What's New in Polaris and Leap

7.6

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## Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Polaris Installation Notes</td>
<td>1</td>
</tr>
<tr>
<td>New or Modified Polaris Administrative Settings</td>
<td>2</td>
</tr>
<tr>
<td>Polaris API Changes</td>
<td>6</td>
</tr>
<tr>
<td>Polaris API Versions</td>
<td>8</td>
</tr>
<tr>
<td>Using Bibliographic Search API Endpoints with Ad Hoc Filters</td>
<td>9</td>
</tr>
<tr>
<td>Bulk Waiving Fines in Leap</td>
<td>10</td>
</tr>
<tr>
<td>Creating Bulk Waive Criteria and Scheduling the Waive Process to Run</td>
<td>10</td>
</tr>
<tr>
<td>Previewing Bulk Waive Results</td>
<td>13</td>
</tr>
<tr>
<td>Editing Bulk Waive Criteria</td>
<td>15</td>
</tr>
<tr>
<td>Deleting Bulk Waive Criteria</td>
<td>15</td>
</tr>
<tr>
<td>Viewing the Bulk Waive History</td>
<td>15</td>
</tr>
<tr>
<td>Viewing the Most Recent Bulk Waive Processing Report</td>
<td>16</td>
</tr>
<tr>
<td>Viewing the Complete Bulk Waive History</td>
<td>17</td>
</tr>
<tr>
<td>About Bulk Waive Processing</td>
<td>18</td>
</tr>
<tr>
<td>Logging Bulk Waive Criteria Transactions</td>
<td>19</td>
</tr>
<tr>
<td>Support for In-Line Editing for MARC Records in Leap</td>
<td>21</td>
</tr>
<tr>
<td>In-Line Editing in the Leap MARC Editor</td>
<td>21</td>
</tr>
<tr>
<td>Configuring Leap to Display MARC Format Hints</td>
<td>23</td>
</tr>
<tr>
<td>Working with Item Templates in Leap</td>
<td>25</td>
</tr>
<tr>
<td>Creating a New Item Template</td>
<td>25</td>
</tr>
<tr>
<td>Finding an Existing Item Template</td>
<td>27</td>
</tr>
<tr>
<td>Creating Items Using an Item Template</td>
<td>27</td>
</tr>
</tbody>
</table>

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What's New in Polaris and Leap 7.6

Copying an Item Template ............................................................... 28
Deleting an Item Template .............................................................. 28
Leap’s Bulk Item Processing Is Now in the Background .................... 30
New Ordered and In-Process Statuses for Item Bulk Change ................ 31
Making Ad Hoc Bulk Changes to Items ........................................... 32
  Bibliographic Record ..................................................................... 32
  Find Tool ....................................................................................... 34
Viewing the Bulk Change Report ..................................................... 35
Deleting a Bulk Change Report ......................................................... 37
Support for Working with Lists of ISBNs in Leap ............................ 39
  Enabling the Display of ISBNs in Find Tool Search Results ............ 39
  Performing a Basic Search for a List of ISBNs ............................... 40
  Adding Bibliographic Records to a Record Set from a File of ISBNs .... 42
    Required Permissions ...................................................................... 43
    Adding a File of Bibliographic Records to a Record Set ................. 43
Searching for Non-Circulating Items ................................................. 46
  Selecting the Access Point ............................................................ 46
  Filtering by the Status .................................................................. 47
Displaying 880 Tag Data in the Leap Bibliographic Find Tool ........... 49
  Enabling the Display of 880 Tag Data in the Bibliographic Find Tool .... 49
How Leap Formats and Displays 880 Tag Data ................................ 50
Claiming Serial Issues in Leap ........................................................ 52
  Adding and Deleting Serial Holdings Record Claim Intervals ............ 52
    Adding a Claim Interval for a Serial Holdings Record .................... 53
    Deleting a Claim Interval for a Serial Holdings Record .................. 54
  Claiming a Serial Issue from the Serials Check In Workform .............. 55
  Managing Serial Claims from the Claim Alert List .......................... 56
Claiming a Serial Issue or Part from the Claim Alert List ............... 57
Undoing a Claim from the Claim Alert List ............................................. 59
Managing Serial Claims from the Issue Record Workform .............. 60
Claiming an Issue from the Issue Record Workform ......................... 60
Undoing a Claim from the Issue Record Workform ............................... 61

**Printing a Route Slip for Serials** ........................................................... 62

**Support for Southern Hemisphere Seasons in Publication Patterns** 65

**Printing Invoice Vouchers, Purchase Orders, and Workslips** .......... 67
  Printing Invoice Vouchers ................................................................. 67
  Printing a PO ................................................................................... 69
  Printing a Workslip from a PO Line Item ........................................... 71
  Printing a Workslip from an Invoice Line Item .................................. 73

**SFTP Support for EDI Transmissions and Exporting Notices** ........ 76

**Cirrius Impact is in Beta for Notices** ................................................. 78

**Using the Enhanced Profile for Notices** .......................................... 79

**Exporting Hold Notices More Than Once a Day** .......................... 82

**Enabling the SMS Opt-In Message** .................................................. 83

**Sending Same Day Overdue Notices** ............................................... 85

**Improvements to Filtering in SimplyReports** ................................. 87
  Filtering by Record Set Improvement .................................................. 87
  New Item Language Filter .................................................................. 88

**Improvements to Aeon Special Collection Request Workflows** ...... 89
  Placing an Aeon Request with the Place Request Button .................. 89
  Placing an Aeon Request from the Availability View ......................... 91

