tool to search for and open a serial holdings record.

3. On the Serial Holdings Record workflow, select **Links > Serials Check In**.

The Serials Check In workflow appears.

Serials Check In ⓘ

SAVE ACTIONS REFRESH CLOSE

People and culture in southeastern Massachusetts.

Status: **Currently Received** Destination: **Southern Adirondack Library System (SAL)** Non-Public Notes Non-Public Warning Notes

Serial holdings record ID: 15 Bib control number: 172772 Karens Non Public Note

Copy no.: 1 Collection: **SALS Bookable (SALBK)** fdsa

Call number: Material type: **Periodical**

Check In Combine Issues Print Label Undo Check In Delete **Claim** Issue/Part Status: Expected Filter by Column Filter

DESIGNATION	CATEGORY	EXPECTED	STATUS	STATUS DATE	PATTERN	ROUTE STATUS
<input type="checkbox"/> No., 187/188 (Oct./Nov. 2006)	Index / 1	10/1/2006	Expected	9/17/2020	Open	
<input type="checkbox"/> No., 189/190 (Dec. 2006)	Index / 1	12/1/2006	Expected	9/17/2020	Open	
<input checked="" type="checkbox"/> No., 191 (Mar./Apr. 2007)	Index / 1	3/1/2007	Expected	9/17/2020	Open	
<input type="checkbox"/> No., 193/194 (May/June 2007)	Index / 1	5/1/2007	Expected	9/17/2020	Open	
<input type="checkbox"/> No., 195/196 (July/Sep. 2007)	Index / 1	6/30/2007	Expected	9/17/2020	Open	
<input type="checkbox"/> No., 197/198 (Oct./Nov. 2007)	Index / 1	10/1/2007	Expected	9/17/2020	Open	
<input type="checkbox"/> No., 201 (Mar./Apr. 2008)	Index / 1	3/1/2008	Expected	9/17/2020	Open	

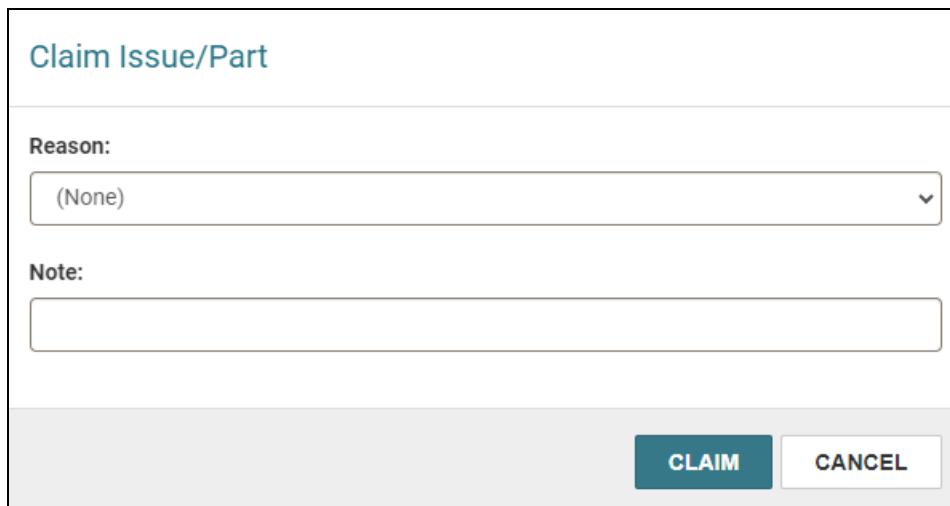
4. Select the issue you want to claim.

5. Select **Claim**.

Leap prompts you to confirm that you want to claim the issue.

6. Select **YES**.

The Claim Issue/Part dialog appears.



7. (Optional) Select a claim reason from the **Reason** list.
8. (Optional) Enter a note in the **Note** box. After you claim an issue, this note appears on the Claims view of the Issue Record workflow.
9. Select **CLAIM**.

Leap does the following:

- Processes the claim
- Displays a success message
- Sets the status of the issue or part to the status it had before it was claimed

Managing Serial Claims from the Claim Alert List

The Claim Alert List displays all serial issues and parts that are eligible to be claimed based on the **Days After Release/Expected Arrival** setting in the supplier record and the claim intervals configured in the serial holdings record.

Note:

You can access the Claim Alert List if you have the **Claim alert list: Access** permission enabled in Polaris Administration (staff client). For more information, search for "Acquisitions Workflow Permissions" in the Polaris staff client help.

Claim Alert List

REFRESH CLOSE

Organizations: Status:

[Issues](#) [Parts](#)

CLAIM UNDO CLAIM Filter Claims

<input type="checkbox"/>	!	ALERT DATE	CYCLE/MAX	LAST CLAIMED	TITLE	ISBN/ISSN	DESIGNATION	DESTINATION
<input type="checkbox"/>		8/6/2023	0 of 2		College catalog	10877932	44th ed. (2023)	Community Library
<input type="checkbox"/>		8/6/2022	0 of 2		College catalog	10877932	43rd ed. (2022)	Community Library
<input type="checkbox"/>		8/6/2021	0 of 2		College catalog	10877932	42nd ed. (2021)	Community Library
<input type="checkbox"/>		8/6/2020	0 of 2	4/12/2024	College catalog	10877932	41st ed. (2020)	Community Library
<input type="checkbox"/>		8/6/2019	0 of 2		College catalog	10877932	40th ed. (2019)	Community Library
<input type="checkbox"/>		8/6/2018	0 of 2		College catalog	10877932	39th ed. (2018)	Community Library
<input type="checkbox"/>		8/6/2017	0 of 2		College catalog	10877932	38th ed. (2017)	Community Library

This section covers the following topics:

- [Claiming a Serial Issue or Part from the Claim Alert List](#)
- [Undoing a Claim from the Claim Alert List](#)

Claiming a Serial Issue or Part from the Claim Alert List

Note:

You can claim serial issues or parts if you have the **Serial issues/standing order parts: Claim** permission enabled in Polaris Administration (staff client). For more information, search for "Serials Workflow Permissions" in the Polaris staff client help.

To claim a serial issue or part from the Claim Alert List

1. Select **Utilities > Claim Alert List**.

The **Claim Alert List** appears. By default, Leap displays the claim alerts for your current organization for issues with a status of Pending Claim.

2. (Optional) To view claim alerts for a different organization, select an organization from the **Organizations** list.

Leap refreshes the list of claim alerts.

3. (Optional) To view claim alerts for serial parts, select the **Parts** view.

Leap refreshes the list of claim alerts.

4. Select the issues or parts you want to claim. You can select multiple issues or parts.

5. Select **CLAIM**.

Leap prompts you to confirm that you want to claim the issues or parts.

6. Select **YES**.

- If you are claiming multiple issues or parts, Leap processes your claims and also does the following:
 - Displays a success message
 - Sets the status of the issue or part to Claimed
- If you are claiming a single issue or part, the Claim Issue/Part dialog appears. Continue to step 7.

7. (Optional) Select a claim reason from the **Reason** list.

8. (Optional) Enter a note in the **Note** box. After you claim an issue, this note appears on the Claims view of the Issue Record workflow.

9. Select **CLAIM**.

Leap does the following:

- Processes the claim

- Displays a success message
- Sets the status of the issue or part to Claimed

Undoing a Claim from the Claim Alert List

Note:

You can undo claims if you have the **Serial issues/standing order parts: Claim** permission enabled in Polaris Administration (staff client). For more information, search for "Serials Workflow Permissions" in the Polaris staff client help.

To undo a claim from the Claim Alert List

1. Select **Utilities > Claim Alert List**.

The **Claim Alert List** appears. By default, Leap displays the claim alerts for your current organization for issues with a status of Pending Claim.

2. (Optional) To view claim alerts for a different organization, select an organization from the **Organizations** list.

Leap refreshes the list of claim alerts.

3. In the **Status** list, select the **Claimed** status.

Leap refreshes the list to display only claim alerts for issues with a status of Claimed.

4. (Optional) To view claim alerts for serial parts, select the **Parts** view.

Leap refreshes the list of claim alerts.

5. Select the issue or part for which you want to undo the claim.

6. Select **UNDO CLAIM**.

Leap prompts you to confirm that you want to undo the claim.

7. Select **YES**.

Leap does the following:

- Reverses the claim
- Displays a success message
- Sets the status of the issue or part to the status it had before it was claimed

Managing Serial Claims from the Issue Record Workform

You can now manage serial claims from the Issue Record workform.

This section covers the following topics:

- [Claiming an Issue from the Issue Record Workform](#)
- [Undoing a Claim from the Issue Record Workform](#)

Claiming an Issue from the Issue Record Workform

You can now claim a serial issue from the Issue Record workform.

Note:

You can claim serial issues if you have the **Serial issues/standing order parts: Claim** permission enabled in Polaris Administration (staff client). For more information, search for "Serials Workflow Permissions" in the Polaris staff client help.

To claim an issue from the Issue Record workform

1. On the Issue Record workform, select **ACTIONS > Claim**.

The screenshot shows the 'Issue Record' interface for the item 'People and culture in southeastern Massachusetts'. At the top right, there are buttons for 'SAVE', 'ACTIONS', a refresh icon, and 'CLOSE'. The 'ACTIONS' dropdown menu is open, showing options for 'Print Label', 'Claim' (highlighted with a red box), and 'Undo Claim'. The main form area contains fields for 'Status' (Expected), 'Status Date' (9/17/2020), 'Expected Arrival Date' (3/1/2007), 'Chronology Date' (4/1/2007), 'Title of', and 'Issue Unit Price' (\$0.00). Navigation tabs for 'Details', 'Notes', and 'Claims' are visible at the bottom of the form.

Leap prompts you to confirm that you want to claim the issues or parts.

