



What's New in Polaris and Leap 5.6

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Polaris Installation Notes	1
File Path	1
Polaris Inventory Manager	1
New and Modified Polaris Administration Settings	2
Polaris Unicode (UTF-8) Compliance	3
Bookmobile TRN Uploads	3
Upgrade Considerations	3
Searching Vital Digital Resources in PAC	4
Setting Up the Vital Search Target in System Administration	6
Setting a Default Remote Database for PowerPAC Searches	7
Configuring the PowerPAC Title Display for Small Screen (Phone) Display	9
Using Google's reCAPTCHA on the PAC Donations Page	11
Google Maps API Key	13
Responsive PowerPAC Updates	14
Change a Purchase Order Number After Release	15
Original Purchase Order Number and Suffix in SimplyReports	17
INN-Reach Requests: Fill Now Blocked for Items from Different Agencies	18
INN-Reach Peer-to-Peer Circulation	19
INN-Reach Administration Tool Changes	19
Polaris Request Workform Changes	21
Polaris Updates for MARC Technical Notices	23
Leap - Find Tool Implicit Truncation	24
Leap - Search for Patron Record Sets	25
Leap - Patron Record Set Workform	27
Patron Record Set Header Elements and Features	28
Patron Record Set Table View	29
Leap - Create a New Empty Patron Record Set	30
Language String Added for Creating a New Patron Record Set	31
Leap - Create a Patron Record Set from All Find Tool Results	32
Leap - Create a Patron Record Set from Selected Find Tool Results	35
Leap - Create a Record Set from the Patron Record Workform	37

Leap - Create a Record Set of Linked Item Records from a Patron Record Set ...	39
Leap - Add Patron Records from Find Tool Results to an Existing Record Set ...	42
Leap - Copy Patron Records from One Record Set to Another	44
Leap - Copy Records from a Patron Record Set to a New Record Set	46
Leap - Add a Patron Record to an Existing Record Set from the Patron Record Workform	48
Leap - Record Set View of Patron Record Workform	50
Language String for Filter Record Sets	51
Leap - Modify a Patron Record Set	52
Add Patron Records to a Record Set	52
Remove Records from a Patron Record Set	54
Leap - Add Patron Records to a Record Set from a File	55
Language Strings Added to WebAdmin for Add from File	57
Leap - Delete a Patron Record Set	58
Add Items to a Record Set from a File	59
Leap - Convert a Hold to an ILL Request	62
Convert a Hold Request to an ILL Request from the Patron Record Workform	62
Convert a Hold Request to an ILL Request from the Hold Request Workform	64
Convert a Hold Request to an ILL Request Process	65
Leap - Unlock a New Hold Request	66
Leap - Export an ILL Request	68
Export an ILL Request from the ILL Request Workform	68
Export an ILL Request from the Patron Record Workform	68
Export an ILL Request Process	69
Language String Added for Export Success Message	69
Leap - Receive an ILL Item	70
Receive an ILL Item from the ILL Request Workform	70
Receive an ILL Item from the Patron Record Workform	71
Create the ILL Item	72
Receive ILL Processing	73
Leap - Return an ILL Item	74

Return an ILL Item from the ILL Request Workform	74
Return an ILL Item from the Patron Record Workform	75
Return an ILL Item Process	75
Language String Added for Cancel Success Message	75
Leap - Cancel an ILL Request	76
Cancel an ILL Request from the ILL Request Workform	76
Cancel an ILL Request from the Patron Record Workform	77
Cancel an ILL Request Processing	77
Language String Added for Cancel Success Message	78
Leap - Delete an ILL Request	79
Delete an ILL Request from the ILL Request Workform	79
Delete an ILL Request from the Patron Record Workform	80
Delete ILL Process	80
Leap - Holds Queue Filter	81
Leap - Link to Hold Request from Hold in Patron Record	83
Leap - Staff Email Added to Lock Information	85
Language String Added for Email on Locked Information	86
Leap - Properties for Library-Assigned and Free-Text Blocks	87
Language String Added for Blocks Properties	88

Polaris Installation Notes

File Path

When the new Polaris release is installed on a workstation, the file path changes from Polaris Clients 5.5 to Polaris Clients 5.6.

Examples:

```
c:\ProgramData\Polaris\Polaris Clients 5.6  
c:\Program Files\Polaris\Polaris Clients 5.6  
c:\Program Files (x86)\Polaris\Polaris Clients 5.6
```

Polaris Inventory Manager

You can now use the Polaris Client Installer wizard to install Polaris Inventory Manager (PIM).

New and Modified Polaris Administration Settings

The following table lists the new and modified profiles, parameters, and permissions in Polaris Administration.