**Suppressing the Pickup Area Option of None** ................................. 92

**Using Additional Payment Methods** ................................................ 94
  Creating a New Payment Method ....................................................... 94
Selecting the New Payment Method for Your Branch ........................................... 96
Viewing the New Payment Method ........................................................................ 98
Checking in Claimed Items without Charging Overdue Fines ......................... 100
  Configuring Leap to Display the Claimed Item Overdue Charges Dialog ..................... 100
  Waiving Overdue Fines when Checking In a Claimed Item ................................... 101
Linking from Patron Records in Leap to External Patron Data ...................... 103
  Link Structure for External Patron Data Links .................................................. 103
  Configuring Leap to Display Links to External Patron Data .............................. 104
  Entering Unique Patron Identifier Data in the Patron Record .......................... 105
  Using External Patron Data Links in Leap ......................................................... 105
Beta Support for Basic OAuth 2.0 with Akamai ................................................. 107
MARC Technical Updates in Polaris 7.6 ............................................................ 108

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Polaris Installation Notes

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

- C:\ProgramData\Polaris\7.6
- C:\Program Files\Polaris\7.6
- C:\Program Files (x86)\Polaris\7.6
New or Modified Polaris Administrative Settings

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

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

<table>
<thead>
<tr>
<th>Setting</th>
<th>Purpose</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>the item &gt; Is a Renewal (API)</td>
<td><strong>Polaris API Changes</strong> or search for &quot;ItemCheckoutPost&quot; in the Polaris API Guide.</td>
<td></td>
</tr>
</tbody>
</table>

### New Permissions

| Access bulk waive: Allow | Access the Bulk Waive Fines view of the Background Processing workform in Leap. For details, see **Bulk Waiving Fines in Leap**. | System |
| Fines: Waive fines via claimed item charges prompt | Waive overdue fines when checking in a claimed item in Leap. This permission allows a user to select No on the Claimed Item Overdue Charges dialog. For details, see **Checking in Claimed Items without Charging Overdue Fines**. | System, Library, Branch |

### New Profiles

| Acquisitions/Serials > API: Use fund name | Determines if the Polaris API endpoint JobsPurchaseOrdersResultGet returns the Fund name (Yes) or the Alternate Fund name (No). The default is No. For details, search for "JobsPurchaseOrdersResultGet" in the Polaris API Guide. | System, Library, Branch |
| Staff Client > Web App: Patron External Database UDF | Used for linking from Leap patron records to external patron data. This setting determines which user-defined field (UDF) in the patron record stores the unique string that identifies the patron in the external database. For details, see **Linking from Patron Records in Leap to External Patron Data**. | System, Library, Branch |
| Staff Client > Web App: Patron External Database URL | Used for linking from Leap patron records to external patron data. This setting specifies the base URL of the external | System, Library, Branch |
### Setting

<table>
<thead>
<tr>
<th>Setting</th>
<th>Purpose</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>database. For details, see <a href="#">Linking from Patron Records in Leap to External Patron Data</a>.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Staff Client &gt; Web App: Suppress Link: Patron External Database</td>
<td>Used for linking from Leap patron records to external patron data. This setting determines whether links to external patron data appear on the patron record workform in Leap. For details, see <a href="#">Linking from Patron Records in Leap to External Patron Data</a>.</td>
<td>System, Library, Branch</td>
</tr>
</tbody>
</table>

### New Policy Table

<table>
<thead>
<tr>
<th>Policy</th>
<th>Purpose</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patron Payment Methods</td>
<td>Defines the payment methods that are available when patrons pay charges in Leap or in the Polaris staff client. For details, see <a href="#">Using Additional Payment Methods</a>.</td>
<td>System</td>
</tr>
</tbody>
</table>

### Modified Parameters

<table>
<thead>
<tr>
<th>Setting</th>
<th>Purpose</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notification &gt; Notification options</td>
<td>You can now configure the Notice interval setting to send the first overdue notice on the same day an item becomes overdue. For details, see <a href="#">Sending Same Day Overdue Notices</a>.</td>
<td>System, Library, Branch</td>
</tr>
<tr>
<td>Request &gt; Holds: Enable asynchronous RTF routing threshold</td>
<td>This parameter determines whether Polaris performs asynchronous or real-time RTF processing on titles with a high volume of hold requests. The parameter is now set to Yes by default, and Polaris performs asynchronous RTF processing (that is, processing takes place in a background job). This improves performance for handling titles with many active or pending hold requests. If your</td>
<td>System</td>
</tr>
<tr>
<td>Setting</td>
<td>Purpose</td>
<td>Level</td>
</tr>
<tr>
<td>--------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td>Setting</td>
<td>library wants to use real-time RTF processing for all hold requests, set this parameter to No.</td>
<td></td>
</tr>
</tbody>
</table>
| Modified Policy Table                             | **Transaction Logging**  
You can now configure Polaris to log transactions when staff members create, modify, or delete bulk waive criteria. The Transaction Logging database table contains the following new transaction types: Bulk waive criteria deleted, Bulk waive criteria created, Bulk waive criteria modified. For details, see [Bulk Waiving Fines in Leap](#). | System, Library, Branch |
| Modified Profile                                  | **Acquisitions/Serials > Route List Defaults**  
The Printing setting, which determines whether route slips are printed in batch or automatically, now applies to Leap as well as to the Polaris staff client. For details, see [Printing a Route Slip for Serials](#). | System, Library, Branch |
### Polaris API Changes

The following methods have been added or updated:

