What's New in Polaris and Leap

7.5

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Polaris Installation Notes

Important:
When the new Polaris release is installed on a workstation, the file path changes from 7.4 to 7.5 as in the following examples:

C:\ProgramData\Polaris\7.5
C:\Program Files\Polaris\7.5
C:\Program Files (x86)\Polaris\7.5
New or Modified Polaris Administrative Settings

The system administration settings below have been added or modified to support the new features in Polaris 7.5.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Purpose</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>New Parameters</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Patron Services &gt; Check-out: Increase Total Item Limit</td>
<td>Defines the number of items a patron can check out in addition to the total item limit defined in the Patron/Material Type Loan Limit Blocks policy table as part of the increased check-out limits feature. For details, see <a href="#">Increasing Check-out Limits by Branch</a>.</td>
<td>Branch</td>
</tr>
<tr>
<td>Request &gt; Holds Options &gt; Pickup Area</td>
<td>Allows you to:</td>
<td>System, Branch</td>
</tr>
<tr>
<td></td>
<td>• enable pickup area to appear system-wide</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• select the default pickup area</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• enable pickup area to appear in PAC</td>
<td></td>
</tr>
<tr>
<td></td>
<td>For details, see <a href="#">Using Pickup Areas</a>.</td>
<td></td>
</tr>
<tr>
<td>Patron Services &gt; Overdues: Charge fines for dates closed</td>
<td>Specifies whether Polaris charges overdue fines on closed dates. The default setting is No. For details, see <a href="#">Charging Overdue Fines on Library Closed Dates</a>.</td>
<td>System</td>
</tr>
<tr>
<td><strong>New Permissions</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fines: Approve waiver requests for user threshold</td>
<td>Approve waiver requests for patrons in Leap up to the maximum amount allowed in the staff member’s profile. Applies to Leap only. For details, see <a href="#">Using the New Waiver Workflow</a>.</td>
<td>System</td>
</tr>
<tr>
<td>Fines: Decline</td>
<td>Decline waiver requests for patrons in</td>
<td>System</td>
</tr>
<tr>
<td>Setting</td>
<td>Purpose</td>
<td>Level</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>-------------------------------------------------------------------------</td>
<td>-------</td>
</tr>
<tr>
<td>waiver requests</td>
<td>Leap. Applies to Leap only. For details, see Using the New Waiver Workflow.</td>
<td></td>
</tr>
<tr>
<td>Fines: Submit waiver requests</td>
<td>Submit waiver requests for patrons in Leap. Applies to Leap only. For details, see Using the New Waiver Workflow.</td>
<td>System</td>
</tr>
<tr>
<td>Modify increased check-out limits</td>
<td>Add, modify, and delete entries in the Increased Check-out Limits policy table, which defines the number of increased check-outs a patron can have from specific material types. For details, see Increasing Check-out Limits by Branch.</td>
<td>System</td>
</tr>
<tr>
<td>Override age restrictions</td>
<td>Continue a checkout or placing a hold request for a patron who is blocked due to age restrictions for a specific material type. For details, see Using Age-Related Loan Policies.</td>
<td>System</td>
</tr>
<tr>
<td>Patron Privileges: Modify</td>
<td>For managers, this permission causes the Extended Loan Period and Increased Check Out Limit checkboxes on the patron record to display as editable, rather than read-only. No overrides allowed. For details, see Increasing Check-out Limits by Branch.</td>
<td>System</td>
</tr>
<tr>
<td>Weeding templates: Access, Create, Delete, Modify</td>
<td>For staff that manage weeding templates, these permissions allow a staff member to access, create, modify, and delete weeding templates for their logged-in branch. For details, see Using Leap's Improved Weeding Workflow.</td>
<td>Branch</td>
</tr>
<tr>
<td>Weeding: Approve</td>
<td>For reviewers and approvers to move the weeding record set along in the approval process. Approval can change the status of</td>
<td>Branch</td>
</tr>
</tbody>
</table>
### Setting

<table>
<thead>
<tr>
<th>Setting</th>
<th>Purpose</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>a weeding record set from In Review to Approval Requested or from Approval Requested to Approved. Applies to Leap only. For details, see <a href="#">Using Leap’s Improved Weeding Workflow</a>.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Weeding: Decline</td>
<td>For reviewers and approvers to move the weeding record set back to Pending in the approval process. Applies to Leap only. For details, see <a href="#">Using Leap's Improved Weeding Workflow</a>.</td>
<td>Branch</td>
</tr>
<tr>
<td>Weeding: Submit for approval</td>
<td>For staff to submit weeding record sets for review or approval. Applies to Leap only. For details, see <a href="#">Using Leap's Improved Weeding Workflow</a>.</td>
<td>Branch</td>
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</tbody>
</table>

### New Profiles

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<thead>
<tr>
<th>Setting</th>
<th>Purpose</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff Client &gt; Automated object lock clearing: Age of lock to clear</td>
<td>Specifies which object lock entries the Clear Object Locks SQL job removes from the Object Locks database table. For details, see <a href="#">Configuring Polaris to Automatically Clear Object Locks</a>.</td>
<td>System</td>
</tr>
<tr>
<td>Staff Client &gt; Web App: Custom 1 URL</td>
<td>Specifies the URL that corresponds to the Web App: Suppress Link: Custom 1 setting. When a user selects the Custom 1 menu option, Leap opens the website you specify here. For details, see <a href="#">New Custom Menu Options in Leap</a>.</td>
<td>System, Library, Branch</td>
</tr>
<tr>
<td>Staff Client &gt; Web App: Custom 2 URL</td>
<td>Specifies the URL that corresponds to the Web App: Suppress Link: Custom 2 setting. When a user selects the Custom 2 menu option, Leap opens the website you specify here. For details, see <a href="#">New Custom Menu Options in Leap</a>.</td>
<td>System, Library, Branch</td>
</tr>
<tr>
<td>Setting</td>
<td>Purpose</td>
<td>Level</td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------------------------</td>
</tr>
<tr>
<td>Staff Client &gt; Web App: Library Documentation URL</td>
<td>Specifies the URL that corresponds to the Web App: Suppress Link: Library Documentation setting. When a user selects the Library Documentation menu option, Leap opens the website you specify here. For details, see <a href="#">New Custom Menu Options in Leap</a>.</td>
<td>System, Library, Branch</td>
</tr>
<tr>
<td>Staff Client &gt; Web App: Suppress Field: Extended Loan Periods</td>
<td>Indicates whether the Extended Loan Periods checkbox is suppressed from display in the Leap Patron Registration workflow. Applies to Leap only. For details, see <a href="#">Managing Extended Loan Periods</a>.</td>
<td>System</td>
</tr>
<tr>
<td>Staff Client &gt; Web App: Suppress Field: Increased Check-out Limits</td>
<td>Determines whether the Increased Check Out Limits checkbox appears on the Leap Patron Registration workflow. This checkbox enables the increased check-out limits feature for a patron. Applies to Leap only. For details, see <a href="#">Increasing Check-out Limits by Branch</a>.</td>
<td>System</td>
</tr>
<tr>
<td>Staff Client &gt; Web App: Suppress Link: Custom 1</td>
<td>Determines whether the Custom 1 option appears in the Utilities menu in Leap. When a user selects the Custom 1 menu option, Leap opens the website specified in the Web App: Custom 1 URL setting. For details, see <a href="#">New Custom Menu Options in Leap</a>.</td>
<td>System, Library, Branch</td>
</tr>
<tr>
<td>Staff Client &gt; Web App: Suppress Link: Custom 2</td>
<td>Determines whether the Custom 2 option appears in the Utilities menu in Leap. When a user selects the Custom 2 menu option, Leap opens the website specified in the Web App: Custom 2 URL setting. For details, see <a href="#">New Custom Menu Options in Leap</a>.</td>
<td>System, Library, Branch</td>
</tr>
<tr>
<td>Setting</td>
<td>Purpose</td>
<td>Level</td>
</tr>
<tr>
<td>---------</td>
<td>---------</td>
<td>-------</td>
</tr>
<tr>
<td>Staff Client &gt; Web App: Suppress Link: Library Documentation</td>
<td>Determines whether the Library Documentation option appears in the Help menu in Leap. When a user selects the Library Documentation menu option, Leap opens the website specified in the Web App: Library Documentation URL setting. For details, see New Custom Menu Options in Leap.</td>
<td>System, Library, Branch</td>
</tr>
<tr>
<td>Staff Client &gt; Web App: Use waiver request action</td>
<td>Determines whether Leap replaces the current Waive action on the patron account with a Waiver Request form. Applies to Leap only. For details, see Using the New Waiver Workflow.</td>
<td>System</td>
</tr>
</tbody>
</table>

**New Policy Table**

<table>
<thead>
<tr>
<th>Setting</th>
<th>Purpose</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hold Pickup Areas</td>
<td>Defines the pickup areas within a pickup location that staff members and patrons can select when placing a hold request. For details, see Using Pickup Areas.</td>
<td>System</td>
</tr>
<tr>
<td>Increased Check-out Limits</td>
<td>Defines the number of additional items that a patron can check out from specific material types as part of the increased check-out limits feature. For details, see Increasing Check-out Limits by Branch.</td>
<td>Branch</td>
</tr>
<tr>
<td>User Defined Waiver Request Reasons</td>
<td>Defines the reasons staff can request a waiver for a patron. For details, see Using the New Waiver Workflow.</td>
<td>System</td>
</tr>
</tbody>
</table>

