polaris

What's New in Polaris and Leap

7.0

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Contents

Polaris Installation Notes

Important:
When the new Polaris release is installed on a workstation, the file path changes from 6.7 to 7.0 as in the following examples:

C:\ProgramData\Polaris\7.0
C:\Program Files\Polaris\7.0
C:\Program Files (x86)\Polaris\7.0

New or Modified Polaris Administrative Settings

Several system administration settings and one database table have been modified to facilitate the new features for Polaris staff client and Leap in 7.0.

Setting	Purpose	Level
New Profiles		
PAC > Patron Access options: Contact Info: Patron address - Change allowed	Allows patrons to change their physical address online, then select one of the following options: Patron can submit change request OR Patron can change without verification For more information, search the Polaris staff client help for "Patron address - Change allowed".	System, Library, and Branch
Staff Client > Web App: Analytics	If you do not want to be represented in Leap analytics, you can opt out by setting this Profile to "No".	System
Modified Profiles		
Automatically sort MARC bibliographic tags	In previous versions, this profile determined if MARC tags are automatically sorted when you save a bibliographic record in the staff client. As of version 7.0, the profile also determines if tags are automatically sorted when you save a bibliographic record in Leap.	System, Library, Branch
Display MARC field description	In previous versions, this profile determined if MARC field descriptions appeared in the MARC21 view of the Bibliographic and Authority workforms in the staff client. As of version 7.0, the	System, Library, Branch, Staff

Setting	Purpose	Level
	profile also determines if Leap displays the valid MARC subfield definitions when you add or edit a bibliographic record tag.	
MARC Validation: Bibliographic	In previous versions, this profile determined how bibliographic records are validated in the staff client. As of version 7.0, the profile also determines how bibliographic records are validated in Leap.	System
Remote automatic authority control	In previous versions, this profile determined if and how the staff client checks for matching authority records in remote databases. As of version 7.0, this profile also controls remote automatic authority control in Leap.	System, Library, Branch
Modified Permissions		
Bibliographic records: Create	In previous versions, this permission determined if users could create bibliographic records in the staff client. As of version 7.0, the permission also determines if users can create or copy bibliographic records in Leap.	System, Library, Branch
Bibliographic records: Modify	In previous versions, this permission determined if users could modify bibliographic records in the staff client. As of version 7.0, the permission also determines if users can modify bibliographic records in Leap.	System, Library, Branch
Express Importing	In previous versions, this permission determined if users could use the Express Import option in the staff client. As of version 7.0, the permission also determines if users can import	System

Setting	Purpose	Level
	bibliographic records in Leap.	
Reset Due Date: Allow	In previous versions, this permission determined if users could reset due dates for checked out items in the staff client and reset individual due dates in Leap. As of version 7.0, the permission also determines if users can bulk update due dates in Leap.	System
Modified Database Tables		
Bibliographic Deduplication	In previous versions, this database table determined rules for bibliographic record duplicate detection in the staff client. As of version 7.0, the database table also determines the bibliographic record duplicate detection rules used in Leap.	System, Library, Branch

Polaris API Changes

PAPI now includes several new and modified methods that range from general PAPI improvements to endpoints that facilitate connection to third-party applications.

The following methods have been added or updated:

Method Name	Purpose
AuthenticatePatron	Now has the option to return an access token that expires in 24 hours.
BibGet	Updated to return the UPC value, if it is present, in the bibliographic record.
ILLRequestCancel	Allows the consumer to cancel Interlibrary Loan (ILL) requests.
PatronAccountPay	Now returns the TxnID for the fine payment in the response body.
PatronBasicDataGet	Now does the following: - returns the patron's blocks in the PatronSystemBlock element. - includes query string parameters for patron notes and addresses. - includes five user-defined fields (UDFs) for patrons.
PatronItemsOutGet	Now supports excluding econtent records.
PatronNotesGet	Provides the ability to retrieve patron notes (blocking and non-blocking), for a given patron barcode.
PatronRegistrationUpdate	Now includes five user-defined fields (UDFs) for patrons. The documentation for PatronBasicDataGet now includes the

Method Name	Purpose
	new UDFs.
PatronUdfConfigsGet	Returns the possible user-defined values, when UDFs are not configured as free-text. This endpoint also includes information about the system administration configuration of the UDFs.
RecordSetContentGet	Now returns a list of records in a bibliographic or item record set as well as a patron record set.
RecordSetRecordsPut	Now adds or removes bibliographic, item, or patron records to or from a record set.
Synch_ItemsByBibIDGet	Now supports excluding econtent records.
UpdatePatronNotesData	Provides the ability to prepend, append, or replace staff notes on patrons.

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

INN-Reach Participation in Multiple Central Servers

The Polaris integration with INN-Reach now allows libraries to participate in two or more separate Central Servers. Libraries can now borrow and lend materials through more than one Central Server using INN-Reach. The INN-Reach Administration tool can now be configured using more than one Excel spreadsheet, a spreadsheet for each Central Server. The Administration tool offers a detailed view of the activity on each Central Server. Once multiple INN-Reach Central Servers are configured, daily operations for INN-Reach change very little. The main changes are evident in the INN-Reach Administration tool.

INN-Reach Configuration

The process to upload the configuration and mapping spreadsheets for each Central Server has been updated to accommodate multiple INN-Reach Central Servers.

1. Collaborate to configure the spreadsheets. Library Administrators and Innovative Interfaces® staff work together to configure each INN-Reach server using an Excel spreadsheet. Each Central Server has its own configuration and mapping spreadsheet. There must be one primary server. There can be one or many secondary servers.

2. Make sure primary and secondary configuration spreadsheets contain the correct information in the correct tab.

    a. The primary server configuration spreadsheet must start with the LocalServer tab. You must specify peer-to-peer central definitions on the Central tab for the primary server.

        Note: If peer-to-peer central definitions are specified in the spreadsheet for a secondary server, you'll receive a warning.

    b. All secondary configuration spreadsheets must start with a Central tab.

3. Load the primary and secondary configuration spreadsheets in the correct order.

a. First load the configuration spreadsheet for the primary server.

b. After that, the configuration spreadsheets for the secondary servers can be loaded in any order. The configuration load utility warns you if you load multiple spreadsheets in the wrong order or have missing configuration data.

