



What's New in Polaris and Leap

7.5

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Contents

Polaris Installation Notes	1
New or Modified Polaris Administrative Settings	2
Polaris API Changes	9
Using Pickup Areas	10
Setting Up Pickup Areas	10
Adding Pickup Areas to the Policy Table	10
Enabling Pickup Area at the System Level	12
Designating the Default Pickup Area and Display in PAC at the Branch Level	13
Using Pickup Areas in Leap	14
Using Pickup Areas in PAC	17
Emailing and Printing Pickup Areas	21
Printing Pickup Area in Hold Notices	22
Using Age-Related Loan Policies	24
How Age-Related Loan Policies Work	24
Minimum Age Blocks with Title-Level Hold Requests	25
Setting Up Age-Related Loan Policies	25
Declaring Items Damaged in Leap	27
Declaring an Item Damaged at Check-In	27
Declaring an Item Damaged From the Patron Record	29
New Custom Menu Options in Leap	32
Enabling a Custom Menu Option	33
Specifying the URL that Corresponds to a Menu Option	34

Modifying Menu Option Text	35
Using Leap's Improved Weeding Workflow	36
Creating a Weeding Template	36
Setting a Discard Amount	39
Deleting a Weeding Template	40
Creating an Empty Weeding Record Set	40
Modifying a Weeding Record Set by Adding or Removing Records	41
Deciding what Weeding Approval Process to Use	42
Submitting the Weeding Record Set for Review or Approval	43
Approving or Declining a Weeding Record Set	45
Using the Approval Dashboard to Approve or Decline	45
Using the Weeding Record Set Workform	46
Deleting or Undeleting a Weeding Record Set	47
Using the New Waiver Workflow	49
Setting Up the New Waiver Workflow	49
Enabling the New Waiver Workflow	49
Setting the Maximum Waiver Amount	51
Adding Waiver Reasons to the Policy Table	53
Using the New Waiver Process in Leap	55
Submitting a Waiver Request	56
Approving or Declining a Waiver Request	57
Using the Weeding and Waiver Approval Dashboard	59
Weeding Requests	59
Waiver Requests	62
Managing Extended Loan Periods	65
Setting Up Extended Loan Periods in Polaris Administration (Staff Client)	65
Selecting in Leap	68

Patron Check-Out	69
Increasing Check-out Limits by Branch	70
Setting Up Increased Check-out Limits	70
Determining Base Check-out Limits	73
How Increased Check-out Limits Work	75
Examples	76
Searching for Bibliographic Records by National Bibliography Number	79
Leap Performance Improvements for Bibliographic Records with Thousands of Items	80
Using Volume Level Holds	81
Setting Up Volume Level Holds	81
Placing a Volume Level Hold in Leap	82
Charging Overdue Fines on Library Closed Dates	85
Configuring Polaris to Charge Overdue Fines on Closed Dates	85
Other Factors that Affect Overdue Fines on Closed Dates	86
Logging Transactions for Patron Blocks	87
Configuring Polaris to Automatically Clear Object Locks	89
Working with the Clear Object Locks SQL Job	89
Configuring the Automated object lock clearing: Age of lock Profile	89
Support for Basic OAuth 2.0 Authentication in Leap	91
New External ID Field on the Staff Member Workform	92
How the Authentication Process Uses the External ID	92
Adding an External ID to a Staff Member in Polaris Administration (Staff Client)	93
Adding an External ID to a Staff Member in Polaris Administration (Web-Based)	94
Enabling a User Inactivity Time-out Period in Leap	95
MARC Technical Updates in Polaris 7.5	96

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.

Setting	Purpose	Level
New Parameters		
Patron Services > Check-out: Increase Total Item Limit	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 Increasing Check-out Limits by Branch .	Branch
Request > Holds Options > Pickup Area	Allows you to: <ul style="list-style-type: none"> • enable pickup area to appear system-wide • select the default pickup area • enable pickup area to appear in PAC For details, see Using Pickup Areas .	System, Branch
Patron Services > Overdues: Charge fines for dates closed	Specifies whether Polaris charges overdue fines on closed dates. The default setting is No. For details, see Charging Overdue Fines on Library Closed Dates .	System
New Permissions		
Fines: Approve waiver requests for user threshold	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 Using the New Waiver Workflow .	System
Fines: Decline	Decline waiver requests for patrons in	System

Setting	Purpose	Level
waiver requests	Leap. Applies to Leap only. For details, see Using the New Waiver Workflow .	
Fines: Submit waiver requests	Submit waiver requests for patrons in Leap. Applies to Leap only. For details, see Using the New Waiver Workflow .	System
Modify increased check-out limits	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 .	System
Override age restrictions	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 .	System
Patron Privileges: Modify	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 .	System
Weeding templates: Access, Create, Delete, Modify	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 .	Branch
Weeding: Approve	For reviewers and approvers to move the weeding record set along in the approval process. Approval can change the status of	Branch

Setting	Purpose	Level
	a weeding record set from In Review to Approval Requested or from Approval Requested to Approved. Applies to Leap only. For details, see Using Leap's Improved Weeding Workflow .	
Weeding: Decline	For reviewers and approvers to move the weeding record set back to Pending in the approval process. Applies to Leap only. For details, see Using Leap's Improved Weeding Workflow .	Branch
Weeding: Submit for approval	For staff to submit weeding record sets for review or approval. Applies to Leap only. For details, see Using Leap's Improved Weeding Workflow .	Branch
New Profiles		
Staff Client > Automated object lock clearing: Age of lock to clear	Specifies which object lock entries the Clear Object Locks SQL job removes from the Object Locks database table. For details, see Configuring Polaris to Automatically Clear Object Locks .	System
Staff Client > Web App: Custom 1 URL	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 New Custom Menu Options in Leap .	System, Library, Branch
Staff Client > Web App: Custom 2 URL	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 New Custom Menu Options in Leap .	System, Library, Branch

Setting	Purpose	Level
Staff Client > Web App: Library Documentation URL	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 New Custom Menu Options in Leap .	System, Library, Branch
Staff Client > Web App: Suppress Field: Extended Loan Periods	Indicates whether the Extended Loan Periods checkbox is suppressed from display in the Leap Patron Registration workflow. Applies to Leap only. For details, see Managing Extended Loan Periods .	System
Staff Client > Web App: Suppress Field: Increased Check-out Limits	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 Increasing Check-out Limits by Branch .	System
Staff Client > Web App: Suppress Link: Custom 1	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 New Custom Menu Options in Leap .	System, Library, Branch
Staff Client > Web App: Suppress Link: Custom 2	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 New Custom Menu Options in Leap .	System, Library, Branch

Setting	Purpose	Level
Staff Client > Web App: Suppress Link: Library Documentation	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 .	System, Library, Branch
Staff Client > Web App: Use waiver request action	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 .	System
New Policy Table		
Hold Pickup Areas	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 .	System
Increased Check-out Limits	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 .	Branch
User Defined Waiver Request Reasons	Defines the reasons staff can request a waiver for a patron. For details, see Using the New Waiver Workflow .	System
Modified Database Tables		
Transaction Logging	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	System, Library, Branch

Setting	Purpose	Level
	Patron block added and Patron block removed transaction types. For details, see Logging Transactions for Patron Blocks .	
Modified Permissions		
Cataloging record sets: Access, Create, Delete, Modify	Cataloging record set permissions are modified to include weeding record sets. Applies to Leap only. For details, see Using Leap's Improved Weeding Workflow .	System
Modify lost/damaged item amount	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 Declaring Items Damaged in Leap .	System
Special item check in	This permission now also applies to checking in damaged items. With this permission, you can check in damaged items in Leap. For details, see Declaring Items Damaged in Leap .	System, Library, Branch
Modified Policy Tables		
Material Types	Names the various material types held by the library. Minimum Age column added to support age-related loan policies. For details, see Using Age-Related Loan Policies .	System
Modified Profiles		
Patron Services > Waiver approval threshold	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 Using the New Waiver	Staff Member

Setting	Purpose	Level
	Workflow.	

Polaris API Changes

The following methods have been added or updated:

Method Name	Purpose
HoldRequestCreate	<p>Now returns a StatusValue of "10" when the patron is blocked from placing a hold because they do not meet the minimum age requirement for that item.</p> <p>Now returns an XML Body Element of "HoldPickupAreaID" for the area in the branch where patron would like to pick up item.</p>
ItemCheckoutPost	<p>Now returns the following ItemBlockFlags:</p> <ul style="list-style-type: none"> • 16777216 - when the patron is blocked from checking out an item because they do not meet the minimum age requirement. • 33554432 - when the patron is blocked from checking out an item because the item has a status of Damaged.
MultiPartGet	<p>Now returns the following for the XML Element of Type:</p> <ul style="list-style-type: none"> • 2 - Volume (multipart set) • 3 - Item
PickupAreasGet	<p>This endpoint returns a list of valid pickup areas for the branch based on the organization ID.</p>

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.

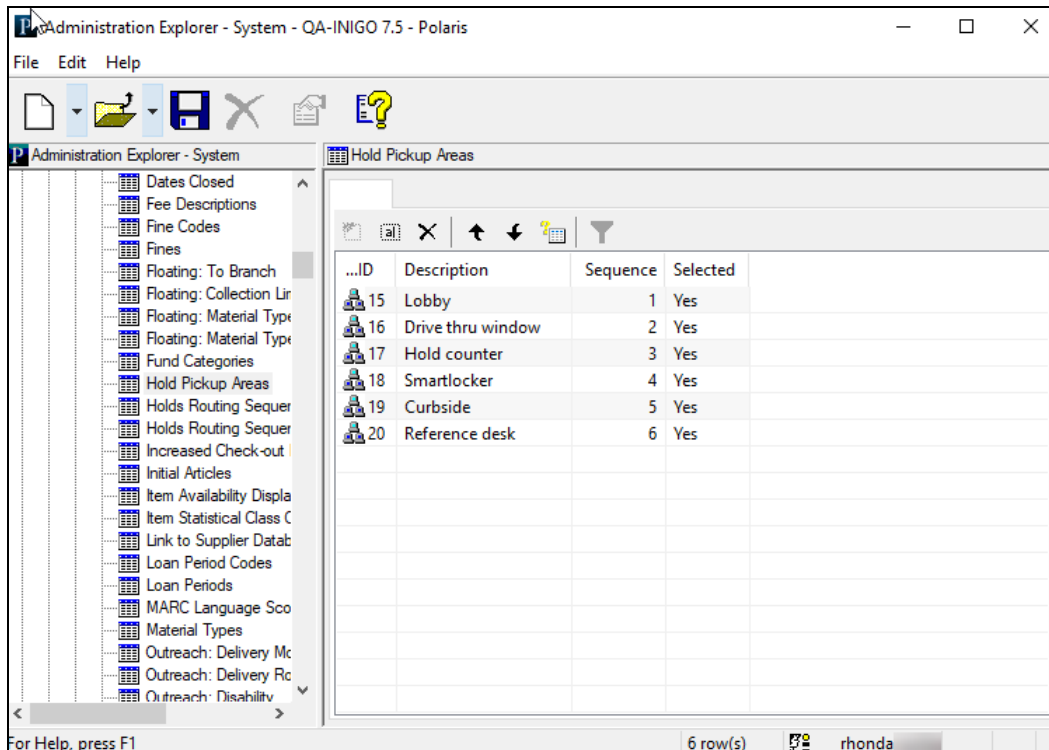
Adding Pickup Areas to the Policy Table

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.



