



# What's New in Polaris and Leap

7.3

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# Contents

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<b>Polaris Installation Notes</b> .....	<b>1</b>
<b>New or Modified Polaris Administrative Settings</b> .....	<b>2</b>
<b>Polaris API Changes</b> .....	<b>3</b>
<b>Enabling and Using INN-Reach Visiting Patron</b> .....	<b>5</b>
Using Visiting Patron Check Out (INN-Reach) .....	5
Checking In an Item from a Visiting Patron (INN-Reach) .....	6
<b>Creating Purchase Orders Manually</b> .....	<b>7</b>
Create a Purchase Order Manually .....	7
Create a Purchase Order Line Item Manually .....	8
Copy a Purchase Order Line Item to an Invoice .....	11
Create a Purchase Order Line Item Segment Manually .....	12
<b>Expanded Support for Invoices in Leap</b> .....	<b>14</b>
Create an Invoice .....	14
Add Line Items to an Invoice .....	16
Receive an Invoice Line Item .....	25
View Additional Information on the Invoice Workform .....	25
<b>Creating, Editing, and Copying Authority Records in Leap</b> .....	<b>28</b>
Create an Authority Record .....	28
Edit an Authority Record .....	29
Copy an Authority Record .....	30
Add MARC Tags and Edit MARC Tag Data .....	30
Authority Record Validation and Duplicate Checking .....	36
Cataloging Keyboard Shortcuts .....	38

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<b>Replacing Duplicate Records in Leap</b> .....	<b>39</b>
<b>Consolidated Views on the Leap Item Record Workform</b> .....	<b>41</b>
<b>Using Borrow By Mail in Leap</b> .....	<b>42</b>
Place a Hold from a Patron Record .....	42
Place Multiple Holds .....	43
Print a Checklist .....	46
Print a Mailer .....	47
<b>Canceling Holds in Held Status</b> .....	<b>48</b>
<b>Using the Picklist Cancelled View</b> .....	<b>49</b>
<b>Improvements to Patron Passwords</b> .....	<b>50</b>
Support for Complex Patron Passwords .....	50
Improved Data Protection for Patron Passwords .....	50
<b>Opting Out of Self-Registration Duplicate Detection</b> .....	<b>51</b>
<b>Updates to the OCLC ILL Integration</b> .....	<b>53</b>
<b>Support for Azure AD Authentication with Leap SSO</b> .....	<b>55</b>
<b>Access to LX Starter</b> .....	<b>56</b>
Professionally Designed Circulation Notices .....	56
Free Image Library and Cover Images .....	57
Automated Bounceback Handling and Workflows .....	58
Engagement Metrics .....	58
More About LX Starter .....	58

## Polaris Installation Notes

**Important:**

When the new Polaris release is installed on a workstation, the file path changes from 7.2 to 7.3 as in the following examples:

C:\ProgramData\Polaris\7.3

C:\Program Files\Polaris\7.3

C:\Program Files (x86)\Polaris\7.3

## New or Modified Polaris Administrative Settings

The system administration settings below have been added or modified to facilitate the new features for Polaris Administration (staff client) and Leap in 7.3.

Setting	Purpose	Level
<b>New Parameters</b>		
Permit cancellation on: Held	Specifies whether patrons and staff can cancel hold requests with a status of Held. For details, see <a href="#">Canceling Holds in Held Status</a> .	System
INN-Reach: Enable visiting patron check out	Specifies whether you can perform visiting patron check-outs in Leap. When this parameter is enabled, the Visiting Patron Check Out (INN-Reach) option appears in the Utilities menu in Leap. For details, see <a href="#">Enabling and Using INN-Reach Visiting Patron</a> .	System, Library, and Branch
<b>New Profile</b>		
Perform duplicate detection	Specifies whether the system performs duplicate detection when patrons self-register using PowerPAC, MobilePAC, or Polaris API. For details, see <a href="#">Opting Out of Self-Registration Duplicate Detection</a> .	System, Library, and Branch
<b>Modified Parameter</b>		
ILL options	The Polaris OCLC ILL integration now supports the latest standard ( <a href="#">ISO 18626</a> ) for ILL transactions. If you use OCLC's ILL Direct Request service, you must configure two new settings on the ILL options dialog. For details, see <a href="#">Updates to the OCLC ILL Integration</a> .	System, Library, and Branch

## Polaris API Changes

The following methods have been updated:

Method Name	Purpose
HoldRequestCancel	<p>This public method now cancels a specific hold request or cancels all local hold requests for a specific patron whose hold requests have a status of held (6), library-enabled. This method still cancels the statuses:</p> <ul style="list-style-type: none"> <li>• inactive (1)</li> <li>• active (2)</li> <li>• pending (4)</li> <li>• shipped (5)</li> <li>• not supplied (7) library-enabled</li> <li>• located (18) library-enabled</li> </ul> <p><b>Note:</b> Now, submitting a zero for the RequestID forces a “cancel all” operation.</p>
PatronBasicDataGet	<p>The method now returns both the patron code and patron statistical class values.</p>
PatronRegistrationCreateData	<p>The method now allows patrons to self-register and generate a barcode, even if a matching patron record exists. This happens only when the SA setting Profiles &gt; PAC &gt; Patron Access Options, self-registration tab has duplicate detection disabled.</p>
PatronRegistrationUpdate	<p>The method now returns patron registration information, such as name, username, and barcode.</p>

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



## Enabling and Using INN-Reach Visiting Patron

Libraries that participate in INN-Reach can now enable visiting patron functionality in Leap. An INN-Reach visiting patron visits a library other than their home library in the INN-Reach system and checks out items using their home library credentials. If your library participates in INN-Reach, use the following steps to enable this functionality in Leap.

### To enable the Visiting Patron Check Out (INN-Reach) menu option in Leap

1. Contact Innovative to have a representative configure visiting patron in the INN-Reach Central server.
2. In the Polaris System Administration (staff client), go to Administration **Explorer** > **System** > **Parameters** > **Request**.
3. Set the **INN-Reach: Enable visiting patron checkout** parameter to **Yes**. The parameter is set to **No** by default.
4. Select **Save**.

The Visiting Patron Check Out (INN-Reach) menu option appears in Leap.

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### Using Visiting Patron Check Out (INN-Reach)

After you enable the menu item in Leap, staff can use Leap as follows to check out an INN-Reach item and check in an INN-Reach item.

### To check out an item to a Visiting Patron

1. In Leap, select **Utilities** > **Visiting Patron Check Out (INN-Reach)**.  
The Visiting Patron Authentication dialog opens.
2. Select the INN-Reach participating library that the patron belongs to.
3. Enter the patron's barcode.
4. (Optional) Have the patron enter their password. This is optional or required based on the settings for the patron's account at their home library.
5. Select **OK**.
6. The Visiting Patron Check Out workform opens.
7. Type or Find the barcode of the item to be checked out.

**Note:**

The patron can check out the item provided the item has a status of "In," is holdable and contributed to INN-Reach (see [Circulate Items Requested via INN-Reach](#)). And the patron is not blocked from borrowing or at their request limit.

8. Select Enter .

The item appears in the table and the Check Out number increments.

9. (Optional) You can set a special loan time period for a visiting patron if you have **Modify due date and time** permission. For detailed steps on setting special loan time period, see [Set a Special Due Date/Loan Period During Check Out](#).

10. Select **OK**.

11. Select **COMPLETE**.

The items are checked out to the visiting patron.

---

## Checking In an Item from a Visiting Patron (INN-Reach)

Visiting patrons can return items to either the lending library or their home library. Checking in visiting patron items follows the normal check in processes.

To check in an item from a visiting patron, see [Check in Items in Normal mode](#).