> **Note**:
> The Central servers must be loaded in primary and secondary order for the configuration process, but the primary and secondary servers are otherwise equal.

Search the staff client help for "INN-Reach Configuration and Mapping Spreadsheet."

Updates to Status and Statistics

The Status and Statistics page of the INN-Reach Admin Tool now includes synchronization information for all configured Central servers and your local Polaris server. Record Contribution Statistics now include one table on statistics for each Central server.

Polaris to INN-Reach

Home | Status ▾ | Log Files ▾ | Diagnostics ▾

Status and Statistics

The INN-Reach statistical data listed below applies to this local Polaris site.

Local Server Status

Good news! Local system is configured and running.

show details

Current Queue Status

Queue Status	Count	Action
Record contribution queue size	0	
Circulation message queue size	0	Suspend

Record Contribution Statistics

Emeryville Central Test (d2ir1)	1 hour	24 hours	7 days	30 days	Lifetime
Bibliographic records contributed	0	0	11138	11138	11138
Bibliographic records updated	0	0	8	8	8
Item records contributed	0	0	12728	12728	12728
Item records updated	0	2	13	13	13

Emeryville Central Test (p2ir2) (p2ir2)	1 hour	24 hours	7 days	30 days	Lifetime
Bibliographic records contributed	0	0	65	65	65
Bibliographic records updated	0	0	0	0	0
Item records contributed	0	0	46	46	46
Item records updated	0	0	2	2	2

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Updates to Configuration and Mappings

The Configuration and Mappings page of the INN-Reach Admin Tool now shows the Filters before the Central Servers section, since the filters apply to all servers.

Select the View button beside a Central Server to expand the page and display the following details for the Central Server:

- Agencies participating in this INN-Reach consortium
- Polaris branches participating in this INN-Reach consortium
- Item status mappings
- Material type mappings
- Collection mappings
- INN-Reach Central IType (item type) to Polaris format mappings
- Polaris Patron Code to INN-Reach Central PType (patron type) mappings
- INN-Reach Central PType to Polaris Patron Code mappings

Configuration and Mappings…

Central Servers

Configuration	Central Server Name	Code	Discovery Layer URL	Peer-to-Peer
Hide	Emeryville Central Test	d2ir1	http://qavircentd2ir01.iii.com/search	
View	Emeryville Central Test (p2ir2)	p2ir2	http://qavircentp2ir02.iii.com/search	

Agencies

Central	Agency Name	Code
d2ir1	Polaris QA-Dewey MVLS	plagg
d2ir1	Polaris QA-Dewey SALS	plagh

Show Filtered Rows

Participating Polaris Branches

Central	Org ID	Branch Name	Upload to INN-Reach	INN-Reach Agency Code	Pickup Location Code	Synced with Central
d2ir1	27	Corinth's Free Library	✔	plagg	qm027	✔
d2ir1	34	Fort Edward Free Library	✔	plagg	qm034	✔

Item Status Mappings

Central	Polaris Status ID	Polaris Description	Upload to INN-Reach	INN-Reach Status Code	INN-Reach Description
d2ir1	1	In	✔	Available	
d2ir1	2	Out	✔	Not Available	

Material Type Mappings

Central	Material Type ID	Description	Upload to INN-Reach	INN-Reach Central IType
d2ir1	1	Book	✔	200
d2ir1	3	Video	✔	200

Collection Mappings

Central	Collection ID	Description	Upload to INN-Reach	INN-Reach Central IType
d2ir1	9	Art Books	✔	201
d2ir1	25	Children's Fiction	✔	(use Material Type mapping)

INN-Reach Central IType to Polaris Format Mappings

Central	INN-Reach Central IType	Polaris Format ID	Description
d2ir1	200	1	Book
d2ir1	201	1	Book

Polaris Patron Code to INN-Reach Central PType Mappings

Central	Polaris Patron Code	Description	Can Log Into INN-Reach	INN-Reach Central PType
d2ir1	1	Regular	✔	210
d2ir1	2	Juvenile	✔	210

INN-Reach Central PType to Polaris Patron Code Mappings

Central	INN-Reach Central PType	Polaris Patron Code	Description
d2ir1	200	24	Test code for Rotterdam
d2ir1	201	24	Test code for Rotterdam

The mappings are created with the help of Innovative support when your library joins a central INN-Reach consortium. Search the staff client help for "INN-Reach Configuration and Mapping Profile" for more information. Contact Innovative support if you need to change email alert addresses or Polaris/Central mappings.

Using INN-Reach with Multiple Central Servers

To use INN-Reach with more than one Central Server

1. Collaborate with Innovative Interfaces® staff to edit the Excel spreadsheet according to the steps in the "INN-Reach Configuration and Mapping Spreadsheet" topic of the staff client help.

2. Upload the spreadsheets for each Central Server.

3. Synchronize your local Polaris Server with the Central Servers.

4. Use the INN-Reach Admin Tool to monitor your Central Servers. Search the staff client help for "INN-Reach Admin Tool."

Creating, Editing, and Copying Bibliographic Records in Leap

You can now perform the following cataloging workflows in Leap:

- Create Bibliographic Records
- Edit Bibliographic Records
- Copy a Bibliographic Record

When you catalog in Leap, the system performs the same record validation, duplicate checking, and authority control that takes place in the staff client. See Record Validation, Duplicate Checking, and Authority Control. Leap also offers keyboard shortcuts for cataloging workflows. See Cataloging Keyboard Shortcuts.

Create Bibliographic Records

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

> **Tip:**
> You can use keyboard shortcuts when creating bibliographic records. See Cataloging Keyboard Shortcuts for a list of all available shortcuts.

To create a bibliographic record

1. Select **New** > **Bibliographic Record**.

   A New Bibliographic Record dialog appears.

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

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

3. Select **OK**.

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

- Leader
- 008 field
- 245 tag

4. Select the record owner from the **Owner** list.

> **Note:**
> The record owner is the organization that can determine permissions for the record. For more information, search for "Granting Permissions" in the Polaris staff client help.

5. (Optional) Edit the following settings as desired:

- **Display in PAC** - Select this option if you want this bibliographic record to display in the PAC.
- **Do not overlay** - Select this option to specify that the bibliographic record cannot be overlaid.