**Modified Database Tables**

<table>
<thead>
<tr>
<th>Setting</th>
<th>Purpose</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction Logging</td>
<td>You can now configure Polaris to log transactions when staff-generated blocks are added to or removed from patron records. The Transaction Logging database table now contains the new</td>
<td>System, Library, Branch</td>
</tr>
</tbody>
</table>
What's New in Polaris and Leap 7.5

Setting | Purpose | Level |
--- | --- | --- |
| | Patron block added and Patron block removed transaction types. For details, see **Logging Transactions for Patron Blocks**. | |

**Modified Permissions**

<table>
<thead>
<tr>
<th>Setting</th>
<th>Purpose</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cataloging record sets: Access, Create, Delete, Modify</td>
<td>Cataloging record set permissions are modified to include weeding record sets. Applies to Leap only. For details, see <strong>Using Leap’s Improved Weeding Workflow</strong>.</td>
<td>System</td>
</tr>
<tr>
<td>Modify lost/damaged item amount</td>
<td>This permission now also applies to fees for damaged items. With this permission, you can change the amount of the replacement charge or processing fee when declaring an item lost or damaged. For details, see <strong>Declaring Items Damaged in Leap</strong>.</td>
<td>System</td>
</tr>
<tr>
<td>Special item check in</td>
<td>This permission now also applies to checking in damaged items. With this permission, you can check in damaged items in Leap. For details, see <strong>Declaring Items Damaged in Leap</strong>.</td>
<td>System, Library, Branch</td>
</tr>
</tbody>
</table>

**Modified Policy Tables**

<table>
<thead>
<tr>
<th>Setting</th>
<th>Purpose</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Material Types</td>
<td>Names the various material types held by the library. Minimum Age column added to support age-related loan policies. For details, see <strong>Using Age-Related Loan Policies</strong>.</td>
<td>System</td>
</tr>
</tbody>
</table>

**Modified Profiles**

<table>
<thead>
<tr>
<th>Setting</th>
<th>Purpose</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patron Services &gt; Waiver approval threshold</td>
<td>Works with the Fines: Approve waiver requests for user threshold permission to set the maximum waiver amount this staff member can approve. Applies to Leap only. For details, see <strong>Using the New Waiver</strong>.</td>
<td>Staff Member</td>
</tr>
<tr>
<td>Setting</td>
<td>Purpose</td>
<td>Level</td>
</tr>
<tr>
<td>---------</td>
<td>---------</td>
<td>-------</td>
</tr>
<tr>
<td></td>
<td>Workflow</td>
<td></td>
</tr>
</tbody>
</table>
## Polaris API Changes

The following methods have been added or updated:

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<tr>
<th>Method Name</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>HoldRequestCreate</td>
<td>Now returns a StatusValue of &quot;10&quot; when the patron is blocked from placing a hold because they do not meet the minimum age requirement for that item. Now returns an XML Body Element of &quot;HoldPickupAreaID&quot; for the area in the branch where patron would like to pick up item.</td>
</tr>
<tr>
<td>ItemCheckoutPost</td>
<td>Now returns the following ItemBlockFlags:</td>
</tr>
<tr>
<td></td>
<td>• 16777216 - when the patron is blocked from checking out an item because they do not meet the minimum age requirement.</td>
</tr>
<tr>
<td></td>
<td>• 33554432 - when the patron is blocked from checking out an item because the item has a status of Damaged.</td>
</tr>
<tr>
<td>MultiPartGet</td>
<td>Now returns the following for the XML Element of Type:</td>
</tr>
<tr>
<td></td>
<td>• 2 - Volume (multipart set)</td>
</tr>
<tr>
<td></td>
<td>• 3 - Item</td>
</tr>
<tr>
<td>PickupAreasGet</td>
<td>This endpoint returns a list of valid pickup areas for the branch based on the organization ID.</td>
</tr>
</tbody>
</table>

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

You can now define a pickup area within a pickup location for staff members or patrons to use when selecting a location for picking up holds.

This topic covers the following:

1. Setting Up Pickup Areas in Polaris Administration (staff client).
2. Using Pickup Areas in Leap.
3. Using Pickup Areas in PAC.
4. Emailing and Printing Pickup Areas.

Setting Up Pickup Areas

To set up Leap and PAC to use Pickup Areas, you must do the following:

1. Add your library’s pickup areas to the Hold Pickup Areas policy table.
2. Enable Pickup Area at the system level.
3. Designate the default pickup area and display in PAC at the branch level.

Adding Pickup Areas to the Policy Table

The Hold Pickup Areas policy table is empty by default. You can add pickup areas at the system level or the branch level for all branches, then you can change the settings for pickup areas at the branch level.

To add pickup areas at the system level for all branches in Polaris Administration (staff client)

1. Open Administration > Explorer.
2. Select Policy Tables > Hold Pickup Areas.
   The Hold Pickup Areas pane appears.

4. Enter the following:
   a. Description — Enter the name to show in the pickup area dropdown lists in Leap and PAC.
   b. Sequence — Enter a number to define the display order of the added pickup area in the dropdown lists for Leap and PAC.
   c. Selected — Select Yes if the pickup area is valid for your branch, and you want this pickup area to appear in dropdown lists for Pickup Area in Leap and in PAC.

5. Select OK.

The new pickup area row appears in the Hold Pickup Areas pane.

You can also change or delete existing Pickup Area entries using the icons at the top of the Hold Pickup Areas pane. For more information, search "Working with Tables" in the Polaris staff client help.
Enabling Pickup Area at the System Level

You must enable Pickup Area at the system level before you can designate the default pickup area, which is the area that shows in the dropdown list for Leap and PAC by default.

To enable Pickup Area at the system level for all branches in Polaris Administration

(staff client)

1. Open Administration > Explorer.
2. Select System > Parameters > Request > Holds Options.
3. Select Pickup Area.
4. Select Enable pickup area (system only).

5. (Optional) To display a pickup area by default in Leap and PAC, select an option from the Default pickup area list.

This default applies to all branches until it’s reset at the branch level.
6. (Optional) To display Pickup Area options in PAC, select **Enable pickup area in PAC**.

   This selection applies to all branches until it's reset at the branch level.

7. Select **OK**.

   The system displays the new pickup area fields as described in the *Email and Print Pickup Areas* section.

**Designating the Default Pickup Area and Display in PAC at the Branch Level**

After you add and enable Pickup Areas at the system level, you have the flexibility to set the default pickup area and display in PAC options differently for each branch.

**To set pickup-area options at the branch level in Polaris Administration (staff client)**

1. Open **Administration > Explorer**.
2. From the branch list, select the branch name.
3. Select **Parameters > Request > Holds Options**.
4. Select **Pickup Area**.

![Pickup Area Options](image)

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5. To display a pickup area by default in Leap and PAC, select an option from the Default pickup area list.

6. To display Pickup Area options in PAC, select Enable pickup area in PAC.

7. Select OK.

Leap and PAC display the pickup area list with the default option first.

---

Using Pickup Areas in Leap

When placing a hold in Leap or in PAC, staff members and patrons can now select a pickup area within a pickup location. For example, when you select a pickup location, it is a library branch. If the branch offers multiple Pickup Areas—such as smart lockers, curbside, and holds counter—you can now select one of those as well.

To select a pickup area in Leap

1. Go to the patron record workform.
2. Select Holds/Held.
   - The following image shows that the new hold area now includes Pickup Area.
4. Use the Find Tool to retrieve an item to place on hold.
5. Select a branch from the **Pickup Branch** dropdown list.
6. (Optional) Select a pickup area from the **Pickup Area** list.
7. Select **PLACE HOLD**.
   
   The pickup area appears beside Pickup Branch in the holds table.
The pickup area appears in all views of the Picklist workform.
The pickup area also appears in the following locations:

- ILL request view in the patron workform
- ILL workform
- Unclaimed ILL Picklist

Using Pickup Areas in PAC

To select a pickup area in PowerPAC

1. Browse or search for an item to place a hold on.
2. Select PLACE REQUEST.
3. Select a Pickup Location and a Pickup Area.
4. Select **Submit Request**.

A list of your hold requests appears. The pickup area appears in the Pickup Library column beside the pickup location.
To change the pickup area

1. To see a list of your hold requests, select My Account > Requests.
2. Select a hold request.
3. Select Change Pickup Location.
   The Change Hold Request page appears.
4. Select the Pickup Location you had before.
5. Select a New Pickup Area.
6. Select **Submit**.

A Pickup location was changed message appears.

7. Select **OK**.

The new pickup area appears beside Pickup Location in your hold requests list.

The pickup area also appears in the following locations:
• ILL request form in PAC
• Hold Requests create and view in MPAC
• Requests in PAPI

For more information, search "PickupAreasGet" in the Polaris API Guide.

Emailing and Printing Pickup Areas

The pickup area can appear in the following:

- hold call slips
- hold slip
- hold pickup slips
- first and second default email hold notices
- SIP extension at check in

See the table below for steps to display Pickup Area in these places.