3. Select **Insert** .

The Add Hold Pickup Areas dialog opens.

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.

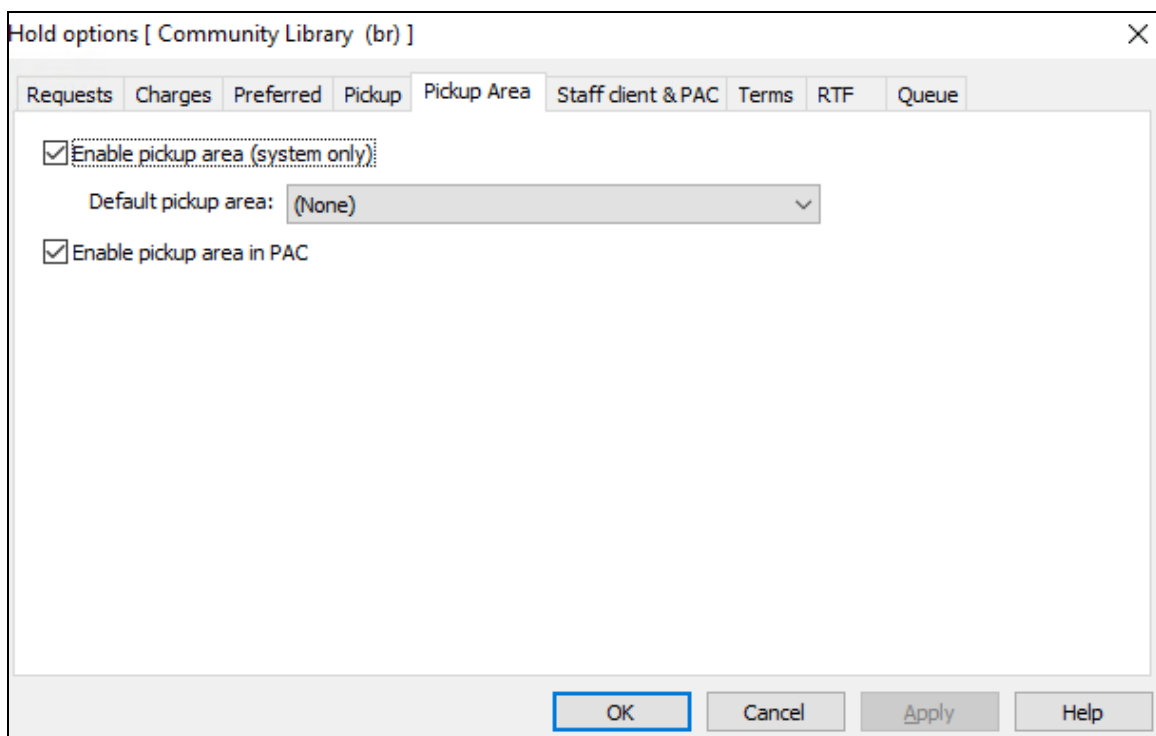
You can also change or delete existing Pickup Area entries using the icons at the top of the Hold Pickup Areas pane. For more information, search "Working with Tables" in the Polaris staff client help.

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.

- (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.

- Select **OK**.

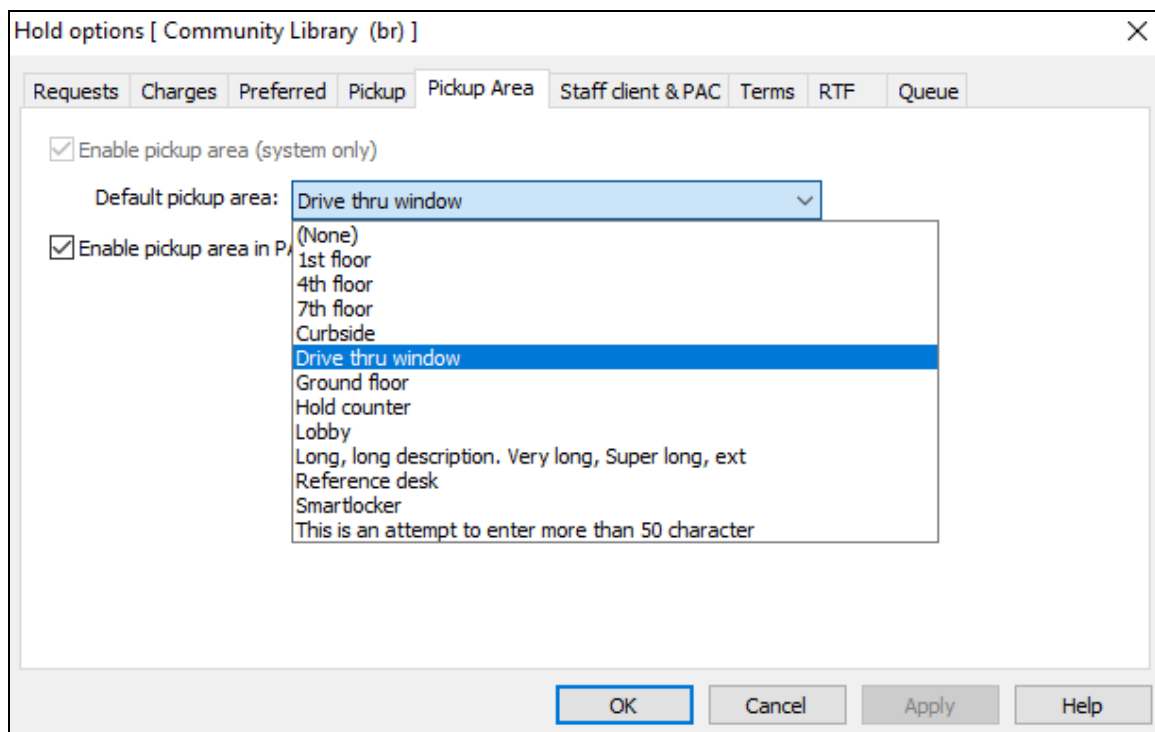
The system displays the new pickup area fields as described in the [Email and Print Pickup Areas](#) section.

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)

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



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**.
3. Select **New Hold**.

The following image shows that the new hold area now includes Pickup Area.

The screenshot shows a web interface for placing a hold. At the top, there are buttons for 'New Hold', 'Cancel', 'Reactivate', 'Delete', and 'More'. A 'Filter Holds' search box is on the right. Below these are fields for 'Activation' (10/12/2023), 'Expiration' (10/27/2023), 'Pickup Branch' (Community Library), and 'Pickup Area' (Drive thru window). A 'Borrow by Mail' checkbox is also present. A green 'PLACE HOLD' button is prominent. Below the form is a 'FIND TOOL' section with a search bar containing 'A forest Christmas' and a 'FIND TOOL' button. To the right of the search bar is a 'Barcode' field. Below the search bar are various metadata fields: Author (Holm, Mayling Mack), ISBN (0060225726), Format (Book), Series, Edition (1st ed.), Pages, Publisher (Harper & Row), Call NO, Issue, Date (1977), LCCN (76058696), Serial Copy, and Volume.

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.

What's New in Polaris and Leap 7.5

BELLA RUCKER ⓘ

PACREG383134
COMMUNITY LIBRARY

📁 BLOCKS 📄 NOTES

REGISTRATION ACTIONS ▾ ↻ **CLOSE**

📄 Check Out (0) 📄 Out (0) / Overdue (0) 💰 Account (\$0.00) 🕒 Claims (0) / Lost (0) 📄 Hold (6) / Held (0) More ▾

➕ New Hold ⏪ Cancel ⏩ Reactivate 🗑 Delete More ▾

Filter Holds

<input type="checkbox"/>	AUTHOR ▾	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS	PICKUP BRANCH	QUEUE	HOLD UNTIL	GROUP
<input type="checkbox"/>	Christopher, Matt, 1917-1997, author.	The fox steals home	Book		9/12/2023	Active	Community Library - Curbside	1		
<input type="checkbox"/>	Christopher, Matt, 1917-1997, author.	The hockey machine	Book		10/4/2023	Pending	Community Library - Smartlocker	1		
<input type="checkbox"/>	Christopher, Matt, 1917-1997, author.	Soccer scoop	Book		10/4/2023	Cancelled	Community Library			
<input type="checkbox"/>	De Bono, Edward, 1933-2021	The 5 day course in thinking	Book		9/12/2023	Expired	Amsterdam Free Library - Drive thru window			
<input type="checkbox"/>	Geus, Mireille, 1964-	Piggy	Book		9/12/2023	Expired	Community Library			
<input type="checkbox"/>	Holm, Mayling Mack.	A forest Christmas	Book	jP Fict	10/12/2023	Pending	Community Library - Drive thru window	1		

The pickup area appears in all views of the Picklist workflow.

Picklist

Community Library ▾ ↻ **CLOSE**

📄 Pending (0) 📄 Located (0) 🕒 Unclaimed (7) 🕒 Unclaimed ILL (1) 📄 Hold (1) to Transfer (1) ⏪ Cancelled (1)

🔍 Properties

Filter requests

Total items | 1 total

<input type="checkbox"/>	AUTHOR	TITLE	MATERIAL TYPE	PATRON NAME	NEW PICKUP BRANCH	PICKUP AREA	ITEM BARCODE	HELD DATE
<input type="checkbox"/>	Clifford, Eth, 1915-2003	Help! I'm a prisoner in the library	Book	Clapper, David R	NIS	Drive thru window	0000201405743	10/12/2023

The pickup area also appears in the following locations:

- ILL request view in the patron workflow
- ILL workflow
- 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**.

Library Info ▾ Search ▾ My Account ▾ Help ▾

Place a request:

 **The fox steals home**
Author: Christopher, Matt, 1917-1997, author.


Barcode: *****3134

Username: BellaRucker

Pickup Library: Community Library ▾

Pickup Area: Drive thru window ▾

Please mail this to me.




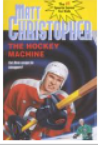

Always use this pick-up location (you can change it at any time)?