## Creating Purchase Orders Manually

Library staff can now use Leap to create purchase orders, purchase order line items, and segments. You need the Purchase Orders: Create permission to manually create a purchase order. For more information about purchase order permissions, search for "Acquisitions Workflow Permissions" in the Polaris staff client help. This topic covers the following information:

- [Create a Purchase Order Manually](#)
- [Create a Purchase Order Line Item Manually](#)
- [Copy a Purchase Order Line Item to an Invoice](#)
- [Create a Purchase Order Line Item Segment Manually](#)

### Create a Purchase Order Manually

#### To create a purchase order manually

1. Select **New > Purchase Order**.

The New Purchase Order workform opens with the following fields prefilled:

Field	Prefill
Owner	the logged-in branch
Status	Pending
Status Date	date purchase order is created
Type	Firm Order
Method	Purchase
Number	dependent on Polaris Administration (staff client) settings:  <b>Note:</b> Leap prefills the PO Number according to the Polaris Administration (staff client) settings. The PO Number is a compound value that can include:

Field	Prefill
	<ul style="list-style-type: none"> <li>• A prefix for system-generated purchase orders</li> <li>• The purchase order number increment</li> <li>• The purchase order starting number</li> </ul> <p>For more information on these settings, search for "Automatic Purchase Order Numbers" in the Polaris staff client help.</p>

2. Fill in the required fields (PO Number and supplier) and select **SAVE**.

The system creates the purchase order and opens the Purchase Order workflow. For more information on the purchase order workflow, see [View or Edit a Purchase Order](#).

### To create a purchase order manually with templates enabled

1. Select **New > Purchase Order**.  
The New Purchase Order dialog opens.
2. Select a template to help prefill your library's designated fields in the new purchase order in addition to the fields automatically prefilled when you select **None**.  
Selecting **None** prefills the [same fields prefilled](#) in a new purchase order.
3. Select **OK**.  
The New Purchase Order workflow opens.
4. Fill in the required fields (PO Number and supplier) and select **SAVE**.  
The system creates the purchase order and opens the Purchase Order workflow. For more information on the purchase order workflow, see [View or Edit a Purchase Order](#).

### Create a Purchase Order Line Item Manually

Purchase order line items contain information about the titles you are ordering. Each line item contains at least one segment with the distribution and fund information for the copies of that title.

**Note:**

To view and edit information in the Purchase Order Line Item workflow,

you need the following permissions:

- Access Acquisitions: Allow
- Purchase Orders: Access
- Purchase Orders: Modify

### To open the Purchase Order Line Item workflow

1. Go to the Purchase Order workflow.
2. Select the **Line Items** view.
3. Select a row in the line items table.  
The Purchase Order Line Item workflow opens.

### To add a line item

To add a line item, the purchase order must be in Pending status and the user must have Purchase Orders: Modify, Create permissions.

1. Select **NEW LINE ITEM**.

The Purchase Order Line Item workflow opens. This is a modified workflow with only **Details** and **Segments** views.

### New Purchase Order Line Item - 1

SAVE
ACTIONS ▾
CLOSE

Purchase order number: <b>RCR2</b>	Status: <b>Pending</b>	Line no.: 1
Suffix:	Status date: <b>8/23/2022</b>	Bib control number:
ISBN/ISSN:	Other no.:	Material type:

---

Details
Segments

Title Details

ISBN/ISSN	FIND	Bib Control Number	Bib Template
<input type="text"/>		<input type="text"/>	<input type="text"/>
Title		Author	
<input type="text"/>		<input type="text"/>	
Publisher	Date	Edition	<input type="checkbox"/> Alert <input checked="" type="checkbox"/> Display in PAC
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Other No.	LCCN	Material Type	
<input type="text"/>	<input type="text"/>	<input type="text"/>	

Price

Unit Price	Discount Rate	Discount Price
<input type="text" value="\$0.00"/>	<input type="text" value="25"/>	<input type="text"/>

2. Fill in the required fields. For more information about Purchase Order Line Item fields, see [View and Edit Purchase Order Line Item Information](#).
3. [Create a segment](#).
4. Select **SAVE**.

The system saves the purchase order line item in Pending status.

#### To modify the status or delete a line item

1. Select the checkbox beside the row in the Line Item table you want to modify.
2. Select one of the following:
  - **CANCEL** - Changes a line item with a status of Received or Closed to Canceled.

- **DELETE** - Removes the line item from the table and deletes it from the system.
- **RECEIVE** - Changes a line item with a status of Pending, Continuing, or Partly Received to Received.
- **UNDO RECEIPT** - Changes a line item with a status of Received to On Order.

You can modify more line item statuses in the Purchase Order Line Item workflow.

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## Copy a Purchase Order Line Item to an Invoice

### To copy a line item to an invoice

1. From the Purchase Order Line Item workflow, select the **Line Items** view.
2. Select the checkbox beside the row in the Line Item table you want to modify.
3. Select **COPY TO**.

This option is not available under the following circumstances:

- The purchase order type is Firm, Donation or Gift and a purchase order line item is selected that is already linked to an invoice line item or has a status of Canceled, Claimed, Closed, Pending, or Pending Claim.
  - The purchase order type is Standing Order and a purchase order line item is selected that is already linked to an invoice line item or has a status of not Currently Received.
  - The purchase order type is Subscription and the purchase order line item or items selected is already linked to an invoice line item or has a status that is not Currently Received.
  - Any purchase order line items selected have linked invoice line items or a suppressed status.
4. Select one of the following:
    - **New Invoice** - Copy the purchase order line item and its segments to an invoice you create. For detailed steps on creating an Invoice, see [Create an Invoice](#).

- **Existing Invoice** - Copy the purchase order line item and its segments to an existing invoice you choose from the Find Tool.

The Copy to Invoice dialog opens.

5. Select **CONTINUE**.

The system creates invoice line items from the selected purchase order line items. The system copies purchase order line item title details, pricing, and segment data to the invoice line item. The system updates the invoice line item quantity according to the following table:

Purchase Order Status	Invoice Line Item Quantity
Not Received or Currently Received	0
Received or Currently Received	Copied from purchase order line item
Part Received	Copied from purchase order line item segments

## Create a Purchase Order Line Item Segment Manually

- **To create a new segment**
  1. From the Purchase Order Line Item workform, select the **Segments** view.
  2. Select **+ NEW SEGMENT**.  
The Add Segment dialog opens.
  3. Enter or select the following values:
    - **Quantity** - Enter the number of units for this segment order.
    - **Destination** - Select the destination library or branch for this segment order.
    - **Collection** - (optional) Select the collection this order belongs to.
    - **Fund** - Select the fund that pays for this order.
  4. Select **SAVE**.



Leap adds the new segment to the table in the Purchase Order Line Item workflow.

## Expanded Support for Invoices in Leap

In addition to viewing, paying, editing and deleting invoices in Leap, you can now also do any of the following:

- [Create an invoice.](#)
- [Add line items to an invoice.](#)
- [Receive an invoice line item.](#)
- [View additional information on the Invoice workflow.](#)

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### Create an Invoice

You can create invoices manually in Leap if you have the Invoices: Create permission enabled in Polaris Administration. For more information about invoice permissions, search for "Acquisitions Workflow Permissions" in the Polaris staff client help.

#### To create an invoice

1. Select **New > Invoice**.  
A New Invoice workflow appears.

### New Invoice - 2

SAVE
CLOSE

<b>Number</b> <input style="width: 95%;" type="text"/>	<b>Suffix</b> <input style="width: 95%;" type="text"/>	<b>Lines</b> <input style="width: 95%;" type="text"/>	<b>Type</b> Regular <span style="float: right;">▼</span>
<b>Invoice Date</b> 9/6/2022 <input style="width: 15px; height: 15px; border: 1px solid #ccc;" type="text"/>	<b>Status</b> Open	<b>Status Date</b> 9/6/2022	<b>Total</b> <input style="width: 95%;" type="text"/>
			<b>Method</b> Purchase <span style="float: right;">▼</span>

---

[Details](#)

Account Identifiers

<b>Owner</b> Community Library (COB) <span style="float: right;">▼</span>	<b>Supplier</b> <input style="width: 95%;" type="text"/> <span style="float: right; border: 1px solid #ccc; padding: 2px 5px;">FIND</span>
<b>SAN</b> <input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/> : <input style="width: 30px;" type="text"/>	<b>SAN</b> <input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/> : <input style="width: 30px;" type="text"/>
<b>Plan</b> <input style="width: 95%;" type="text"/>	<b>Account</b> <input style="width: 95%;" type="text"/>

Invoice Details

<b>Transmission Method</b> (None) <span style="float: right;">▼</span>	<b>EDI File Name</b> <input style="width: 95%;" type="text"/>
---	--

2. Enter a unique invoice number in the **Number** box.
3. In the **Suffix** box, enter an invoice number suffix.
4. Select an invoice type from the **Type** list. By default, **Regular** is selected.
5. (Optional) Use the **Invoice Date** setting to edit the invoice creation date.
6. Select a payment method from the **Method** list.