<table>
<thead>
<tr>
<th>To display Pickup Area here</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hold call slips (pickup area appears under the location pickup branch)</td>
<td>Enable Pickup Area at the system level.</td>
</tr>
<tr>
<td>First and second default email hold notices (pickup area appears after the held-till value)</td>
<td>Enable Pickup Area at the system level.</td>
</tr>
<tr>
<td>SIP extension - &quot;PA[PickupAreaDescription]&quot; (pickup area appears in the message returned at check in)</td>
<td>Enable Pickup Area at the system level.</td>
</tr>
<tr>
<td><strong>Note:</strong> This SIP extension only appears if the checked-in item fills a patron hold and the other hold-related fields are populated.</td>
<td></td>
</tr>
</tbody>
</table>
## Printing Pickup Area in Hold Notices

When you enable Pickup Area at the system level, printed hold notices display a customizable language string (Notices > LBL_PICKUPAREA). This language string should advise patrons to call the library or log in to PAC to see their Pickup Area. Printed hold notices include the following:

- Hold Requests Full Page Mailer
- Hold Requests Half Page Mailer
- Hold Requests Full Page Mailer Dot Matrix
- Hold Requests Postcard
• Hold Requests Z Fold Mailer
• Hold Requests Z Fold Mailer Oversized
Using Age-Related Loan Policies

Using age-related loan policies, you can now configure Polaris to restrict check-outs and hold requests for specific material types based on the patron's age. For example, you can block patrons under the age of 13 from checking out or placing a hold request on movies rated PG-13. These blocks apply to the initial check-out only; Polaris does not check the patron's age during renewal transactions.

Once set up, age-related loan policies work wherever you can place a hold request or check out an item, including Leap, Polaris staff client, ExpressCheck, PAC, and Polaris API.

This section covers the following topics:

- How Age-Related Loan Policies Work
- Setting Up Age-Related Loan Policies

How Age-Related Loan Policies Work

When library staff or patrons check out an item or place a hold, Polaris performs a minimum age check as follows:

- Identifies the material type associated with the item and determines whether a minimum age is set in the Material Types policy table.
- If a minimum age exists for the material type, compares it against the birth date field in the patron record.

If the patron is younger than the age specified for that material type, the system displays a Minimum Age alert. For example, this is the alert that appears in Leap:

```
Minimum age alert

Patron (Mr. Bill Lockwood) does not meet the minimum age requirements for this material type. Do you want to continue?

CONTINUE CANCEL
```

Library staff who have the new **Override age restrictions: Allow** permission can override the block by selecting **Continue**. After staff overrides a block, the system does not
display another alert for the same material type in the current check-out session for the same patron.

**Minimum Age Blocks with Title-Level Hold Requests**

When library staff or a patron places a title-level hold request, Polaris evaluates all items attached to the bibliographic record. If there are items with different material types, the system generates a block using the item with the most restrictive age. For example, if there is a DVD with a minimum age of 16 and a Blu-Ray disc with a minimum age of 18 attached to the same bibliographic record, the system only allows the title-level hold if the patron is at least 18 years of age.

If there are no items attached to the bibliographic record, the system allows the title-level hold. In this scenario, the patron might be blocked later at check-out if the item filling the hold has a minimum age that would block the patron.

---

**Setting Up Age-Related Loan Policies**

**Tip:**

Innovative does not recommend setting up this feature unless your library requires entering a birth date during patron registration. If a patron’s record does not have a value in the **Birth Date** field, the system assumes the patron is too young and blocks check-outs and hold requests for all material types that have a **Minimum Age** set. For information on setting the **Birth Date** field as required during patron registration, see "Setting Patron Registration Required Fields and Defaults" in the Polaris staff client documentation.

**To set up age-related loan policies**

1. Determine which material types you want to restrict and the age limit for each.

2. In Polaris Administration (staff client), go to **Administration Explorer > System > Policy Tables > Material Types.**

   The Material Types table appears.
3. For each material type you want to restrict, do the following:
   a. Double-click the row for the material type.
   b. Enter a value in the **Minimum Age** field.
   c. Select **OK**.

4. Select **Save**.

5. Assign the **Override age restrictions: Allow** permission to staff who are authorized to override Minimum age blocks.

   For information on assigning permissions, search the Polaris staff client help for "Assign Permissions".

---

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Declaring Items Damaged in Leap

Leap now supports two different workflows for declaring items damaged. This section covers the following topics:

- Declaring an Item Damaged at Check-In
- Declaring an Item Damaged From the Patron Record

Declaring an Item Damaged at Check-In

You can check in a damaged item from the Check In workform if the item's circulation status is Out or In and you have the following permission settings in Polaris Administration (staff client):

- Special item check in: Access
- Special item check in: Select damaged

For more information about these permissions, search for "Circulation Permissions" in the Polaris staff client help.

To declare an item damaged at check-in

1. Select CHECK IN.
   
   The Check In workform appears.

2. Select the Damaged view.

3. Do one of the following:
   
   - Scan the barcode of the item you want to check in.
   - Select FIND TOOL to search for and select the item you want to check in.

4. Select Enter.
   
   The Declare Item Damaged dialog appears.
5. Select one of the following options:

- **Declare damaged: charge and notify** - When you select this option, Leap does the following:
  - Checks the item in.
  - Sets the item's circulation status to Damaged.
  - If applicable, charges replacement and processing fees to the patron's account.

  **Note:**
  If the item's status is In, Leap charges replacement and processing fees to the account of the patron who last borrowed the item.

  - Sends a bill notice to notify the patron of the charges.
  - Assigns a system-generated block ("Item is Damaged") to the item record.

- **Declare damaged: update item only** - When you select this option, Leap does the following:
6. To add a note that appears in the item record and on the bill notice, enter text in the **Special item check-in note** box.

7. Select **OK**.

   Leap processes the check-in according to the option you selected.

---

**Declaring an Item Damaged From the Patron Record**

You can declare an item damaged from the Out/Overdue view of the patron record if you have the **Modify lost/damaged item amount: Allow** permission in Polaris Administration (staff client). For more information about this permission, search for "Circulation Permissions" in the Polaris staff client help.

**To declare an item damaged from the patron record**

1. Open the patron record.
2. Select the **Out/Overdue** view.
   
   Leap displays the patron's checked out items.
3. Select the item you want to declare damaged.
4. Select **Declare Damaged**.
   
   The Declare Item Damaged dialog appears.
5. For each type of fine or fee (replacement, processing, and overdue), select the appropriate action from the **Actions** list.

6. (Optional) For each type of fine or fee, modify the **Amount**.

7. If the patron is paying a fine or fee, select a payment method from the **Payment method** list.

   **Note:**
   Leap can accept credit card payments if your library has enabled EnvisionWare or Comprise as the eCommerce payment gateway and a credit card reader is attached to the workstation.

8. To send a bill notice for charges associated with the damaged item, select **Send a bill**.

9. To add a message that appears on the bill notice, enter text in the **Added message** box.

10. Select **OK**.
Leap does the following:

- Sets the item's circulation status to Damaged.
- If applicable, charges fines or fees to the patron's account and accepts payments.
- Assigns a system-generated block ("Item is Damaged") to the item record.
New Custom Menu Options in Leap

Leap now supports three new menu options that your library can choose to enable and customize. Each menu option opens a website that your library specifies.

You can use the menu options to provide links from Leap to resources that your staff members use, such as:

- SQL Server Reporting Services
- SimplyReports
- INN-Reach Central Catalog
- Your library’s internal documentation

Two of the custom menu options appear on the Utilities menu when enabled.

The third option appears on the Help menu when enabled.
By default, these menu options do not appear in the Leap user interface. For each menu option, you can do the following:

- Enable the menu option.
- Specify the website that opens when a user selects the menu option.
- Modify or translate the menu option text.

Enabling a Custom Menu Option

Three new administrative profiles determine whether menu options appear in the Leap user interface:

- Web App: Suppress Link: Custom 1
- Web App: Suppress Link: Custom 2
- Web App: Suppress Link: Library Documentation

You can set each profile at the system, library, or branch level in Polaris Administration (staff client).

To enable a custom menu option

1. In Polaris Administration (staff client), go to Administration > Explorer.
2. Select an organization level (System, Library, or Branch).
3. Select Profiles > Staff Client.
4. Double-click the Web App: Suppress Link profile you want to enable, then set the Value option to No.
By default, each profile is set to **Yes**.

5. Select **Save**.

---

**Specifying the URL that Corresponds to a Menu Option**

Three new administrative profiles specify the URLs that correspond to each custom menu option:

- Web App: Custom 1 URL
- Web App: Custom 2 URL
- Web App: Library Documentation URL

You can set each profile at the system, library, or branch level in Polaris Administration (staff client).

**To specify a URL for a custom menu option**

1. In Polaris Administration (staff client), go to **Administration > Explorer**.
2. Select an organization level (**System, Library**, or **Branch**).
3. Select **Profiles > Staff Client**.
4. Double-click the profile you want to configure, then enter a URL in the **Value** field. The URL must begin with http:// or https://.

5. Select **Save**.

---

**Modifying Menu Option Text**

To modify or translate the menu option text that appear in the user interface, update the following Staff Web Client string identifiers in the Web Admin (Language Editor) Tool:

<table>
<thead>
<tr>
<th>Default Menu Option Text</th>
<th>String Identifier</th>
</tr>
</thead>
<tbody>
<tr>
<td>Custom 1</td>
<td>SWC_CUSTOM_1</td>
</tr>
<tr>
<td>Custom 2</td>
<td>SWC_CUSTOM_2</td>
</tr>
<tr>
<td>Library Documentation</td>
<td>SW_CI_LIBRARY_DOCUMENTATION</td>
</tr>
</tbody>
</table>
Using Leap’s Improved Weeding Workflow

You can now use Leap to manage your weeding process. Leap offers a workflow with permissions for staff and managers to take different roles while weeding item or bibliographic records.