2. Select **YES**.

The Claim Issue/Part dialog appears.

3. (Optional) Select a claim reason from the **Reason** list.
4. (Optional) Enter a note in the **Note** box. After you claim an issue, this note appears on the Claims view of the Issue Record workflow.
5. Select **CLAIM**.

Leap does the following:

- Processes the claim
- Displays a success message
- Sets the status of the issue or part to Claimed

Undoing a Claim from the Issue Record Workflow

You can now undo a claim for a serial issue from the Issue Record workflow. The issue must have a status of Claimed.

Note:

You can undo claims if you have the **Serial issues/standing order parts: Claim** permission enabled in Polaris Administration (staff client). For more information, search for "Serials Workflow Permissions" in the Polaris staff client help.

To undo a claim for an issue from the Issue Record workflow

1. On the Issue Record workflow, select **ACTIONS > Undo Claim**.

Leap prompts you to confirm that you want to undo the claim.

2. Select **YES**.

Leap does the following:

- Reverses the claim
- Displays a success message
- Sets the status of the issue or part to the status it had before it was claimed

Printing a Route Slip for Serials

You can now print a route slip during serials check-in for an issue or part in Leap.

To set up the route list in the Polaris staff client

1. To associate a route list with an issue or part do one of the following:
 - Select **Tools, Add to route list** on the Issue, Part, or Check In workform.
 - Right-click on the issue/part in the Find Tool results list and select **Add to route list**. The Find Tool appears with Route List selected. Search for and select the route list that you want to associate with the issue/part.
2. To set the print method to Automatic, do the following:
 - a. Go to Administration Explorer > **System** > **Profiles**.
 - b. Select **Acquisitions/Serials**.
 - c. Select **Route list defaults** to open the Route List Defaults dialog.
 - d. Beside **Printing**, select **Automatic**.

The screenshot shows the 'Route List Defaults' dialog box. At the top, there is a close button (X). Below that, the 'Route Period' is set to '1 days' and 'Home Location' is an empty dropdown. Under 'Printing', the 'Automatic' radio button is selected and highlighted with a red box, while 'Batch' is unselected. Below this are three text input fields: 'Return Instructions' (with the placeholder 'Please return by:'), 'Header', and 'Footer'. At the bottom, there is a 'Piece Display Options' section with a list of items: 'Call Number', 'Copy Number', and 'Linked Items'. To the right of this list are 'Add' and 'Remove' buttons. Further right is a list of fields: 'Type', 'Title', 'Status', 'Designation', 'Destination', 'Collection', and 'ISSN', with 'Up' and 'Down' buttons. At the very bottom are 'OK', 'Cancel', and 'Help' buttons.

e. Select **OK**.

To print a route slip during serials check-in for an issue or part in Leap

1. Go to **Utilities > Serials Check In**.

The Find Tool - Serial Holdings Record page opens.

2. Type the title of a serial and select the search icon.

A result list appears.

3. Select a serial title from the result list and select **Open**.

The Serials Check In workform opens.

4. In the Serials Check In workform, select an issue or part that has a status other than Received.

5. Select **Check In**.

Serials Check In i

GQ

SAVE
ACTIONS ▾
↻
🖨️
CLOSE

Status: Currently Received	Destination: Southern Adirondack Library System (SAL)	Non-Public Notes	Non-Public Warning Notes
Serial holding record ID: 1525	Bib control number: 342231		
Copy no.: 1	Collection: (None)		
Call number:	Material type:		

📄 Check In
More ▾

Issue/Part Status: Expected ▾
Filter by Column ▾
Filter

	DESIGNATION	CATEGORY	EXPECTED	STATUS	STATUS DATE	PATTERN	ROUTE STATUS
<input checked="" type="checkbox"/>	Caption Z (Nov. 2020)	Basic Bib / 1	11/22/2020	Expected	8/18/2020	Open	
<input type="checkbox"/>	Caption A (Dec. 2020)	Basic Bib / 1	12/22/2020	Expected	8/18/2020	Open	
<input type="checkbox"/>	Caption B (Jan. 2021)	Basic Bib / 1	1/22/2021	Expected	8/18/2020	Open	
<input type="checkbox"/>	Caption C (Feb. 2021)	Basic Bib / 1	2/22/2021	Expected	8/18/2020	Open	
<input type="checkbox"/>	Caption D (Mar. 2021)	Basic Bib / 1	3/21/2021	Expected	8/18/2020	Open	

6. Because of the Polaris staff client setting, you see the **Print Route Slip** dialog. Do one of the following:

- Select **Yes** to see the Print dialog.
- Select **Cancel** to continue the check-in without printing the route slip.

If you set the route lists to batch print or if more than one route list is linked to the serial holding record, then you must use the Polaris staff client to print the batch. For more information about batch printing route slips, search "Print a Route Slip" in the Polaris staff client help.

When the check-in is complete, the issue or part status changes to Received. Overnight processes update changes to the compressed holdings in PAC.

Support for Southern Hemisphere Seasons in Publication Patterns

When you add or edit a serial publication pattern in Leap, you can now specify whether the pattern applies to the northern hemisphere or the southern hemisphere. This means that libraries in the southern hemisphere can configure Leap so that the season chronology captions that appear in Leap match the seasons listed on the serial issue.

Examples:

- When **Season hemisphere** is set to South and a publication pattern has a start date of 4/5/2024, Leap displays the season chronology caption Autumn.
- When **Season hemisphere** is set to North and a publication pattern has a start date of 4/5/2024, Leap displays the season chronology caption Spring.

New Publication Pattern - 1

SAVE
CLOSE

Category

Details
 Designation
 Regularity Pattern

Frequency

Start Date

End Date

Starting Designation

Season hemisphere

Chronology Setup

+ ADD CHRONOLOGY
DELETE

	LEVEL	CAPTION	FORMAT	START VALUE	DISPLAY
<input type="checkbox"/>	1	Season	Full Text	23	Autumn

Note:

By default, **Season hemisphere** is set to North. Publication patterns that

already exist in your system are also automatically set to North. If you want to use this default behavior, you don't need to take any action.

To configure the season hemisphere for a publication pattern

1. On the Serial Holding Record workform, do one of the following:

- Select **+ NEW PATTERN**.
- Select an existing publication pattern.

The Publication Pattern workform appears.

2. Select the **Designation** tab.

3. In the **Season hemisphere** list, select one of the following:

- North
- South

You cannot change the **Season hemisphere** setting for a publication pattern that is linked to a serial issue that has already been received.

4. Select **SAVE**.

Printing Invoice Vouchers, Purchase Orders, and Workslips

You can now print invoice vouchers, purchase orders (PO), and workslips using functionality in Leap.

- [Printing Invoice Vouchers](#)
- [Printing a Purchase Order](#)
- [Printing a Workslip from a PO Line Item](#)
- [Printing a Workslip from an Invoice Line Item](#)

Printing Invoice Vouchers

Note:

To print an invoice voucher, you need the **Invoices: Print vouchers** permission in the branch that owns the invoice.

1. In Leap, go to the Find Tool.
2. Search for an invoice and select one in the search results.
3. Select **OPEN**.

The Invoice workform appears.

4. Select the **Payment History** view.

The Payment History view displays a table listing each payment made against the invoice.

Invoice i

SAVE
ACTIONS ▾
↻
📄
CLOSE

Number <input type="text" value="1551382"/>	Suffix <input type="text" value="EDI"/>	Lines <input type="text" value="14"/>	Type <input type="text" value="Regular"/>
Invoice Date <input type="text" value="1/9/2008"/>	Status <input type="text" value="PartPaid"/>	Status Date <input type="text" value="10/13/2011"/>	Total <input type="text" value="\$627.98"/>
			Method <input type="text" value="Purchase"/>

🔗 Details
☰ Line Items
📄 Charges
📄 Payment History
📄 Bibliographic Records
📄 Items
🛒 Purchase Orders
🏠 Funds

✎ MODIFY CHECK/VOUCHER
🖨️ PRINT VOUCHER ▾

Filter

	PAYMENT DATE	USER	AMOUNT	CHECK/VOUCHER NUMBER	CHECK/VOUCHER DATE	PAYMENT STATUS	NOTE
<input type="checkbox"/>	10/13/2011 4:15:53 PM	Joanne.Reid	\$22.49	Vchr# 444	10/13/2011	Paid	

5. Select the checkbox for each payment you want to include on the voucher.
6. Select **PRINT VOUCHER**, and select one of the following:
 - Full
 - Summary

The printable voucher appears in a new browser window.