6. Add MARC tags or edit MARC tag data.

7. Select **SAVE** to save the new record to the database, or **CLOSE** to discard the record without saving.

If you select **SAVE**, Leap performs record validation, duplicate detection, and authority control, and then saves the record. For more information, see Record Validation, Duplicate Checking, and Authority Control. If you select **CLOSE**, Leap prompts you to confirm that you want to discard your changes.

Edit Bibliographic Records

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

> **Tip:**
> You can use keyboard shortcuts when editing bibliographic records. See Cataloging Keyboard Shortcuts for a list of all available shortcuts.

To edit a bibliographic record

1. Find the bibliographic record you want to edit, and open it in the Bibliographic Record workform.

2. Select **MARC**.

   The **MARC** view appears.

3. [Add MARC tags or edit MARC tag data](#).

4. Select **SAVE** to save your changes to the database, or **CLOSE** to discard your changes.

   If you select **SAVE**, Leap performs record validation, duplicate detection, and authority control, and then saves the record. For more information, see [Record Validation, Duplicate Checking, and Authority Control](#). If you select **CLOSE**, Leap prompts you to confirm that you want to discard your changes.

Copy a Bibliographic Record

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

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

To copy a bibliographic record

1. Find the bibliographic record you want to copy, and open it in the Bibliographic Record workform.

2. Select **ACTIONS** > **Copy**.

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

3. (Optional) Edit the following settings as desired:

- **Display in PAC** - Select this option if you want this bibliographic record to be displayed in the PAC.
- **Do not overlay** - Select this option to specify that the bibliographic record cannot be overlaid.

4. Add MARC tags or edit MARC tag data.

5. Select **SAVE** to save the new record to the database, or **CLOSE** to discard the record without saving.

   If you select **SAVE**, Leap performs record validation, duplicate detection, and authority control, and then saves the record. For more information, see Record Validation, Duplicate Checking, and Authority Control. If you select **CLOSE**, Leap prompts you to confirm that you want to discard your changes.

Add MARC Tags and Editing MARC Tag Data

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

- Edit the Leader or an existing control field.
- Edit an existing data field tag.
- Add a new control field.
- Add a new data field tag.
- Reorder tags.
- Delete a tag.

Edit the Leader or an Existing Control Field

You can edit the Leader and certain control fields (006, 007, and 008). You cannot edit the 001 tag (Control Number) or the 005 tag (Date and Time of Latest Transaction).

To edit the Leader or a control field

1. Select the checkbox next to the field you want to edit.

2. Select **EDIT TAG**.

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

LEADER - BIBLIOGRAPHIC DATA ✕

Record status (05)	c - Corrected or revised
Type of record (06)	a - Language material
Bibliographic level (07)	m - Monograph/item
Type of control (08)	- No specific type
Character coding scheme (09)	- MARC-8
Encoding level (17)	- Full level
Descriptive cataloging form (18)	a - AACR 2
Multipart resource record level (19)	- Not specified or not applicable

OK **CANCEL**

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

Edit an Existing Data Field Tag

To edit a data field tag

1. Select the checkbox beside the tag you want to edit.

2. Select **EDIT TAG**.

> **Note:**
> You can also use a keyboard shortcut to open a tag for editing. To do this, select "E".

A dialog appears.

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

245 - TITLE STATEMENT

Tag

245

Data

‡aRoots /‡cAlex Haley.

Indicator One

1 - Added entry

Indicator Two

0 - Number of nonfiling characters

CTRL+Q - Insert subfield delimiter (‡)

(‡a) Title / (‡b) Remainder of title / (‡c) Statement of responsibility, etc. / (‡f) Inclusive dates / (‡g) Bulk dates / (‡h) Medium / (‡k) Form / (‡n) Number of part/section of a work / (‡p) Name of part/section of a work / (‡s) Version / (‡6) Linkage / (‡8) Field link and sequence number

OK   CANCEL

3. (Optional) Select a value from the **Indicator One** list to edit the first indicator.

4. (Optional) Select a value from the **Indicator Two** list to edit the second indicator.

5. (Optional) Enter text in the **Data** box to edit subfield data.

> **Note:**
> Select Ctrl + Q to insert a new subfield delimiter (‡).

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

Add a New Control Field

You can add certain control fields (006, 007, and 008) to the bibliographic record. You cannot add a second 008 field if the record already contains one.

To add a control field

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

> **Note:**
> You can also use a keyboard shortcut to open the INSERT menu. To do this, select "I".

2. Select the type of control field you want to add (**006 Control Field**, **007 Control Field**, or **008 Control Field**).

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

3. Edit MARC data by selecting a value from a list box or entering text in a box.

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

Add a New Data Field Tag

To add a data field tag

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

2. Select **Data Field**.

> **Note:**
> You can also use a keyboard shortcut to open the Data Field dialog. To do this, select "I" and then "F".

    The Insert Data Field dialog appears.

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

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

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

4. (Optional) Select a value from the **Indicator One** list to specify the first indicator.

5. (Optional) Select a value from the **Indicator Two** list to specify the second indicator.

6. Enter text in the **Data** box to add subfield data.

   > **Note:**
   > Select Ctrl + Q to insert a new subfield delimiter (‡).

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

Reorder Tags

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

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

- You cannot move the Leader, the 001 tag, or the 005 tag.
- You cannot move a control field (003, 006, 007, or 008) below a non-control field tag. You also cannot move a non-control field tag above a control field.

To reorder tags in the bibliographic record

1. Select the checkbox next to the tag you want to move.

2. Select **MOVE TAG UP** or **MOVE TAG DOWN**.

> **Note:**
> You can also select Shift + Up arrow or Shift + Down arrow.

Delete a Tag

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

To delete a tag

1. Select the checkbox next to the tag you want to delete.

2. Select **DELETE TAG**.

> **Note:**
> You can also use a keyboard shortcut to delete the selected tag. To do this, select "D".

Record Validation, Duplicate Checking, and Authority Control

When you save a bibliographic record, Leap does the following:

- Verifies that the record contains both a Leader and an 008 control field. See [Leader and 008 Verification](#).
- Performs record validation (if automatic MARC validation is enabled). See [MARC Record Validation](#).
- Performs duplicate detection. See [Bibliographic Record Duplicate Detection](#).
- Performs authority control. Leap checks for matching authority records and performs remote authority control (if automatic remote authority control is enabled). See [Authority Control](#).