To complete the weeding workflow

1. [Create a Weeding Template](#). To create a weeding template, you need the Weeding templates: Create permission.
2. [Delete a Weeding Template](#).
3. [Create a Weeding Record Set](#).
4. [Modify a Weeding Record Set by Adding or Removing Records](#).
5. [Decide what Weeding Approval Process to Use](#).
6. [Submit the Weeding Record Set for Review or Approval](#). To submit a weeding record set for review or approval, you need the Weeding: Submit for approval permission.
7. [Approve or Decline a Weeding Record Set](#). To approve a weeding record set, you need the Weeding: Approve permission. To decline a weeding record set, you need the Weeding: Decline permission.
   - Approved — On approval, records in each weeding record set can be set to Withdrawn, can be marked Deleted, or can remain unchanged, depending on the settings in the weeding template.
   - Declined — On decline, a weeding record set restarts at: Modify a Weeding Record Set by Adding or Removing Records.
8. [Delete or Undelete a Weeding Record Set](#). To delete or undelete a weeding record set, you need the Cataloging record sets: Delete/Undelete permission.

Creating a Weeding Template

A weeding template allows you to define criteria that Leap uses to verify items that you add to a weeding record set. Using a weeding template’s criteria, you can create a weeding record set. You can create one or many weeding criteria sets for one weeding
template. For each template, you can also set a discard amount for the weeding record set.

**Note:**
To create a weeding template, you need the following permission:
*Weeding templates: Create*

**To create a weeding template**

1. Go to the **New** menu > **Template** > **Weeding**.
   The New Weeding Template workform appears.

2. Enter a **Name** for the template, and select an **Owner**.
   Using the Name, you can search for the template by name using the Find Tool. The Owner limits the available templates when creating a weeding record set.

3. Select one of the following for **Mark Items Withdrawn**:
   - **Never** — (default) Leap never automatically changes the status of items in the corresponding record set.
   - **Immediately** — When you save, Leap automatically changes the status of all items in the record set to Withdrawn.
   - **At Approval** — When a final approver approves the record set (the last step in the process), Leap automatically changes the status of all items in the record set to Withdrawn.

4. (Optional) Select **Alert for Last Copy** if you want an alert to appear when a staff member adds the last viable copy of an item to the weeding record set.
   When this option is enabled, staff members adding to a weeding record set see a notification indicating that the item is the last copy. An alert icon also appears beside the record in the record set table.

5. (Optional) Select **Delete Approved Items** if you want Leap to mark all records in the record set with the status Deleted when the weeding record set is approved. If

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¹Last viable copy could mean that this is the final item record in the system. It could mean that all other copies are marked as missing or lost. It could also mean that this record is the last copy in an unsuppressed status.

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your library retains deleted item records, staff members can search for the items and undelete them.

6. Select **SAVE**.

7. Select **+ADD CRITERIA** to add criteria that the system uses to validate items added to the weeding record set.

A Weeding Criteria workform opens.

   a. Enter a **Name** for the criteria set.

   b. Enter a power search expression in the **Inclusion Criteria** box.

      You can test your power search expressions by putting them in the search bar of the Find Tool to see the results. For information on building power search expressions, search the Leap help for "Do a Power Search."

   c. (Optional) Select **TEST CRITERIA** to have Leap validate the syntax in the **Inclusion Criteria** box.

      A notification indicates if the power search syntax is correct or contains errors.

   d. Select Item Filters to limit the search further:

      i. Creation dates — Enter a number in **Newer Than** or **Older Than**, then select **Years** or **Months**.

      ii. Lifetime Circulation counts — Select **Over** or **Under**, and then type a number in **Lifetime Circulation** or **Lifetime In-House Circulation**.

      iii. Year-to-Date Circulation counts — Select **Over** or **Under**, and then type a number in **Year-to-Date Circulation** or **Year-to-Date In-House Circulation**.

   e. Select **SAVE**.

8. (Optional) To delete a criteria set from the Weeding Template Details view, do the following:

   a. Select the checkbox beside the criteria set.

   b. Select **DELETE**.
9. Select **SAVE**.

After criteria are added, staff can add item records to the weeding list. If Leap detects a record in the weeding list that doesn't match the criteria, it rejects the record and staff members receive a notification stating the record ID and that it is not eligible for weeding.

**Setting a Discard Amount**

A discard amount allows you to assign a value to the items that are removed as the result of a weeding list. You can set the source of the amount to one of three options.

**To set a discard amount**

1. Open the Weeding Template and select the **Discard Amount** view.
2. Select a **Source**:
   - **None** – The discard amount is always zero. This is the default.
   - **Item Record Price** – Let Leap calculate the Discard Amount based on the price associated with the Item Record.
   - **Template** – Set a discard amount based on the item language field in the item record.
     i. To add a row to the template table, select **+ ADD**.
        A template for Language and Amount appears.
     ii. Select a **Language** and assign an **Amount** for items published in the selected language.
     iii. Select **OK**.
        The row appears in the template table below.
     iv. To delete a row, select the checkbox beside that row and select **DELETE**.
3. Select **SAVE**.

---

*Note:*
You can delete a criteria set only if it is not in use by another weeding template.
Deleting a Weeding Template

To delete a weeding template

1. Delete all weeding record sets linked to the weeding template.
   If one weeding record set still uses this template, you cannot delete it.
2. View the Weeding Template workform.
3. Select the Actions menu.
4. Select Delete.
   The Delete Weeding Template dialog opens.
5. Select Continue.

Creating an Empty Weeding Record Set

To create a empty record set

1. Select New > Record Set.
2. Select Weeding for the Record Type.
3. Select a Weeding Template.
   To create a weeding template, see Create a Weeding Template.
4. Select OK.
A New Weeding Record Set workform opens.

5. Enter a Name.

6. (Optional) Select an Owner from the list. The owner is automatically set to your logon branch.

   **Note:**
   The branches in the Owner list are the branches where you have permission to create record sets.

7. (Optional) Enter a note in the Note box.

8. Select SAVE.

Modifying a Weeding Record Set by Adding or Removing Records

**To add records to a record set**

1. Open the record set in the Weeding Record Set workform.
2. To select the record or records to add, use one of these methods:
   - Select FIND to open the Find Tool with the appropriate record type selected. Search for and select the records to add. Select OPEN.
   - Scan or type the barcode. The Scan or enter barcode option is available for all record set types except for authority record sets. You can scan or type a barcode to add an item record to a weeding record set.

   **Note:**
   If you try to add any records that already belong to the record set, a
notification informs you that duplicates were found. The notification also displays the number of records that were actually added.

3. To add records from a file, select ACTIONS > Add from file.

![Weeding Record Set Workform]

The Weeding Record Set workform appears with the records added to it.

To remove records from a record set

1. Search for and select the record set you want to modify.
   
   The Weeding Record Set workform appears.

2. Select the checkboxes beside the records you want to remove.

3. Select ACTIONS above the list, and select Remove Selected Records.

   The records are removed from the record set, but remain in the Polaris database.

Deciding what Weeding Approval Process to Use

After creating a weeding record set, a staff member can send the weeding record set for one or two rounds of approval, depending on your library’s preferred process.
Two rounds of approval — Use **Submit for Review** if you want weeding record sets to go through two levels of approval.

a. Use **Submit for Review** as the first round of approval. This changes the status of the record set to In Review and the record set moves to the Approval Dashboard.

b. The reviewer uses the Approval Dashboard to approve or decline the weeding record set. Approval changes the status of the record set from In Review to Approval Requested.

c. The approver uses the approval dashboard or the weeding record set workform to approve or decline the weeding record set. Approval changes the status of the record set from Approval Requested to Approved.

One round of approval — Use **Submit for Approval** as the first round of approval if you want weeding record sets to go through one level of approval.

a. Use **Submit for Approval** as the first round of approval if your library uses one round of approval, skipping the **Submit for Review** step. This changes the status of the record set to Approval Requested and the record set moves to the Approval Dashboard.

b. The approver uses the approval dashboard or the weeding record set workform to approve or decline the weeding record set. Approval changes the status of the record set from Approval Requested to Approved.

**Submitting the Weeding Record Set for Review or Approval**

**To submit a weeding record set for review or approval**

1. Use the Find Tool to find the weeding record set you want to submit.
2. Open the weeding record set.
3. Review and adjust the item list. You can:
   a. View the properties of one weeding record at a time.

      * Select the checkbox beside the record you want to view.
      * Select **ACTIONS > Properties**.
   
   b. Filter the list by typing a keyword to filter by in the **Filter** field.
c. Add more records.
   - To scan in, find records, or add records from a file, see Modify a Weeding Record Set by Adding or Removing Records.

d. Remove records.
   - Select the checkbox beside each record you want to remove.
   - Select ACTIONS > Remove Selected Records.

4. Select SAVE.
5. Select ACTIONS for the record set.
6. Select one of the following:
   - **Submit for Review** – Requires Cataloging record sets: Modify permission. Select this option to send the weeding record set to a reviewer for the first round of review, if you're using two rounds of approval.
   - **Submit for Approval** – Requires Weeding: Submit for approval permission. Select this option to send the weeding record set for final approval.

If you select **Submit for Review**, the status of the record set changes to In Review, and the record set moves to the Approval Dashboard. In the Approval Dashboard, the reviewer can approve or decline the weeding list. In the Weeding Record Set workform the reviewer can submit the record set for approval, or decline the weeding list.
If you select **Submit for Approval**, the status of the record set changes to Approval Requested, and the record set moves to the Approval Dashboard. In the Approval Dashboard, the reviewer can approve or decline the weeding list.