Activation Date: 10/13/2023
(ex: m/d/yyyy)

Note:

4. Select **Submit Request**.

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

My Account ▾		Help ▾	
 Tucker, Bella		 - more information  - additional note	
Requests			
<input type="checkbox"/>	Title	Status	Pickup Library
<input type="checkbox"/>	 The hockey machine by Christopher, Matt, 1917-1997, author.	Pending (as of 10/4/2023)	Community Library - Smartlocker
<input type="checkbox"/>	 The fox steals home by Christopher, Matt, 1917-1997, author.	Pending (as of 10/13/2023)	Community Library - Drive thru window

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**.

My Account ▾ Help ▾

Change Hold Request

New Pickup Location:

New Pickup Area:

	Title	Status	Pickup Library	Format
	The fox steals home by Christopher, Matt, 1917-1997, author.	Pending (as of 10/13/2023)	Community Library - Drive thru window	



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.

My Account ▾ Help ▾

Rucker, Bella  - more information
 - additional note

Requests

	Title	Status	Pickup Library	Format
<input type="checkbox"/>	 The hockey machine by Christopher, Matt, 1917-1997, author.	Pending (as of 10/4/2023)	Community Library - Smartlocker	 
<input type="checkbox"/>	 The fox steals home by Christopher, Matt, 1917-1997, author.	Pending (as of 10/13/2023)	Community Library - <input type="text" value="Smartlocker"/>	 

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.

To display Pickup Area here	Do this
Hold call slips (pickup area appears under the location pickup branch)	Enable Pickup Area at the system level.
First and second default email hold notices (pickup area appears after the held-till value)	Enable Pickup Area at the system level.
SIP extension - "PA[PickupAreaDescription]" (pickup area appears in the message returned at check in)	Enable Pickup Area at the system level. Note: This SIP extension only appears if the checked-in item fills a patron hold and the other hold-related fields are populated.

To display Pickup Area here	Do this
<p>Hold pickup slips (pickup area appears under the location for pickup branch)</p>	<ol style="list-style-type: none"> 1. Enable Pickup Area at the system level. 2. Go to Administration > Explorer > System. 3. Select Parameters > Patron Services > Hold pickup slip options: 4. Select Contents Selection. 5. Add Pickup area from Options to Selections. 6. Select Save.
<p>Hold slip (pickup area appears under the location for pickup branch)</p>	<ol style="list-style-type: none"> 1. Enable Pickup Area at the system level. 2. Go to Administration > Explorer > System. 3. Select Parameters > Patron Services > Hold Slip Options. 4. Add Pickup area from Options to Selections. 5. Select Save.

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?

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.

Description	Minimum Age
Book	18
New / Popular Book	0
Video	18
Children's Video	0
Audiobook	0
Music	0
Periodical	0
Rental	0
Software	0
Kit - Audiovisual	0
Kit - Realia	0
Equipment	0
Art	20
Picture, Photo	0
Kellie Rental Score	0
Kellie Rental Manuscript	0
Kellie R-Rated Realia	18
Vertical Files & Material	0
Map	0
Book and CD	18
Museum Pass	0

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".

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.

Declare Item Damaged

Barcode: 0000201369899	Material Type: Book
Status: Out	Patron: Laura Izquierda
Title: Rite of passage	

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

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

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

OK
CANCEL

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:

- Checks the item in.
 - Sets the item's circulation status to Damaged.
 - Assigns a system-generated block ("Item is Damaged") to the item record.
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.

Declare Item Damaged ✕

Item Barcode: **0000201369899**

Due Date: **10/17/2023**

Patron Name: **Izquierda, Laura**

Title: **Rite of passage**

Billed Date: Billed

Patron Barcode: **A12291954**

Total Fine: \$14.25

	Replacement:	Processing:	Overdue:
Charge:	\$12.95	\$0.00	\$0.00
Paid:	\$0.00	\$0.00	\$0.00
Waived:	\$0.00	\$0.00	\$0.00
Amount due:	\$14.25 (incl. \$1.30 tax)	\$0.00	\$0.00

Action:

Charge ▾

Leave as is ▾

Leave as is ▾

Amount:

\$14.25

\$0.00

\$0.00

Payment method: Cash ▾

Payment amount: **\$0.00**

Send a bill

OK
CANCEL

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.

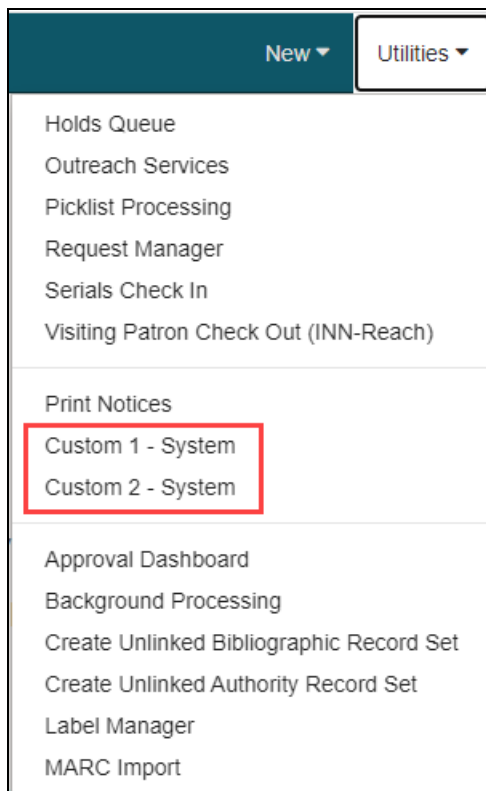
New Custom Menu Options in Leap

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.

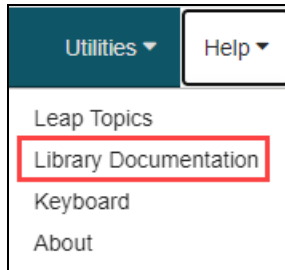
You can use the menu options to provide links from Leap to resources that your staff members use, such as:

- 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**.

Profile	Value
Web App: Request Manager Default Hold request st...	Active
Web App: Request Manager Default ILL request stat...	Not active
Web App: Request Manager Default INN-Reach requ...	Active
Web App: Suppress Link: Custom 1	Yes
Web App: Suppress Link: Custom 2	Yes
Web App: Suppress Link: Library Documentation	Yes
Web App: Suppress Link: PAC	No
Web App: Suppress View: Associations	No
Web App: Suppress View: Messages	No
Web App: Suppress View: Notes	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:

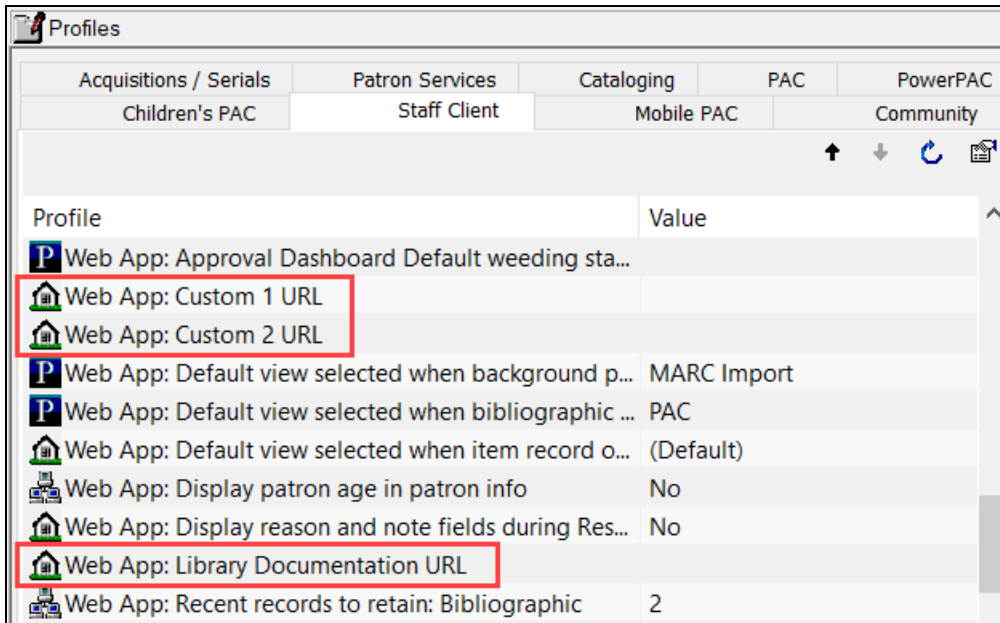
- Web App: Custom 1 URL
- Web App: Custom 2 URL
- Web App: Library Documentation URL

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**.

- Double-click the profile you want to configure, then enter a URL in the **Value** field. The URL must begin with http:// or https://.



- 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:

Default Menu Option Text	String Identifier
Custom 1	SWC_CUSTOM_1
Custom 2	SWC_CUSTOM_2
Library Documentation	SW_CI_LIBRARY_DOCUMENTATION

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](#)¹ 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

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 unsupressed status.

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**.

Note:

You can delete a criteria set only if it is not in use by another weeding template.

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**.

Deleting a Weeding Template

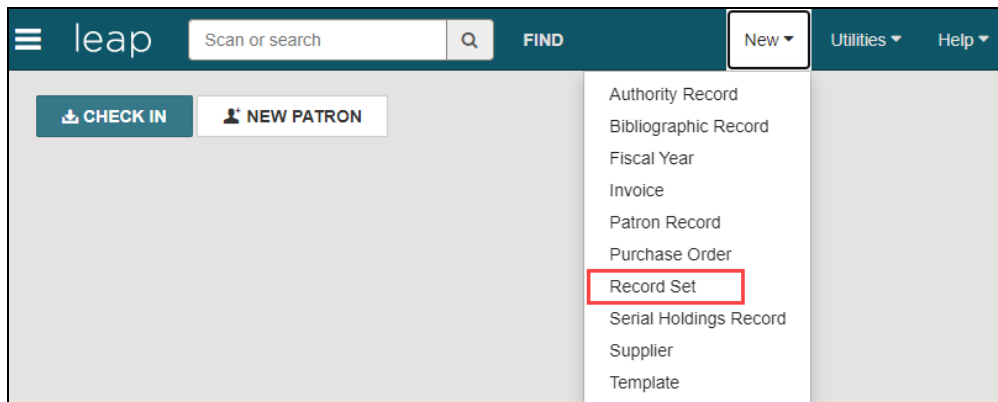
To delete a weeding template

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 workflow.
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.

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

The screenshot shows the 'Weeding Record Set' workform. At the top, there are buttons for 'SAVE', 'ACTIONS', a refresh icon, a print icon, and 'CLOSE'. Below these are several input fields: 'Name' (RCR Status In Newer than 3 Months), 'Owner' (Community Library (br)), 'Status' (Approval Reque), 'Record Set ID' (136403), 'Note' (In and Newer than 3 Months), 'Template' (RCRWeedingTemplate), 'Record Status' (Final), and 'Record Count' (11). Below the form is a search bar with 'Scan or enter barcode' and a 'FIND TOOL' button. A table of records is displayed below the search bar. The 'ACTIONS' dropdown menu is open, showing options: 'Add from File', 'Add from Item Record Set', 'Remove Selected Records', and 'Properties'. The 'Add from File' option is highlighted with a red box.