**Note:**  
The available payment methods depend on the invoice type selected.

7. Select the library that owns the invoice from the **Owner** list.

**Note:**  
Organizations appear in the **Owner** list if the organization has the Invoices: Create permission.

8. Select a supplier. To do this:
  - a. Select **FIND**.
  - b. Use the Find Tool to search for a supplier and select it.

c. Select **OPEN**.

**Notes:**

- When you select a supplier, Leap automatically applies the supplier's current discount rate to the invoice.
- You are not required to select a supplier if the invoice type is Miscellaneous.

9. Enter plan information in the **Plan** box.
10. Select the invoice transmission method from the **Transmission Method** list.
11. To indicate that the invoice should be closed by a certain date (and that no payments or credits should be made after this date), enter a date in the **Closing Alert Date** box.
12. Enter a payment due date in the **Payment Due Date** box.
13. Enter the date that the invoice materials were received in the **Receipt Date** box.
14. Enter the date that invoice materials were shipped in the **Shipped Date** box.
15. Enter any notes about the invoice in the **Note** box.
16. Select **SAVE**.

You can [add line items](#), charges, credits, or discounts to the new invoice.

---

## Add Line Items to an Invoice

Leap now supports the following workflows for adding invoice line items:

- [Add an invoice line item for an existing bibliographic record.](#)
- [Add an invoice line item to create a brief bib record.](#)
- [Add an invoice line item to a Miscellaneous invoice.](#)

### Add an Invoice Line Item for an Existing Bibliographic Record

You can add an invoice line item for an existing bibliographic record if all of the following conditions are true:

- You have the following permissions enabled in Polaris Administration:
  - Invoices: Create
  - Invoices: Modify
- The invoice is not a Miscellaneous invoice.
- The invoice has a status of Open.

**To add an invoice line item for an existing bibliographic record**

1. Use the Find Tool to find the invoice you want to edit, and open it in the Invoice work-form.
2. Select the **Line Items** view.
3. Select **NEW LINE ITEM**.

The New Invoice Line Item workform appears.

**New Invoice Line Item - 1** SAVE CLOSE

Invoice number: 30126439210099      Status: **Open**      Line no.: 1  
 Suffix:      Status date: 8/24/2022      Bib control number:  
 ISBN/ISSN:      Other no.:      Purchase order number:

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

**Title Details**

ISBN/ISSN        Bib Control Number       Bib Template (None)

Title       Author

Publisher       Date       Edition        Alert  Display in PAC

Other No.       LCCN       Material Type (None)

Shipped Date        Alert Note

4. On the **Details** view, select an ISBN or ISSN by doing the following:
  - a. Select **FIND**.
  - b. Use the Find Tool to search for a bibliographic record and select it.
  - c. Select **OPEN**.

Leap populates bibliographic record fields with data (including title, author, and price) from the record you selected. Once you select an ISBN or ISSN, you can no longer edit bibliographic data fields.

5. (Optional) Select the **Alert** checkbox to display an alert icon for the line item on the **Line Items** view of the Invoice workflow.
6. (Optional) Enter a number in the **Other No.** box. This field corresponds to the bibliographic record 024 tag.
7. (Optional) Select a material type from the **Material Type** list.

**Note:**

The Material Types policy table determines the material types that appear in this list. For more information, search for "Material Types Policy Table" in the Polaris staff client help.

8. (Optional) Enter the date when invoice materials were shipped in the **Shipped Date** box.
9. (Optional) Enter text in the **Alert Note** box.
10. Enter a number in the **Unit Price** box.
11. (Optional) Edit the **Discount Rate**.

**Notes:**

- Leap automatically applies the supplier's current discount rate to the invoice line item.
- Leap automatically calculates the discount rate if you enter the unit price and discount price. The discount rate can have up to four decimal places.

12. (Optional) Edit the **Discount Price**.

**Note:**

Leap automatically calculates the discount price if you enter the unit price and discount rate.

13. Select the **Segments** view.
14. Add at least one line item segment.

### To add a line item segment

- a. On the Invoice Line Item workform, select the **Segments** view.
- b. Select the **Orders** view.
- c. (Optional) Enter text in the **Filter** box to filter the list of segments.
- d. Select **+NEW SEGMENT**.

The Add Segment dialog appears.

- e. Do one or more of the following:
  - Select a library or branch from the **Destination** list.

**Note:**

If the invoice method is Depository Agreement or Purchase, the destination you select must have at least one fund.

- Select a collection from the **Collection** list.
  - Select a fund from the **Fund** list.
- f. Select **OK**.

15. Select **SAVE**.

### Add an Invoice Line Item to Create a Brief Bib Record

You can add an invoice line item when no bibliographic record exists. Leap automatically creates a brief bib record using the bibliographic data you provide.

You can add an invoice line item and automatically create a brief bib record if all of the following conditions are true:

- You have the following permissions enabled in Polaris Administration:
  - Invoices: Create
  - Invoices: Modify
  - Create a bib record from acquisitions and serials: Allow
- The invoice is not a Miscellaneous invoice.
- The invoice has a status of Open.

**To add an invoice line item and a brief bib record**

1. Use the Find Tool to find the invoice you want to edit, and open it in the Invoice workform.
2. Select the **Line Items** view.
3. Select **NEW LINE ITEM**.

The New Invoice Line Item workform appears.

4. (Optional) On the **Details** view, enter a number in the **ISBN/ISSN** box.
5. (Optional) Select a template from the **Bib Template** list.
6. Enter a title in the **Title** box.
7. (Optional) Enter an author in the **Author** box.
8. (Optional) Enter the publisher in the **Publisher** box.
9. (Optional) Enter the publication date in the **Date** box.
10. (Optional) Enter the edition in the **Edition** box.
11. (Optional) Select the **Alert** checkbox to display an alert icon for the line item on the **Line Items** view of the Invoice workform.



12. (Optional) Select the **Display in PAC** checkbox if you want the title to appear in the PAC.

**Notes:**

- The Display in PAC: Brief bibliographic records created from acquisitions administrative setting controls the default setting of this checkbox. This setting is available in Polaris Administration (staff client) on the **Profiles > Acquisitions/Serials** tab. For more information, search for "Enable Brief Bib Record Display in PAC" in the Polaris staff client help.
- If you select a template from the **Bib Template** list, Leap applies the **Display in PAC** setting specified in the template.

13. (Optional) Enter a number in the **Other No.** box. This field corresponds to the bibliographic record 024 tag.
14. (Optional) Enter a Library of Congress Control Number in the **LCCN** box.
15. (Optional) Select a material type from the **Material Type** list.

**Note:**

The Material Types policy table determines the material types that appear in this list. For more information, search for "Material Types Policy Table" in the Polaris staff client help.

16. (Optional) Enter the date when invoice materials were shipped in the **Shipped Date** box.
17. (Optional) Enter text in the **Alert Note** box.
18. Enter a number in the **Unit Price** box.
19. (Optional) Edit the **Discount Rate**.

**Notes:**

- Leap automatically applies the supplier's current discount rate to the invoice line item.
- Leap automatically calculates the discount rate if you enter the unit price and discount price. The discount rate can have up to four decimal places.

20. (Optional) Edit the **Discount Price**.

**Note:**

Leap automatically calculates the discount price if you enter the unit price and discount rate.

21. Select the **Segments** view.

22. Add at least one line item segment.

**To add a line item segment**

- a. On the Invoice Line Item workform, select the **Segments** view.
- b. Select the **Orders** view.
- c. (Optional) Enter text in the **Filter** box to filter the list of segments.
- d. Select **+NEW SEGMENT**.

The Add Segment dialog appears.

- e. Do one or more of the following:
  - Select a library or branch from the **Destination** list.

**Note:**

If the invoice method is Depository Agreement or Purchase, the destination you select must have at least one fund.

- Select a collection from the **Collection** list.
- Select a fund from the **Fund** list.

- f. Select **OK**.

23. Select **SAVE**.

**Add an Invoice Line Item to a Miscellaneous Invoice**

You can add an invoice line item to a Miscellaneous invoice when all of the following conditions are true:

- You have the following permissions enabled in Polaris Administration:
  - Invoices: Create
  - Invoices: Modify
- The invoice has a status of Open.

**To add an invoice line item to a Miscellaneous invoice**

1. Use the Find Tool to find the invoice you want to edit, and open it in the Invoice workform.
2. Select the **Line Items** view.
3. Select **NEW LINE ITEM**.

The New Invoice Line Item workform appears.