### Approving or Declining a Weeding Record Set

Reviewers and approvers can approve or decline weeding record sets using one of the following methods:

- **Approval Dashboard** — You can approve (or decline) multiple weeding record sets at once.

- **Weeding Record Set workform** — You can review the list of records, and add or delete records before you approve or decline the individual weeding record set.

### Using the Approval Dashboard to Approve or Decline

**Note:**

To approve a weeding record set, you need the **Weeding: Approve** permission. To decline a weeding record set, you need the **Weeding: Decline** permission.

**To approve or decline a weeding record set using the Approval Dashboard**

1. To open the Approval Dashboard, go to **Utilities > Approval Dashboard**.
   
   The Weeding Requests tab of the dashboard appears in the **Active Requests** view.

2. (Optional) Filter or sort the list of weeding requests.
   
   a. To filter the list by record status, select a status from the **Status** list.
   
   b. To filter by keyword, type a keyword in the **Filter** box.
   
   c. To sort the list, select a column header.

3. Select the checkbox beside each weeding list you want to approve or decline.

   Leap enables the **APPROVE** and **DECLINE** buttons.

4. Select one of the following:
• **APPROVE** – Select this option to approve the weeding record sets. Records in the weeding record set are set to **Withdrawn**, or are marked **Deleted**, depending on the settings in the weeding template.

• **DECLINE** – Select this option to send records in the weeding record set back to the original state of **Pending**, so staff can do more work on them.

**Using the Weeding Record Set Workform**

To approve or decline a weeding record set using the Weeding Record Set workform

1. Use the Find Tool to find the weeding record set you want to approve or decline.
2. Open the Weeding Record Set workform.
3. Select **ACTIONS** for the record set.

4. Select one of the following:
   a. **Approve** – Select this option to approve the weeding record set. Records in the weeding record set are set to **Withdrawn**, or are marked **Deleted**, depending on the settings in the weeding template.

   b. **Decline** – Select this option to send records in the weeding record set back to the original state of **Pending**, so staff can do more work on them.
Deleting or Undeleting a Weeding Record Set

You can delete or undelete a weeding record set like you can an item record set.

---

**Note:**
To delete or undelete a weeding record set, you need the Cataloging record sets: Delete/Undelete permission.

---

**To delete a weeding record set**

1. Open the weeding record in the Weeding Record Set workform.
2. Select Actions > Delete.

One of the following messages appears, depending on your library's setting for the profile Retain deleted item records:

- The weeding record will be marked for deletion. Do you want to continue?
- The weeding record will be permanently deleted. Do you want to continue?

3. Select **CONTINUE** to delete the weeding record set.

---

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The item is either marked for deletion and retained, or it’s permanently deleted from the database, depending on the profile setting.

4. (Optional) To permanently delete the weeding record set regardless of the profile setting, select **Actions > Delete** a second time.

**To undelete a weeding record set**

1. Open a deleted weeding record set in the Weeding Record Set workform.
2. Select **Actions > Undelete**.

Leap updates the weeding record set as follows:

- Sets the record status to Final.
- Displays the username as the modifier.
- Displays the modification date as the undelete date.
- Selects the Display in PAC checkbox.
- Adds an undeleted row to the item record history.
- Logs a weeding record undeleted transaction (9012).
Using the New Waiver Workflow

The new waiver workflow gives you more granular control over the process of waiving an amount charged to a patron's account. Using this new workflow, you can designate staff members who can oversee the waiver process by approving or declining a waiver request. Staff members who don't have permission to waive fees can start the process by requesting a waiver approval.

**Important:**
To use the new waiver workflow, you must remove the old waive permission (Fines: waive fines at circ), and set the following system-level permissions for staff members:

- Fines: Submit waiver requests
- Fines: Approve waiver requests for user threshold
- Fines: Decline waiver requests

This topic covers the following:

1. [Setting Up the New Waiver Workflow](#) in Polaris Administration (staff client).
2. [Using the New Waiver Workflow](#) in Leap.

---

### Setting Up the New Waiver Workflow

You can set up the New waiver workflow in Polaris Administration (staff client) using the following steps:

1. [Enable the new waiver workflow](#).
2. [Set the maximum waiver amount](#) that each staff member can approve.
3. [Add reasons to the policy table](#) User Defined Waiver Request Reasons.

### Enabling the New Waiver Workflow

**To enable the new waiver workflow**

1. In Polaris Administration (staff client), select **Administration > Explorer**.
2. Select **System > Profiles > Staff Client**.
3. Double-click the **Web App: Use waiver request action** profile set the value to **Yes**.

![Screenshot of Profiles window in Polaris showing the Web App: Use waiver request action profile set to Yes.]

4. Select **Save**.

When you enable this option, Leap replaces the current Waive action on the patron account with a Waiver Request form.
Setting the Maximum Waiver Amount

You can set the waiver threshold, which is the maximum dollar amount that each staff member is allowed to waive at one time.

To set the waiver threshold

1. In Polaris Administration (staff client), select Administration > Staff Member.
2. Search for a staff member and open the staff member workform.
The user-level profile appears with the waiver approval threshold set to $0.00.
4. Double-click to edit the dollar amount.

5. Select **Save**.

   In the example above, this staff member can approve a waiver request for up to $100.00.

**Adding Waiver Reasons to the Policy Table**

The waiver reasons are blank by default so that libraries can configure their own reasons that they might waive a fee. This table is blank by default.

**To configure waiver reasons**

1. In Polaris Administration (staff client), select **Administration > Explorer**.

2. Select **Policy Tables > User Defined Waiver Request Reasons**. The User Defined Waiver Request Reasons policy table opens. This table is empty by default.

3. Select **Insert** to add each reason staff can select in Leap when requesting a waiver.
4. (Optional) Modify or delete reasons from this table.
   You can't delete a reason if a record uses it.

5. Select **Save**.
   Leap displays these reasons in the **Reason** list on the waiver request form.
Using the New Waiver Process in Leap

The waiver request workflow involves the following steps:

1. A patron requests a waiver for one of their fines.

2. An Authorized staff member submits a waiver request using the Waiver Request form.

   To access the Waiver Request form, you need Fines: Submit waiver requests permission.

3. Overseeing staff approves or declines the waiver request.

   To approve a waiver request, you need the Fines: Approve waiver requests for user threshold permission. To decline a waiver request, you need the Fines: Decline waiver requests permission.

   When you approve or decline a waiver, the following happens:

   - Approved — the amount requested is waived and removed from the patron's account.

   - Declined — the charge remains on the patron account.
Submitting a Waiver Request

To submit a waiver request

1. In Leap, use the Find Tool to find the patron who wants a waiver.
2. To open the patron record workflow, double-click the patron in the search results. The patron record workflow appears.
3. Select the Account view.
4. Select the check box beside the charges you want to waive.
5. Select Waiver Request.
   The area below the buttons expands to show the Waiver Request Form.

6. Fill in the form information:
   - (Optional) Change the Amount to waive. By default, Leap lists the entire amount of the charge.
   - Select a Reason.
   - (Optional) Enter a Note.
7. Select REQUEST WAIVER.
The Waiver column appears in the patron's account table. This column has a check mark in it if there is a pending waiver request for the charge.

**Note:**
When a waiver request is in progress, Leap doesn't allow:
- A staff member to start a new waiver request.
- A patron to pay the fee in question.

The waiver request moves to the Approval Dashboard.

**Approving or Declining a Waiver Request**

**To approve or decline a waiver request**

1. To open the Approval Dashboard, go to **Utilities > Approval Dashboard**.
   The Weeding Requests tab of the dashboard appears.
2. Select **Waiver Requests**.
   The Waiver Requests tab of the dashboard appears in the **Active Requests** view.
3. (Optional) Filter or sort the list of waiver requests.
   - To filter by keyword, type a keyword in the **Filter** box.
   - To sort the list, select a column header.
4. Select the checkbox beside the waiver request you want to approve or decline.
   Leap enables the REVIEW button.

5. Select REVIEW.
   The Review Waiver Request ID dialog opens.

   ![Review Waiver Request ID 146](image)

   - **TITLE**: Patron Registration Fee
   - **DESCRIPTION**: 
   - **AMOUNT**: $4.22
   - **WAIVE AMOUNT**: $4.22
   - **BARCODE**: 

   **Reason**
   - Patron otherwise in good standing

   **Request Note**
   - Waive registration fee?

   **Decision Note**

6. Review the waiver request information.
7. (Optional) Enter an explanation in the Decision Note field.
8. Select one of the following:
   - **APPROVE** – Select this option to approve the waiver request. The waiver request is set to a status of Approved, and Leap removes the charge from the patron’s account.
   - **DECLINE** – Select this option to leave the charge on the patron’s account. The waiver request is set to a status of Declined.
Using the Weeding and Waiver Approval Dashboard

The Approval Dashboard gives reviewers and approvers an overview of their to do lists for weeding and waiver requests. Reviewers can move one request or multiple requests to the next level for approval. Staff at the end of the review process can also approve or decline requests to conclude the process.

The Approval Dashboard contains two tabs:

- [Weeding Requests](#)
- [Waiver Requests](#)

Weeding Requests

The Weeding Requests tab gives reviewers and approvers one place to approve or decline weeding record sets. This view is limited to records within each staff member’s logon branch.

To filter weeding record sets

- By view – Select the arrow beside the current view and select a new view.