	!	TITLE	ASSIGNED BRANCH	COLLECTION	MATERIAL TYPE		STATUS
<input type="checkbox"/>	!	Jerome Robbins' Broadway : [compact audio disc] original	Community Library	Audiovisual (AV)	Music	CDTM Rob	In

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

To remove records from a record set

- Search for and select the record set you want to modify.
The Weeding Record Set workform appears.
- Select the checkboxes beside the records you want to remove.
- 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 workflow 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 workflow 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.

The screenshot shows the 'Weeding Record Set' form. At the top right, there are buttons for 'SAVE', 'ACTIONS', 'REFRESH', 'RESULTS', and 'CLOSE'. The 'ACTIONS' dropdown menu is open, showing four options: 'Submit for Review', 'Submit for Approval', 'Approve', and 'Decline'. Below the form is a table with columns: TITLE, ASSIGNED BRANCH, COLLECTION, MATERIAL TYPE, SHELF LOCATION, CALL NO., VOL., STATUS, BARCODE, LAST ACTIVITY DATE, RECORD STATUS, and CONTROL NUMBER. The table contains three rows of records, each with a checkbox in the first column.

	TITLE	ASSIGNED BRANCH	COLLECTION	MATERIAL TYPE	SHELF LOCATION	CALL NO.	VOL.	STATUS	BARCODE	LAST ACTIVITY DATE	RECORD STATUS	CONTROL NUMBER
<input type="checkbox"/>	The night the whole class slept over	Community Library	Children's Fiction (JF)	Book		J Fict Pev		Withdrawn	0001900202571	4/10/2007 2:59:10 PM	Final	1637328
<input type="checkbox"/>	The Victory Club [electronic resource]	Community Library	Downloadable Audiobooks (DBAK)	Audiobook		Online Resource		Withdrawn			Final	2586502
<input type="checkbox"/>	You and no other [electronic resource]	Community Library	Downloadable Audiobooks (DBAK)	Audiobook		Online Resource		Withdrawn			Final	2773553

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 workflow 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 workflow](#) – 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 Workflow

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

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

The screenshot shows the 'Weeding Record Set' workflow interface. At the top, there are buttons for 'SAVE', 'ACTIONS', a refresh icon, a print icon, and 'CLOSE'. Below these are input fields for 'Name' (RCR Status In Newer than 3 Months), 'Owner' (Community Library (br)), 'Note' (In and Newer than 3 Months), and 'Template' (RCRWeedingTemplate). There are also fields for 'Record Set ID' (136403) and 'Record Count' (11). A 'Final' button is visible. Below the form is a 'FIND TOOL' section with a search bar and a 'Filter' button. At the bottom, a table lists records with columns: checkbox, icon, TITLE, ASSIGNED BRANCH, COLLECTION, MATERIAL TYPE, SHELF LOCATION, CALL NO., VOL., STATUS, and BARCC. One record is visible: Jerome, Community, Audiovisual (AV), Music, CD M, In, 000190.

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 workflow.
2. Select **Actions > Delete**.

The screenshot shows the 'Weeding Record Set' workflow interface. At the top right, there are buttons for 'SAVE', 'ACTIONS', a refresh icon, and 'CLOSE'. The 'ACTIONS' dropdown menu is open, displaying several options: 'Submit for Review', 'Submit for Approval', 'Approve', 'Decline', 'Delete', and 'Undelete'. The 'Delete' option is highlighted with a red box, and a mouse cursor is pointing at it. Below the form fields, there is a search bar with 'Scan or enter barcode' and a 'FIND TOOL' button, along with another 'ACTIONS' dropdown and a 'Filter' input. A table below contains one item with the following details:

	!	TITLE	ASSIGNED BRANCH	COLLECTION	MATERIAL TYPE	SHELF LOCATION	CALL NO.	VOL.	STATUS
<input type="checkbox"/>	!	Jerome Robbins' Broadway : [compact audio disc] original Broadway cast recording.	Community Library	Audiovisual (AV)	Music		CD M Rob		In

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.

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 workflow.
2. Select **Actions > Undelete**.

Weeding Record Set ⓘ SAVE ACTIONS ▾ ↺ CLOSE

Name
RCR Status In Newer than 3 Months

Owner
Community Library (br)

Note
In and Newer than 3 Months

Template
RCRWeedingTemplate

Scan or enter barcode ↵ FIND TOOL ACTIONS ▾ Filter

<input type="checkbox"/>	!	TITLE	ASSIGNED BRANCH	COLLECTION	MATERIAL TYPE	SHELF LOCATION	CALL NO.	VOL.	STATUS
<input type="checkbox"/>	!	Jerome Robbins' Broadway : [compact audio disc] original Broadway cast recording.	Community Library	Audiovisual (AV)	Music		CD M Rob		In

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:

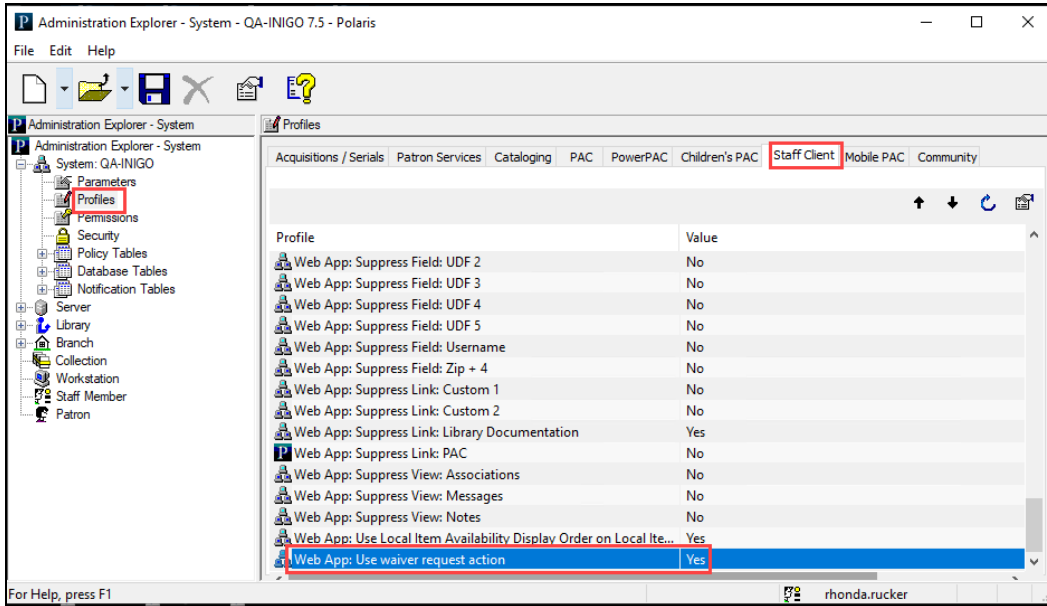
1. [Enable the new waiver workflow](#).
2. [Set the maximum waiver amount](#) that each staff member can approve.
3. [Add reasons to the policy table](#) User Defined Waiver Request Reasons.

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**.



4. Select **Save**.

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

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🔒 BLOCKS 📄 NOTES

REGISTRATION ACTIONS ▾ ↻ **CLOSE**

📦 Check Out (0) 📦 Out (0) / Overdue (0) 📄 Account (\$4.22) ⌚ Claims (0) / Lost (0) 📄 Holds (8) / Held (0)
More ▾

Pay Waiver Request Add Charge Bill Charge More ▾

Filter Charges

Balance: **\$4.22**

Amount to waive:

Reason:

Note:

REQUEST WAIVER CANCEL

View: Account Summary ▾

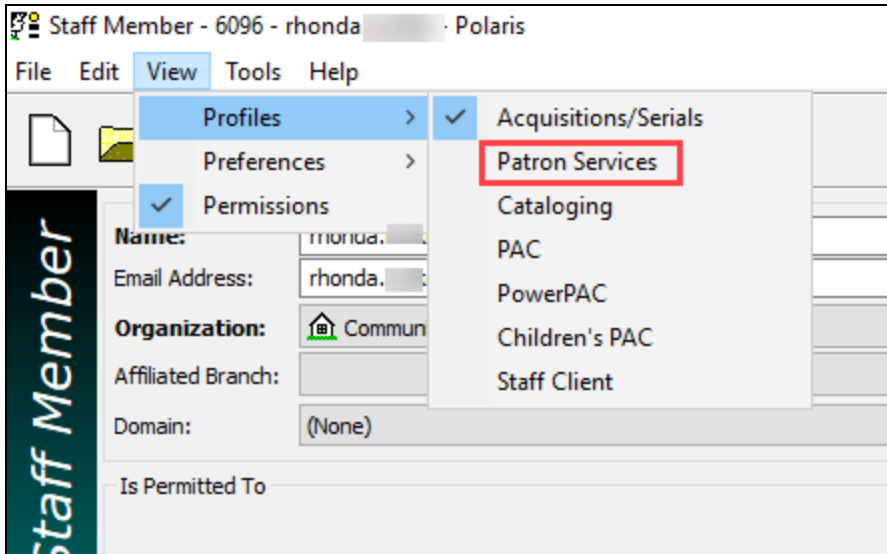
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	TYPE	DATE ▲	BARCODE	TITLE	REASON	ORGANIZATION	NOTE	BILLED	AMOUNT	BALANCE
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Charge	6/17/2020			Patron Registration Fee	Community Library	Self Registration via PAC		\$4.22	\$4.22