**New Invoice Line Item - 1**

Invoice number: 43224 misc      Status: Open      Line no.: 1

Suffix: purch      Status date: 8/23/2008      Bib control number:

ISBN/ISSN:      Other no.:      Purchase order number:

SAVE CLOSE

---

[Details](#)
Segments

**Title Details**

<b>ISBN/ISSN</b>	<b>FIND</b>	<b>Bib Control Number</b>	<b>Bib Template</b>
<input type="text"/>		<input type="text"/>	(None) <span style="float: right;">▼</span>
<b>Title</b>		<b>Author</b>	
<input type="text"/>		<input type="text"/>	
<b>Publisher</b>	<b>Date</b>	<b>Edition</b>	<input type="checkbox"/> Alert <input checked="" type="checkbox"/> Display in PAC
<input type="text"/>	<input type="text"/>	<input type="text"/>	
<b>Other No.</b>	<b>LCCN</b>	<b>Material Type</b>	
<input type="text"/>	<input type="text"/>	(None) <span style="float: right;">▼</span>	
<b>Shipped Date</b>	<b>Alert Note</b>		
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>		

4. Enter a title in the **Title** box.
5. (Optional) Enter an author in the **Author** box.
6. (Optional) Select the **Alert** checkbox to display an alert icon for the line item on the **Line Items** view of the Invoice workform.
7. (Optional) Enter a number in the **Other No.** box. This field corresponds to the bibliographic record 024 tag.
8. (Optional) Enter the date when invoice materials were shipped in the **Shipped Date** box.
9. (Optional) Enter text in the **Alert Note** box.
10. Enter a number in the **Unit Price** box.

11. (Optional) Edit the **Discount Rate**.

**Notes:**

- Leap automatically applies the supplier's current discount rate to the invoice line item.
- Leap automatically calculates the discount rate if you enter the unit price and discount price. The discount rate can have up to four decimal places.

12. (Optional) Edit the **Discount Price**.

**Note:**

Leap automatically calculates the discount price if you enter the unit price and discount rate.

13. Select the **Segments** view.

14. Add at least one line item segment.

**To add a line item segment**

- a. On the Invoice Line Item workform, select the **Segments** view.
- b. Select the **Orders** view.
- c. (Optional) Enter text in the **Filter** box to filter the list of segments.
- d. Select **+NEW SEGMENT**.

The Add Segment dialog appears.

- e. Enter a number in the **Quantity** box.
- f. (Optional) Do one or more of the following:
  - Select a library or branch from the **Destination** list.

**Note:**

The destination you select must have at least one fund.

- Select a collection from the **Collection** list.
- Select a fund from the **Fund** list.

- g. Select **OK**.

15. Select **SAVE**.

## Receive an Invoice Line Item

You can receive an invoice line item if the line item meets all of the following conditions:

- The payment status of the invoice line item is Open.
- The invoice line item is linked to a purchase order line item.
- The order type associated with the purchase order line item is Firm, Donation, or Gift.
- The linked purchase order line item has a status other than Received, Currently Received, Canceled, or Closed.

### To receive an invoice line item

1. On the Invoice workform, select the **Line Items** view.
2. Select one or more line items and then select **RECEIVE**.  
Leap prompts you to confirm that you want to receive the line item(s).
3. Select **CONTINUE**.  
Leap receives the line item and displays a confirmation message.

---

## View Additional Information on the Invoice Workform

The Invoice workform now includes four new views:

- **Bibliographic Records**
- **Items**
- **Purchase Orders**
- **Funds**

### Bibliographic Records View

The **Bibliographic Records** view displays the bibliographic records that are linked to the invoice. You can select a bibliographic record to view or edit it.

**Invoice** ⓘ

SAVE
ACTIONS ▾
REFRESH ↻
RESULTS 📄
CLOSE

**Number**  
sal5923

**Suffix**

**Lines**  
2

**Type**  
Regular ▾

**Invoice Date**  
6/7/2022 📅

**Status**  
Open

**Status Date**  
6/7/2022

**Total**  
\$89.61

**Method**  
Purchase ▾

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

Filter Bibs

TITLE	AUTHOR	FORMAT	RECORD STATUS	LINKED ITEMS	HOLDS	PUB DATE	CALL NO.	CONTROL NUMBER
The earl's comeuppance	Warady, Phyllis Ann.	Book	Final	4	0	1991	Fict	233997
Upholstery repair and restoration.	McDonald, Robert J.	Book	Final	6	0	1977	684.12 M	790

### Items View

The **Items** view displays the item records that are linked to the invoice. You can select an item record to view or edit it.

**Invoice** ⓘ

SAVE
ACTIONS ▾
REFRESH ↻
RESULTS 📄
CLOSE

**Number**  
sal5923

**Suffix**

**Lines**  
2

**Type**  
Regular ▾

**Invoice Date**  
6/7/2022 📅

**Status**  
Open

**Status Date**  
6/7/2022

**Total**  
\$89.61

**Method**  
Purchase ▾

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

Filter Items

TITLE	ASSIGNED BRANCH	COLLECTION	MATERIAL TYPE	SHELF LOCATION	CALL NUMBER	STATUS	BARCODE	LAST ACTIVITY	RECORD STATUS	CONTROL NUMBER
The earl's comeuppance	Southern Adirondack Library System	**special character test 10 (**spt10** */ )	Art	Folklife Center	t Fict w	Ordered			Final	12889557
The earl's comeuppance	Stillwater Public Library	Children's Nonfiction (JNF)	Art		Fict	Ordered			Final	12889558
The earl's comeuppance	Stillwater Public Library	Children's Nonfiction (JNF)	Art		Fict	Ordered			Final	12889559
Upholstery repair and restoration.	Southern Adirondack Library System	**special character test 10 (**spt10** */ )	Book		1 684.12 M 4	Ordered			Final	12889560

## Purchase Orders View

The **Purchase Orders** view displays the purchase orders that are linked to the invoice. You can select a purchase order to view or edit it.

**Invoice** ⓘ
SAVE
ACTIONS ▾
REFRESH
RESULTS
CLOSE

Number:

Suffix:

Lines:

Type:

Invoice Date:

Status:

Status Date:

Total:

Method:

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

PURCHASE ORDER NUMBER	SUFFIX	TYPE	STATUS	DATE	SUPPLIER	TOTAL
SAL5923		Donation	Released	6/7/2022	BLACK CAT PRESS	\$89.61

## Funds View

The **Funds** view displays the funds that are linked to the invoice. You can select a fund to view or edit it.

**Invoice** ⓘ
SAVE
ACTIONS ▾
REFRESH
RESULTS
CLOSE

Number:

Suffix:

Lines:

Type:

Invoice Date:

Status:

Status Date:

Total:

Method:

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

FUND NAME	ALTERNATE NAME	FUND TYPE	STATUS	TOTAL ALLOCATED	ENCUMBERED	EXPENDED	FREE BALANCE	FISCAL YEAR
1 CR Donation	1CRDon	Donation	Open	\$1,500.00	\$802.60	\$647.21	\$50.19	FY View 2
TLPL - Donations 2015-16	d16	Donation	Open	\$5,546.24	\$80.64	\$8.95	\$5,456.65	TLPL 2015-2016

## Creating, Editing, and Copying Authority Records in Leap

In addition to viewing authority records, you can now also perform the following authority record tasks in Leap:

- [Create an Authority Record](#)
- [Edit an Authority Record](#)
- [Copy an Authority Record](#)

When you save an authority record in Leap, the system performs the same record validation and duplicate checking that takes place in the staff client. See [Authority Record Validation and Duplicate Checking](#). Leap also offers keyboard shortcuts for authority record workflows. See [Cataloging Keyboard Shortcuts](#).

---

### Create an Authority Record

You can create authority records in Leap if you have the Authority records: Create permission enabled in Polaris Administration. For more information about cataloging permissions, search for "Cataloging Permissions" in the Polaris staff client help.

**Tip:**

You can use keyboard shortcuts when creating authority records. See [Cataloging Keyboard Shortcuts](#) for a list of all available shortcuts.

### To create an authority record

1. Select **New > Authority Record**.

A New Authority Record dialog appears.

2. (Optional) If you want to use a template to create the new record, select a template from the **Authority Record Template** list. By default, no template is selected.

**Note:**

For more information about record templates, search for "Using Cataloging Templates" in the Polaris staff client help.