- By record status – Select the arrow beside the current status and select a new status.
Note:
You can update your workform user defaults to ensure Leap always filters your weeding requests by the same status.

- By keyword – Enter a keyword in the Filter box.

To update your workform user defaults
1. In Leap, select your username, and select Settings.
   The Settings page opens.
2. Select the Workform User Defaults tab.
3. To specify the default weeding request status that appears in the Approval Dashboard, select a status from the **Weeding Requests** list.

4. Select **SAVE**.

**To approve or decline a weeding record set using the Approval Dashboard**

**Note:**
To approve a weeding record set, you need the **Weeding: Approve** permission. To decline a weeding record set, you need the **Weeding: Decline** permission.

1. To open the Approval Dashboard, go to **Utilities > Approval Dashboard**.
   The Weeding Requests tab of the dashboard appears in the **Active Requests** view.

2. (Optional) Filter or sort the list of weeding requests.
   a. To filter the list by record status, select a status from the **Status** list.
   b. To filter by keyword, type a keyword in the **Filter** box.
   c. To sort the list by column, select a column header.

3. Select the checkbox beside each weeding list you want to approve or decline.
   Leap enables the **APPROVE** and **DECLINE** buttons.

4. Select one of the following:
• **APPROVE** – Select this option to approve the weeding record sets. On approval, records in each weeding record set can be set to Withdrawn, can be marked Deleted, or can remain unchanged, depending on the settings in the weeding template.

• **DECLINE** – Select this option to send records in the weeding record set back to the original status of Pending, so staff can do more work on them.

Waiver Requests

The Waiver Requests tab gives requesters and approvers one place to look for waiver requests. It gives you one place to approve or decline a waiver request.

**To filter waiver requests**

• By view – Select the arrow beside the current view and select a new view.
• By keyword – Enter a keyword in the Filter box.

To approve or decline a waiver request using the Approval Dashboard

1. To open the Approval Dashboard, go to Utilities > Approval Dashboard.
   The Weeding Requests tab of the dashboard appears.

2. Select Waiver Requests.
   The Waiver Requests tab of the dashboard appears in the Active Requests view.

3. (Optional) Filter or sort the list of waiver requests.
   a. To filter by keyword, type a keyword in the Filter box.
   b. To sort the list, select a column header.

4. Select the checkbox beside the waiver request you want to approve or decline.
   Leap enables the REVIEW button.

5. Select REVIEW.
   The Review Waiver Request ID dialog opens.
Review the waiver request information.

7. (Optional) Enter an explanation in **Decision Note**.

8. Select one of the following:
   - **APPROVE** – Select this option to approve the waiver request. The waiver request is set to a status of Approved and Leap removes the charge from the patron’s account.
   - **DECLINE** – Select this option to leave the charge on the patron’s account. The waiver request is set to a status of Declined.
Managing Extended Loan Periods

Your library can now offer extended loan periods on one or more collections to selected patrons, so they have a longer time period to return these items.

To receive the Extended Loan Period

1. **Setting Up Extended Loan Periods in Polaris Administration (Staff Client)** – The Library administrator must enable **Extended Loan Period**, configure **Additional Loan Units** for chosen collections, and assign the permission **Patron Privileges**: **Modify** to certain Leap users.

2. **Selecting in Leap** – Library staff must have the permission **Patron Privileges**: **Modify** and select **Extended Loan Period** on the patron record in Leap.

3. **Patron Check-Out** – The patron must check out an item from a collection with **Additional Loan Units** configured.

If all three conditions are met, the checkout due date includes the Additional Loan Units.

---

Setting Up Extended Loan Periods in Polaris Administration (Staff Client)

To enable **Extended Loan Period** and configure **Additional Loan Units**

1. To display the **Extended Loan Periods** checkbox in Leap, set the following profile setting to **No**: Profiles > Staff Client > Web App: Suppress Field: Extended Loan Periods.
2. To configure **Additional Loan Units**:
   a. Go to Polaris Administration (staff client) > Collection, and search for the chosen collection.
b. Select the collection to open the Collections workform.

c. Type a number in the **Additional Loan Units** field to increase the loan units (amount of time) allowed for items in the collection. **Polaris** calculates the loan period for the collection as follows: Base Units + Additional Loan Units.

Tip:
To find the Base Units for a collection, go to the Loan Periods table of the governing library. In Polaris Administration (staff client), select **Branch > BranchName > Policy Tables > Loan Periods**. The Loan Periods policy table displays the Time Unit and the base number of Units for the selected branch. In the example below, the Base Units is 14 Days.
3. Assign the permission **Patron Privileges: Modify** to Leap users who need to select **Extended Loan Period** on Leap's patron record, Preferences section.

For information on assigning permissions, search the Polaris staff client help for "Assign Permissions", and see "Add a Staff Member" in the Polaris System Administration (Web-Based) guide.

---

**Selecting in Leap**

**To select Extended Loan Period on the patron record in Leap**

1. Ensure you have the permission **Patron privileges: Modify**.
   Contact your Polaris Administrator with questions.

2. In Leap, use the Find Tool to find the patron.

3. Open the **Patron Record > Registration View**, and scroll to the **Preferences** section.
4. Select **Extended Loan Period**.

![Preferences](image)

**Patron Check-Out**

A patron can use any method to check out an item from a collection that has **Additional Loan Units** configured. **Polaris** uses the patron preferences, base units, and additional loan units to calculate the appropriate due date.

The following examples are for patrons with the same home library and branch:

<table>
<thead>
<tr>
<th>Patron</th>
<th>Base Units</th>
<th>Has Extended Loan Periods?</th>
<th>Additional Loan Units in Collection</th>
<th>Total loan period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patron 1</td>
<td>14 days</td>
<td>Yes</td>
<td>12 days</td>
<td>26 days</td>
</tr>
<tr>
<td>Patron 2</td>
<td>14 days</td>
<td>No</td>
<td>12 days</td>
<td>14 days</td>
</tr>
<tr>
<td>Patron 3</td>
<td>14 days</td>
<td>Yes</td>
<td>0 days</td>
<td>14 days</td>
</tr>
</tbody>
</table>

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Increasing Check-out Limits by Branch

Using the increased check-out limits feature, your library now can increase the total item limit and material type limits for patrons at a branch. The branch can enable the feature for specific patrons through the preference settings in the patron record. Once enabled for a patron, the increased limits apply to all check-out transactions regardless of what Polaris application the patron uses for check-out (for example, Leap, the Polaris staff client, ExpressCheck, and Polaris API).

Tip:
Increased check-out limits do not apply to integrated eContent because the vendors control the loan limits for those items.

This section covers the following topics:

- Setting Up Increased Check-out Limits
- Determining Base Check-out Limits
- How Increased Check-out Limits Work

Setting Up Increased Check-out Limits

The process of setting up increased check-out limits involves configuring settings in Polaris Administration (staff client) at both the system and branch level and enabling the option in Leap for individual patrons.

To set up increased check-out limits

1. Enable a system-wide setting for the increased check-out feature.
   a. In Polaris Administration (staff client), go to Administration Explorer > System > Profiles.
   b. Select the Staff Client tab.
   c. Locate the Web App: Suppress Field: Increased Check-out Limit profile setting. This setting displays the Increased Check Out Limits checkbox in Leap, which library staff use to enable this feature for individual patrons.
d. Change the value to **No**.

e. Select **Save**.

2. Configure the increased check-out limits for each participating branch.

   **Note:**
   You must have the **Modify increased check-out limits: Allow** permission to complete this section.

Configuring increased check-out limits for a branch involves setting two branch-level settings. Before you begin, however you might want to determine the base **check-out limits** currently set for each branch.

a. In Polaris Administration (staff client), go to **Administration Explorer > [Branch Name] > Parameters**.

b. Select the **Patron Services** tab, and locate the Check-out: Increase Total Item Limit parameter. This parameter defines the number of items a patron can check out in addition to the total item limit defined in the Patron/Material Type Loan Limit Blocks policy table.

c. Enter the number by which you want to increase total check-outs.

d. Select **Save**.

e. In Polaris Administration (staff client), go to **Administration Explorer > [Branch Name] > Policy Tables > Increased Check-out Limits**.

This table allows you to specify which material types can have increased check-outs. When you enter a value in this table for a specific material type, the system adds this number to the maximum item limit defined for that material type in the Patron/Material Type Loan Limit Blocks policy table. If a material type does not appear in this table, then no increased check-outs are allowed for that material type.

   **Warning:**
   Both the Increased Check-out Limits policy table and the Check-out: Increase Total Item Limit parameter above must be configured for this feature to work properly.

f. Select Insert 📋.
The Insert: Increased Check-out Limits dialog appears.

![Insert: Increased Check-out Limits dialog](image)

- **g.** Select a material type from the list, and enter the number of increased check-outs allowed.
- **h.** Repeat the last two steps to add additional material types.
- **i.** Select **Save**.

3. Enable the increased check-out feature for individual patrons.

   **Note:**
   You must have the **Patron privileges: Modify** permission to complete this section.

   - **a.** In Leap, use the Find Tool to find the patron.
   - **b.** Open the patron record, and select **Registration**.
   - **c.** Select the **Preferences** tab on the left side of the screen.
   - **d.** Select **Increased Check Out Limit**.
e. Select Save.

Determining Base Check-out Limits

Prior to configuring increased check-out limits, you can review the base check-out limits already set in your system.

To determine base check-out limits

1. In Polaris Administration (staff client), go to Administration Explorer > [Branch Name] > Policy Tables > Patron/Material Type Loan Limit Blocks.
   