Setting the Maximum Waiver Amount

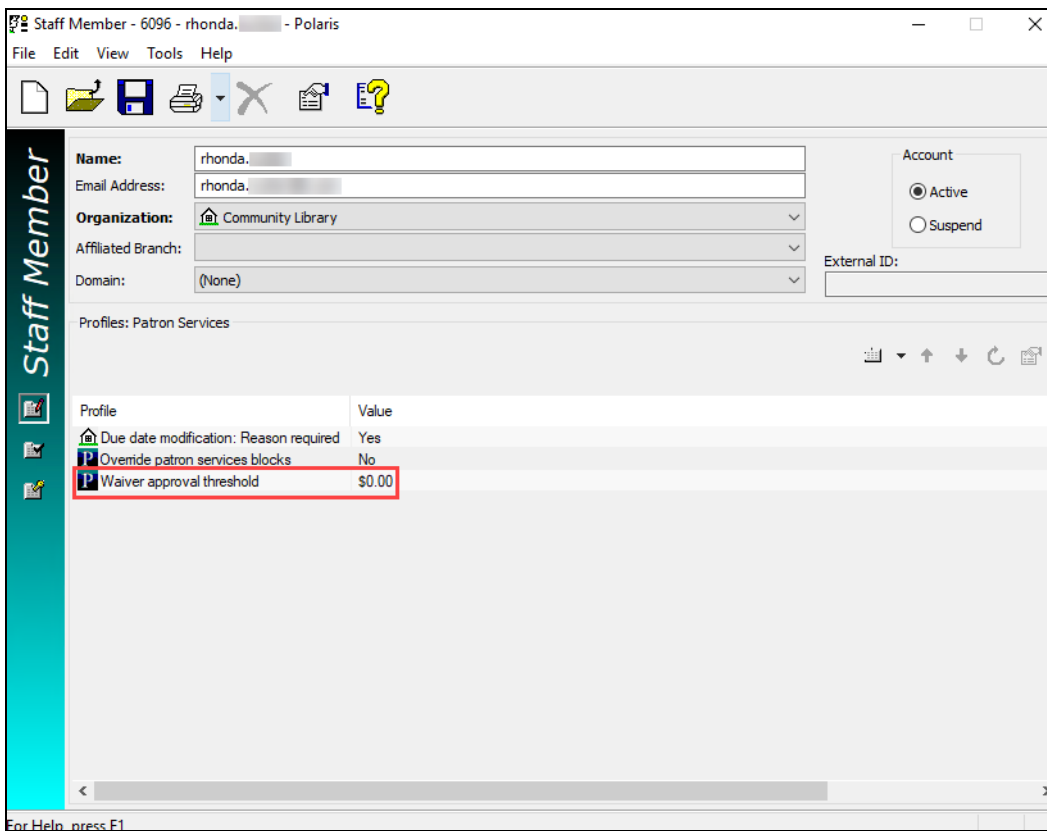
You can set the waiver threshold, which is the maximum dollar amount that each staff member is allowed to waive at one time.

To set the waiver threshold

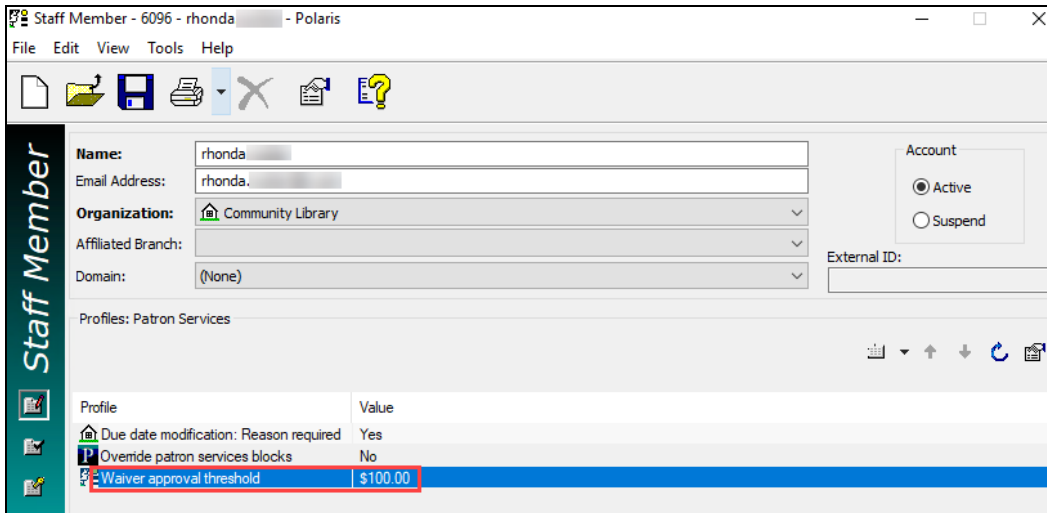
1. In Polaris Administration (staff client), select **Administration > Staff Member**.
2. Search for a staff member and open the staff member workform.
3. Select **View > Profiles > Patron Services**.



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.

TYPE	DATE	BARCODE	TITLE	REASON	ORGANIZATION	NOTE	BILLED	AMOUNT	BALANCE
Charge	6/17/2020			Patron Registration Fee	Community Library	Self Registration via PAC		\$4.22	\$4.22

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.

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BLOCKS **NOTES**

REGISTRATION ACTIONS ↕ ↻ CLOSE

Check Out (0) Out (0) / Overdue (0) Account (\$4.22) Claims (0) / Lost (0) Holds (8) / Held (0) More ▾

Pay Waiver Request Add Charge Bill Charge More ▾ Filter Charges

Balance: **\$4.22**

Amount to waive:

Reason:

Note:

REQUEST WAIVER CANCEL

View: Account Summary ▾

<input checked="" type="checkbox"/>		TYPE	DATE ▲	BARCODE	TITLE	REASON	ORGANIZATION	NOTE	BILLED	AMOUNT	BALANCE
<input checked="" type="checkbox"/>		Charge	6/17/2020			Patron Registration Fee	Community Library	Self Registration via PAC		\$4.22	\$4.22

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.

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REGISTRATION ACTIONS

Account (\$5.25)

Charges: \$5.25 Deposits: \$0.00 Credits: \$0.00 Balance: \$5.25

TYPE	DATE	BARCODE	TITLE	REASON	ORGANIZATION	NOTE	BILLED	AMOUNT	BALANCE
Charge	10/4/2023	0002100160452	At the plate with-- Mark McGwire	Borrow By Mail Charge	Community Library	Borrow by mail for \$5.25		\$5.25	\$5.25
								\$5.25	

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

TITLE	DESCRIPTION	AMOUNT	WAIVE AMOUNT	BARCODE
	Patron Registration Fee	\$4.22	\$4.22	

Reason

Patron otherwise in good standing

Request Note

Waive registration fee?

Decision Note

APPROVE

DECLINE

CANCEL

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.

The screenshot shows the 'Approval Dashboard' interface. At the top right, there are 'Refresh' and 'CLOSE' buttons. Below the dashboard title, there are two tabs: 'Weeding Requests' (active) and 'Waiver Requests'. In the center, there are 'APPROVE' and 'DECLINE' buttons. To the right, there is a 'Status' dropdown menu set to 'Approval Requested' and a 'Filter' dropdown menu. The 'View' dropdown menu is open, showing 'Active Requests' (selected), 'Active Requests', and 'Recently Processed'. Below the filters is a table with the following data:

<input type="checkbox"/>	ID	NAME	STATUS	REQUEST DATE	NO OF ITEMS	DISCARD AMOUNT
<input type="checkbox"/>	136403	RCR Status In Newer than 3 Months	Approval Requested	6/30/2023 12:41:56 PM	11	

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

Approval Dashboard ↻ CLOSE

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

APPROVE DECLINE Status: Approval Requested Filter View: Active Requests

	ID	NAME	STATUS	REQUEST	NO OF ITEMS	DISCARD AMOUNT
<input type="checkbox"/>	136403	RCR Status In Newer than 3 Months	Approval Requested	6/30/2023 12:41:56 PM	11	

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.

Approval Dashboard ↻ CLOSE

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

APPROVE DECLINE Status: Approval Requested Newer Filter View: Active Requests

	ID	NAME	STATUS	REQUEST DATE	NO OF ITEMS	DISCARD AMOUNT
<input type="checkbox"/>	136403	RCR Status In Newer than 3 Months	Approval Requested	6/30/2023 12:41:56 PM	11	

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.

The screenshot shows the 'Settings' page with the 'Workform User Defaults' tab selected. At the top right are 'SAVE', 'REFRESH', and 'CLOSE' buttons. Below the navigation tabs are three main sections: 'Workforms: Default view', 'Request manager: Default status', and 'Workform tracker: Recent records'. The 'Approval dashboard: Default status' dropdown is highlighted with a red box and set to 'All'. Other dropdowns include 'Check in' (Normal), 'Item record' (Circulation), 'Bibliographic record' (Preview), 'Background processing' (MARC Import), 'Holds' (Active), 'ILL' (Not active), 'INN-Reach' (Active), 'Patron' (2), 'Bibliographic' (2), and 'Item' (2). Below these are 'Workforms: New item record' (Young Adult Series (Community Library)) and 'Workforms: Item bulk change' (None).

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.

The screenshot shows the 'Approval Dashboard' interface. At the top right, there are 'C' and 'CLOSE' buttons. Below the dashboard title, there are two tabs: 'Weeding Requests' and 'Waiver Requests', with 'Waiver Requests' being the active tab. On the right side, there is a 'View' dropdown menu with a red box around it, showing options: 'Recently Processed' (selected), 'Recently Processed', and 'Active Requests'. Below the dropdown is a 'Filter' button. The main content is a table with the following data:

ID	STATUS	NAME	BARCODE	BRANCH	REQUEST DATE	AMOUNT
155	Approved	Slinger, Bruce E	1004200000231	Cambridge Public Library	9/29/2023 12:34:00 PM	\$15.00

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

The screenshot shows the 'Approval Dashboard' interface. At the top right, there are 'C' and 'CLOSE' buttons. Below the title, there are two tabs: 'Weeding Requests' and 'Waiver Requests', with the latter being selected. A 'View: Recently Processed' dropdown menu is visible, and below it is a 'Filter' input box highlighted with a red border. The main content is a table with the following data:

ID	STATUS	NAME	BARCODE	BRANCH	REQUEST DATE	AMOUNT
155	Approved	Slinger, Bruce E	1004200000231	Cambridge Public Library	9/29/2023 12:34:00 PM	\$15.00
154	Approved	Mahlitz, John W	1000200032687	Saratoga Springs Public Library	9/29/2023 12:31:49 PM	\$2.10

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 Waiver Request ID 146

TITLE	DESCRIPTION	AMOUNT	WAIVE AMOUNT	BARCODE
	Patron Registration Fee	\$4.22	\$4.22	

Reason

Patron otherwise in good standing

Request Note

Waive registration fee?