The following shows a full voucher:

Check/Voucher No.: 444
Date: 10/13/2011

Supplier: Midwest Tapes
Supplier Alt. Name: Midwest
Contact Person: <no name entered>
Address:
Library Account No.: 12305

SUMMARY

Invoice No.: 1551382
Invoice Date: 1/9/2008
Payment Due:
Exchange Rate: 1.0000
Total Quantity: 1

FUND ALLOCATIONS

Fiscal Year	Fund	Fund External Name	Base Amount	Total Amount
SCP FY 2008	Branch Audiovisual		\$22.49	\$22.49
Check/Voucher Total (EUR):				\$22.49

DETAILS FOR INVOICE

ISBN/ISSN	Title	Qty	PO/Line Seg No.	Fund(s)	Base Amt	Amount
1415736804 :	The heartbreak kid [DVD]	1	SCP1031	Branch Audiovisual	\$22.49	\$22.49
Line Item Total (EUR):						\$22.49

7. Select the print option from the new browser window to open your browser's print dialog.

Printing a PO

Note:

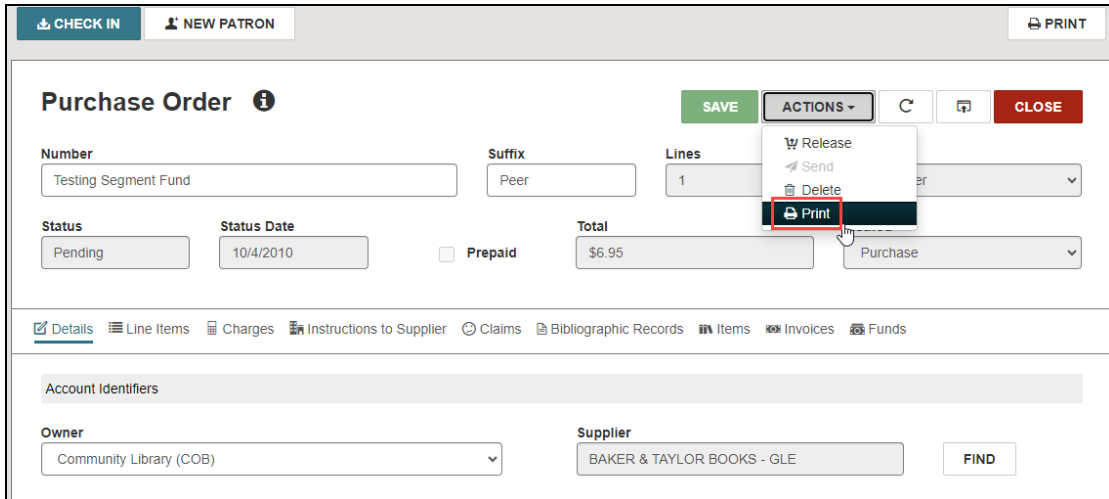
To print a PO, you need the **Purchase Orders: Print purchase Orders** permission.

1. In Leap, go to the Find Tool.
2. Search for a purchase order and select one in the search results.

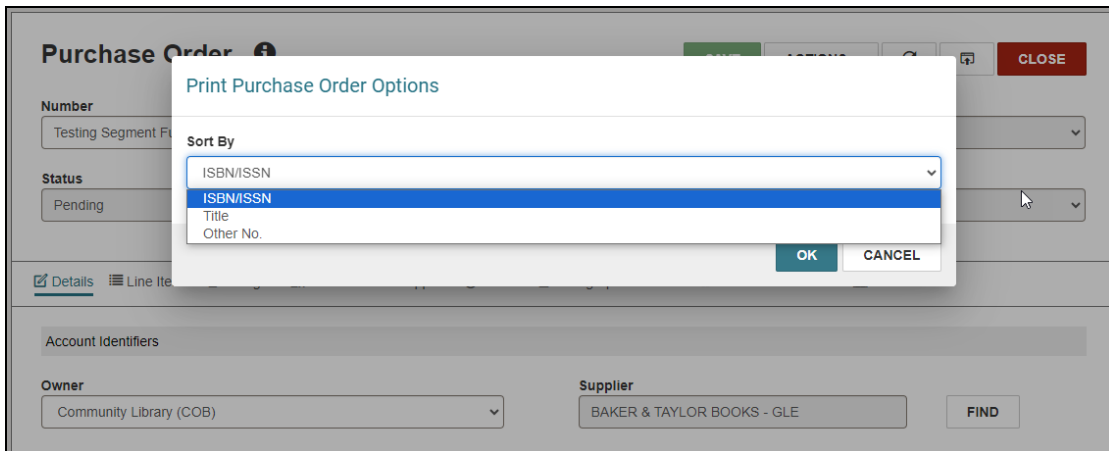
3. Select **OPEN**.

The Purchase Order workflow appears.

4. Select **ACTIONS > Print**.



The Print Purchase Order Options dialog opens.



5. To sort the items in the printable PO by one of the following, select a sort option:

- ISBN/ISSN
- Title
- Other No.

6. Select **OK**.

The printable PO appears in a new browser window.

BAKER & TAYLOR BOOKS - GLE								
SAN: 1556150								
Account Number: 8899000								
Att: Order Department 251 Mt Olive Church Road Commerce, GA 19170-8049 USA								
Purchase Order: Testing Segment Fund Peer								
Ship To: Community Library PO Box 219 147 Barnerville Road Cobleskill, NY 12043-0219				Bill To: Community Library PO Box 219 147 Barnerville Road Cobleskill, NY 12043-0219				
Date Ordered:								
Tax Exemption No.:								
Total Amount: \$6.95								
Total Quantity Ordered: 1								
<i>Please supply the following item(s):</i>								
Qty	ISBN/ISSN	Title/Author	Line ID	Other No.	Material Type	Est. Disc Rate	Unit Price	Total Amount
1	0399206124 :	Miracle at Midway / Mercer, Charles E. (Charlie)	181334			0.0000%	\$6.95	\$6.95
Items Subtotal:								\$6.95
Estimated Shipping/Handling:								\$0.00
Estimated Other Charges:								\$0.00
Estimated Sales Tax:								\$0.00
TOTAL:								\$6.95
Tax Rate: 0.00%								

7. Select the print option from the new browser window to open your browser's print dialog.

Printing a Workslip from a PO Line Item

Note:

To print a workslip from a PO line item, you need the **Purchase Orders: Print workslips** permission.

1. In Leap, go to the Find Tool.
2. Search for a purchase order and select one in the search results.
3. Select **OPEN**.

The Purchase Order workflow appears.

4. Select the **Line Items** view.

The Line Items view displays a table listing each line item in the PO.

Purchase Order SAVE ACTIONS REFRESH RESULTS CLOSE

Number: Testing Segment Fund Suffix: Peer Lines: 1 Type: Firm Order

Status: Pending Status Date: 10/4/2010 Prepaid Total: \$6.95 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 PRINT WORKSLIP

<input checked="" type="checkbox"/>	LINE	TITLE	AUTHOR	ISBN/ISSN	AMOUNT	ORDERED	RECEIVED	INVOICED	FUND	STATUS
<input checked="" type="checkbox"/>	1	Miracle at Midway	Mercer, Charles E. (Charlie)	0399206124	\$6.95	1	0	0	One Fund	Pending

5. Select the checkbox for each line item you want to include in the workslip.
6. Select **PRINT WORKSLIP**.

The printable Item workslip appears in a new browser window.

The Invoice workflow appears.

4. Select the **Line Items** view.

The Line Items view displays a table listing each line item in the invoice.

Invoice ⓘ

SAVE ACTIONS ↕ ↻ 📄 CLOSE

Number: Test no 1 Suffix: kec Lines: 1 Type: Regular

Invoice Date: 8/19/2022 Status: Open Status Date: 8/19/2022 Total: \$20.00 Method: Purchase

Details **Line Items** Charges Payment History Bibliographic Records Items Purchase Orders Funds

NEW LINE ITEM RECEIVE CREDIT DELETE PRINT WORKSLIP Filter

<input checked="" type="checkbox"/>	LINE	TITLE	AUTHOR	ISBN/ISSN	AMOUNT	RECEIVED	PAID	PO NO.	FUND	STATUS
<input checked="" type="checkbox"/>	1	Yogacise	Lalvani, Vimla.	0517141027 :	\$20.00	0	0	SAL649 b&t	Inv Don A	Open

5. Select the checkbox for each item you want to include on the workslip.
6. Select **PRINT WORKSLIP**.

The printable item workslip appears in a new browser window.

SFTP Support for EDI Transmissions and Exporting Notices

In previous versions, Polaris supported transmitting EDI data and exporting notices using FTP. As of version 7.6, Polaris now supports using either FTP or SFTP for these workflows.

You can now enter either an FTP or an SFTP address in the FTP Address field on the Supplier workflow.

The screenshot shows the 'Supplier' workflow form. At the top, there are fields for Name (ABBAY PRESS), Alternative Name (ABBAY), and Currency (USD). Below these are fields for SAN (169-7978), Account Number (nvbc), and Owner (Southern Adironack Library System (SAL)). A navigation bar includes 'Details', 'Orders', 'Payments', and 'Claims'. The 'EDI Setup' section has checkboxes for 'EDI Orders', 'Enriched EDI Orders', and 'ASN Shipments'. The 'FTP Address' field is highlighted with a red border and contains the value 'sftp.polarislibrary.com'. Other fields include 'POA/INV Directory' (EDIOut_QA), 'Username' (PolarisExec@ftpsecure.polarislibrary.com), 'PO File Directory' (EDIIn_QA), 'Password' (masked with dots), and 'PO File Extension' (sdfdfs).

In addition, you can now enter either an FTP or an SFTP address in the FTP Server URI fields on the General tab of the Notification options dialog.

Notification options

General Overdue & Bill Hold Request & Cancellation Fine Reminder Serial

Notification method

- Print
 - Export
 - Available in PAC
- E-mail
 - Available in PAC
- Phone
 - Export
 - Available in PAC
- TXT Message
 - Export
 - Include with phone
 - Available in PAC
 - Display SMS terms

[Languages...](#)

ftps

ftps://ftp.polarislibrary.com

E-mail notice

From: "QA-POLARIS" <...@iii.com>

Reply-to: "QA-POLARIS" <...@iii.com>

E-mail address to use: Use E-mail address only

Send report for e-mail notice processing

...@polarislibrary.com

Export

Print

FTP Server URI: ftps://ftp.polarislibrary.com

Logon name: Polarisexec@ftpsecure.pola

Password:

Phone

FTP Server URI: ftps://ftp.polarislibrary.com

Logon name: Polarisexec@ftpsecure.pola

Password:

Txt Message

FTP Server URI: ftps://ftp.polarislibrary.com

Logon name: Polarisexec@ftpsecure.pola

Password:

Save a local copy Enhanced profile

Save Cancel Apply Help

Cirrius Impact is in Beta for Notices

Cirrius Impact is now in beta for Innovative Phone Alerts (IPA) and text (SMS) notices. The Cirrius Impact integration uses the existing export notices functionality in Polaris. Contact your Account Manager if you are interested in these services.