   The Patron/Material Type Loan Limit Blocks table appears.
2. View the following information:

- In the upper pane, the **Total Item Limit** appears for each patron type. The setting in the Check-out: Increase Total Item Limit parameter increases this amount.

- When you select a patron type in the upper pane, the lower pane displays the maximum item limit by material type for that patron type. The settings in the Increased Check-out Limits policy table increase these amounts.

**Note:**
The system-level Patron Services parameter Consortium Circulation determines which branch’s settings are used for loan limit blocks. For details, see “Governing Library for Circulation Transactions” in the Polaris staff client documentation.
How Increased Check-out Limits Work

During check-out transactions, Polaris does the following to apply increased check-out limits:

1. **Base Check-out Limits** -- Determines the base check-out limit and base material type limit using the Patron/Material Type Loan Limit Blocks policy table.
   - If the check-out does not exceed either limit, the transaction is allowed.
   - If the check-out exceeds one or both of the limits, the system proceeds to the next step.

   **Note:**
   The system-level Consortium Circulation parameter determines which branch’s settings are used for determining the base check-out limits. For details, see "Governing Library for Circulation Transactions" in the Polaris staff client documentation.

2. **Increased Check-out Limits** -- Determines if increased check-out limits apply to the current transaction as follows:
   - Determines whether the patron is enabled for increased check-out limits using the **Increased Check Out Limit** setting in the **Preferences** section of the patron record.
   - Determines if an increased total item limit is configured for the branch using the Check-out: Increase Total Item Limit parameter. If so, it adds this number to the base total item limit.
   - Determines if an increased material type limit is configured for the branch using the Increased Check-out Limits policy table. If so, it adds this number to the base material type limit.

Once the increased check-out limits are determined, the system proceeds to the next step.

   **Note:**
   The settings that determine the increased total item limit and increased material type limit are branch-level settings that use the item's assigned branch. This might differ from the transacting branch or patron's branch that determines the base check-out limits in step 1.
3. **Material Type Limit Check** -- Checks whether the transaction exceeds the material type limit as follows:

   - If the check-out does not exceed the increased material type item limit, proceeds to the next step.
   - If the check-out exceeds the increased material type limit, displays a block message. Staff can override the block and continue with the transaction if they have **Override item limit blocks: Allow** permission.

4. **Total Item Limit Check** -- Checks whether the total item limit has been exceeded as follows:

   - If the check-out does not exceed the increased total item limit, the transaction is allowed.
   - If the check-out exceeds the total item limit, displays a block message. Staff can override the block and continue with the transaction if they have **Override item limit blocks: Allow** permission.

**Examples**

The examples below assume that the governing library for patron blocks is set to use the transacting branch (Main) and that all items being checked out are also from the Main branch. The relevant settings from Polaris Administration (staff client) for the Main branch are:

<table>
<thead>
<tr>
<th>Table / Parameter</th>
<th>Setting</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patron/Material Type Loan Limit Blocks policy table</td>
<td>Total Item Limit</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>Maximum Item Limit (book)</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>Maximum Item Limit (DVD)</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>Maximum Item Limit (laptop)</td>
<td>1</td>
</tr>
<tr>
<td>Check-out: Increase Total Item Limit parameter</td>
<td>n/a</td>
<td>2</td>
</tr>
<tr>
<td>Increased Check-out Limits policy table</td>
<td>Book</td>
<td>2</td>
</tr>
</tbody>
</table>
Example 1

**Requested transaction**: A patron currently has 5 books checked out and wants to check out another book.

**System response**: This transaction exceeds the base material type limit and the base total item limit, so the system looks at the settings for increased check-out limits and determines:

- The patron is enabled for increased check-out limits.
- The branch is configured for 2 additional items (for an increased total item limit of 7).
- Of the 2 additional items allowed, both can be books (for an increased material type limit of 7 for books).

Because the additional book is from a branch configured for increased check-outs, the transaction is allowed. If the item is from a branch that is not configured for increased check-outs, the system displays a block message.

Example 2

**Requested transaction**: A patron currently has 3 books and 2 DVDs checked out and wants to check out another DVD.

**System response**: This transaction exceeds the base material type limit for DVDs and the base total item limit, so the system looks at the settings for increased check-out limits and determines:

- The patron is enabled for increased check-out limits.
- The branch is configured for 2 additional items (for an increased total item limit of 7).
- DVDs are not configured for increased check-out limits.

The system displays a material type limit block message. Even though the patron can check out two additional items, the material type of those items must be configured in the Increased Check-out Limits policy table. Otherwise, the base material type limits apply.

Example 3

**Requested transaction**: A patron currently has 5 books checked out and wants to check out a laptop.
System response: This transaction exceeds the base total item limit, so the system looks at the settings for increased check-out limits and determines:

- The patron is enabled for increased check-out limits.
- The branch is configured for 2 additional items (for an increased total item limit of 7).

The check-out does not exceed the increased total item limit, so the transaction is allowed. Although laptops are not a material type configured in the Increased Check-out Limits policy table, the patron is still entitled to check out one laptop as part of the base material type limits.
Searching for Bibliographic Records by National Bibliography Number

You can now search for bibliographic records by national bibliography number (NBN) in Leap.

A new NBN basic search option appears in the Bibliographic Record Find Tool.

![Find Tool - Bibliographic Record](image)

When you select the NBN search option, Leap finds bibliographic records with an 015 tag subfield $a that matches your search term.

You can also filter a bibliographic record search by NBN.

![Find Tool - Bibliographic Record](image)

To translate or change the search option label that appears in the user interface, update the following Staff Web Client string identifier in the Web Admin (Language Editor) Tool: ERMS_TK_QUALIFIER_BR_NBN.
Leap Performance Improvements for Bibliographic Records with Thousands of Items

In previous versions, Leap sometimes became unresponsive when you attempted to view items for a bibliographic record with thousands of linked items.

Version 7.5 includes performance updates that improve Leap's ability to display bibliographic records with many items. Leap now successfully displays the All Items view of the Bibliographic Record workform for a bib record with thousands of linked item records.
Using Volume Level Holds

You can allow staff and patrons to place holds on the first-available copy of the following in the Polaris staff client, Leap, or PowerPAC:

- integrated serials
- multi-part sets
- non-integrated serials

This topic covers the following:

- Setting Up Volume Level Holds
- Placing a Volume Level Hold in Leap

Note:
To place any type of hold in PowerPAC, see "Request Materials" in the PowerPAC help.

Setting Up Volume Level Holds

1. In Polaris Administration (staff client), go to Administration Explorer > System > Parameters.
2. Select the Request tab.
3. Open Holds options.
   The Hold Options dialog opens showing the Requests tab.
4. In the Manage Item Requests section, select Limit item requests to first available copy and select one of the following:
   - **Allow requests on integrated serials in PAC and Staff Client** — to allow requests on serials cataloged in the Polaris serials module. Use this setting if your library uses the Polaris serials module.
   - **Allow requests on multi-part sets and non-integrated serials in PAC and Staff Client** — to allow requests on volumes of multi-part bibliographic items and serials not cataloged in the Polaris serials module (non-integrated...
serials).
Use this setting if your library doesn't use the Polaris serials module, but you want to allow staff and patrons to request a hold on a specific volume or date of a multi-part title, and not just the title as a whole.

- **All** — to allow requests on serials cataloged in the Polaris serials module, serials not cataloged in the Polaris serials module, and volumes of multi-part bibliographic items.
Use this setting if your library uses the Polaris serials module and you also allow staff and patrons to request a hold on a specific volume or date of a multi-part title.

![Hold options](image)

5. Select **Apply** and then select **OK**.

---

### Placing a Volume Level Hold in Leap

**To place a hold**

1. Open a patron record in Leap and select **Holds / Held**.
2. Select **New Hold**.
The New Hold area expands.

3. Select **FIND TOOL**.

4. Search for and open a title with multiple volumes.

5. Select **OPEN**.

The find tool populates the Title and other fields for the selected bibliographic record.

6. Select **PLACE HOLD**.

The Serial/Multi Volume Holds dialog opens.

![Serial/Multi Volume Holds](image)

7. Select one of the following:
   - **Request any item**
   - **Request the first available copy of one of the listed items** and select a specific volume from the list.

8. Select **CONTINUE**.

Leap creates the hold request and adds the title and volume to the Holds list.
## What's New in Polaris and Leap 7.5

### BELLA WONKA  📖

**PACREG383132**  
**COMMUNITY LIBRARY**

- **Check Out (0)**  
- **Out (0) / Overdue (0)**  
- **Account ($4.22)**  
- **Claims (0) / Lost (0)**  
- **Holds (3) / Held (0)**  
- **ILL (0) / Held (0)**

### New Hold

<table>
<thead>
<tr>
<th>AUTHOR</th>
<th>TITLE</th>
<th>FORMAT</th>
<th>CALL NUMBER</th>
<th>ACTIVATION DATE</th>
<th>STATUS</th>
<th>PICKUP BRANCH</th>
<th>QUEUE</th>
<th>HOLD UNTIL</th>
<th>GROUP</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>New fears: new horror stories by masters of the genre</td>
<td>Book</td>
<td></td>
<td>9/21/2023</td>
<td>Active</td>
<td>Community Library - Drive thru window</td>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Journal of chemical education Vol. 88 no. 10 (Oct. 2011)</td>
<td>Periodical</td>
<td></td>
<td>9/21/2023</td>
<td>Active</td>
<td>Community Library - Drive thru window</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>H. G. Wells and modern science fiction</td>
<td>Serial</td>
<td>823 W452s</td>
<td>9/21/2023</td>
<td>Pending</td>
<td>Community Library - Drive thru window</td>
<td>1</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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Charging Overdue Fines on Library Closed Dates

In previous versions, you could choose whether Polaris charges overdue fines on days of the week that the library is closed. As of version 7.5, you can now also choose to charge overdue fines on dates that the library is closed (for example, holidays).