Decision Note

APPROVE
DECLINE
CANCEL

6. 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

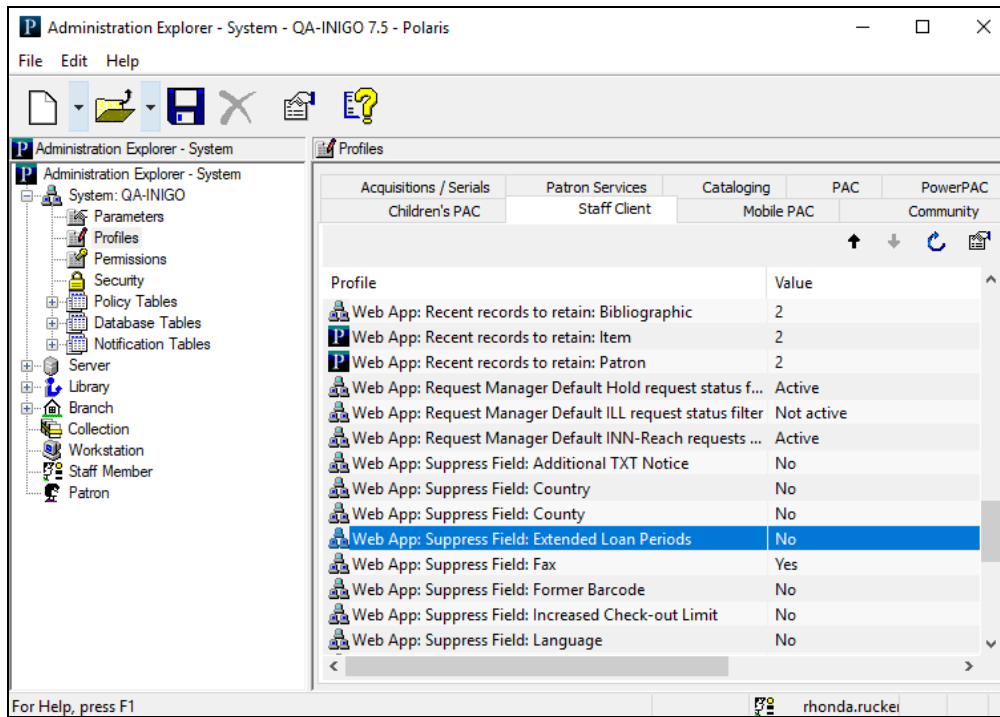
1. [Setting Up Extended Loan Periods in Polaris Administration \(Staff Client\)](#) – The Library administrator must enable **Extended Loan Period**, configure **Additional Loan Units** for chosen collections, and assign the permission **Patron Privileges: Modify** to certain Leap users.
2. [Selecting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

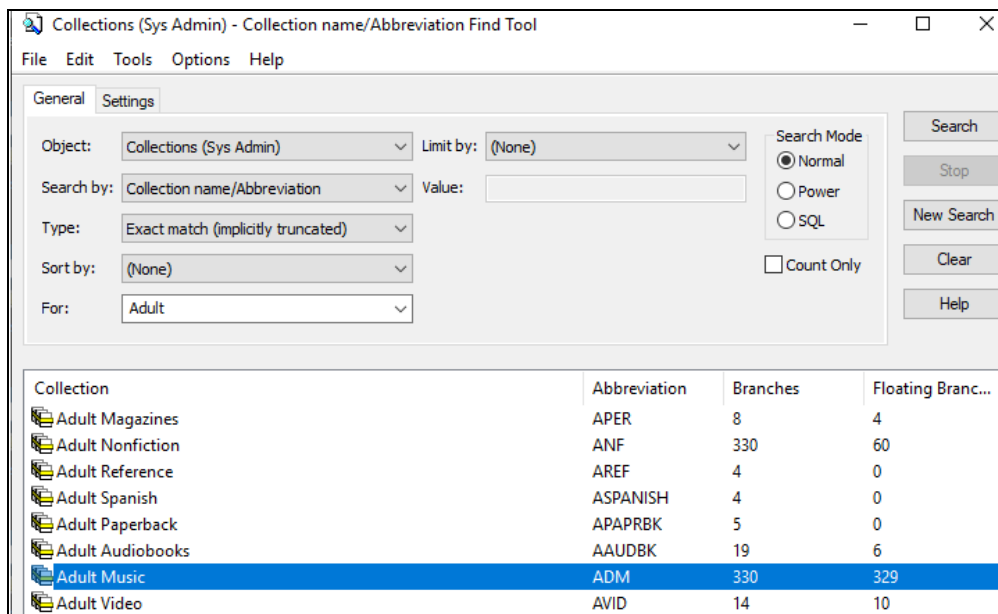
To enable Extended Loan Period and configure Additional Loan Units

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.

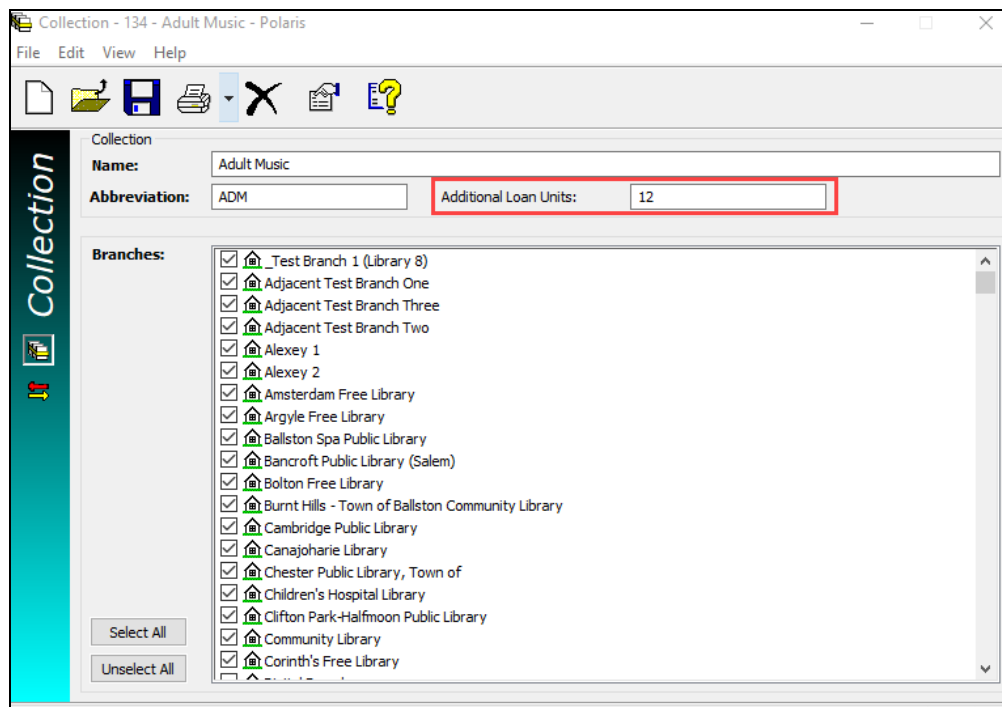


2. To configure **Additional Loan Units**:

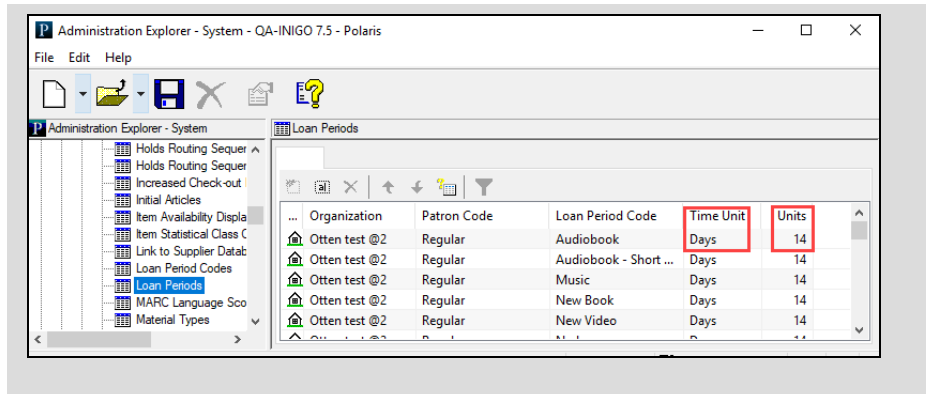
- a. Go to Polaris Administration (staff client) > Collection, and search for the chosen collection.



- b. Select the collection to open the Collections workflow.
- 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

Preferred Pickup Branch

Ballston Spa Public Library
▼

Language

English
▼

Exclude from Notices and Reminders

Overdue
 Hold
 Billing
 Almost Overdue/Auto-Renew
 Patron Record Expiration
 Inactive Patron

Maintain Reading History
 Do Not Delete Record
 E-mail Notices in Plain Text
 Exclude from Collection Agency
 Increased Check Out Limit
 Extended Loan Period

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:

Patron	Base Units	Has Extended Loan Periods?	Additional Loan Units in Collection	Total loan period
Patron 1	14 days	Yes	12 days	26 days
Patron 2	14 days	No	12 days	14 days
Patron 3	14 days	Yes	0 days	14 days

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**.

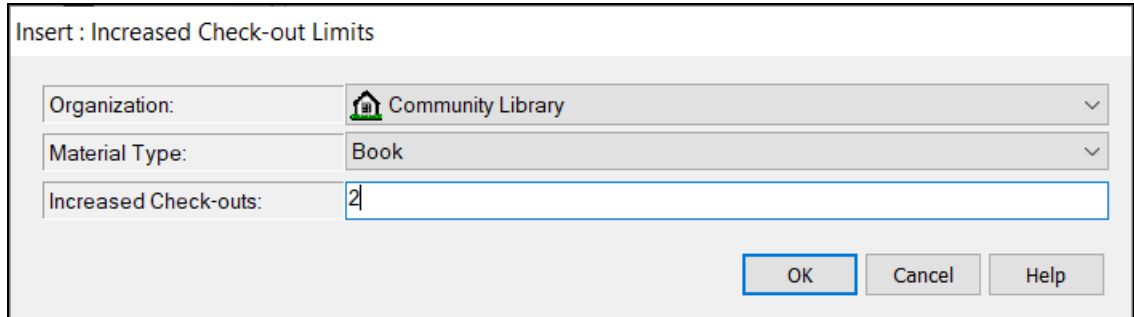
This table allows you to specify which material types can have increased check-outs. When you enter a value in this table for a specific material type, the system adds this number to the maximum item limit defined for that material type in the Patron/Material Type Loan Limit Blocks policy table. If a 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

Organization:	 Community Library
Material Type:	Book
Increased Check-outs:	2

OK Cancel Help

- 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**.

Preferences

Preferred Pickup Branch

MAIN
▼

Language

English
▼

Exclude from Notices and Reminders

Overdue
 Hold
 Billing
 Almost Overdue/Auto-Renew
 Patron Record Expiration
 Inactive Patron

Maintain Reading History
 Do Not Delete Record
 E-mail Notices in Plain Text
 Exclude from Collection Agency
 Increased Check Out Limit
 Extended Loan Period

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.