<table>
<thead>
<tr>
<th>Method Name</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>BibKeywordSearch</td>
<td>Return a list of bibliographic records that match the search criteria. Modified so that the &quot;limit&quot; query parameter is no longer restricted to the values returned by the LimitFiltersGet endpoint.</td>
</tr>
<tr>
<td>BibGet Version 1</td>
<td>Return bibliographic information for a specified record.</td>
</tr>
<tr>
<td>BibGetByType Version 2</td>
<td>Return bibliographic information for a specified item’s key and type of key.</td>
</tr>
<tr>
<td>BibsPost</td>
<td>Import MARC records to create and overlay bibliographic records in Polaris. An import job is created for each post. By default, Polaris attempts to match the incoming 001 tag to an existing bibliographic record ID. If Polaris finds a match, it modifies the existing record. If Polaris does not find a match, it creates a new bibliographic record.</td>
</tr>
<tr>
<td>PatronRegistrationCreate Version 1</td>
<td>Create a new patron registration record.</td>
</tr>
<tr>
<td>PatronRegistrationCreate Version 2</td>
<td>Create a new patron registration record, modified to accept multiple patron addresses.</td>
</tr>
<tr>
<td>PatronRegistrationUpdate Version 1</td>
<td>Update patron registration information.</td>
</tr>
<tr>
<td>PatronRegistrationUpdate Version 2</td>
<td>Update patron registration information, modified to contain multiple patron addresses.</td>
</tr>
<tr>
<td>ILLRequestPost</td>
<td>Start the ILL request process. This process is based on a “messaging” system and will allow</td>
</tr>
<tr>
<td>Method Name</td>
<td>Purpose</td>
</tr>
<tr>
<td>---------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>ItemCheckoutPost</td>
<td>Check out an item as a patron. This endpoint is modified so that it automatically tries to renew an item if the specified patron currently has the item checked out, unless the transacting branch has renewals blocked in Polaris Administration (staff client). Parameters &gt; SelfCheck Unit &gt; Polaris SelfCheck: Blocking conditions &gt; Item blocks tab &gt; Block the checkout if the item &gt; Is a renewal (API). The modification solves the problem of Polaris using all of a patron's renewals if the patron accidentally leaves the item on or near the RFID sensor for too long.</td>
</tr>
</tbody>
</table>

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

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

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

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

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

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

This section covers the following topics:

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

Creating Bulk Waive Criteria and Scheduling the Waive Process to Run

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

To create a set of bulk waive criteria

1. Select Utilities > Background Processing.
   The Background Processing workform appears.
2. Select the Bulk Waive Fines view.
3. Select + NEW.
   The New Bulk Waive Criteria workform appears.
4. Enter a unique name for the bulk waive criteria set in the **Name** box.

5. Select an organization from the **Owner** list.

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

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

   **Note:**
   When you perform a bulk waive, Leap logs a transaction in the patron account for each charge waived. The note you enter here is
7. To schedule Leap to waive fines for this set of bulk waive criteria, select the Scheduled checkbox and select a date. Leap performs the bulk waive in an overnight process on the date you select. For more information about the processing that occurs, see About Bulk Waive Processing.

8. Define the criteria that Leap uses to identify the charges to waive. To be waived by the bulk waive process, a charge must meet all the criteria you define. Select one or more of the following options:

- **Fee Reason** – Waive charges associated with a particular fee reason. Select the Fee Reason checkbox and select one or more reasons from the list.

- **Fine Age Older Than** – Waive charges applied before a particular date. Select the Fine Age Older Than checkbox and select a date.

- **Owning Branch** – Waive charges associated with a particular owning branch. Select the Owning Branch checkbox and select one or more branches from the list.

- **Patron Code** – Waive charges for a particular patron code. Select the Patron Code checkbox and select one or more patron codes from the list.

- **Patron Last Activity Date Before** – Waive charges for patrons whose last activity was before a particular date. Select the Patron Last Activity Date Before checkbox and select a date.

- **Patron Branch** – Waive charges associated with a particular patron branch (that is, the branch where a patron is registered). Select the Patron Branch checkbox and select one or more branches from the list.

- **Collection** – Waive charges associated with a particular collection. Select the Collection checkbox and select one or more collections from the list.

- **Material Type** – Waive charges associated with a particular material type. Select the Material Type checkbox and select one or more material types from the list.

- **Item Branch** – Waive charges associated with a particular item branch. Select the Item Branch checkbox and select one or more branches from the list.
• **SQL Search Criteria** – Waive charges defined by the SQL search criteria you enter. Enter a SQL query in the **SQL Search Criteria** box. The SQL query must be a select statement that returns charge transaction IDs. For more information, search for "Setting Up SQL Searches" in the Polaris staff client help.

```
Sample SQL query:
SELECT TxnID FROM PatronAccount WHERE OutstandingAmount > 0
```

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

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

10. Select **SAVE**.

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

```
Bulk Waive Criteria Preview

Total Waive Amount: $206.52
Total Transactions: 661
Total Patrons: 553
Total Items: 628
```

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

---

### Previewing Bulk Waive Results

You can preview the results of a bulk waive process before you run it. The preview shows you the total number of charges that would be waived, the total value of the
charges that would be waived, and provides additional details about each charge.

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

**To preview bulk waive results**

1. Select **Utilities > Background Processing**.
   
   The Background Processing workform appears.

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

3. (Optional) Enter text in the **Filter** box to filter the list of bulk waive criteria.