The **days** that your library is closed are defined in the **Hours of operation** parameter. The **Days not fineable** parameter controls whether overdue fines are charged on days that the library is closed. Both parameters are found on the Patron Services tab in Polaris Administration (staff client).

The **dates** that your library is closed are defined in the Dates Closed policy table in Polaris Administration (staff client). A closed date is a specific date that the library is closed that is an exception to the library’s normal hours of operation. The new **Overdues: Charge fines for dates closed** parameter controls whether overdue fines are charged on closed dates. You can set this parameter at the system level in Polaris Administration (staff client).

**Note:**
By default, Polaris does not charge overdue fines on closed dates. 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:

- [Configuring Polaris to Charge Overdue Fines on Closed Dates](#)
- [Other Factors that Affect Overdue Fines on Closed Dates](#)

---

Configuring Polaris to Charge Overdue Fines on Closed Dates

**To configure Polaris to charge overdue fines on closed dates**

1. In Polaris Administration (staff client), go to **Administration > Explorer > System**.
2. In the Administration Explorer - System tree list view, double-click the system name to expand the list.
3. Select **Parameters > Patron Services**.

   The patron services system parameters appear.
4. Double-click the **Overdues: Charge fines for dates closed** parameter, and set the **Value** option to **Yes**. By default, the parameter is set to No.

5. Select **Save**.

**Other Factors that Affect Overdue Fines on Closed Dates**

The Consortium Circulation parameter also affects how Polaris calculates overdue fines on closed dates. This parameter determines which branch’s closed dates Polaris uses when calculating overdue fines. For more information, search for "Governing Library for Circulation Transactions" in the Polaris staff client help.
Logging Transactions for Patron Blocks

You can now configure Polaris to log transactions when staff-generated blocks (library-assigned blocks or free-text blocks) are added to or removed from patron records.

Logging transactions for patron blocks makes it possible to retain an audit trail of the blocks added to patron accounts, even after the blocks have been removed.

**To configure transaction logging for patron blocks**

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 view, 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 **Patron block added** transaction type, and set the **Log Transaction** value to **Yes** or **No**. By default, the value is set to Yes.

7. Double-click the **Patron block deleted** transaction type, and set the **Log Transaction** value to **Yes** or **No**. By default, the value is set to Yes.

8. Select **Save**.
Configuring Polaris to Automatically Clear Object Locks

You can now configure Polaris to automatically clear object lock entries that are more than a certain number of hours old. This reduces the likelihood of staff members encountering unintentionally locked records while working in Leap or the staff client. It also saves time for the staff members tasked with manually clearing object lock entries.

You can enable the new **Clear Object Locks** SQL job, which clears entries from the Object Locks database table when it runs. The new **Automated object lock clearing: Age of lock to clear** profile specifies which object lock entries the SQL job removes.

This section covers the following topics:

- Working with the Clear Object Locks SQL Job
- Configuring the Automated object lock clearing: Age of lock Profile

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Working with the Clear Object Locks SQL Job

When enabled, the Clear Object Locks SQL job runs hourly and removes entries in the Object Locks database table that are older than the number of hours specified in the Automated object lock clearing: Age of lock to clear profile.

By default, this SQL job is disabled.

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Configuring the Automated object lock clearing: Age of lock Profile

Edit the Automated object lock clearing: Age of lock to clear profile to specify which object lock entries the Clear Object Locks SQL job removes.

**To configure the Automated object lock clearing: Age of lock profile**

1. In the Polaris shortcut bar, select **Administration > Explorer > System**.
2. In the Administration Explorer - System tree list view, double-click the system name to expand the list.
3. Select **Profiles > Staff Client**.
4. Double-click the **Automated object lock clearing: Age of lock to clear** profile, and set the **Value** option to a number of hours between 1 and 72.

![Profile settings](image)

By default, the profile is set to 12. If you set the profile to 0, the Clear Object Locks SQL job does not remove any object lock entries.

**Note:**
Be aware that setting this profile to a smaller number, such as 1 or 2, increases the likelihood that the Clear Object Locks SQL job might remove an object lock entry for a record that a staff member is actively editing.

5. Select **Save**.
Support for Basic OAuth 2.0 Authentication in Leap

Leap now supports the use of basic OAuth 2.0 for single sign-on (SSO) authentication. Unlike standard OAuth 2.0, basic OAuth 2.0 does not use OpenID Connect (OIDC) or Proof Key for Code Exchange (PKCE). In addition, basic OAuth 2.0 does not rely on claims found within a JSON web token (JWT). Instead, it exchanges an access token (typically, an opaque token) to retrieve claims from the OAuth /userinfo endpoint.

Contact Innovative for help getting started with basic OAuth 2.0 authentication.
New External ID Field on the Staff Member Workform

If your library’s process for authenticating staff members requires an external ID, you can now add the ID to the staff member record. Depending on your library's process, the external ID may be used during authentication when a staff member signs in to Leap or Polaris System Administration (web-based).

**Note:**
For more information about configuring authentication for Leap or Polaris System Administration (web-based), see the Polaris and OAuth 2.0 with OpenID Connect Integration Guide.

The External ID field corresponds to the ExternalID value in the PolarisUsers database table. If you update the External ID field, Polaris writes your changes to the database.

An external ID maps a Polaris staff member to an ID used or provided by an external identity provider.

This section covers the following topics:

- [How the Authentication Process Uses the External ID](#)
- [Adding an External ID to a Staff Member in Polaris Administration (Staff Client)](#)
- [Adding an External ID to a Staff Member in Polaris Administration (Web-Based)](#)

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How the Authentication Process Uses the External ID

Staff member authentication for Leap and for Polaris System Administration (web-based) is handled by one of the following identity providers:

- Active Directory and Active Directory Federation Services (AD FS)
- Azure Active Directory (Azure AD)

By default, during authentication, the system uses the user principal name (UPN) in the format of an email address to map a Polaris staff member to the corresponding Active Directory user or Azure AD user.

However, if an identity provider returns an ID that is not a UPN, or a UPN that is not in the same domain as the Polaris domain, you can configure the system to use the external ID to map the Polaris staff member to the corresponding identity provider user.
Note:
For information about enabling the use of the external ID in authentication, see the Polaris and OAuth 2.0 with OpenID Connect Integration Guide.

Adding an External ID to a Staff Member in Polaris Administration (Staff Client)

To add an external ID to a staff member record in Polaris Administration (staff client)

1. Select Administration > Explorer > Staff Member.
2. Select Search.
3. Search for the staff member you want to edit, and open the staff member record.

4. Enter the external ID in the External ID box. The value must be unique and a maximum of 100 characters.
5. Select Save.
Adding an External ID to a Staff Member in Polaris Administration (Web-Based)

To add an external ID to a staff member record in Polaris Administration (web-based)

1. From the Polaris Administration (web-based) home screen, select Staff Members.
2. Search for the staff member you want to edit, and open the staff member record.

3. Enter the external ID in the External ID box. The value must be unique and a maximum of 100 characters.
4. Select SAVE.
Enabling a User Inactivity Time-out Period in Leap

Your library can now enable a user inactivity time-out period for Leap.

**Note:**
Leap also has a separate maximum session length time-out period of approximately 24 hours. A Leap user who is signed in must re-authenticate after 24 hours, or the system automatically signs them out.

To enable the user inactivity time-out period, open a ticket with Innovative Support. In the ticket, specify the length of the inactivity time-out period you want to use (for example, 30 minutes).

When the user inactivity time-out period is enabled, Leap displays an Inactivity Timeout dialog two minutes before the end of the time-out period.

![Inactivity Timeout Dialog](image)

You can select **CONTINUE WORKING** to remain signed in to Leap or **LOGOUT** to sign out. If you don't select either option, Leap closes your session and signs you out when the user inactivity time-out period elapses.
MARC Technical Updates in Polaris 7.5

The updates specified in the following links were implemented in Polaris 7.5.

- [MARC Technical Notice (January 31, 2022)](#)
- [MARC Technical Notice (February 11, 2022)](#)
- [MARC Technical Notice (February 28, 2022)](#)
- [MARC Technical Notice (March 14, 2022)](#)
- [MARC Technical Notice (March 28, 2022)](#)
- [MARC Technical Notice (April 15, 2022)](#)
- [MARC Technical Notice (April 20, 2022)](#)
- [MARC Technical Notice (June 1, 2022)](#)
- [MARC Technical Notice (June 14, 2022)](#)
- [MARC Technical Notice (June 22, 2022)](#)
- [MARC Technical Notice (June 28, 2022)](#)
- [MARC Technical Notice (August 16, 2022)](#)
- [MARC Technical Notice (August 24, 2022)](#)
- [MARC Technical Notice (September 21, 2022)](#)
- [MARC Technical Notice (September 27, 2022)](#)
- [MARC Technical Notice (October 12, 2022)](#)
- [MARC Technical Notice (October 18, 2022)](#)
- [MARC Technical Notice (November 15, 2022)](#)
- [MARC Technical Notice (December 6, 2022)](#)