Leader and 008 Verification

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

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

MARC Record Validation

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

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

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

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

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

Bibliographic Record Duplicate Detection

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

If duplicate detection identifies possible duplicate records when you save a bibliographic record, Leap displays duplicate detection results and prompts you to do one of the following:

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

Authority Control

Leap checks for matching authority records and links the bibliographic record to the appropriate authority record(s). If automatic remote authority control is enabled, Leap also checks for matching authority records in the remote database your library has specified. For more information on enabling or configuring automatic remote authority control, search for "Managing Authority Control" in the Polaris staff client help.

If the bibliographic record contains headings with no exact authority matches, Leap displays the headings in the Check Headings Assistant dialog and prompts you to do one of the following:

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

Cataloging Keyboard Shortcuts

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

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

Importing MARC Records in Leap

Leap now provides MARC and MARCXML record importing functionality that is comparable to the Express Import feature in the Polaris staff client.

> **Note:** For information about the Express Import and Full Import features in the staff client, search for "Importing Records" in the staff client help.

When you import records using Leap, the system:

- Performs the same processing and validation that occurs when you import records in the staff client. For more information, search for "Automatic Processes During Import" in the staff client help.
- Uses the same permissions that control record importing in the staff client. For more information, search for "Cataloging Permissions" in the staff client help.

> **Note:** Importing a large number of records may cause slow performance for other processes. We recommend that you perform large imports when the library is closed and when it will not interfere with scheduled system backups.

The process for importing MARC and MARCXML records in Leap includes the following tasks:

1. Select an import profile and choose records to import.

> **Note:** Custom import profiles are configured in the Polaris staff client. For more information, search for "Setting Up Import Profiles" in the staff client help.

2. Review and configure import options.

3. Review and configure record set import options.

4. Perform the record import.

5. View and manage pending, in progress, and completed record imports.

Select an Import Profile and Choose Records

To begin the import process, select an import profile and choose the MARC or MARCXML records you want to import.

> **Note:** Before you can import records, you must download record files from the cataloging source or materials vendor and save them on your workstation or in another location where you can easily find them.

To select an import profile and choose records to import

1. Select **Utilities** > **MARC Import**.

   The MARC Import Setup workform appears. The **Profile Setup** view displays an alphabetized list of all import profiles, including Polaris read-only profiles and your library's custom profiles.

2. Find the profile you want to use for importing. To find an import profile, you can:

   - Select a column heading to sort the list by Profile Name, Description, or Creator.

- Type in the Filter box to filter the list.

3. Select an import profile.

   The **Vendor Account** field displays the vendor account associated with the selected profile, if one exists.

4. Click **SELECT FILE**.

   The Select File dialog box appears.

5. Select **BROWSE**.

   A File Upload window appears.

6. On the File Upload window, browse and select the MARC or MARCXML file(s) you want to import.

   > **Note:** You can import the following types of files: .dat, .mrc, .txt, and .xml.

7. Select **Open**.

   The selected file(s) appear in the Select File dialog box.

8. Select **CONTINUE**.

   The MARC Import Setup workform displays the number of files you have selected for import, along with a list of their file names.

9. (Optional) To remove a file from the list of files to be imported, select the trash can icon.

Next, review and configure import options.

Review and Configure Record Import Options

Record import profiles are configured in the staff client and cannot be modified in Leap. However, you can review the profile settings that apply to your Leap record import before you start the import process.

You can also edit a limited number of record import options in Leap.

> **Note:** If you edit import options in Leap, your changes apply only to the current record import.

To review and configure record import options

- On the MARC Import Setup workform, select **Bibliographic Records**.

  The Bibliographic Records view appears, displaying the import profile options that apply to bibliographic records in the current import.

- ○ (Optional) If you do not want the imported bibliographic records to display in the PAC, clear the **Display in PAC** checkbox. **Display in PAC** is selected by default.

- ○ (Optional) If you want to protect incoming bibliographic records that are saved to the database so that they cannot be overlaid in future processing, select **Do not overlay**. **Do not overlay** is cleared by default.

  > **Note:** Before saving imported records, Leap processes and validates them according to the settings defined in the import profile. Only records that are saved to the database receive the **Do not overlay** flag.

- Select **Item Records**.

The Item Records view appears, displaying the import profile options that apply to item records in the current import.

- Select **Authority Records**.

The Authority Records view appears, displaying the import profile options that apply to authority records in the current import.

Next, .

Review and Configure Record Set Import Options

When you import records, you can specify that Leap group certain types of records into record sets to facilitate record retrieval or bulk processing. If you import multiple files in a single import process, Leap places the records in each file in a separate record set.

You can configure import options for record sets in the import profile in the Polaris staff client. For more information, search for "Set Import Options for Record Sets" in the staff client help.

You can also edit record set import options in Leap.

> **Note:** If you edit record set import options in Leap, your changes apply only to the current record import.

To review and configure record set import options

1. On the MARC Import Setup workform, select **Record Sets**.

   The Record Sets view appears, displaying the import profile options that apply to record sets for the current import.

2. For each record type, select one of the following options:

   - **Save to new record set** - Saves imported records to a new record set with the name you specify. If you select this option, do the following:

     a. Type the name of the record set in the **Name** box.

     b. Select the record set owner from the **Owner** list.

   - **Save to existing record set** - Saves imported records to the existing record set that you select. If you select this option, do the following:

a. Select **FIND**.

The record set Find Tool appears.

b. Search for and select an existing record set.

c. Select **OPEN**.

d. Under **Record Set Options**, select **Append** or **Replace**.

> **Note:** If you have specified a record set for records with a status of Deleted, imported records with a status of Deleted are put in a record set. In addition, existing records that are overlaid by duplicate incoming records are put in the Deleted record set.

Next, perform the record import.

Perform the Record Import

To import MARC and MARCXML records

- On the MARC Import Setup workform, select **IMPORT**.

  Leap attempts to add your import to the Import Jobs Queue and displays either a success message or an error message.

During the record import, Leap performs the same processing and validation that occurs when you import records in the staff client. For more information, search for "Automatic Processes During Import" in the staff client help.

Your files may be in a pending state for a few minutes before import processing begins. To view and manage pending, in progress, and completed record imports, see View and Manage Record Imports.

View and Manage Record Imports

The MARC Import view of the Cataloging Processing workform displays information about pending, in progress, and completed record imports. On the MARC Import view, you can:

- [View the status of a record import](#).