3. Select **OK**.



The New Authority Record workform appears. If you are using a template, the workform displays the MARC fields specified in the template. If you are not using a template, the workform displays the following fields:

- Leader
  - 008 field
4. [Add MARC tags or edit MARC tag data.](#)
  5. Select **SAVE** to save the new record to the database.

Leap performs record validation and duplicate detection and then saves the record. For more information, see [Authority Record Validation and Duplicate Checking](#).

---

## Edit an Authority Record

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

**Tip:**

You can use keyboard shortcuts when editing authority records. See [Cataloging Keyboard Shortcuts](#) for a list of all available shortcuts.

### To edit an authority record

1. Find the authority record you want to edit, and open it in the Authority Record workform.
2. Select **MARC**.  
The **MARC** view appears.
3. [Add MARC tags or edit MARC tag data.](#)
4. Select **SAVE** to save your changes to the database.

Leap performs record validation and duplicate detection and then saves the record. For more information, see [Authority Record Validation and Duplicate Checking](#).

## Copy an Authority Record

You can copy an authority record in Leap if you have the Authority records: Create permission enabled in Polaris Administration. For more information about cataloging permissions, search for "Cataloging Permissions" in the Polaris staff client help.

**Tip:**

You can use keyboard shortcuts when copying authority records. See [Cataloging Keyboard Shortcuts](#) for a list of all available shortcuts.

### To copy an authority record

1. Find the authority record you want to copy, and open it in the Authority Record workform.
2. Select **ACTIONS > Copy**.

The New Authority Record workform appears. Leap populates the workform fields with the MARC data and record settings from the record you are copying.

3. [Add MARC tags or edit MARC tag data](#).
4. Select **SAVE** to save the new record to the database.

Leap performs record validation and duplicate detection and then saves the record. For more information, see [Authority Record Validation and Duplicate Checking](#).

---

## Add MARC Tags and Edit MARC Tag Data

When you are creating, editing, or copying authority records, you can modify tag data by doing any of the following:

- [Edit the Leader or the 008 control field](#).
- [Edit an existing data field tag](#).
- [Add an 008 control field](#).
- [Add a new data field tag](#).
- [Reorder tags](#).
- [Delete a tag](#).

### Edit the Leader or the 008 control field

You can edit the Leader and the 008 control field. You cannot edit the 001 tag (Control Number) or the 005 tag (Date and Time of Latest Transaction).

#### To edit the Leader or the 008 control field

1. Select the checkbox next to the field you want to edit.
2. Select **EDIT TAG**.

A dialog appears. The dialog contains editable fields that correspond to the MARC field you selected.

The screenshot shows a dialog box titled "LEADER - AUTHORITY DATA" with a close button (X) in the top right corner. The dialog contains five rows of dropdown menus, each with a label on the left and a dropdown box on the right:

- Record status (05)**: c - Corrected or revised
- Type of record (06)**: z - Authority data
- Character coding scheme (09)**: - MARC-8
- Encoding level (17)**: n - Complete authority record
- Descriptive cataloging form (18)**: - No information provided

At the bottom right of the dialog, there are two buttons: "OK" (in a teal box) and "CANCEL" (in a white box with a grey border).

3. Edit MARC data.
4. Select **OK** to close the dialog and retain your changes.

### Edit an existing data field tag

#### To edit a data field tag

1. Select the checkbox beside the tag you want to edit.
2. Select **EDIT TAG**.

**Note:**

You can also use a keyboard shortcut to open a tag for editing. To do this, press "E".

A dialog appears.

**Note:**

If your library or branch has enabled the **Display MARC field description** setting in Polaris Administration, the dialog displays the valid MARC subfield definitions for the current MARC tag in a yellow box. For more information, search for "Turn MARC Tag Name Display On or Off" in the Polaris staff client help.

130 - HEADING--UNIFORM TITLE

Tag: 130

Indicator One: - Undefined

Indicator Two: 0 - Number of nonfiling characters

Data: ‡aSecrets of nature

CTRL+Q - Insert subfield delimiter (‡)

(‡a) Uniform title / (‡d) Date of treaty signing / (‡f) Date of a work / (‡g) Miscellaneous information / (‡h) Medium / (‡k) Form subheading / (‡l) Language of a work / (‡m) Medium of performance for music / (‡n) Number of part/section of a work / (‡o) Arranged statement for music / (‡p) Name of part/section of a work / (‡r) Key for music / (‡s) Version / (‡t) Title of a work / (‡v) Form subdivision / (‡x) General subdivision / (‡y) Chronological subdivision / (‡z) Geographic subdivision / (‡6) Linkage / (‡8) Field link and sequence number

OK CANCEL

3. (Optional) Select a value from the **Indicator One** list to edit the first indicator.
4. (Optional) Select a value from the **Indicator Two** list to edit the second indicator.
5. (Optional) Enter text in the **Data** box to edit subfield data.

**Note:**

Press Ctrl + Q to insert a new subfield delimiter (‡).

6. Select **OK** to close the dialog and retain your changes.

## Add an 008 control field

You can add an 008 control field to the authority record only if the record does not already contain one.

### To add an 008 control field

1. Select **INSERT** to open the INSERT menu.

**Note:**

You can also use a keyboard shortcut to open the INSERT menu. To do this, press "I".

2. Select **008 Control Field**.

A dialog appears. The dialog contains editable fields that correspond to the MARC field you selected.

3. Edit MARC data a value from a list box or entering text in a box.
4. Select **OK** to close the dialog and retain your changes.

## Add a new data field tag

### To add a data field tag

1. Select **INSERT** to open the INSERT menu.
2. Select **Data Field**.

**Note:**

You can also use a keyboard shortcut to open the Data Field dialog. To do this, press "I" and then "F".

The Insert Data Field dialog appears.

The screenshot shows a dialog box titled "Insert Data Field". It has a close button (X) in the top right corner. The dialog is divided into several sections: a "Tag" input field, two dropdown menus labeled "Indicator One" and "Indicator Two", and a large "Data" text area. Below the "Data" area, there is a tooltip that reads "CTRL+Q - Insert subfield delimiter (‡)". At the bottom right of the dialog, there are two buttons: "OK" and "CANCEL".

3. Enter a three-digit tag number in the **Tag** box. The tag number must be between 010 and 999.

The dialog updates to display appropriate values in the Indicator One and Indicator Two lists.

**Note:**

If your library or branch has enabled the **Display MARC field description** setting in Polaris Administration, the dialog also displays the valid MARC subfield definitions for the current MARC tag in a yellow box. For more information, search for "Turn MARC Tag Name Display On or Off" in the Polaris staff client help.

4. (Optional) Select a value from the **Indicator One** list to specify the first indicator.
5. (Optional) Select a value from the **Indicator Two** list to specify the second indicator.
6. Enter text in the **Data** box to add subfield data.

**Note:**

Select Ctrl + Q to insert a new subfield delimiter (‡).

7. Select **OK** to close the dialog and retain your changes.

## Reorder tags

**Note:**

If your library has enabled automatic MARC tag sorting for authority records, Leap sorts the tags in the authority record in the order specified in the MARC validation profile when you save the record. You do not need to manually reorder tags, and Leap does not save any changes to the tag order that you make manually. For more information about automatic tag sorting, search for "Turn Automatic MARC Tag Sorting On or Off" in the Polaris staff client help.

If your library has *not* enabled automatic MARC tag sorting for authority records, you can change the order of the MARC tags in a authority record. The following conditions apply:

- You cannot move the Leader, the 001 tag, or the 005 tag.
- You cannot move an 008 control field below a data field tag. You also cannot move a data field tag above an 008 control field.

### To reorder tags in the authority record

1. Select the checkbox next to the tag you want to move.
2. Select **MOVE TAG UP** or **MOVE TAG DOWN**.

**Note:**

You can also press Shift + Up arrow or Shift + Down arrow.

## Delete a tag

You cannot delete the 001 tag, the 005 tag, or any tag that your library has defined as a required authority record tag. For more information about required tags, search for "Administering MARC Validation and Display" in the Polaris staff client help.

### To delete a tag

1. Select the checkbox next to the tag you want to delete.
2. Select **DELETE TAG**.

**Note:**

You can also use a keyboard shortcut to delete the selected tag. To do this, press "D".

## Authority Record Validation and Duplicate Checking

When you save an authority record, Leap does the following:

- Verifies that the record contains both a Leader and an 008 control field. See [Leader and 008 Verification](#).
- Performs record validation (if automatic MARC validation is enabled). See [Authority Record Validation](#).
- Performs duplicate detection. See [Authority Record Duplicate Detection](#).