As with other third-party integrations, Polaris exports phone and text messages to a notice file report which it sends to Cirrius Impact for processing. Cirrius Impact then sends back a success code through the Polaris API after each phone or text message goes out. The incoming success codes update notification information in the patron record.

Using the Enhanced Profile for Notices

Important:

If you already export notices using the (default) standard profile, please check with your vendor before enabling the enhanced profile.

If you are using a third-party service for exporting notices, you can use the enhanced profile. The enhanced profile includes the following data columns in addition to the data columns provided in the standard profile. The data columns for the enhanced profile and a description of the data they contain follows:

- DeliveryOptionID – Values designating the notification method.
- LanguageID – A 4- or 5-digit value specifying the notification language.
- NotificationTypeID – A value specifying the type of notification.
- ReportingOrgID – The database identifier for the reporting (sending) branch.
- PatronID – The database identifier for the patron being notified.
- The following extra columns based on conditions:

Column	Conditions	Description
ItemRecordID	Appears on overdues, bills, hold and second hold notices.	Contains the database identifier for the item associated with the notification.
SysHoldRequestID	Appears on first and second hold pickup notices, hold cancel notices, and on ILL request notices.	Contains a numeric value that is: Positive – for first and second hold pickup notices, and hold cancel notices Negative – for ILL requests
PickupArea Description	Appears on first and	Contains a description

Column	Conditions	Description
	second hold pickup notices when pickup area is configured.	of the area in the library where the patron can pick up their held item.
TxnID	Appears on manual bill notices.	Contains the database identifier for the patron account transaction associated with the notification.
AccountBalance	Appears on fines, bills, and manual bills.	Contains the patron's balance owed

For more details, search "Export File Details" in Polaris Administration (staff client) help.

To use the enhanced profile

1. In Polaris Administration (staff client), go to **Administration Explorer > System > Parameters**.
2. Select **Notification**, and open **Notification Options**.
3. Select **General**.
4. In the Export section, select the **Enhanced Profile** checkbox.

Notification options

General Overdue & Bill Hold Request & Cancellation Fine Reminder Serial

Notification method

- Print
 - Export
 - Available in PAC
- E-mail
 - Available in PAC
- Phone
 - Export
 - Available in PAC
- TXT Message
 - Export
 - Include with phone
 - Available in PAC
 - Display SMS terms

[Languages...](#)

E-mail notice

From: "QA-POLARIS" <...@iii.com>

Reply-to: "QA-POLARIS" <...@iii.com>

E-mail address to use: Use both E-mail and Alt f

Send report for e-mail notice processing

...@clarivate.com

Export

Print

FTP Server URI: ftp://ftp.polarislibrary.com

Logon name: ...:@ftpsecure.pola

Password:

Phone

FTP Server URI: ftp://ftp.polarislibrary.com

Logon name: ...:@ftpsecure.pola

Password:

Txt Message

FTP Server URI: ftp://ftp.polarislibrary.com

Logon name: ...:@ftpsecure.pola

Password:

Save a local copy Enhanced profile

Save Cancel Apply Help

5. Select **Save**.

Exporting Hold Notices More Than Once a Day

You can now export hold notices more often than once a day using an existing SQL job.

In previous versions, **Hold Notice Processing** populated hold notice email and text and sent out email notices. In 7.6, this SQL job now also exports hold notices data for all hold notice methods that are configured for export (print, email, text, and phone). It is scheduled by default to run daily every four hours between 9:00 AM and 7:59 PM, but you can run it more frequently.

Note:

When you schedule **Hold Notice Processing**, ensure **Notices Processing** doesn't run at the same time (the default is 6:00 AM once a day).

Enabling the SMS Opt-In Message

For libraries that are currently sending text (SMS) notices using a third party vendor, you can now enable Polaris to display the following opt-in message during patron registration and patron record update in PAC:

"By selecting TXT Messaging, I verify that this is my mobile number and opt in to receive library notifications regarding holds, overdues, fines and general notices. Message frequency may vary. Message & data rates may apply. Reply HELP for help and STOP to cancel. View our Terms of Service and Privacy Policy."

This message was originally created to support the Cirrius Impact integration with Polaris, but you can use the Polaris Web Administration Tool (Language Editor) to modify this message by changing the wording in **PACML_SMS_TERMS**. The language string appears when it is enabled for the patron's registered branch, and a patron selects text messaging in PAC.

Note:

If you modify the provided opt-in message, be aware that federal regulations require the message to contain information about the frequency of notices, terms of service, how to stop receiving notices, and how to get help.

To enable the SMS opt-in message

1. In Polaris Administration (staff client), go to **Administration Explorer > System > Parameters**.
2. Select **Notification**, and open **Notification Options**.
3. Select **General**.
4. In the Notification method section, select **TXT message**.
5. Select **Display SMS terms**.

Notification options

General Overdue & Bill Hold Request & Cancellation Fine Reminder Serial

Notification method

- Print
 - Export
 - Available in PAC
- E-mail
 - Available in PAC
- Phone
 - Export
 - Available in PAC
- TXT Message
 - Export
 - Include with phone
 - Available in PAC
 - Display SMS terms

[Languages...](#)

E-mail notice

From: "QA-POLARIS" <@iii.com>

Reply-to: "QA-POLARIS" <@iii.com>

E-mail address to use: Use both E-mail and Alt f

Send report for e-mail notice processing

@clarivate.com

Export

Print

FTP Server URI: ftp://ftp.polarislibrary.com

Logon name: @ftpsecure.pola

Password: ●●●●●●

Phone

FTP Server URI: ftp://ftp.polarislibrary.com

Logon name: @ftpsecure.pola

Password: ●●●●●●

Txt Message

FTP Server URI: ftp://ftp.polarislibrary.com

Logon name: @ftpsecure.pola

Password: ●●●●●●

Save a local copy Enhanced profile

Save Cancel Apply Help

6. Select **Save**.

Sending Same Day Overdue Notices

You can now configure Polaris to send the first overdue notice on the same day an item becomes overdue. In previous versions, you could send the first overdue notice no earlier than the day *after* an item became overdue.

When the first overdue notice interval is set to a value of 0 on the Notification options dialog in Polaris Administration (staff client), the system adds overdue items to the notice queue on the day they become overdue.

Note:

This change does not apply to second or third overdue notices. When the notice interval for second (or third) overdue notices is set to 0, Polaris does not send second (or third) overdue notices.

To configure Polaris to send the overdue notice on the day the item becomes overdue

1. In Polaris Administration (staff client), go to **Administration > Explorer**.
2. Select an organization level (**System, Library, or Branch**).
3. In the Administration Explorer tree list, double-click the system, library, or branch name to expand the list.
4. Select **Parameters > Notification**.
5. Double-click **Notification options**.
The Notification options dialog appears.
6. Select the **Overdue & Bill** tab.
7. In the **First overdue** section, set the **Notice interval** to 0.

Notification options

General Overdue & Bill Hold Request & Cancellation Fine Reminder Serial

Overdue Export

First overdue

Notice interval: 0 days Include claimed items

Notification method: Patron preference Send additional TXT message

Notification library: Patron's branch

Return address: Use notification library

Second overdue

Notice interval: 0 days Send additional TXT message

Notification method: E-mail

Third overdue

Notice interval: 0 days Send additional TXT message

Notification method: E-mail

Bill Export

Notice interval (does not apply to manually-billed charges): 90 days Send additional TXT message

Notification method: Patron preference

Notification library: Lending branch

Return address: Use notification library

Combine patron notices

Notification method: Patron preference Send additional TXT message

Save Cancel Apply Help

8. Select **Save** .

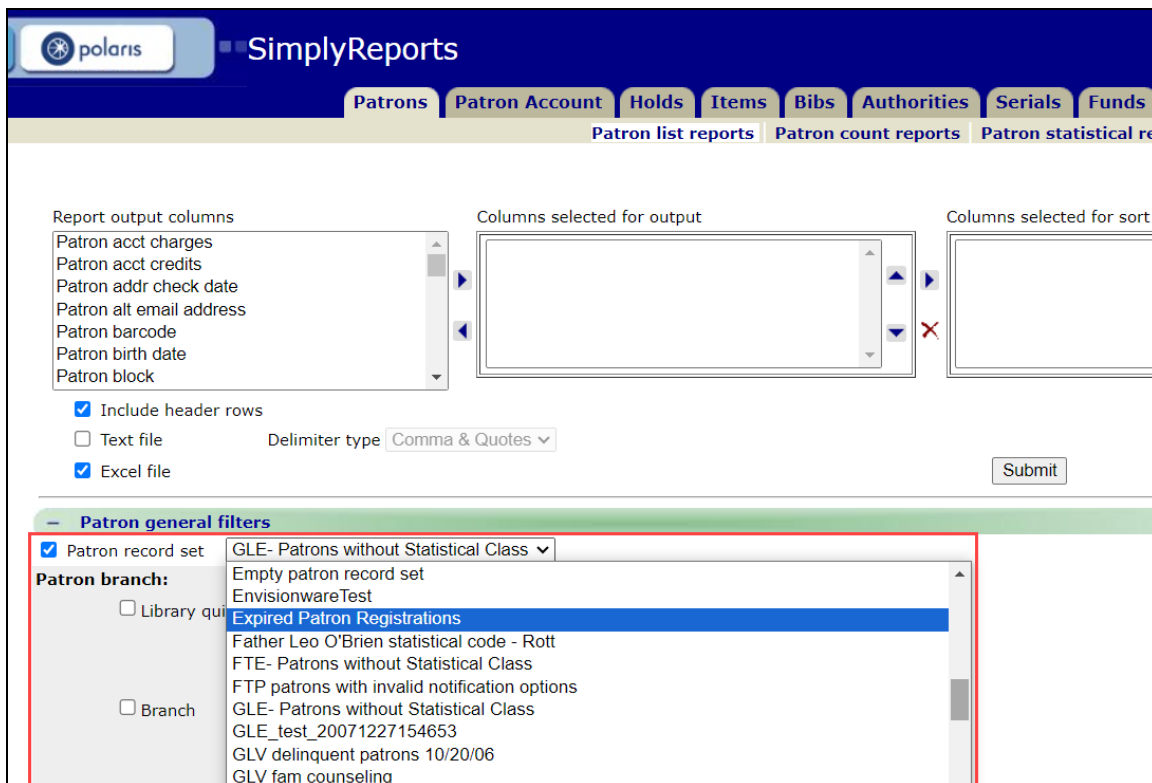
Improvements to Filtering in SimplyReports

Version 7.6 contains two improvements for filtering report output in SimplyReports:

- [Filtering by Record Set Improvement](#)
- [New Item Language Filter](#)

Filtering by Record Set Improvement

When you use a record set filter to limit report output to records in a particular record set, the list no longer includes deleted record sets. This improvement means that you don't have to scroll through a long list of deleted record sets to find the record set you want to select for your report.