Organization	Patron Code	1st Level Fine	2nd Level Fine	Total Item Limit	Total Overdue	Total Holds	Total ILL	Total Reserve Items
Community Library	Regular	\$0.99	\$5.00	50	2	30	0	0
Community Library	Juvenile	\$0.99	\$5.00	50	2	30	0	0
Community Library	Juvenile with R...	\$0.99	\$5.00	50	2	30	0	0
Community Library	Staff / Board	\$0.99	\$5.00	50	2	30	0	0
Community Library	Outreach	\$0.99	\$5.00	50	2	30	0	0
Community Library	Temporary	\$0.99	\$5.00	50	2	2	0	0
Community Library	ILL Agency	\$0.99	\$5.00	50	2	30	0	0
Community Library	Delinquent Bor...	\$0.00	\$0.00	50	0	0	0	0
Community Library	Retired	\$0.99	\$5.00	50	2	30	0	0

Organization	Patron Code	Material Type	Maximum Item Limit	Hold Limit
Community Library	Regular	Book	50	30
Community Library	Regular	New / Popular ...	50	30
Community Library	Regular	Video	50	30
Community Library	Regular	Children's Video	50	30
Community Library	Regular	Audiobook	50	30
Community Library	Regular	Music	50	30
Community Library	Regular	Periodical	50	30
Community Library	Regular	Rental	50	30
Community Library	Regular	Software	50	30
Community Library	Regular	Kit - Audiovisual	50	30
Community Library	Regular	Kit - Realia	2	2
Community Library	Regular	Equipment	50	30
Community Library	Regular	Art	50	30

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 / Parameter	Setting	Value
Patron/Material Type Loan Limit Blocks policy table	Total Item Limit	5
	Maximum Item Limit (book)	5
	Maximum Item Limit (DVD)	2
	Maximum Item Limit (laptop)	1
Check-out: Increase Total Item Limit parameter	n/a	2
Increased Check-out Limits policy table	Book	2

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:

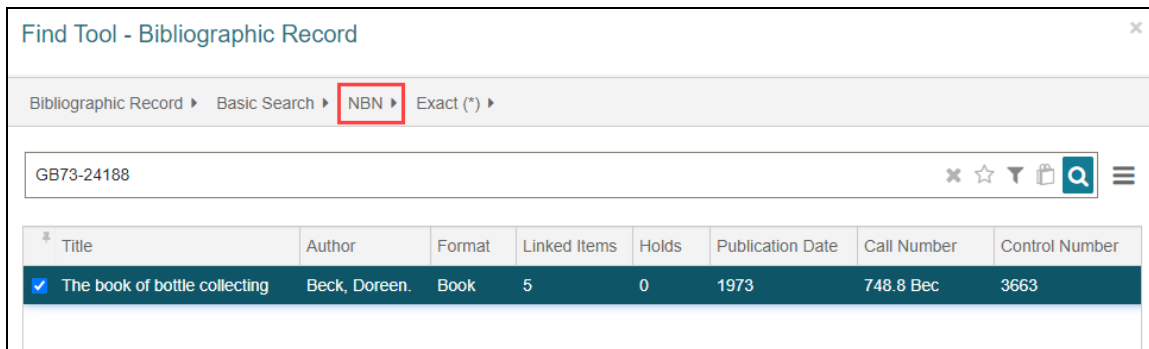
- The patron is enabled for increased check-out limits.
- The branch is configured for 2 additional items (for an increased total item limit of 7).

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

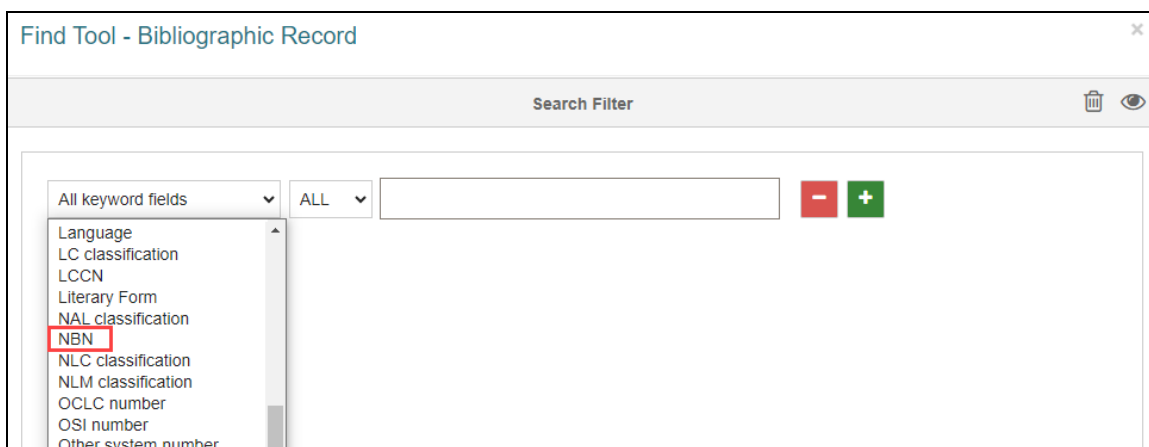
You can now search for bibliographic records by national bibliography number (NBN) in Leap.

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



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.



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.

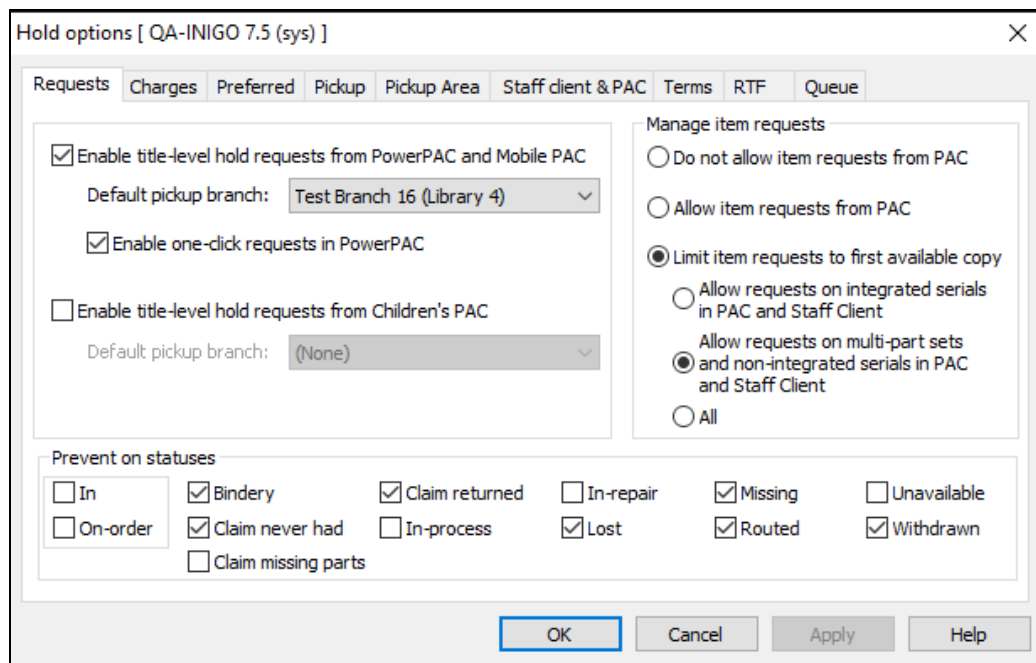
4. In the Manage Item Requests section, select **Limit item requests to first available copy** and select one of the following:
 - **Allow requests on integrated serials in PAC and Staff Client** – to allow requests on serials cataloged in the Polaris serials module. Use this setting if your library 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.



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

You have selected a serial or multi-part title. A request placed on the title will trap any available item. Would you like to:

Request any item (bib-level request)

Request the first available copy of one of the listed items

Vol. 88 no. 10 (Oct. 2011) ▼

CONTINUE **CANCEL**

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

🔒 BLOCKS 📄 NOTES

REGISTRATION ACTIONS ↕ C 📄 CLOSE

📄 Check Out (0) 📄 Out (0) / Overdue (0) 💰 Account (\$4.22) 🕒 Claims (0) / Lost (0) 📄 Holds (3) / Held (0) 📄 ILL (0) / Held (0) More ▾

New Hold
Cancel
Reactivate
Delete
Suspend/Reactivate
Fill Now
More ▾

Filter Holds

<input type="checkbox"/>	AUTHOR ▾	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS	PICKUP BRANCH	QUEUE	HOLD UNTIL	GROUP
<input type="checkbox"/>		New fears : new horror stories by masters of the genre	Book		9/21/2023	Active	Community Library - Drive thru window	2		
<input type="checkbox"/>		Journal of chemical education. Vol. 88 no. 10 (Oct. 2011)	Periodical		9/21/2023	Active	Community Library - Drive thru window	1		
<input type="checkbox"/>	📖	H. G. Wells and modern science fiction	Serial	823 W45zs	9/21/2023	Pending	Community Library - Drive thru window	1		

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:

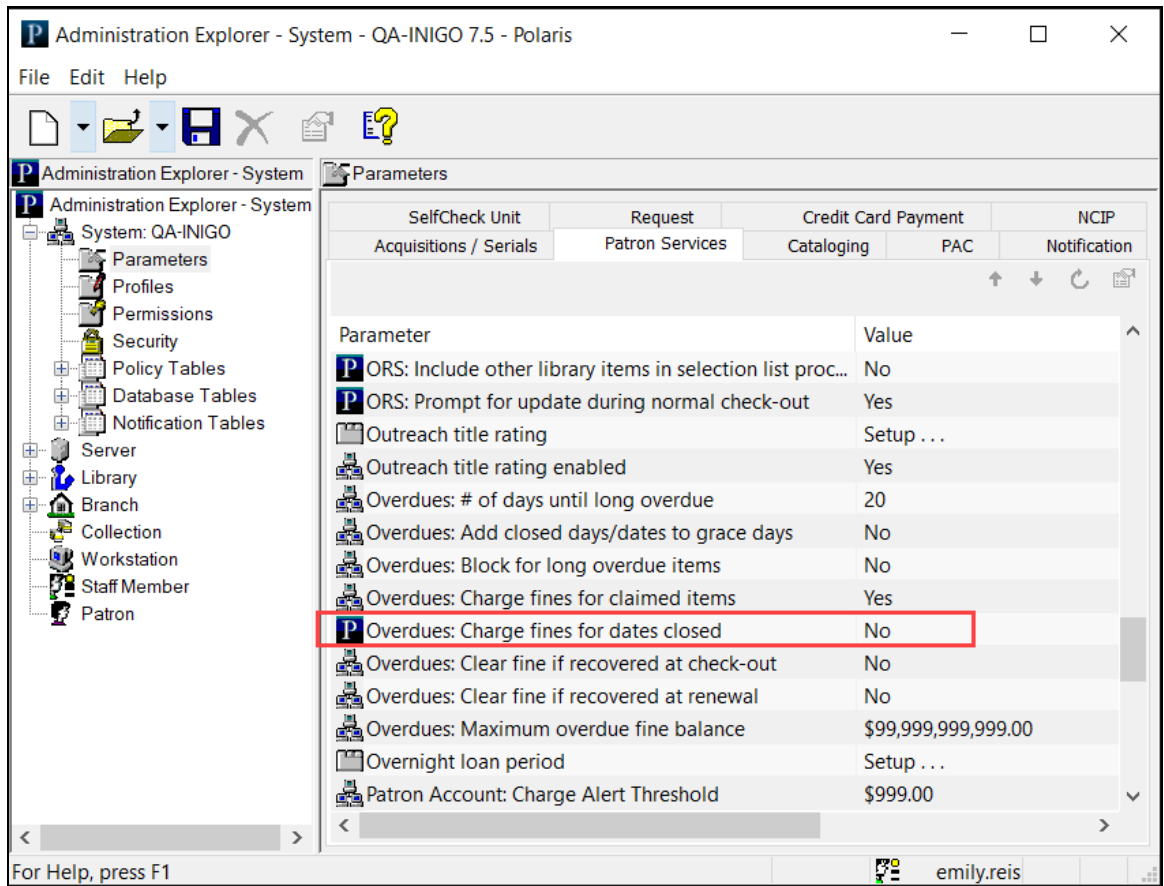
- [Configuring Polaris to Charge Overdue Fines on Closed Dates](#)
- [Other Factors that Affect Overdue Fines on Closed Dates](#)