- [Print an import report](#).

- [Stop an import that is pending or in progress](#).

- [Delete a record import from the list](#).

To access the MARC Import view

1. Select **Utilities** > **Cataloging Processing**.

   The Cataloging Processing workform appears.

2. Select **MARC Import**.

   The **MARC Import** view appears, displaying a list of record imports. The most recent imports appear at the top of the list.

View the Status of a Record Import

To view the status of a record import

- On the MARC Import view of the Cataloging Processing workform, find the record import you want to view. To find an import, you can:

- Select any column heading to re-sort the list.
- Type in the **Filter** box to filter the list.
- Select **MORE** to show more record imports.

For more information about record import statuses, search for "Import Jobs Queue" in the Polaris staff client help.

Print a Record Import Report

You can print a report that provides details about a specific record import.

To print a record import report

1. On the MARC Import view of the Cataloging Processing workform, find the record import for which you want to print an import report. To find an import, you can:
   - Select any column heading to re-sort the list.
   - Type in the **Filter** box to filter the list.
   - Select **MORE** to show more record imports.

2. Select the record import.

   Your browser launches a new Import Report window that displays the contents of the import report.

3. In the new browser window, select **Print**.

   > **Note:** You can also select **Download** in your browser window to save a copy of the import report in PDF format.

Stop a Record Import

You can stop a record import if the status of the import is Pending or Running.

> **Note:** For more information about the implications of stopping record imports, search for "Stop an Import Job" in the Polaris staff client help.

To stop a record import that is pending or in progress

1. On the MARC Import view of the Cataloging Processing workform, find the record import you want to view. To find an import, you can:

- Select any column heading to re-sort the list.

- Type in the **Filter** box to filter the list.

- Select **MORE** to show more record imports.

2. Select the checkbox to the left of the file name for the import you want to stop.

3. Select **Stop**.

   Leap prompts you to confirm that you want to stop the record import.

4. On the confirmation dialog, select **YES**.

   Leap stops the import and displays a success message.

Delete a Record Import

Record imports appear on the MARC Import view of the Cataloging Processing workform until they are manually deleted. You can delete a record import when you no longer need the import report or other information about the import.

To delete a record import

1. On the MARC Import view of the Cataloging Processing workform, find the record import you want to delete. To find an import, you can:

   - Select any column heading to re-sort the list.

   - Type in the **Filter** box to filter the list.

   - Select **MORE** to show more record imports.

2. Select the checkbox to the left of the file name for the import you want to delete.

3. Select **Delete**.

   Leap prompts you to confirm that you want to delete the record import.

4. On the confirmation dialog, select **YES**.

   Leap deletes the import and displays a success message.

Leap Bibliographic Bulk Change Includes 006 and 007 Tags

You can use Leap to change the non-MARC, Leader, and MARC-tag information on several bibliographic records at once. Leap is now expanded to include the ability to edit 006 and 007 MARC tags.

To bulk-change data fields in bibliographic records

1. Go to a bibliographic record set in Leap.
2. Select **ACTIONS** > **Bulk Change**.

The Bibliographic Record Bulk Change workform appears.

3. Select a tab to choose the type of data to change in this record set:

- **006 Tag**: Select this tab to make changes to the 006 tag (such as for books, index, language, or cataloging source).
- **007 Tag**: Select this tab to make changes to the 007 tag (such as for electronic resource, motion picture, sound recording, or text).

Specify the 006 Tag

The 006 tag complements the 008 tag, and modifying either a 008 or a 006 tag in Leap works the same way. Search "Specify 008 Tag" in the Leap help for more information.

Specify the 007 Tag

To modify 007 tag information

1. Select the category to edit from the **Category of Material** list.
2. Select the down-arrow that corresponds to the 007 tag position you want to change.

3. To change an existing value, select a "From" value from the left drop-down list and a "To" value from the right drop-down list.
4. Select the positions you want to change in the 007 tag for all records in the record set.

5. Click **UPDATE BIBS**.

The Summary of Changes dialog appears.

6. Check the summary, and do one of the following:
    - Select **CONTINUE** to make the bulk changes. A message tells you the change was added to the bulk change queue. Leap returns you to the Bibliographic Record Set page.
    - Select **CANCEL** to return to the Bibliographic Bulk change page without making changes.

Creating and Viewing Issues and Parts in Leap

You can now view details and properties for any subscription issue or part record in Leap. Leap now also allows you to create a single issue or part record without having to predict the next set in the publication pattern.

[View the Issue or Part Record Details](#)

[Create a Single Issue or Part](#)

View the Issue or Part Record Details

To view the issue or part properties

- Hover over the **i** icon in the issue or part record header.
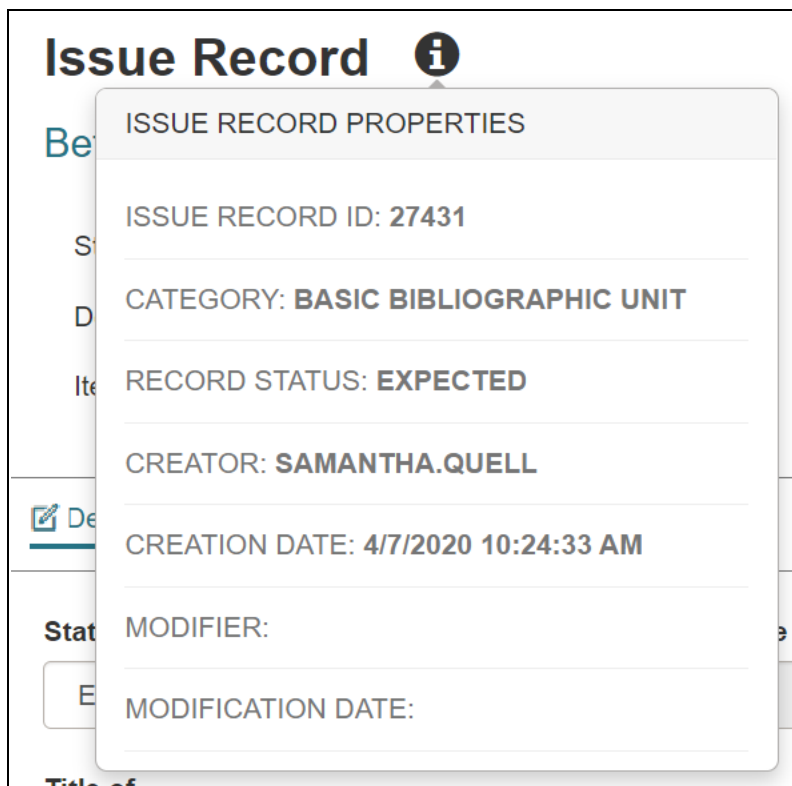
To view and edit issue or part record details

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

   The Find Tool - Serial Holdings Record page appears.