### Leader and 008 Verification

Both a Leader and an 008 control field are required to save an authority record, even if your library has disabled all other MARC record validation.

If you attempt to save a record that lacks a Leader or an 008 field, Leap prompts you to add the missing field(s).

### Authority Record Validation

If automatic MARC validation is enabled, Leap performs the record validation specified in your library's MARC Validation: Authority profile. For more information on enabling or configuring MARC validation, search for "Administering MARC Validation and Display" in the Polaris staff client help.

If record validation determines that required tags are missing when you attempt to save a record, Leap prompts you to add the required tag(s). If record validation determines that there are other validation errors, Leap displays the validation errors and prompts you to do one of the following:

- Select **CONTINUE** to save the record despite the validation errors.
- Select **CANCEL** to stop saving and return to editing the record.

If you return to editing a record with validation errors, Leap displays a MARC Validation Results sidebar that lists the validation errors.



MARC Validation Results

Tag 008 is not the correct length of 40

**VALIDATE & SAVE**

You can edit the record and then select **VALIDATE & SAVE** to perform validation again and attempt to save the record.

### Authority Record Duplicate Detection

Leap identifies potential duplicate records based on the rules your library has configured in the Authority Deduplication table. For more information, search for "Managing Duplicate MARC Records" in the Polaris staff client help.

If duplicate detection identifies possible duplicate records when you save an authority record, Leap displays duplicate detection results.

Authority Record Duplicate Detection Results

---

**Record to Replace**

	CONTROL#	REASON
<input type="checkbox"/>	29	LCCN;Heading/Thesaurus

**REPLACE**
**CONTINUE**
**CANCEL**

You can do one of the following:

- Save the record. To do this, select **CONTINUE**.
- Replace one or more duplicate record with the record you are saving. To do this, select one or more records in the **Record(s) to Replace** list and select **REPLACE**.  
Leap deletes the selected records and saves the authority record that will be retained.
- Stop saving and return to editing the record. To do this, select **CANCEL**.

---

## Cataloging Keyboard Shortcuts

The table below lists the keyboard shortcuts you can use when editing bibliographic and authority records.

Action	Keyboard Shortcut
Edit the selected tag	E
Open the INSERT menu	I
Open the Insert Data Field dialog	I then F
Delete the selected tag	D
Move the selected tag up	Shift + Up arrow
Move the selected tag down	Shift + Down arrow
Insert subfield delimiter (‡) in tag Data field	Ctrl + Q

## Replacing Duplicate Records in Leap

Version 7.3 includes improvements to Leap's duplicate detection functionality for bibliographic records. If Leap identifies possible duplicate records when you save a bibliographic record, you can now choose to replace the duplicate records with the record you are saving.

**Note:**

You can also replace duplicate records when you save an authority record. For details, see [Creating, Editing, and Copying Authority Records in Leap](#) and navigate to the Authority Record Validation and Duplicate Checking section.

If you save a bibliographic record and Leap identifies possible duplicates, the Bibliographic Record Duplicate Detection Results dialog appears.

### Bibliographic Record Duplicate Detection Results

**Record to Retain**

CONTROL#	TITLE	AUTHOR	FORMAT	ITEMS	STATUS
1748013	New Fears: new horror stories by masters of the genre		Book	0	Final

**Record(s) to Replace**

<input type="checkbox"/>	CONTROL#	TITLE	AUTHOR	FORMAT	ITEMS	STATUS	REASON
<input type="checkbox"/>	1563313	New fears : new horror stories by masters of the genre		Book	6	Final	ISBN
<input type="checkbox"/>	1747992	New fears : new horror stories by masters of the genre		Book	0	Final	ISBN

ADD TITLES

REPLACE

CONTINUE

CANCEL

In previous versions, you could select **CONTINUE** to save the record or **CANCEL** to stop saving and return to editing the record.

In version 7.3, you can now also replace one or more duplicate record with the record you are saving.

### To replace duplicate records

1. (Optional) To manually add a duplicate record that does not already appear in the **Record(s) to Replace** list, do the following:
  - a. Select **ADD TITLES**.
  - b. Use the Find Tool to search for a bibliographic record and select it.
  - c. Select **OPEN**.

The record appears in the **Record(s) to Replace** list.

2. Select one or more records in the **Record(s) to Replace** list.
3. Select **REPLACE**.

Leap deletes the selected records, moves their linked items and holds to the bibliographic record that will be retained, and saves the record that will be retained.

## Consolidated Views on the Leap Item Record Workform

In previous versions, the Item Record workform in Leap contained both a **Details** view and a **Controls** view. In version 7.3, these views have been combined into a single **Details** view.

The settings that appeared on the **Controls** view in previous versions are now located at the bottom of the **Details** view.

The screenshot displays the 'Details' view of the Leap Item Record Workform. At the top, a navigation bar includes links for Details, Circulation, Blocks and Notes, History, Statistics, Record Sets, Notices, and Source and Donor. The form is organized into several sections:

- Barcode**: A text input field.
- Owning Branch\***: A dropdown menu showing 'Southern Adirondack (lib)'.
- Bib Control Number\***: A text input field with '13455' and a 'FIND' button.
- Collection**: A dropdown menu showing 'VHS (Juv) (VHS-Juv)'.
- Assigned Branch\***: A dropdown menu showing 'Southern Adirondack Library System (SAL)'.
- Parent Item**: A text input field.
- Shelf Location**: A dropdown menu showing '(None)'.
- Price**: A text input field with '\$8.95'.
- Non-circulating**
- Temporary Location**: A text input field.
- Circulation Status**: A dropdown menu showing 'In-Process'.
- Display in PAC**

Below these are three grouped sections:

- Material Type\***: 'Book and CD' (dropdown)
- Loan Period\***: 'Audiobook' (dropdown)
- Renewal Limit\***: '0' (text input)
- Statistical Code**: 'CBA' (dropdown)
- Fine Code\***: 'Children's Music' (dropdown)
- Home Branch\***: 'Southern Adirondack Library System (SAL)' (dropdown) with  **Do not float**

Another grouped section contains:

- Call Number Scheme\***: 'Dewey Decimal' (dropdown)
- Cutter**: Text input field
- Volume**: Text input field
- Prefix**: Text input field
- Suffix**: Text input field
- Copy**: Text input field
- Classification**: 'J Fict' (text input)
- Name of Piece**: Text input field

The bottom section, titled 'Hold Limited To:', contains:

- Loanable outside system**
- Do not mail to patron**
- Holdable**
- Pickup at**: 'Southern Adirondack Library System' (dropdown)
- Patrons from this library and branches**:  days past first available
- Patrons from this branch only**
- Preferred borrowers**

## Using Borrow By Mail in Leap

Staff members can now request titles for patrons and designate the requests as Borrow by Mail using Leap. Staff can also print a checklist of requests and a mailer using Leap.

**Note:**

To use Borrow by Mail, your library must be licensed for it. Contact your Innovative representative if you'd like to purchase a Borrow by Mail license.

This topic covers the following:

- [Place a Hold from a Patron Record](#)
- [Place Multiple Holds](#)
- [Print a Checklist](#)
- [Print a Mailer](#)

### Place a Hold from a Patron Record

#### To place a hold from a patron record

1. In Leap, go to the **Patron record > Holds** view.

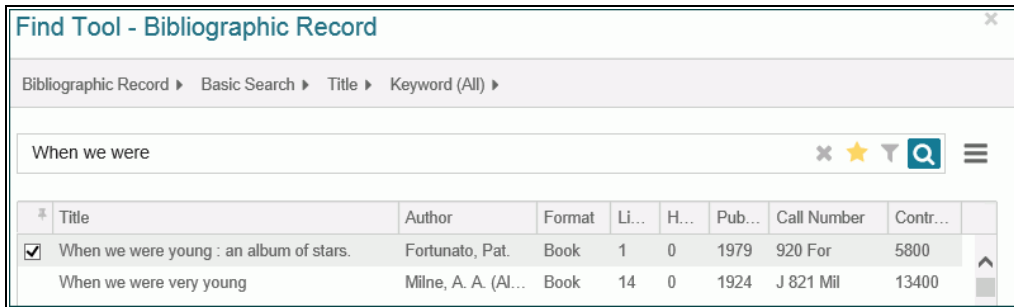
The patron's holds are displayed.