4. Select the checkbox next to the bulk waive criteria you want to preview.

5. Select **PREVIEW**.

   Leap displays a preview of the bulk waive results.
Editing Bulk Waive Criteria

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

Deleting Bulk Waive Criteria

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

Viewing the Bulk Waive History

You can view information about bulk waive processes that have been run in the past. There are two ways to view bulk waive history:
• Viewing the Most Recent Bulk Waive Processing Report
• Viewing the Complete Bulk Waive History

Viewing the Most Recent Bulk Waive Processing Report

To view the most recent bulk waive processing report

1. Select Utilities > Background Processing.
   The Background Processing workform appears.

2. Select the Bulk Waive Fines view.

3. Select the checkbox next to a set of bulk waive criteria.

4. Select REPORT.

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

<table>
<thead>
<tr>
<th>Txn ID</th>
<th>Txn Date</th>
<th>Waive Amount</th>
<th>Fee Reason</th>
<th>Patron Barcode</th>
<th>Item Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>121029</td>
<td>8/14/2002 12:00:00 AM</td>
<td>$0.25</td>
<td>Hold Request</td>
<td>100000811011</td>
<td>Desecration: [large print]</td>
</tr>
<tr>
<td>3915511</td>
<td>2/26/2020 9:52:55 AM</td>
<td>$2.00</td>
<td>Hold Request</td>
<td>1000041630412</td>
<td>Antichrist takes the throne</td>
</tr>
<tr>
<td>3959176</td>
<td>3/12/2019 9:18:40 AM</td>
<td>$2.50</td>
<td>Hold Request</td>
<td>38757</td>
<td>The bee sneeze.</td>
</tr>
<tr>
<td>3956105</td>
<td>10/4/2023 3:54:51 PM</td>
<td>$5.25</td>
<td>Borrow By Mail Charge</td>
<td>PAGREG383132</td>
<td>Hoppy the load</td>
</tr>
<tr>
<td>2299273</td>
<td>3/22/2007 7:59:51 PM</td>
<td>$0.25</td>
<td>Hold Request</td>
<td>1000001236600</td>
<td>At the plate with-- Mark McGwire</td>
</tr>
</tbody>
</table>

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Viewing the Complete Bulk Waive History

To view the complete bulk waive history

1. Select Utilities > Background Processing.
   The Background Processing workform appears.

2. Select the Bulk Waive Fines view.

3. Select a set of bulk waive criteria.
   The Bulk Waive Criteria workform appears.

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

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

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

The system does the following during bulk waive processing:

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

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

**To configure transaction logging for bulk waive criteria**

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

   Polaris displays a list of transaction types. You can select the **Transaction Description** column heading to sort the list.
6. Double-click the **Bulk waive criteria deleted** transaction type, and set the **Log Transaction** value to **Yes** or **No**. By default, the value is set to **Yes**.

7. Double-click the **Bulk waive criteria created** transaction type, and set the **Log Transaction** value to **Yes** or **No**. By default, the value is set to **Yes**.

8. Double-click the **Bulk waive criteria modified** transaction type, and set the **Log Transaction** value to **Yes** or **No**. By default, the value is set to **Yes**.

9. Select **Save**.
Support for In-Line Editing for MARC Records in Leap

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

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

This section covers the following topics:

- In-Line Editing in the Leap MARC Editor
- Configuring Leap to Display MARC Format Hints

In-Line Editing in the Leap MARC Editor

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

In previous versions, you had to select a MARC field or tag and then select Edit to make changes. In version 7.6, you can place your cursor in the MARC field or tag you want to edit and immediately start typing to enter MARC data.
The table below lists the keyboard shortcuts you can use when editing bibliographic or authority records in version 7.6.

<table>
<thead>
<tr>
<th>Action</th>
<th>Keyboard Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Insert a new tag row below the current tag.</td>
<td>Ctrl + I</td>
</tr>
<tr>
<td>If your cursor is currently in a control field (Leader, 006, 007, or 008), Leap adds a new control field row. If your cursor is in a data field tag (010–999), Leap adds a new data field tag row.</td>
<td></td>
</tr>
<tr>
<td>Delete the current tag.</td>
<td>Ctrl + D</td>
</tr>
<tr>
<td>You cannot delete the 001 tag, the 005 tag, or any tag that your library has defined as a required tag. For more information about required tags, search for &quot;Administering MARC Validation and Display&quot; in the Polaris staff client help.</td>
<td></td>
</tr>
<tr>
<td>Move the current tag up.</td>
<td>Shift + Up arrow</td>
</tr>
<tr>
<td>You cannot do the following:</td>
<td></td>
</tr>
<tr>
<td>• Move the Leader, the 001 tag, or the 005 tag</td>
<td></td>
</tr>
<tr>
<td>• Move a control field (003, 006, 007, or 008) below a data field tag</td>
<td></td>
</tr>
<tr>
<td>• Move a data field tag above a control field</td>
<td></td>
</tr>
<tr>
<td>Action</td>
<td>Keyboard Shortcut</td>
</tr>
<tr>
<td>----------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------------------------------------</td>
</tr>
<tr>
<td>Move the current tag down.</td>
<td>Shift + Down arrow</td>
</tr>
<tr>
<td>You cannot do the following:</td>
<td></td>
</tr>
<tr>
<td>• Move the Leader, the 001 tag, or the 005 tag</td>
<td></td>
</tr>
<tr>
<td>• Move a control field (003, 006, 007, or 008) below a data field tag</td>
<td></td>
</tr>
<tr>
<td>• Move a data field tag above a control field</td>
<td></td>
</tr>
<tr>
<td>Move your cursor up a row.</td>
<td>Ctrl + Up arrow</td>
</tr>
<tr>
<td>Move your cursor down a row.</td>
<td>Ctrl + Down arrow</td>
</tr>
<tr>
<td>Insert a subfield delimiter (‡).</td>
<td>Ctrl + Q</td>
</tr>
<tr>
<td>Open or close the current expanding field (Leader, 006, 007, or 008).</td>
<td>Ctrl + E</td>
</tr>
<tr>
<td>Close and save the current expanding field (Leader, 006, 007, or 008) after selecting values.</td>
<td>Ctrl + S</td>
</tr>
<tr>
<td>Display or hide MARC format hints for the current tag. (MARC format hints must be enabled in order to use this keyboard shortcut. For more information, see Configuring Leap to Display MARC Format Hints.)</td>
<td>Ctrl + H</td>
</tr>
</tbody>
</table>