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

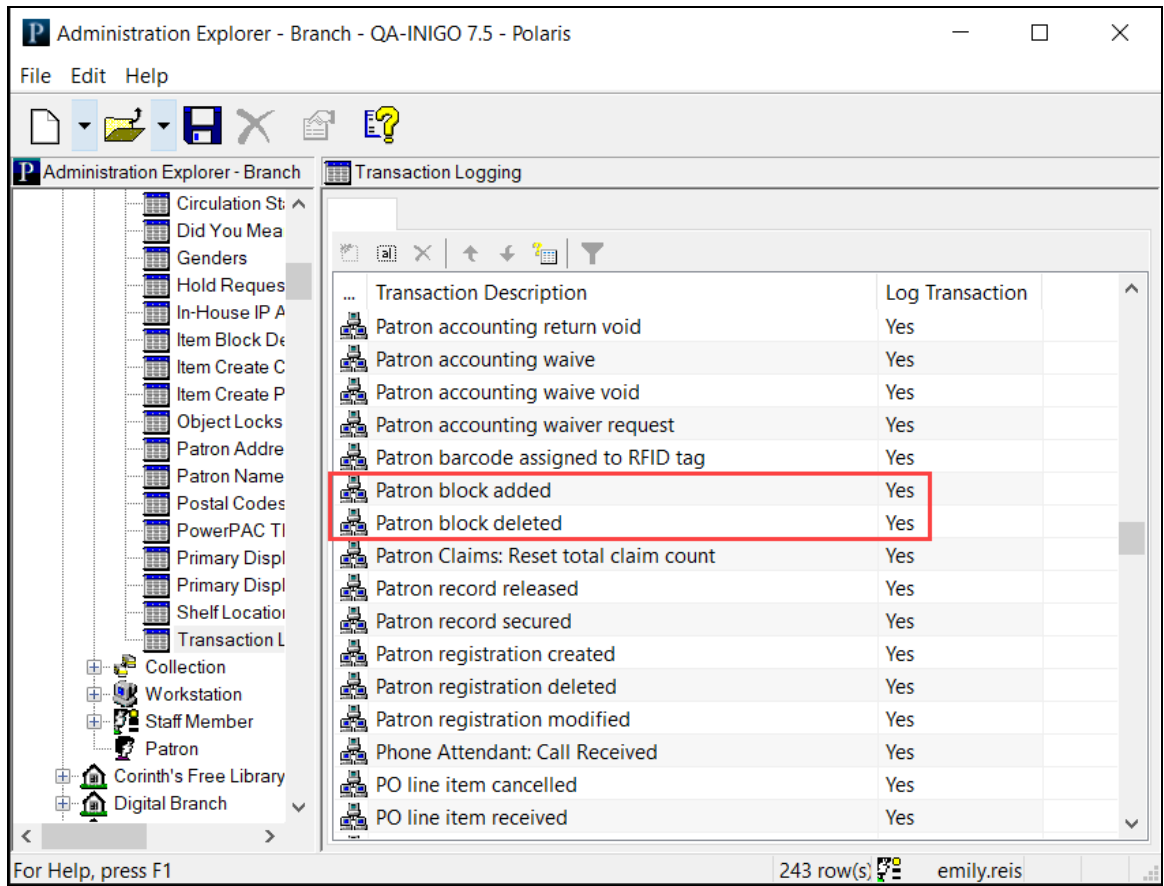
You can now configure Polaris to log transactions when staff-generated blocks (library-assigned blocks or free-text blocks) are added to or removed from patron records.


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](#)

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.

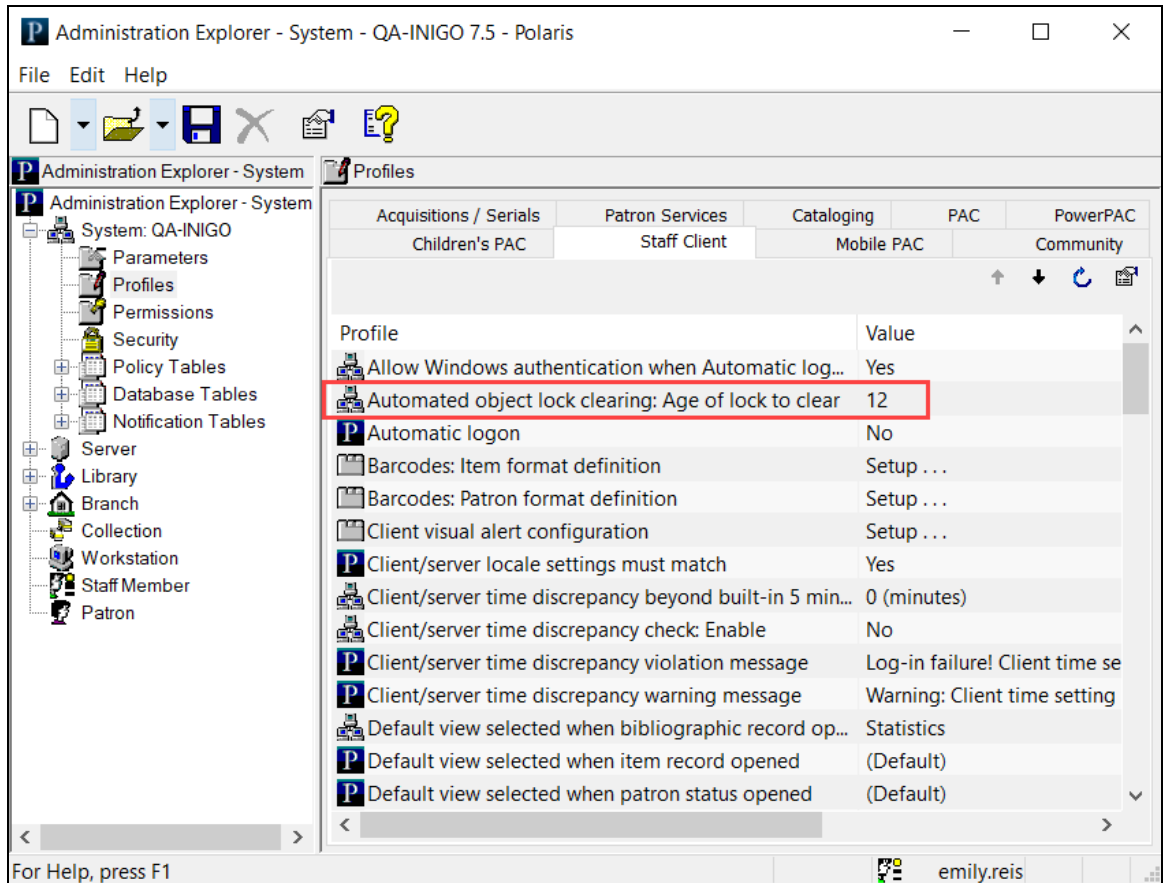
Configuring the Automated object lock clearing: Age of lock Profile

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.



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 \(Web-Based\)](#)

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.

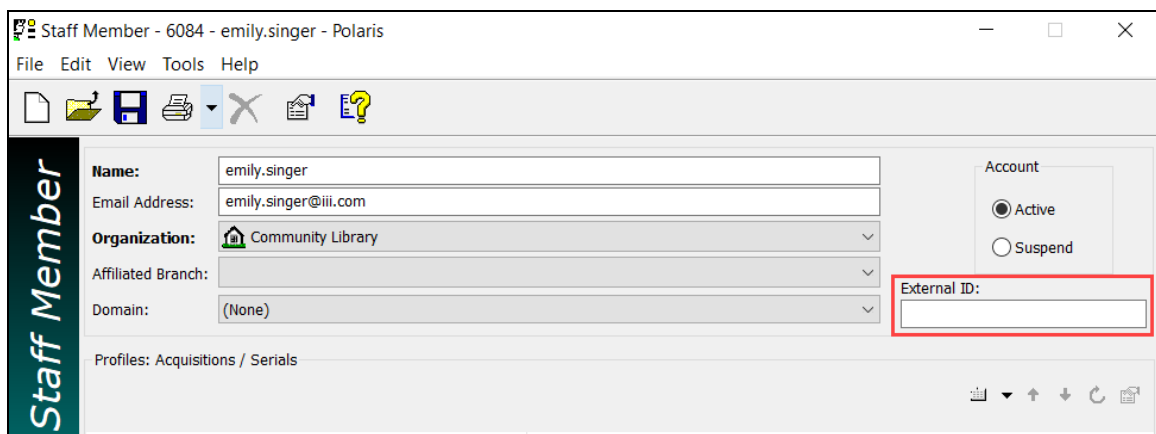
Note:


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.

The screenshot shows the Polaris Administration interface for editing a staff member record. The header displays "polarisSA - Staff Members" and the user "emily.singer". The record is for "emily.singer". There are "SAVE" and "CLOSE" buttons. The form includes fields for Name (emily.singer), Email (emily.singer@iii.com), Domain (None), External ID (highlighted with a red box), Organization (Community Library (br)), and Affiliated Branch.

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

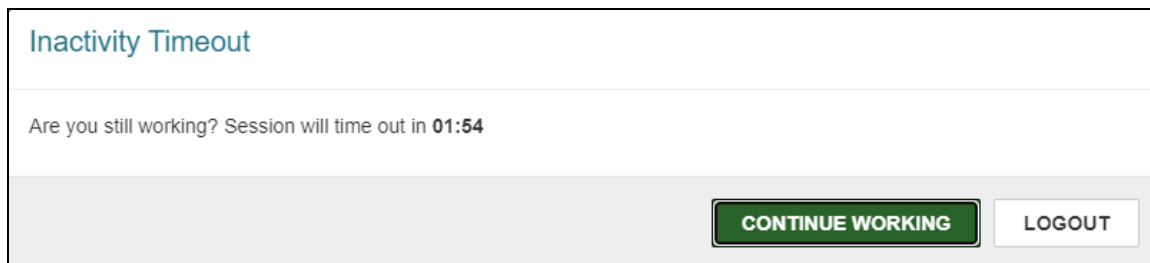
Your library can now enable a user inactivity time-out period for Leap.

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.



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 \(December 6, 2022\)](#)