The following types of reports include a record set filter:

- Patron list reports
- Patron count reports
- Bibliographic list reports
- Bibliographic count reports
- Item list reports
- Item count reports
- Authority list reports
- Authority count reports

New Item Language Filter

Item list reports and item count reports now include an item language filter.

The screenshot shows a filter configuration interface with four rows of filters. Each row has a checkbox on the left and a dropdown menu on the right. The 'Item language' filter is highlighted with a red border. The dropdown for 'Item language' is open, showing a list of languages: Albanian, Arabic, Armenian, and Bengali. To the right of the dropdown is a checkbox labeled 'Not present'.

<input type="checkbox"/> Circ status	In Out Out-ILL Held
<input type="checkbox"/> Resource group	All orgs - testing Saratoga & other branches test group test non-integrated hoopla titles Otten test
<input type="checkbox"/> Vendor account	3M QA Digital Group 1 3M QA Digital Group 2 3M QA Digital Group 3 3MTest account
<input checked="" type="checkbox"/> Item language	Albanian Arabic Armenian Bengali

The Item language filter limits report output to items with a Language value that matches the selected language. You can select more than one language. If Not present is selected, the report output is limited to items with no Language value specified in the item record.

Improvements to Aeon Special Collection Request Workflows

Version 7.6 contains updates to PowerPAC that improve the user experience when a patron places a request for an item that is part of an Aeon special collection.

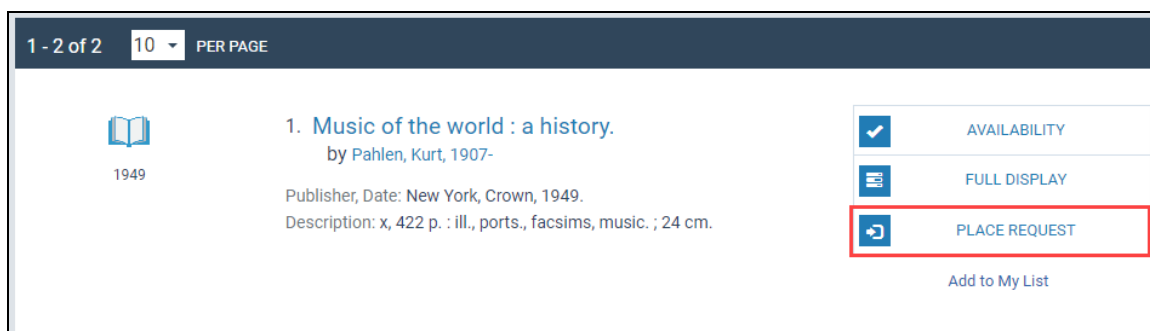
The following workflows have been added or improved for libraries that use Aeon to handle special collection requests:

- [Placing an Aeon Request with the Place Request Button](#)
- [Placing an Aeon Request from the Availability View](#)

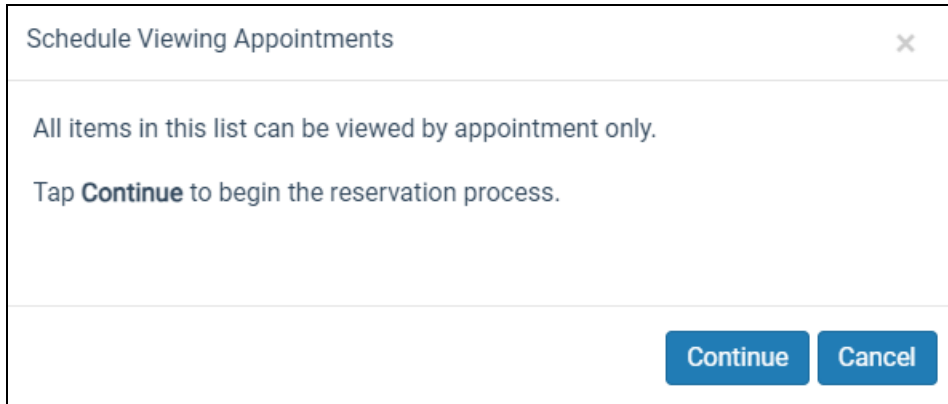
For more information about using Aeon special collection requests with Polaris, see Enabling Aeon Special Collection Requests in the [What's New in Polaris and Leap \(7.4\)](#) document.

Placing an Aeon Request with the Place Request Button

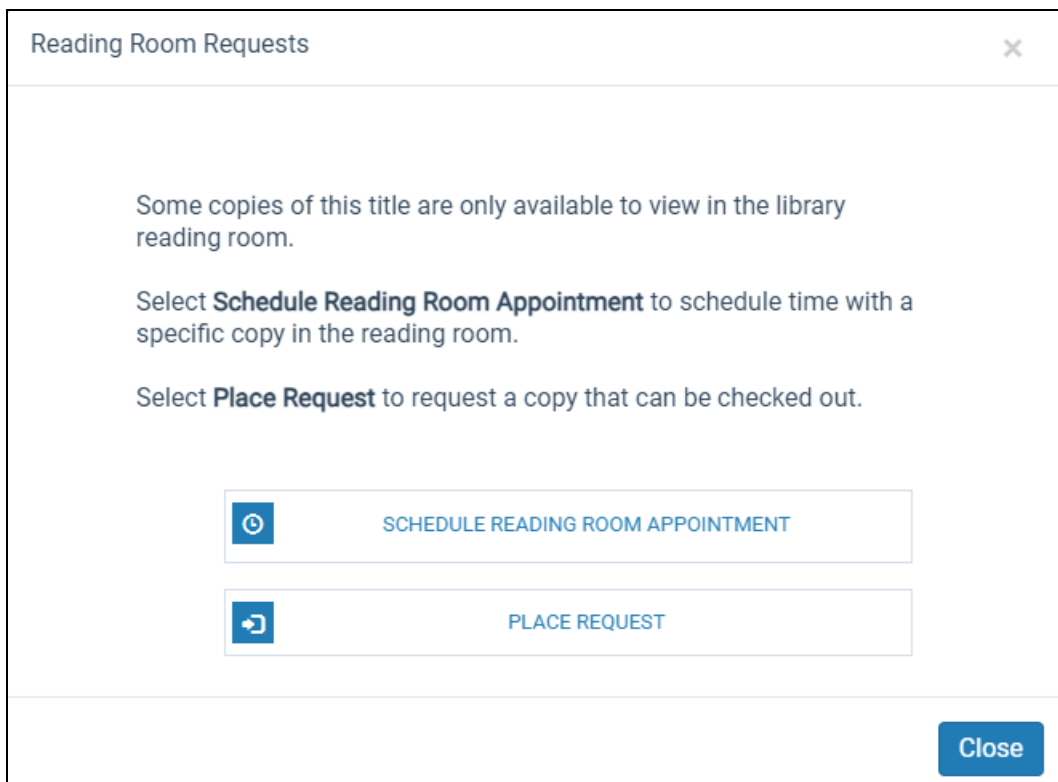
In previous versions, you could only initiate an Aeon special collection request by viewing a title's availability information. In Polaris 7.6, you can also initiate an Aeon special collection request by selecting the PLACE REQUEST button.



If all items associated with the title are part of a special collection, PowerPAC displays the Schedule Viewing Appointments dialog and prompts you to place an Aeon special collection request.






If some items associated with the title are part of a special collection but others are not, PowerPAC displays the Reading Room Requests dialog. You can choose whether to place an Aeon special collection request and view the item in a reading room, or request a copy of the item that can be checked out.



Placing an Aeon Request from the Availability View

When you view availability information for an item that is part of an Aeon special collection, PowerPAC now displays a "Request to view in reading room" link. Selecting the link initiates an Aeon special collection request.

 2. Music of the world, a history., Pahlen, Kurt, 1907- (1949)

Call Number	Shelf Location	Status	Circ Date	Type
▼ Saratoga Springs Public Library (1 of 1 available)				
  780 PAH		In		Book
<div style="border: 2px solid red; display: inline-block; padding: 2px 10px; color: blue; text-decoration: underline;">Request to view in reading room</div>				

You can also place an Aeon special collection request by selecting the request icon .

Suppressing the Pickup Area Option of None

Now, you can suppress the pickup option of "None" using a setting in Polaris Administration (staff client).