**Configuring Leap to Display MARC Format Hints**

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

**To configure Leap to display MARC format hints**

1. In the Leap header, select your username.
2. Select **Settings**.
   The Settings page opens.
3. Select the **Workform User Defaults** tab.

4. In the **Workforms: Default view** section, select the **Display hints** checkbox.

5. Select **SAVE**.

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

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

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

This section covers the following topics:

- Creating a New Item Template
- Finding an Existing Item Template
- Creating Items Using an Item Template
- Copying an Item Template
- Deleting an Item Template

Creating a New Item Template

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

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

**To create a new item template**

1. Select the New menu.
   A dropdown menu appears.
2. Select Template > Item.
A blank New Item Template workform appears with the Details view open.

3. Fill in the required fields: **Name** and **Owner**.

4. (Optional) Enter other values you'd like to duplicate when you create items from this template.

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

   **Note:**
   To be consistent with the Item Workform, the Item Template workform includes the Barcode field, but it is always disabled.

5. Select **SAVE**.
Finding an Existing Item Template

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

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

**To find an existing item template**

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

Leap opens the Item Template workform.

---

Creating Items Using an Item Template

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

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

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

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

To copy an item template
1. Find or create an item template.
2. In the Item Template workform, select the **ACTIONS** menu.
3. Select **Copy**.
   
The copy opens in a new Item Template workform.
4. (Optional) To create a unique template from the copy, change the values and update the **Name** field.
5. Select **SAVE**.
   
Leap saves the new item template.

Deleting an Item Template

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

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

To delete an item template
1. Find or create an item template.
2. In the Item Template workform, select the **ACTIONS** menu.
3. Select **Delete**.
   
The Delete Item Template dialog opens.

4. Select **CONTINUE** to delete the item template.
   
   Leap deletes the item template and confirms the deletion with a notification.
Leap's Bulk Item Processing Is Now in the Background

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

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

- In-Process
- On Order

This change makes it easier to process item records when you order materials from suppliers that do not support EDI ordering workflows.
Making Ad Hoc Bulk Changes to Items

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

- Bibliographic Record
- Find Tool

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

- Viewing the Bulk Change Report
- Deleting a Bulk Change Report

Bibliographic Record

To bulk-change item records from the bibliographic record

1. In Leap, go to the Find Tool.
2. Search for a bibliographic record and select one in the search results.
3. Select OPEN.
   The Bibliographic Record workform appears.
4. Select the All Items view.
   The All Items view displays a table listing each item linked to the bibliographic record.
5. Select the checkbox beside each item in the table that you want to change.

6. Select **BULK CHANGE**.

   The Item Record Bulk Change workform appears.

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

8. Select **UPDATE ITEMS**.
   
   The Summary of Changes dialog appears.
9. Select **CONTINUE**.

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

---

**Find Tool**

**To bulk-change item records from the Find Tool**

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

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

---

**Viewing the Bulk Change Report**

**To view the bulk change report**

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

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

The Item Bulk Change view appears displaying a table of the item bulk change jobs.
4. To open a Bulk Change report, select a row in the table.
   The Bulk Change report opens in a new browser tab.

## Deleting a Bulk Change Report

**To delete a bulk change report**

1. In Leap, go to the **Utilities** menu.
2. Select **Background Processing**.
3. Select the **Item Bulk Change** view.
   The Item Bulk Change view appears displaying a table listing the item bulk changes.
4. Select the checkbox beside each Bulk Change report you want to delete.
5. Select **DELETE**.
6. Select **YES** in the confirmation dialog.

Leap deletes the Bibliographic Bulk Change report.
Support for Working with Lists of ISBNs in Leap

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

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

---

Enabling the Display of ISBNs in Find Tool Search Results

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

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

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

   The Column Settings configuration options appear.
2. Select **ISBN**.

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

4. Select **SAVE**.

---

### Performing a Basic Search for a List of ISBNs

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

**To search for a list of ISBNs**

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

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

5. Select **Search**.

Leap returns a list of all bibliographic records that contain one of the ISBNs in the list.
Note:
The ISBN column displays normalized, 13-digit ISBNs. This means that:

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

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

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

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

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

This section covers the following topics:

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

**Required Permissions**

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

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

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

**Adding a File of Bibliographic Records to a Record Set**

**To add a file of bibliographic records to a record set**

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

   A file explorer window appears.

5. Select the file of ISBNs.

6. Select **Open**.

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

8. Select **ADD FROM FILE**.

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

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

   Leap handles ISBN matching as follows:
• If an ISBN in the file matches multiple bibliographic records in the database, all matching records are added to the record set.
• If multiple ISBNs in the file match the same bibliographic record in the database, the bibliographic record is added to the record set just once.

9. Select **SAVE**.

Leap saves the record set and logs a "9004 Record set modified" transaction.
Searching for Non-Circulating Items

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

- Selecting the Access Point
- Filtering by the Status

Selecting the Access Point

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

![Find Tool - Item Record](image)

The access point becomes Non-circulating, Keyword changes to Exact, and the search box offers two choices.
• To search for items that are flagged as "Non-circulating," enter Yes in the search box.
• To search for items that are not flagged as "Non-circulating," enter No in the search box.