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

   A result list appears.

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

   The Serials Check In page appears.

4. On the Serials Check In page, select the row with an issue or part that you want to view.

   The Issue Record or Part Record page appears.

5. Select **Details** to view or edit some general information about the issue or part including:

   - Status

   - Expected Arrival Date

   - Chronology Date (read-only)

   - Unit Price

   - Enumeration information based on the publication pattern

- Chronology information based on the publication pattern

6. Select **Notes** to view or edit the following information about the issue or part:

    - Public Notes
    - Non-Public Notes

- Non-Public/Warning Notes

7. Select **Claims** to view or edit the following information about the issue or part:

- Supplier Name

- SAN

- Account No.

- Cycle No.

- Alert Date

- PO Number

- Subscription ID

- Supplier Response

- Note

- Reason

- Reminder

- Claim History

Create a Single Issue or Part

If you receive an extra, unpredicted issue or part, you can create it in Leap.

1. In the Serials Check In workform, go to the **Actions** menu and select **Add Issue/Part**.

   The New Issue Record or New Part Record page appears.

2. Fill in the editable fields in the Details section:

   - Status

   - Expected Arrival Date

   - Chronology Date (read-only)

   - Unit Price

   - Enumeration information based on the publication pattern

   - Chronology information based on the publication pattern

3. (Optional) Fill in Public, Non-Public, or Non-Public Warning notes using the **Notes** section.

4. Click **Save**.

   The new issue or part appears in the issues/parts table.

Updating Address Without Staff Verification

Library staff can choose if they require a patron-updated address to go through staff verification. If you choose **Patron can change without verification** in system administration, then a patron can change their address in PowerPAC without a message to staff.

> **Note**:
>
> For Patron Access Options, PowerPAC and Mobile PAC honor system administration settings as follows:
>
> - If the patron is signed in, the system uses the setting for the patron's registered branch.
> - If the patron is not signed in, the system uses the setting for the connection branch.

When a patron changes their address in PowerPAC, Polaris verifies that the zip code exists in the postal code table and automatically updates the patron addresses. If a call submits a patron address change through PAPI, it adds a new entry in the postal codes table only if the LogonUserID has permission to do so.

> **Note**:
> If you have the existing option **Patron can request address change** setting disabled, then the new option **Change Allowed** is also disabled at upgrade.

To view or edit the Patron Address Update option

1. Open the Polaris staff client.

2. On the **Administration** menu, select **Explorer** > **System**.

   The Administration Explorer window appears.

3. Under **System**, select **Profiles** > **PAC** > **Patron Access Options**.
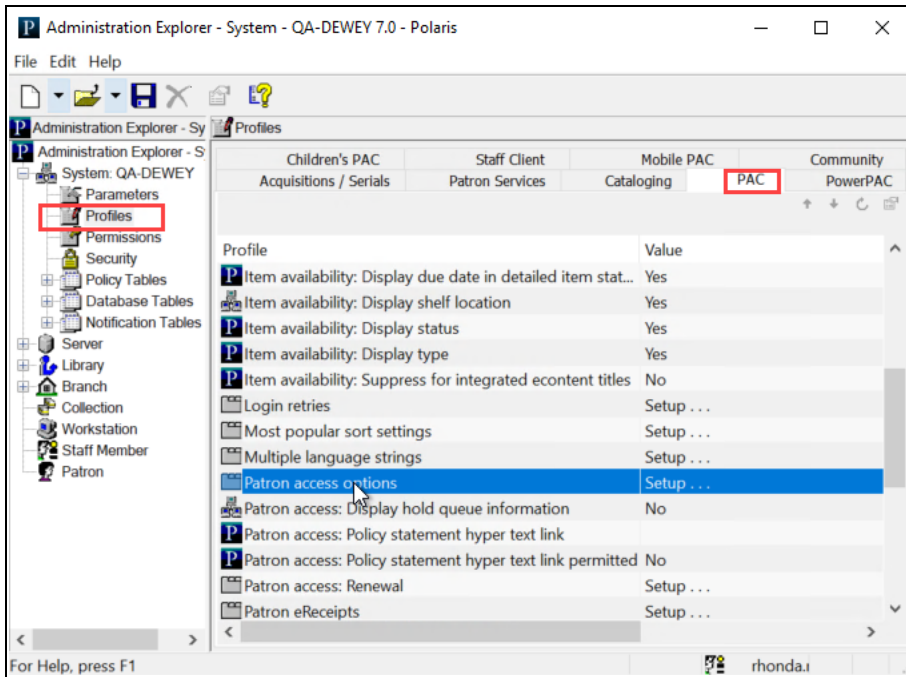
The Patron Access Options window appears.

4. Click the **Contact Info** tab and look for the **Patron address** section.

5. If you want patrons to be able to change their addresses, select **Change Allowed**.

6. Select one of the following under **Change Allowed**:

- **Patron can submit change request** allows patron changes to continue to be sent to library staff for verification.

- **Patron can change without verification** allows patrons to change their addresses without incurring a verification block, and without library staff involvement.

  Note: PowerPAC and Mobile PAC now perform basic validation against the postal codes table when updating the patron address, regardless of which option you select.

7. Select **Save** or **Apply**.

Bulk Updating Item Due Dates in Leap

You can now bulk update the due dates of all checked out items in an item record set in Leap.

To bulk update due dates, you must have the **Reset Due Date: Allow** permission enabled in Polaris Administration. For more information about circulation permissions, search for "Circulation Permissions Reference" in the Polaris staff client help.

This new feature is similar to Leap's Reset Due Date feature, which allows you to update a single due date from the patron record.

You might find it convenient to bulk update due dates in the following situations:

- A scheduled bookmobile stop is canceled.
- A library branch closes unexpectedly because of an emergency situation.