If you suppress the none option, then wherever the pickup options are listed (Leap, PAC):

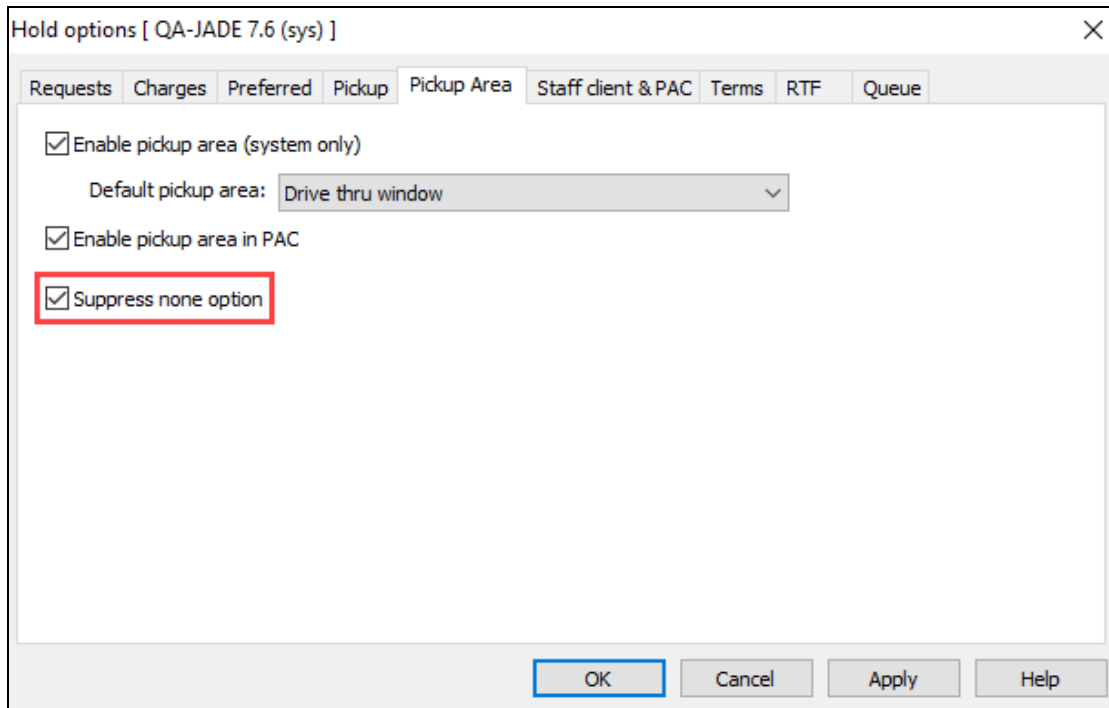
- The system removes "None" from the dropdown list.
- The Default pickup area appears as the first selection.

Note:

If your library enables pickup areas, but there is nothing in the list of pickup areas, then "None" still displays as a pickup option.

To suppress the pickup option of "None"

1. In the Polaris Administration (staff client), open **Administration > Explorer**.
2. Select **System > Parameters > Request > Holds Options**.
3. Select **Pickup Area**.
4. Select **Suppress none option**.



5. Select **OK**.

The system removes "None" from the dropdown list everywhere pickup options are listed. The default pickup area becomes first in the list.

Using Additional Payment Methods

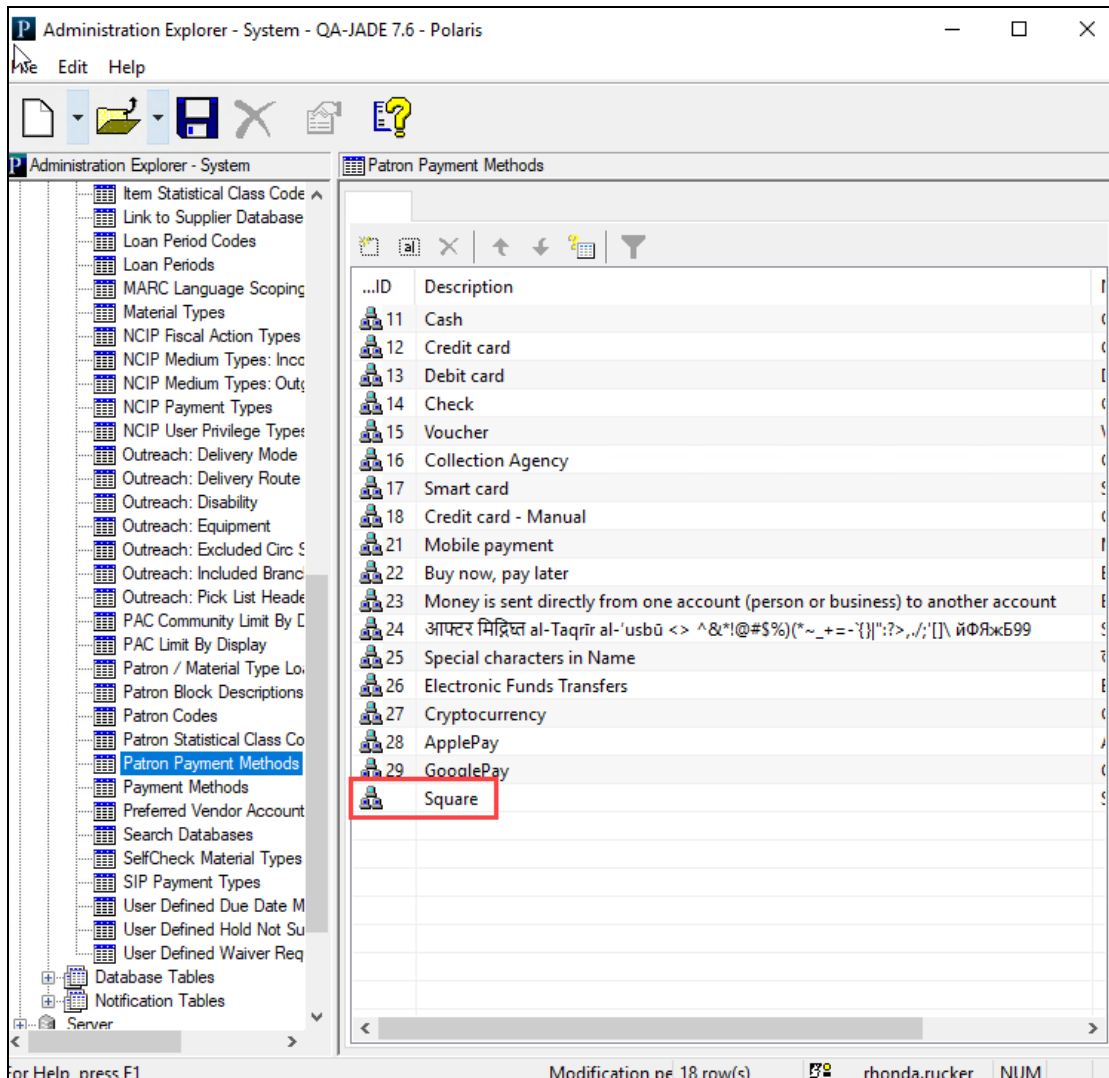
You can now add payment methods to the lists of patron payment options in Polaris. To manage patron payment methods, you must have the permission: **Access tables: Allow**. To add a patron payment method and see it in Leap and the staff client, you must do the following:

1. [Create a new payment method in Polaris Administration \(staff client\)](#).
 2. [Select the payment method in for your branch in System Administration \(staff client\)](#).
 3. [View the payment method in Leap](#).
-

Creating a New Payment Method

To create a new payment method

1. Open Polaris Administration (staff client), and select **Administration > Explorer > System**.
The Administration Explorer appears.
2. Select **Policy Tables > Patron Payment Methods**.



3. Select  **Insert** payment method.

The Insert: Patron Payment Methods dialog appears.

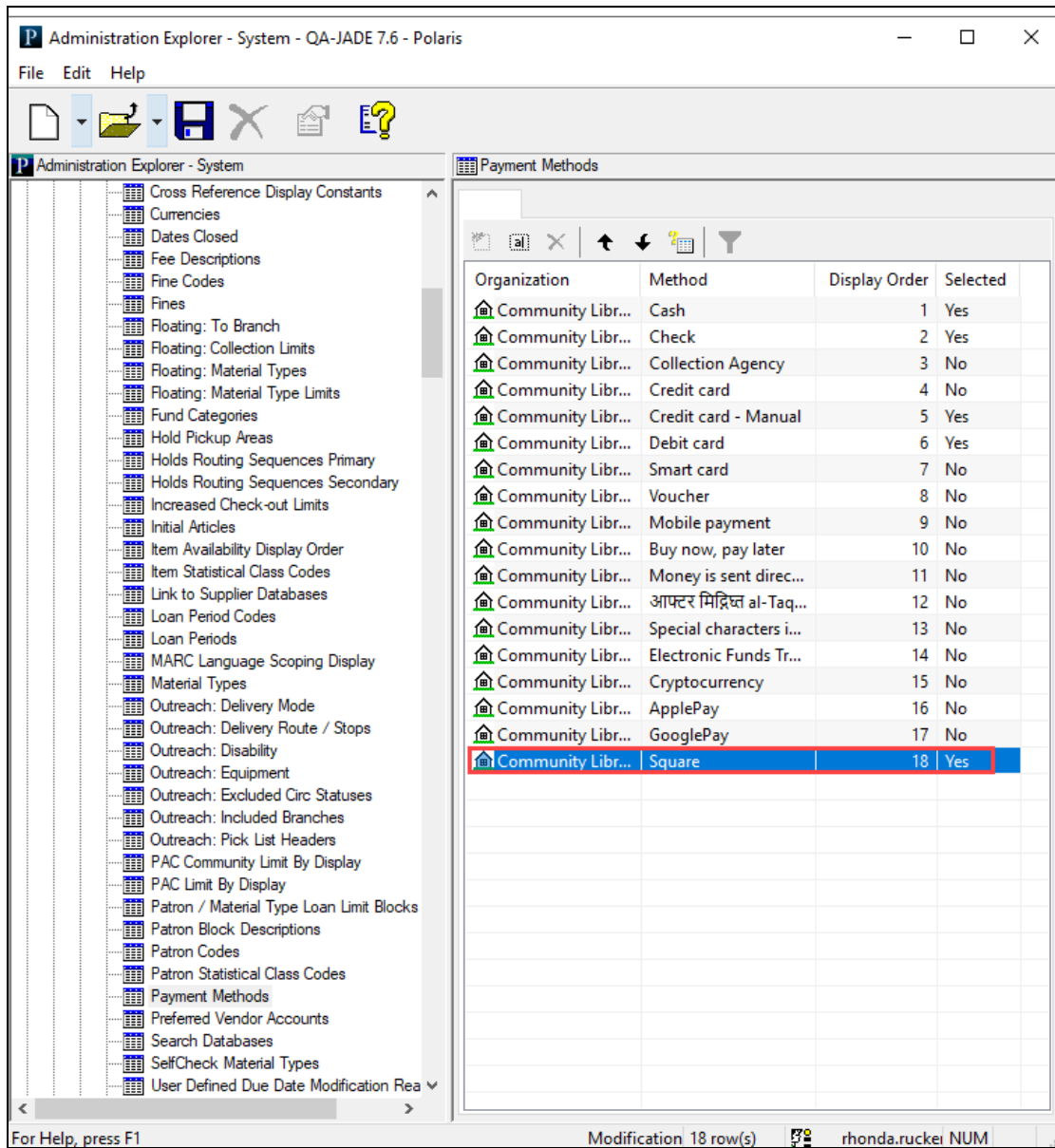
4. Enter a **Description** and **Name** for the new payment method.
5. Select **OK**.