Filtering by the Status

To filter by the status Non-Circulating

1. Select Filter.
   The Search Filter dialog opens.
2. Select +ADD CONDITION.
   The search filter options appear.
3. In the All keyword fields list, select Non-circulating.
The Keyword changes to Non-circulating, the operator becomes an equal sign, and the search box appears as a dropdown list.

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

5. Select APPLY.
Displaying 880 Tag Data in the Leap Bibliographic Find Tool

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

This section covers the following topics:

- Enabling the Display of 880 Tag Data in the Bibliographic Find Tool
- How Leap Formats and Displays 880 Tag Data

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

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

1. In the bibliographic record Find Tool, select Options > Column Settings.
   The Column Settings configuration options appear.
2. Select one or both of the following options:
   
   - **Author (Native Script)** — Enables the display of author data from the 880 tag (that is, 880 tag data that’s linked to a 1xx tag).
   
   - **Title (Native Script)** — Enables the display of title data from the 880 tag (that is, 880 tag data that’s linked to the 245 tag).

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

4. Select **SAVE**.

---

**How Leap Formats and Displays 880 Tag Data**

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

<table>
<thead>
<tr>
<th>If a record contains</th>
<th>Leap displays</th>
</tr>
</thead>
<tbody>
<tr>
<td>An 880 tag linked to the 245 tag</td>
<td>Title data as <code>&lt;880 tag data&gt; / &lt;245 tag data&gt;</code></td>
</tr>
<tr>
<td>An 880 tag linked to a 1xx tag</td>
<td>Author data as <code>&lt;880 tag data&gt; / </code>&lt;1xx tag data&gt;`</td>
</tr>
<tr>
<td>Multiple 880 tags linked to the 245 tag or to a 1xx tag</td>
<td>All 880 tag data. For example, Leap displays a title with three linked 880 tags as follows: <code>&lt;880 tag data&gt; / &lt;880 tag data&gt; / &lt;880 tag data&gt; / &lt;245 tag data&gt;</code></td>
</tr>
</tbody>
</table>
Claiming Serial Issues in Leap

Version 7.6 includes support for managing serial claims in Leap.

This section covers the following topics:

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

Adding and Deleting Serial Holdings Record Claim Intervals

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

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

**Note:**

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

This section covers the following topics:

- Adding a Claim Interval for a Serial Holdings Record
- Deleting a Claim Interval for a Serial Holdings Record
Adding a Claim Interval for a Serial Holdings Record

To add a claim interval for a serial holdings record

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

3. Select ADD CLAIM.

Leap displays the Add Claim Interval dialog.
4. From the **Categories** list, select a type of serial publication.

5. In the **Interval** box, enter the number of days for the claim interval.

6. Select **OK**.

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

### Deleting a Claim Interval for a Serial Holdings Record

**To delete a claim interval for a serial holdings record**

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

   Leap prompts you to confirm the deletion.

5. Select **CONTINUE**.

   Leap deletes the claim interval and displays a success message. The table on the Claims tab refreshes to reflect your changes.
Claiming a Serial Issue from the Serials Check In Workform

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

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

**To claim an issue from the Serials Check In workform**

1. **Select Utilities > Serials Check In.**
   - The serial holdings record Find Tool appears.
2. **Use the Find Tool to search for and open a serial holdings record.**
3. **On the Serial Holdings Record workform, select Links > Serials Check In.**
   - The Serials Check In workform appears.
4. **Select the issue you want to claim.**
5. **Select Claim.**
Leap prompts you to confirm that you want to claim the issue.

6. Select **YES**.

The Claim Issue/Part dialog appears.

![Claim Issue/Part dialog](image)

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

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

9. Select **CLAIM**.

Leap does the following:

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

---

**Managing Serial Claims from the Claim Alert List**

The Claim Alert List displays all serial issues and parts that are eligible to be claimed based on the **Days After Release/Expected Arrival** setting in the supplier record and the claim intervals configured in the serial holdings record.
Note:
You can access the Claim Alert List if you have the Claim alert list: Access permission enabled in Polaris Administration (staff client). For more information, search for "Acquisitions Workflow Permissions" in the Polaris staff client help.

This section covers the following topics:

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

Claiming a Serial Issue or Part from the Claim Alert List

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

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

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

3. (Optional) To view claim alerts for serial parts, select the Parts view.
   
   Leap refreshes the list of claim alerts.

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

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

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

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

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

9. Select CLAIM.
   
   Leap does the following:
   
   • Processes the claim
Undoing a Claim from the Claim Alert List

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

To undo a claim from the Claim Alert List

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

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

3. In the Status list, select the Claimed status.
   Leap refreshes the list to display only claim alerts for issues with a status of Claimed.

4. (Optional) To view claim alerts for serial parts, select the Parts view.
   Leap refreshes the list of claim alerts.

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

6. Select UNDO CLAIM.
   Leap prompts you to confirm that you want to undo the claim.

7. Select YES.
   Leap does the following:
   - Reverses the claim
   - Displays a success message
   - Sets the status of the issue or part to the status it had before it was claimed
Managing Serial Claims from the Issue Record Workform

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

This section covers the following topics:

- Claiming an Issue from the Issue Record Workform
- Undoing a Claim from the Issue Record Workform

Claiming an Issue from the Issue Record Workform

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

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

To claim an issue from the Issue Record workform

1. On the Issue Record workform, select ACTIONS > Claim.
Leap prompts you to confirm that you want to claim the issues or parts.