2. Select **NEW HOLD**.

The area below the button expands.

The screenshot shows the 'New Hold' form interface. At the top, there are action buttons: 'New Hold', 'Cancel', 'Reactivate', 'Delete', and 'More'. A 'Filter Holds' button is also present. The form is divided into sections for 'Activation' (8/31/2022), 'Expiration' (9/15/2022), and 'Pickup' (Community Library). A checkbox for 'Borrow by Mail' is located to the right of the 'Pickup' dropdown. Below these sections are three buttons: 'PLACE HOLD' (highlighted in green), 'UNLOCK', and 'CANCEL'. The main form area contains a search bar for 'Title' with a 'FIND TOOL' button, and input fields for 'Barcode', 'Author', 'Series', 'Edition', 'Format', and 'Pages'. There are also radio buttons for 'ISBN' and 'ISSN' next to the 'Author' field.

3. Select the **Title** box and start typing the title. Then, press **Enter** or select the **Return** button to see the results in the Find Tool. Or, select the **Find Tool** button to open the Find Tool and search for the bibliographic record.



**Note:**

When you search for a title, the Find Tool opens with **Bibliographic Record** selected. If the patron wants a hold placed on a specific item, and your library allows item-specific holds, you can select **Item Record** in the Find Tool and select an item record on which to place the hold.

4. (Optional) Select **Borrow by Mail** to request that the library deliver the title by mail.
5. Select the title to place a hold.
6. To change the duration of the hold request, select the **Activation** and **Expiration** boxes to open the calendar control and select new date.
7. Select **PLACE HOLD**.

If there are no blocking conditions, a message indicates the hold request was created, and the pending hold request appears at the top of the patron's holds list.

## Place Multiple Holds

### To place multiple holds at once for the same patron

1. In Leap, go to the **Patron record > Holds**.  
The patron's holds list is displayed.
2. Select **More > Multiple Holds**.

**MR. EUGENE J MUJICA** ⓘ  
 1000201318127  
 COMMUNITY LIBRARY **BLOCKS** NOTES

REGISTRATION ACTIONS REFRESH RESULTS CLOSE

Check Out (0) Out (4) / Overdue (4) Account (\$15.00) Claims (0) / Lost (0) **Holds (1) / Held (0)** ILL (0) / Held (0) More ▾

New Hold Cancel Reactivate Delete Fill Now Convert To ILL Deny Ask Me Later More ▾

- Return
- Add To Group
- Remove From Group
- Multiple Holds**

AUTHOR ▾	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS	PICKUP BRANCH	PICKUP BE	GROUP
<input type="checkbox"/>	Doctorow, E. L., 1931-2015 author.	Andrew's brain : a novel	Book		1/31/2018	Pending	Community Library	3

The area below the button bar expands.

Check Out (0) Out (1) / Overdue (1) Account (\$15.95) Claims (6) / Lost (0) **Holds (14) / Held (0)** More ▾

New Hold Cancel Reactivate Delete More ▾ Filter Holds

**Activation** 8/31/2022  
**Expiration** 9/15/2022  
**Pickup** Community Library ▾  Borrow by Mail

PLACE HOLD CANCEL

<input type="checkbox"/>	AUTHOR	TITLE	FORMAT	ASSIGNED BRANCH	CALL NUMBER	ITEM BARCODE
ADD TITLES <input type="button" value="🗑️"/>						

3. Select **ADD TITLES** to open the Find Tool.
4. Search for the titles that the patron wants to request.  
The search results are displayed.
5. Select one or more checkboxes next to the titles the patron wants to place a hold on.

**Note:**

You can search for and select multiple titles at once and select them in the Find Tool results. For example, if the patron wants to place holds on



multiple titles with the same author, you can search by author and select the titles in the Find Tool results list.

6. Select **OPEN**.

The titles are displayed in a list, but the holds are not placed until you select **PLACE HOLD**.

**Activation**

**Expiration**

**Pickup**

Borrow by Mail

	AUTHOR	TITLE	FORMAT	ASSIGNED BRANCH	CALL NUMBER	ITEM BARCODE
<input type="checkbox"/>	Russo, Richard Paul.	Ship of fools	Book			
<input type="checkbox"/>	Russo, Richard, 1949-	Mohawk	Book			
<input type="checkbox"/>	Russo, Richard, 1949-	Straight man	Book			
<input type="checkbox"/>	Russo, Richard, 1949-	The risk pool	Book			
<input type="checkbox"/>	Russo, Richard, 1949-	Nobody's fool	Book			
<input type="checkbox"/>	Russo, Richard, 1949-	Empire Falls	Book			

7. To add more titles, select **ADD TITLES**, and search for and select the additional titles.

8. When all requested titles are displayed in the list, select the checkboxes next to the titles, or select the checkbox in the column header to select all titles.

**Note:**  
To remove a title from the list, select the corresponding checkbox, and select the trashcan icon.

9. If you want to enter notes regarding these hold requests, select **Notes** to expand the area and type the notes.
10. (Optional) Select **Borrow by Mail** to request that the library deliver the titles by mail.
11. Select **PLACE HOLD**.

The hold requests are placed on all the selected titles.

## Print a Checklist

You must be logged in to a borrow by mail processing center, and your library must be licensed for the borrow by mail functionality before you can see the **Print Checklist** and **Print Mailer** buttons. Leap now sorts the checklist by patron name first, and then by title.

### To print a checklist

1. Select **Utilities > Request Manager > Holds**.

**Request Manager** REFRESH CLOSE

Branch: Amsterdam Free Library (AMS) Status: Out to patron By: Pickup

Hold Hold ILL INN-Reach

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

Total items | 24 total

<input type="checkbox"/>	AUTHOR	TITLE	CALL NUMBER	BARCODE	FORMAT	BRANCH	PATRON NAME	PATRON BRANCH	OUT	DUE
<input type="checkbox"/>		The Buttercream Gang [videorecording]	VC J Fict But	0004300599323	Videotape	AMS	Roraback, James R	AMS	2/27/2020	3/5/2020
<input checked="" type="checkbox"/>		Benji in Puppy love [videorecording]	VC J BENJ	35285100000218	Videotape	SCP	Patterson, Colleen M	SAR	2/9/2011	2/19/2011

2. Select the status of **Out to patron**.
3. Select the checkboxes beside the listed requests that you want to print in a checklist.
4. Select **Print Checklist**.  
Leap opens your browser's print page.

## Print a Mailer

You must be logged in to a borrow by mail processing center, and your library must be licensed for the borrow by mail functionality before you can see the **Print Checklist** and **Print Mailer** buttons.

### To print a mailer

1. Select **Utilities > Request Manager > Holds**.
2. Select the checkboxes beside the listed requests you want to print a mailer for.
3. Select **Print Mailer**.  
Leap opens your browser's print page.

## Canceling Holds in Held Status

You now have the option to enable staff and patrons to cancel hold requests in the **Held** status.

### To allow patrons and staff to cancel Held holds

1. In the staff client, select **Administration Explorer > System > Parameters > Request**.

The Hold options dialog opens.

2. Select the **Staff client & PAC** tab.

Hold options [ QA-GIZMO 7.3 (sys) ]

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

Trap at check-out

Display patron phone number when trapped

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

Alert in bulk check-in if the item is held

Permit patron notes from PAC

Permit suspended requests from PAC (system only)

**Permit cancellation on: (system only)**

Shipped

Held

If no items are attached:  Alert in Staff Client

Block in PAC

If patron is blocked:  Block in Staff Client

Block in PAC/SIP

Enable request status "Out"

PAC display patron contact info (PowerPAC only)

PAC block for patron verification

Change due date based on ratio:

Of  Requests

To  Items

Loan period  days

OK Cancel Apply Help

3. In the **Permit cancellation on** section, select **Held**.
4. Select **OK**.

Patrons and staff can now cancel hold requests that have the status of Held using PowerPAC, MPAC, PAPI, staff client, MyLibrary, ExpressCheck, and Leap.

## Using the Picklist Cancelled View

To help you save time managing canceled holds, a new **Cancelled** view in Leap's Picklist workflow lists all canceled holds.

### To see the new Picklist > Cancelled view

1. In Leap, select **Utilities > Picklist Processing**.

The Picklist Workform opens.