The system adds the new payment method to the bottom of the Patron Payment Methods table.

Selecting the New Payment Method for Your Branch

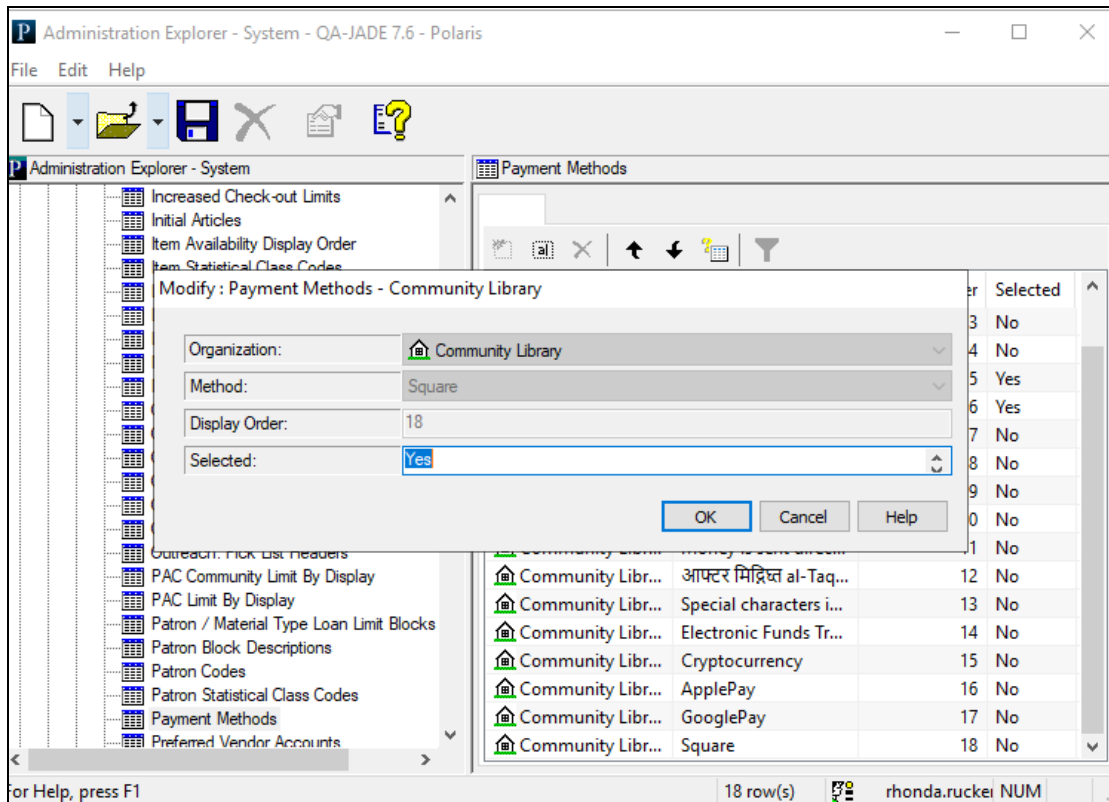
To select the new payment method for your branch


1. Open Polaris Administration (staff client), and select **Administration > Explorer**.
The Administration Explorer appears.
2. Select **Branch > *the name of your branch* > Policy Tables > Payment Methods**.
The Payment Methods table appears with your new entry at the bottom.



3. Select a payment method.

The Modify: Payment Methods dialog appears.



4. Under Selected, enter **Yes**.
5. Select **OK**.
6. Select **Save** .

Polaris displays the new payment method based on the user's logon branch.

Viewing the New Payment Method

After you create and select a payment method in Polaris Administration (staff client), you can view the new payment method while paying a patron charge in Leap.

To view the new payment method in Leap

1. In Leap, use the Find Tool to search for a Patron Record.
2. Open the patron record and select **Account View**.

3. Select a charge from the table and select **Pay**.
4. Expand the **Method** dropdown list.

The new payment method appears in the list.

The screenshot shows a payment interface with the following elements:

- Buttons: Pay, Waiver Request, Add Charge, Bill Charge, More, Filter Charges
- Balance: \$104.99
- Amount: \$104.99
- Method: Cash (dropdown menu open)
- Note: (empty)
- Buttons: PAY, CANCEL
- View: Account Summary

TYPE	DATE	BARCODE	TITLE	REASON	ORGANIZATION	NOTE	BILLED	AMOUNT	BALANCE
Charge	4/9/2024			New Card	Community Library			\$104.99	\$104.99
									\$104.99

The new payment method appears wherever patron payment method appears.

Checking in Claimed Items without Charging Overdue Fines

You can now configure Leap to offer you the option of waiving a patron's overdue fines when you check in a claimed item.

You can already waive overdue fines at check-in using Leap's existing Overdue Fine dialog. However, you may not be aware that the item you are checking in has been claimed. The new **Overdues: Prompt for claimed items** parameter lets you configure Leap to display a separate Claimed Item Overdue Charges dialog when you check in an overdue item that has also been claimed.

Note:

By default, Leap displays the Overdue Fine dialog when you check in an overdue item, but does not alert you when an overdue item has been claimed. If you want to continue to use this default behavior, you don't need to take any action.

The sections below explain how to configure and use this feature:

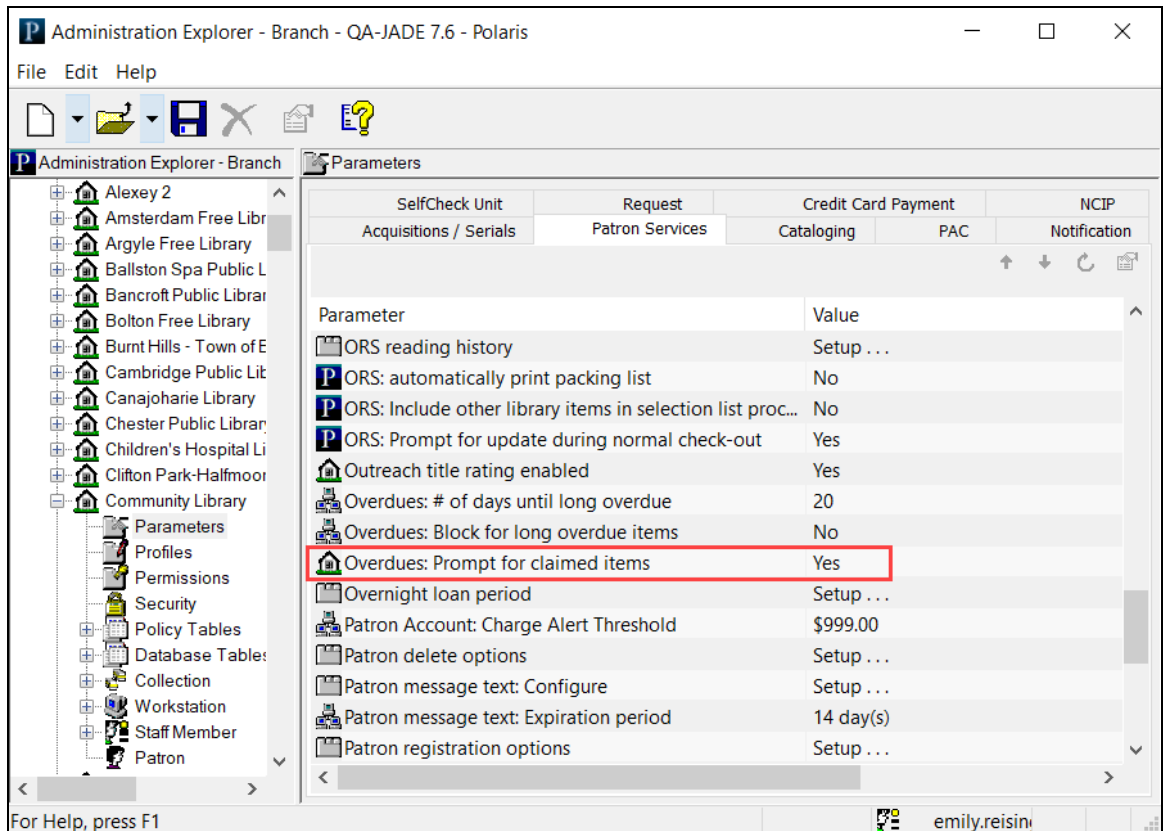
- [Configuring Leap to Display the Claimed Item Overdue Charges Dialog](#)
- [Waiving Overdue Fines when Checking In a Claimed Item](#)


Configuring Leap to Display the Claimed Item Overdue Charges Dialog

To configure Leap to display the Claimed Item Overdue Charges dialog when you check in an overdue item that has been claimed

1. In Polaris Administration (staff client), go to **Administration > Explorer**.
2. Select an organization level (**System, Library, or Branch**).
3. Select **Parameters > Patron Services**.