> **Note:**
> We recommend that you perform bulk due date updates on record sets that contain no more than 1,000 item records. If you need to update due dates for a larger number of items, contact your Site Manager.

To bulk update item due dates

1. Open the Item Record Set workform for the record set containing the items you want to update.

2. Select **ACTIONS** > **Reset Due Dates**.

   The Reset Due Dates dialog appears.

Reset Due Dates   ✕

Jun ⌄	2021 ⌄

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

RESET DUE DATES   CANCEL

3. Use the calendar to select a new due date.

> **Note:**
> You cannot set the new due date to a day when your library is closed.

4. If your library requires that you specify a reason for updating an item's due date, do the following:

   a. Select a reason from the **Reason** list.

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

5. Select **RESET DUE DATES**.

   Leap updates the due dates of the items in the record set that have a status of Out and that are not overdue. If an item is blocked, Leap notifies you and prompts you to continue or cancel updating that item's due date. After processing, Leap displays a message that shows the number of item due dates that were successfully updated and the number of due dates that could not be updated, if any.

   > **Note:**
   > If the record set contains many item records, Leap can take several minutes to process the bulk update.

Adding a Range of Dates Closed

You can now enter a range of dates your system, branch, or library will be closed in the Dates Closed table in the staff client. The Insert: Dates Closed dialog now includes an Until field under the Date Closed field. You must enter a date in both fields. When you enter a date or a range of dates, Polaris adds individual days to the Dates Closed table for the system, branch, or library.

> **Note**:
> Dates saved to the Dates Closed table are now automatically saved to the database.

Once the individual dates are in the table, you can edit and delete each date as needed. Polaris uses the dates in this table to calculate due dates and fines. If a date due lands on a closed date, Polaris automatically moves the due date to the next available open date and also delays fines.

Leap Offline Warning

A warning message now appears in Leap Offline.
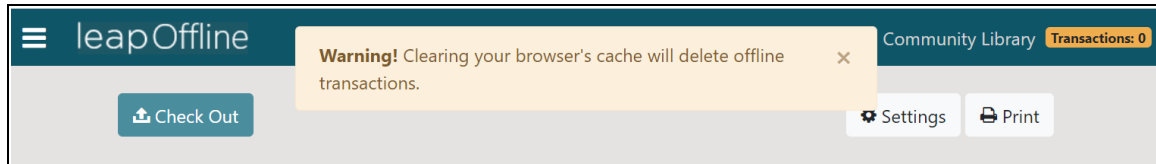
The warning message stays visible to inform offline users that clearing the browser's cache causes Leap Offline files to be cleared as well. If you are working in Leap Offline, be sure to send your files to the server before you end an offline session.

PAPI Acquisitions API Endpoints — in Beta

The Polaris API was expanded to provide new acquisitions endpoints for purchase order creation. These endpoints are currently in beta testing with our first API partner, Baker & Taylor, using their TS360 product.

> **Note**:
> Only libraries using TS360 can use the integration.

Libraries using Baker & Taylor's TS360 can use the following steps to order materials.

To order materials

1. Sign in to your TS360 account on the Baker & Taylor website.

2. Shop for materials, and add them to your cart in TS360.

   Populate your order grids as usual. You must also supply new data points, including supplier, ordered at branch, and PO number. The Polaris API uses this data when it loads the invoice into Polaris.

3. Submit your cart.

   TS360 calls the new PAPI endpoints to validate and submit your order. You might need to address validation issues found in the TS360 interface.
   After the purchase order is created, the order status in TS360 updates, and the purchase order is findable in Polaris.

Using Leap Invoices

Leap now offers the ability to search for, view, and [pay](pay) invoices.

Search for an Invoice

To find the invoice

1. Open the Find Tool.

2. Change your search option to **Invoice**.
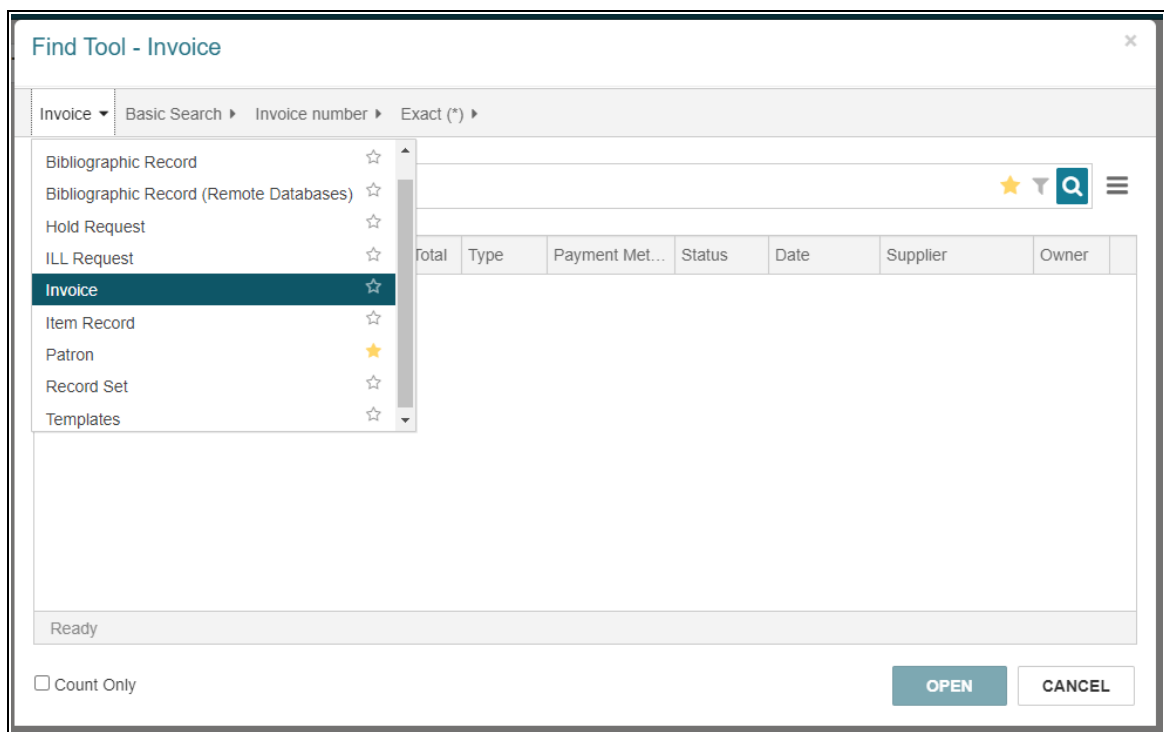
3. Enter the invoice number.

4. Select **Search**.

   The search results open. The results list shows useful fields such as Number of Lines (in the invoice), Type, Total, Payment Method, and Payment Status.