2. Select **YES**.
   The Claim Issue/Part dialog appears.

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

5. Select **CLAIM**.
   Leap does the following:
   - Processes the claim
   - Displays a success message
   - Sets the status of the issue or part to Claimed

### Undoing a Claim from the Issue Record Workform

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

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

**To undo a claim for an issue from the Issue Record workform**

1. On the Issue Record workform, select **ACTIONS > Undo Claim**.
   Leap prompts you to confirm that you want to undo the claim.

2. Select **YES**.
   Leap does the following:
   - Reverses the claim
   - Displays a success message
   - Sets the status of the issue or part to the status it had before it was claimed
Printing a Route Slip for Serials

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

To set up the route list in the Polaris staff client

1. To associate a route list with an issue or part do one of the following:
   - Select **Tools, Add to route list** on the Issue, Part, or Check In workform.
   - Right-click on the issue/part in the Find Tool results list and select **Add to route list**. The Find Tool appears with Route List selected. Search for and select the route list that you want to associate with the issue/part.

2. To set the print method to Automatic, do the following:
   a. Go to Administration Explorer > **System > Profiles**.
   b. Select **Acquisitions/Serials**.
   c. Select **Route list defaults** to open the Route List Defaults dialog.
   d. Beside **Printing**, select **Automatic**.
e. Select **OK**.

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

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

   The Find Tool - Serial Holdings Record page opens.

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

   A result list appears.

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

   The Serials Check In workform opens.

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

6. Because of the Polaris staff client setting, you see the **Print Route Slip** dialog. Do one of the following:
   - Select **Yes** to see the Print dialog.
   - Select **Cancel** to continue the check-in without printing the route slip.

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

   When the check-in is complete, the issue or part status changes to Received. Overnight processes update changes to the compressed holdings in PAC.
Support for Southern Hemisphere Seasons in Publication Patterns

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

Examples:

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

Note: By default, **Season hemisphere** is set to North. Publication patterns that
already exist in your system are also automatically set to North. If you want to use this default behavior, you don’t need to take any action.

**To configure the season hemisphere for a publication pattern**

1. On the Serial Holding Record workform, do one of the following:
   - Select + **NEW PATTERN**.
   - Select an existing publication pattern.

   The Publication Pattern workform appears.

2. Select the **Designation** tab.

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

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

4. Select **SAVE**.
Printing Invoice Vouchers, Purchase Orders, and Workslips

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

- Printing Invoice Vouchers
- Printing a Purchase Order
- Printing a Workslip from a PO Line Item
- Printing a Workslip from an Invoice Line Item

Printing Invoice Vouchers

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

1. In Leap, go to the Find Tool.
2. Search for an invoice and select one in the search results.
3. Select **OPEN**.
   The Invoice workform appears.
4. Select the **Payment History** view.
   The Payment History view displays a table listing each payment made against the invoice.
5. Select the checkbox for each payment you want to include on the voucher.

6. Select **PRINT VOUCHER**, and select one of the following:
   - **Full**
   - **Summary**

   The printable voucher appears in a new browser window.

   The following shows a full voucher:
7. Select the print option from the new browser window to open your browser's print dialog.

## Printing a PO

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

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

4. Select **ACTIONS > Print**.

![Image of Purchase Order workform]

The Print Purchase Order Options dialog opens.

![Image of Print Purchase Order Options dialog]

5. To sort the items in the printable PO by one of the following, select a sort option:
   - ISBN/ISSN
   - Title
   - Other No.

6. Select **OK**.
The printable PO appears in a new browser window.

![Printable PO example](image)

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

## Printing a Workslip from a PO Line Item

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

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

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

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

5. Select the checkbox for each line item you want to include in the workslip.

6. Select **PRINT WORKSLIP**.

The printable Item workslip appears in a new browser window.
7. Select the print option from the new browser window to open your browser’s print dialog.

Printing a Workslip from an Invoice Line Item

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

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

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

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

5. Select the checkbox for each item you want to include on the workslip.

6. Select **PRINT WORKSLIP**.

   The printable item workslip appears in a new browser window.
7. Select the print option from the new browser window to open your browser’s print dialog.
SFTP Support for EDI Transmissions and Exporting Notices

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

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

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

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

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

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

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

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

<table>
<thead>
<tr>
<th>Column</th>
<th>Conditions</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ItemRecordID</td>
<td>Appears on overdues, bills, hold and second hold notices.</td>
<td>Contains the database identifier for the item associated with the notification.</td>
</tr>
<tr>
<td>SysHoldRequestID</td>
<td>Appears on first and second hold pickup notices, hold cancel notices, and on ILL request notices.</td>
<td>Contains a numeric value that is: Positive — for first and second hold pickup notices, and hold cancel notices Negative — for ILL requests</td>
</tr>
<tr>
<td>PickupArea Description</td>
<td>Appears on first and</td>
<td>Contains a description</td>
</tr>
<tr>
<td>Column</td>
<td>Conditions</td>
<td>Description</td>
</tr>
<tr>
<td>----------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>second hold pickup notices when pickup area is configured.</td>
<td>of the area in the library where the patron can pick up their held item.</td>
</tr>
<tr>
<td>TxnID</td>
<td>Appears on manual bill notices.</td>
<td>Contains the database identifier for the patron account transaction associated with the notification.</td>
</tr>
<tr>
<td>AccountBalance</td>
<td>Appears on fines, bills, and manual bills.</td>
<td>Contains the patron's balance owed</td>
</tr>
</tbody>
</table>