The patron services system parameters appear.



4. Double-click the **Overdues: Prompt for claimed items** parameter, and set the **Value** option to **Yes**. By default, the parameter is set to No.
5. Select **Save** .

Waiving Overdue Fines when Checking In a Claimed Item

You can waive overdue fines when checking in a claimed item if you have the **Fines: Waive fines via claimed item charges prompt: Allow** permission assigned in Polaris Administration (staff client). For more information about permissions for waiving patron fines, search for "Circulation and Patron Services Workflow Permissions" in the Polaris staff client help.

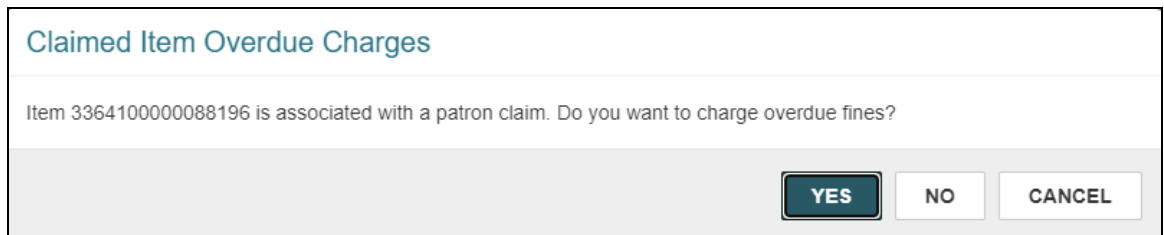
To waive overdue fines when checking in a claimed item

1. In Leap, select **CHECK IN**.

The Check In workform appears.

2. Check in an item that is both overdue and has been claimed.

If the **Overdues: prompt for claimed items** parameter is set to **Yes**, Leap displays the Claimed Item Overdue Charges dialog.



The screenshot shows a dialog box titled "Claimed Item Overdue Charges". The text inside the dialog reads: "Item 3364100000088196 is associated with a patron claim. Do you want to charge overdue fines?". At the bottom right of the dialog, there are three buttons: "YES" (highlighted with a dark background), "NO", and "CANCEL".

3. Select **NO**.

Leap waives the overdue fines and completes the check-in transaction.

Note:

If you select **YES**, Leap charges overdue fines and continues the check-in transaction by displaying the Overdue Fine dialog. If you select **CANCEL**, Leap cancels the check-in transaction.

Linking from Patron Records in Leap to External Patron Data

Polaris now supports links from the patron record in Leap to patron data that is stored in an external database (for example, a school database).

You can configure links to external patron data using three new settings in Polaris Administration (staff client). The following settings can be configured at the system, library, or branch level:

- Web App: Suppress Link: Patron External Database – Determines whether links to external patron data appear on the patron record workform in Leap.
- Web App: Patron External Database URL – Specifies the base URL of the external database.
- Web App: Patron External Database UDF – Determines which user-defined field (UDF) in the patron record stores the unique string that identifies the patron in the external database.

Note:

By default, links from Leap to external patron data are not enabled. If you want to use this default behavior, you don't need to take any action.

The sections below explain how to configure and use this feature:

- [Link Structure for External Patron Data Links](#)
- [Configuring Leap to Display Links to External Patron Data](#)
- [Entering Unique Patron Identifier Data in the Patron Record](#)
- [Using External Patron Data Links in Leap](#)

Link Structure for External Patron Data Links

Polaris uses two elements to construct each link to external patron data link:

- A base URL, specified in the Web App: Patron External Database URL setting.

- A unique patron identifier, specified in a UDF in the patron record. Your library determines which UDF stores the unique patron identifier by configuring the Web App: Patron External Database UDF setting.

When a Leap user selects a link to view external patron data, the system combines these two elements to construct a URL with the following structure:

<base URL><unique patron identifier>

Example:

Assume your library has the following configuration:

- The base URL is set to the following value in the Web App: Patron External Database URL setting:
`https://database.example.com/home/retrieve?identifier=`
- The Web App: Patron External Database UDF setting is set to 5, which specifies that the unique patron identifier is stored in the UDF 5 field in the patron record.
- Sarah Smith's patron record contains a value of 12345 in the UDF 5 field.


When you view Sarah Smith's patron record in Leap and select the external patron data link, the system constructs and launches the following link:

`https://database.example.com/home/retrieve?identifier=12345`

Configuring Leap to Display Links to External Patron Data

To configure Leap to display links to external patron data

1. In Polaris Administration (staff client), go to **Administration > Explorer**.
2. Select an organization level (**System, Library, or Branch**).
3. In the Administration Explorer, double-click the system, library, or branch name to expand the list.
4. Select **Profiles > Staff Client**.

5. Double-click **Web App: Suppress Link: Patron External Database**, then select **No** to enable the display of links to external patron data in Leap.
 6. Double-click **Web App: Patron External Database URL**, then enter the external patron database URL in the **Value** field. The URL must begin with `http://` or `https://`.
 7. Double-click **Web App: Patron External Database UDF**, then select a value between 1 and 5. The value specifies which UDF in the patron record stores the unique string that identifies the patron in the external database. For example, selecting a value of 5 specifies that the unique patron identifier is stored in the UDF 5 field.
 8. Select **Save** .
-

Entering Unique Patron Identifier Data in the Patron Record

For links to external patron data to function, each patron record must contain a unique string that identifies the patron in the external database.

To enter the unique patron identifier in the patron record

1. In Leap, open a patron record.
2. In the left navigation menu, select **Attributes**.
3. Enter the unique patron identifier in the UDF specified in the Web App: Patron External Database UDF setting in Polaris Administration (staff client).

Note:

Your library enables UDFs and assigns labels to them at the system level. The names of the UDFs you see in the patron record depend on your library's configuration.

4. Select **SAVE**.
-

Using External Patron Data Links in Leap

When links to external patron data are enabled and a patron record contains a unique patron identifier in the appropriate UDF, an **EXTERNAL DATABASE** button appears in the

patron's profile. Select this link to view external patron data.

LAURA IZQUIERDA ⓘ

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REGISTRATION ACTIONS ↕ ↻ 🖨️ CLOSE

🔒 BLOCKS 📄 NOTES

📄 Check Out (0) 📄 Out (3) / Overdue (3) 💰 Account (\$0.00) ⌚ Claims (6) / Lost (0) 📄 Holds (10) / Held (0) 📄 ILL (0) / Held (0) More ▾

Profile Attributes Email Address Phone/Fax Notifications Preferences Image Misc. Info

Profile

Barcode *	Registered At *	
<input type="text" value="A12291954"/>	<input type="text" value="Amsterdam"/>	
Former Barcode	Patron Code *	
<input type="text" value="131335456456"/>	<input type="text" value="Retired"/>	
Last Name *	Date of Registration	
<input type="text" value="Izquierda"/>	<input type="text" value="11/15/2018"/>	
First Name *	Expiration Date *	
<input type="text" value="Laura"/>	<input type="text" value="11/15/2024"/>	
Middle Name	Birth Date	
<input type="text"/>	<input type="text" value="12/1/1955"/>	
Title	Suffix	Statistical Class
<input type="text"/>	<input type="text"/>	<input type="text" value="Cobleskill-Town"/>

SAVE

RENEW

RESET PASSWORD

COPY

MERGE

DELETE

SECURE

GENERATE BARCODE

EXTERNAL DATABASE

Beta Support for Basic OAuth 2.0 with Akamai

Leap now supports the use of basic OAuth 2.0 with the Akamai identity provider for single sign-on authentication (SSO). Version 7.6 offers a beta release of this functionality.

Contact Innovative for help getting started with basic OAuth 2.0 authentication using Akamai.

MARC Technical Updates in Polaris 7.6

The updates specified in the following links were implemented in Polaris 7.6.

- MARC Update Number 33 (November 2021)
 - [Bibliographic format updates](#)
 - [Authority format updates](#)
- MARC Update Number 34 (July 2022)
 - [Bibliographic format updates](#)
 - [Authority format updates](#)
- MARC Update Number 35 (December 2022)
 - [Bibliographic format updates](#)
 - [Authority format updates](#)
- MARC Update Number 36 (June 2023)
 - [Bibliographic format updates](#)
 - [Authority format updates](#)
- [MARC Technical Notice \(January 3, 2023\)](#)
- [MARC Technical Notice \(January 25, 2023\)](#)
- [MARC Technical Notice \(February 22, 2023\)](#)
- [MARC Technical Notice \(March 7, 2023\)](#)
- [MARC Technical Notice \(April 25, 2023\)](#)
- [MARC Technical Notice \(May 2, 2023\)](#)
- [MARC Technical Notice \(May 23, 2023\)](#)
- [MARC Technical Notice \(June 20, 2023\)](#)
- [MARC Technical Notice \(July 18, 2023\)](#)
- [MARC Technical Notice \(August 8, 2023\)](#)
- [MARC Technical Notice \(August 22, 2023\)](#)
- [MARC Technical Notice \(August 29, 2023\)](#)
- [MARC Technical Notice \(September 12, 2023\)](#)
- [MARC Technical Notice \(October 20, 2023\)](#)
- [MARC Technical Notice \(October 31, 2023\)](#)