5. Select a search result and select **OPEN**.

The Invoice workform appears. From the Invoice workform, you can view invoice information and pay the invoice.

View Invoice Information

From the Invoice workform, you can view the following:

- Details
- Line Items
- Charges
- Payment History

View Details

Select **Details** to see read-only account identifiers and invoice details as well as notes about the invoice.

View Line Items

Select the **Line Items** tab to see a table listing the line items in the invoice. You can use the Filter box to enter a letter or number to filter the contents of the table.

View Charges

Select **Charges** to see read-only payment details as well as a table listing header charges. You can use the Filter box to enter a letter or number to filter the contents of the table.

View Payment History

Select **Payment History** to see a table listing the payment history of the line items in the invoice. You can use the Filter box to enter a letter or number to filter the contents of the table.

Pay the Invoice

To pay an invoice

1. In the Invoice workform, select **ACTIONS**.

2. Select **Pay**.

    The Check / Voucher dialog appears.

3. Enter a check or voucher number in the **Number** field.

4. Select a **Payment Method** of Check or Voucher.

5. Select the current date in the **Date** field.

6. Select **OK** to process the payment, or select **CANCEL**.

    If you select **OK**, the funds are expended and the payment appears in the Payment History section.

Leap Shelf-Ready Check In

Leap now provides the ability to check in shelf-ready materials received from a supplier.

To check in shelf-ready items

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

   The Check In workform appears.

2. Select **Shelf-Ready**.

   The Shelf-Ready view appears.

3. Enter the barcode of each shelf-ready item by doing one of the following:

   - Type the barcode.

   - Use the Find tool to look up the barcode.

   - Scan the item's barcode.

   Each barcode entered is added to a list and the item is checked in.

4. (Optional) To remove an item, select the item and then **ACTIONS** > **Remove from List**.

   When you remove an item from the list, the item remains checked in but is not marked as received in acquisitions.
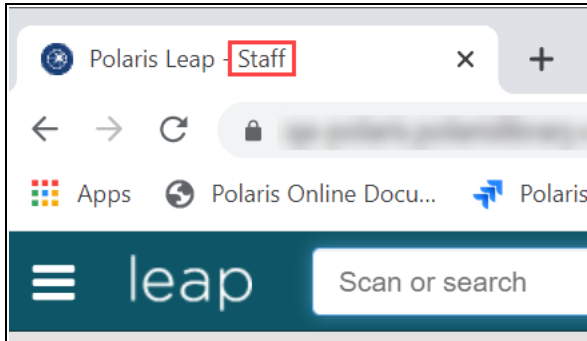
5. Select **ACCEPT SHIPMENT** to accept each item in the list.

   Leap marks the linked line segments as received.

Leap Address and Browser Tab Update

Leap started as a circulation tool. To celebrate that Leap has grown to a tool for all library staff members, we have renamed Leap's browser tab and the URL for Leap:

- Browser tab: from Leap - Circ to Leap - Staff

- Leap's URL: from polarislibrary.com/LeapWebApp/circulation to polarislibrary.com/LeapWebApp/staff
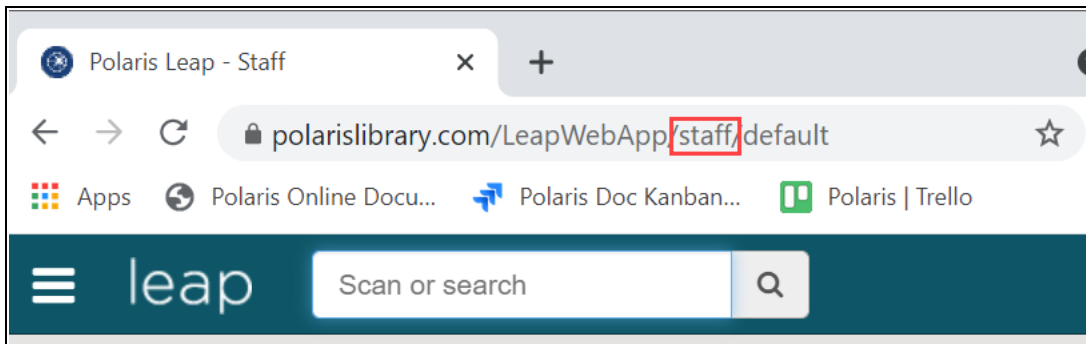
Updated Swagger URL for PAPI

Starting in Polaris 7.0 (as part of the PAPI .NET Core upgrade), Swagger has been updated. The Swagger look and feel and the URL you use to access Swagger is updated. This means the Swagger URL now uses the following URL format:

https://*host*/PAPIService/REST/swagger/index.html.

Replace *host* with the host name of your library's server. For example:

- Old URL: https://midlib.polarislibrary.com**/PAPIService/swagger/index.html**

- New URL:
https://midlib.polarislibrary.com**/PAPIService/REST/swagger/index.html**

A friendly URL is defined for PAPI's Swagger integration. If you navigate to the old URL, you're redirected to the new Swagger URL. If you bookmarked any of the specific endpoints, the bookmark will bring you to the Swagger landing page, but not the specific endpoint.

Be sure to update your PAPI Swagger bookmarks in all the browsers you use.

Usage Analytics in Leap

Innovative Interfaces® wants to focus on the functionality that is most important to you, and that makes it essential for us to understand how your library interacts with our products. Starting in Polaris 7.0, Leap will be integrated with software analytics that allow Innovative to see the usage of different workforms, actions, and features in Leap. These analytics use the Leap code base only and not any library data. For example, tracking when a new patron registration workform is opened, but not seeing any data entered on that form.

If you do not want to be represented in Leap analytics, you can opt out using the new setting Web App: Analytics.

To access this setting, go to the staff client and select the **Administration** menu > **System** > **Profiles** > **Staff Client**.

To opt out, switch the Web App: Analytics setting to "No."