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

To use the enhanced profile

1. In Polaris Administration (staff client), go to Administration Explorer > System > Parameters.
2. Select Notification, and open Notification Options.
4. In the Export section, select the Enhanced Profile checkbox.
5. Select **Save**.
Exporting Hold Notices More Than Once a Day

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

Note:
When you schedule Hold Notice Processing, ensure Notices Processing doesn't run at the same time (the default is 6:00 AM once a day).
Enabling the SMS Opt-In Message

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

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

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

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

To enable the SMS opt-in message

1. In Polaris Administration (staff client), go to Administration Explorer > System > Parameters.
2. Select Notification, and open Notification Options.
4. In the Notification method section, select TXT message.
5. Select Display SMS terms.
6. Select **Save**.
Sending Same Day Overdue Notices

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

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

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

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

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

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

- Filtering by Record Set Improvement
- New Item Language Filter

Filtering by Record Set Improvement

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

![SimplyReports interface showing filtering options](image-url)
The following types of reports include a record set filter:

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

**New Item Language Filter**

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

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

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

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

- *Placing an Aeon Request with the Place Request Button*
- *Placing an Aeon Request from the Availability View*

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

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**Placing an Aeon Request with the Place Request Button**

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

![Example of Place Request Button](image)

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

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

You can also place an Aeon special collection request by selecting the request icon 📖.
Suppressing the Pickup Area Option of None

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

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

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

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

**To suppress the pickup option of "None"**

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

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

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

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

Creating a New Payment Method

To create a new payment method

1. Open Polaris Administration (staff client), and select Administration > Explorer > System.
   
   The Administration Explorer appears.

2. Select Policy Tables > Patron Payment Methods.
3. Select **Insert** payment method.
   The *Insert: Patron Payment Methods* dialog appears.

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

5. Select **OK**.
   The system adds the new payment method to the bottom of the Patron Payment Methods table.
Selecting the New Payment Method for Your Branch

To select the new payment method for your branch

1. Open Polaris Administration (staff client), and select Administration > Explorer.
   The Administration Explorer appears.
2. Select Branch > the name of your branch > Policy Tables > Payment Methods.
   The Payment Methods table appears with your new entry at the bottom.
3. Select a payment method.
   The Modify: Payment Methods dialog appears.
Under Selected, enter Yes.

Select OK.

Select Save.

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

---

**Viewing the New Payment Method**

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

**To view the new payment method in Leap**

1. In Leap, use the Find Tool to search for a Patron Record.
2. Open the patron record and select **Account View**.
3. Select a charge from the table and select **Pay**.
4. Expand the **Method** dropdown list.
   The new payment method appears in the list.

The new payment method appears wherever patron payment method appears.
Checking in Claimed Items without Charging Overdue Fines

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

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

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

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

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

---

Configuring Leap to Display the Claimed Item Overdue Charges Dialog

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

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

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

5. Select **Save**.

---

**Waiving Overdue Fines when Checking In a Claimed Item**

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

1. In Leap, select **CHECK IN**.
   
The Check In workform appears.

2. Check in an item that is both overdue and has been claimed.
   
   If the **Overdues: prompt for claimed items** parameter is set to **Yes**, Leap displays the Claimed Item Overdue Charges dialog.

   ![Claimed Item Overdue Charges](image)

3. Select **NO**.
   
   Leap waives the overdue fines and completes the check-in transaction.

   **Note:**
   
   If you select **YES**, Leap charges overdue fines and continues the check-in transaction by displaying the Overdue Fine dialog. If you select **CANCEL**, Leap cancels the check-in transaction.
Linking from Patron Records in Leap to External Patron Data

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

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

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

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

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

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

Link Structure for External Patron Data Links

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

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

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

<base URL><unique patron identifier>

Example:

Assume your library has the following configuration:

• The base URL is set to the following value in the Web App: Patron External Database URL setting:
  https://database.example.com/home/retrieve?identifier=

• The Web App: Patron External Database UDF setting is set to 5, which specifies that the unique patron identifier is stored in the UDF 5 field in the patron record.

• Sarah Smith's patron record contains a value of 12345 in the UDF 5 field.

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

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

Configuring Leap to Display Links to External Patron Data

To configure Leap to display links to external patron data

1. In Polaris Administration (staff client), go to Administration > Explorer.
2. Select an organization level (System, Library, or Branch).
3. In the Administration Explorer, double-click the system, library, or branch name to expand the list.
4. Select Profiles > Staff Client.
5. Double-click **Web App: Suppress Link: Patron External Database**, then select **No** to enable the display of links to external patron data in Leap.

6. Double-click **Web App: Patron External Database URL**, then enter the external patron database URL in the **Value** field. The URL must begin with http:// or https://.

7. Double-click **Web App: Patron External Database UDF**, then select a value between 1 and 5. The value specifies which UDF in the patron record stores the unique string that identifies the patron in the external database. For example, selecting a value of 5 specifies that the unique patron identifier is stored in the UDF 5 field.

8. Select **Save**.

---

### Entering Unique Patron Identifier Data in the Patron Record

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

**To enter the unique patron identifier in the patron record**

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

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

4. Select **SAVE**.

---

### Using External Patron Data Links in Leap

When links to external patron data are enabled and a patron record contains a unique patron identifier in the appropriate UDF, an **EXTERNAL DATABASE** button appears in the
patron's profile. Select this link to view external patron data.
Beta Support for Basic OAuth 2.0 with Akamai

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

Contact Innovative for help getting started with basic OAuth 2.0 authentication using Akamai.
MARC Technical Updates in Polaris 7.6

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

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