2. Select the **Cancelled** view.

The screenshot shows the Leap Picklist interface. At the top, there is a search bar with the text "Scan or search" and a "FIND" button. The user's name "rhonda.rucker (COB)" is visible in the top right. Below the search bar, the "Picklist" title is displayed, along with a dropdown menu showing "van" and a "CLOSE" button. The interface features several tabs: "Pending (1)", "Located (1)", "Unclaimed (6)", "Unclaimed ILL (8)", "Holds to Transfer (1)", and "Cancelled (1)". The "Cancelled (1)" tab is selected. Below the tabs, there is a "Properties" button and a "Filter requests" input field. The main content area shows a table with the following data:

	AUTHOR	TITLE	MATERIAL TYPE	PATRON NAME	PATRON BRANCH	ITEM BARCODE	CANCELLED DATE
<input type="checkbox"/>	Allison, Linda.	The Sierra Club summer book.	Book	van Natalie	NVR	0001000211548	8/2/2022

3. To open a dialog with details about the hold, select a single hold or row of the table, and select **Properties**.

#### Note:

Unlike other Picklist views, the **Cancelled** view displays rows until you update the circulation status of the item. Deleting the associated canceled hold request does not remove the row, but checking in the item does.

## Improvements to Patron Passwords

Polaris 7.3 includes the following improvements to patron passwords:

- [Support for Complex Patron Passwords](#)
- [Improved Data Protection for Patron Passwords](#)

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### Support for Complex Patron Passwords

In previous versions, patron passwords could not contain special characters or be longer than 16 characters. As of version 7.3, Polaris now supports complex patron passwords.

A patron password must be a minimum of 4 and a maximum of 64 characters. Passwords can contain any printable ASCII character except the pipe ("|") character. This includes numbers, letters, spaces, and most special characters.

**Note:**

If your library uses the "Passwords must be numeric only" setting to restrict patron passwords to numeric characters, this change will not affect you. For more information about the "Passwords must be numeric only" setting, search for "Set patron password and user name options" in the Polaris staff client help.

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### Improved Data Protection for Patron Passwords

Polaris 7.3 contains improvements to the hashing and encryption of patron passwords. Hashing and encryption protect the password data that Polaris stores.

For each patron password, the new hashing and encryption rules take effect the next time the password is changed.

## Opting Out of Self-Registration Duplicate Detection

You can now choose if patrons go through duplicate detection when they self-register. You can set up the Polaris Administration (staff client) so that the system doesn't perform duplicate detection on patrons who self-register using PowerPAC, MobilePAC, or Polaris API.

To opt out of duplicate detection for patrons who self-register

1. Open the Polaris Administration Explorer, and select **Profiles > PAC > Patron access options**.

The Patron Access Options dialog opens.

2. Clear **Perform duplicate detection**.
3. Select **Save**.

**Note:**

To completely disable duplicate detection on patron information entered in PowerPAC, MobilePAC, or Polaris API, ensure the following option is also cleared:

1. Open the Polaris Administration Explorer, and select **Parameters > Patron Services > Duplicate Detection Options**. The Duplicate detection options dialog appears.

Duplicate detection options

Use the following UDFs

- ID Number
- Privileges / Restrictions
- Voter Registration
- CybraryN Use Only (XXX,YYY)
- Not Currently in Use

Name on Identification (First and Last)

- Staff Client
- PAC
- Offline

Use Phone 1

Use E-mail Address

OK Cancel Help

2. Ensure the **Name on Identification (First and Last) > PAC** option is cleared.



## Updates to the OCLC ILL Integration

Polaris 7.3 contains updates to the OCLC ILL integration to support the latest standard ([ISO 18626](#)) for ILL transactions.

This change only impacts you if your library uses OCLC's ILL Direct Request service for ILL. This feature is configured in Polaris Administration (staff client) on the **OCLC** tab of the **Parameters > Request > ILL options** dialog.

ILL options

Requests Restrictions OCLC

Enable OCLC connection

OCLC Symbol:

Service

Direct to Profile

Direct to Lender

Direct to Review

Service URL

API Key

Save Cancel Apply Help

If you use OCLC's ILL Direct Request service, you must configure two new settings on the ILL options dialog:

- **Service URL** - The OCLC service URL. By default, this field contains the following URL:

**<https://worldcat.org/isoill/request/data/>**

The OCLC service URL is the same for all libraries.

- **API Key** - Your library's OCLC API key. Contact OCLC to get this information before upgrading to Polaris 7.3.

## Support for Azure AD Authentication with Leap SSO

Leap now offers basic support for single-sign on (SSO) authentication with Azure Active Directory (Azure AD).

When SSO is enabled and Azure AD is configured, Leap uses OAuth 2.0 with OpenID Connect and PKCE. Authentication is handled by Azure AD.

Contact Innovative for help getting started with SSO for Leap. For additional information about configuring OAuth and Azure AD, see the Polaris and OAuth 2.0 and OpenID Connect Integration Guide (7.3).

## Access to LX Starter

With Polaris 7.3, you'll get access to the Library Experience (LX) Starter package. LX Starter is included in the cost of your Polaris subscription.

**Note:**

LX Starter is not available immediately. Communications about implementation will begin in late 2022. A limited number of libraries will be able to implement LX Starter at first, and availability will increase over time.

The LX Starter package provides you with an intuitive, web-based interface that empowers you to design and send automated circulation notices. The tool includes a visual email editor that lets you add custom branding, free stock photos, and cover images for items in your collection. You can schedule notices to be sent at certain hours and then view engagement metrics to see the number of emails delivered, opened, and clicked on.


Read more about LX Starter features below and watch for communications coming soon with additional information.

- [Professionally Designed Circulation Notices](#)
- [Free Image Library and Cover Images](#)
- [Automated Bounceback Handling and Workflows](#)
- [Engagement Metrics](#)
- [More About LX Starter](#)

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### Professionally Designed Circulation Notices


LX Starter provides you with modern, professionally designed email templates for patron notices. You can add library branding to the templates and select the notices you want to enable. LX Starter supports existing Polaris rules for notices, then batches and sends notice emails. You will be able to send the same notices you currently send in Polaris.






## Hi Abby, Your holds are ready for pickup!

**Pickup at Midpointe Library Middletown**

Once inside the library, go to the front desk. Show your library card to the librarian on duty & request your items. The branch's address is 125 South Broad Street, Middletown, OH 45044

[Address & Hours](#) 

	<p><b>Raceless: In Search of Family, Identity, and the Truth About Where I Belong ...</b> by Steven Schnur Paperback Book</p>	<p>Call No. J SCHNUR Branch Middletown Pickup by <b>Oct 20, 2021</b></p>	
	<p><b>Harry Potter and the half-blood prince</b> DVD</p>	<p>Call No. J SCHNUR Branch Middletown Pickup by <b>Oct 20, 2021</b></p>	
	<p><b>Harry Potter and the Goblet of Fire</b> by Rowling, J. K. Audiobook</p>	<p>Call No. J SCHNUR Branch Middletown Pickup by <b>Oct 20, 2021</b></p>	

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## Free Image Library and Cover Images

LX Starter gives you access to over four million high-resolution images that are licensed to be used freely in your emails. You'll also have access to Syndetics cover images for email notices.

## Automated Bounceback Handling and Workflows

LX Starter can help you protect your sender reputation. If an email bounces, LX Starter stops sending emails to that address until the contact information is updated. Email address information is synced between Polaris and LX Starter.

## Engagement Metrics

View engagement data for email opens and clicks by notice. Metrics let you evaluate the success of the messages you send and use the data to increase engagement.

The screenshot displays the MidPointe LX Starter interface for a campaign titled "Holds Ready for Pickup". The interface includes a navigation sidebar on the left with options like Notices, Journeys, Templates, and Design blocks. The main content area shows an "Overview" section with performance and settings tabs. The performance metrics are as follows:

Performance Metric	Value
Total sent	12.3K
Open rate	56%
Link click rate	9%
Bounce rate	1.5%
Marked as spam rate	0.05%
3 Bounces →	16 Marked as spam →

Below the metrics is an "Email Links" table:

Link URL	Total People	Total Clicks
midpointelibrary/registration/update-your-address	3	3
midpointelibrary/support	3	3

On the right side of the overview, there is a preview of the email design. The design features the MidPointe logo, a personalized greeting "Hi {{first\_name}}", and the main message "Your holds are ready for pickup!". It also includes a pickup location: "Pickup location: {{library\_branch}}".

## More About LX Starter

For more information, see the following resources:

- [LX Starter fact sheet](#).
- [LX Starter webinar \(webinar summary\)](#).