Location / Name	Purpose	Default	Level
Credit Card Payment Parameters - Changed			
Online payments: Configure	New Payflow Pro properties settings to set up Google reCAPTCHA for donations. See "Using Google's reCAPTCHA on the PAC Donations Page" on page 11.	Not enabled	System, library, branch
PAC Profiles - Changed			
Google Maps	Supply the Google Maps API key (if Google Maps implemented after June 2016). See "Google Maps API Key" on page 13.	None	System, library, branch
PowerPAC Profiles - Changed			
Remote databases: Usage settings	Specify a remote database or databases to be included by default in PowerPAC search results. See "Setting a Default Remote Database for PowerPAC Searches" on page 7.	None selected	System, library, branch
Title Display: Configure	Suppress display elements from small screen display. See "Configuring the PowerPAC Title Display for Small Screen (Phone) Display" on page 9.	None suppressed	System, library, branch

Polaris Unicode (UTF-8) Compliance

Unicode is the international standard for encoding and displaying text from international scripts and multiple symbol sets.

The Polaris integrated library system has long supported Unicode character display in MARC records and other specific areas. Beginning with Polaris 5.6, Polaris is Unicode-compliant throughout much of the system, including the staff client, the Polaris Web Client (Leap), Polaris PowerPAC, SimplyReports, staff client reports, notices, and other functions.

There are certain exceptions:

- SIP v.2 protocol, used by the Polaris SIP service to communicate with certain third-party self-check devices, does not support Unicode.
- Patron user names do not support Unicode.
- SMS/text messaging – Some providers do not currently support Unicode. To provide a consistent experience, Polaris 5.6 SMS/text messaging does not support Unicode.
- Email messages – Some providers do not currently support Unicode characters in an email address. However, the email body does support Unicode.
- Inter-library loan – ILL protocol (1997) does not support UTF-8/Unicode.

Bookmobile TRN Uploads

In previous Polaris versions, you could only upload ASCII files. With Polaris 5.6, you can also upload TRN files that are in Unicode or UTF-8 format.

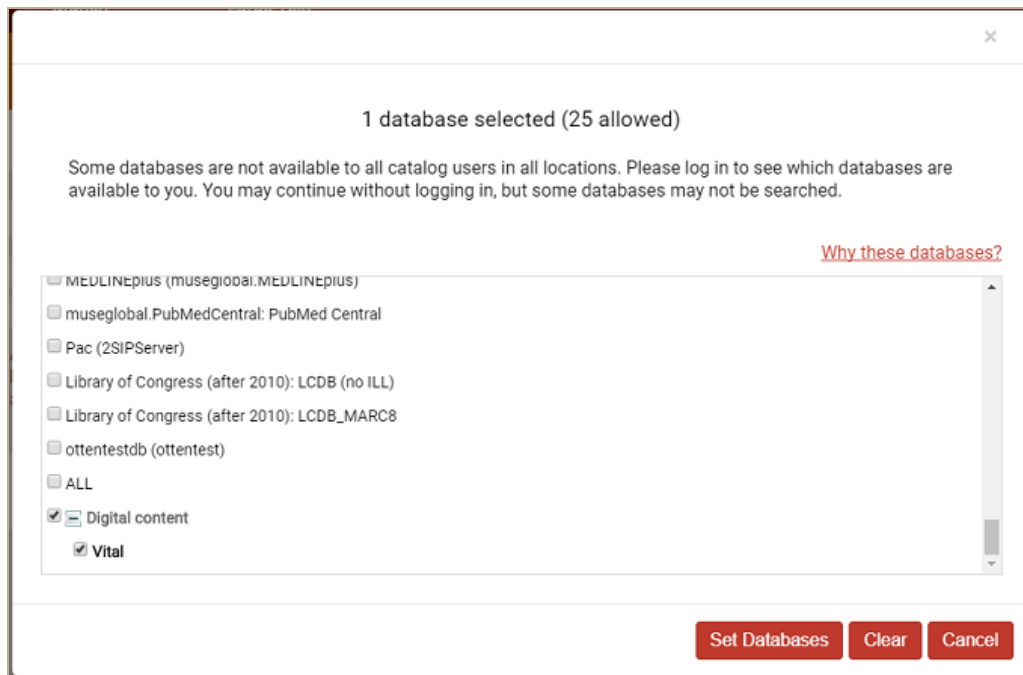
Upgrade Considerations

For Polaris 5.6, the database size will increase more than in previous versions due to Unicode support. Please contact your Polaris Site Manager if you have any concerns about your available disk space.

Searching Vital Digital Resources in PAC

Vital is Innovative's digital asset management solution for describing, indexing, and making available electronic content, such as photographs, slides, digital video, sound clips, and electronic documents. Polaris PowerPAC users can now search for Vital digital resources along with other types of material in the library catalog.

You set up Vital for searching as you would other remote databases. For an overview, see "Setting Up the Vital Search Target in System Administration" on page 6. Patrons can then select the Vital database in the PowerPAC **Select Databases** feature.

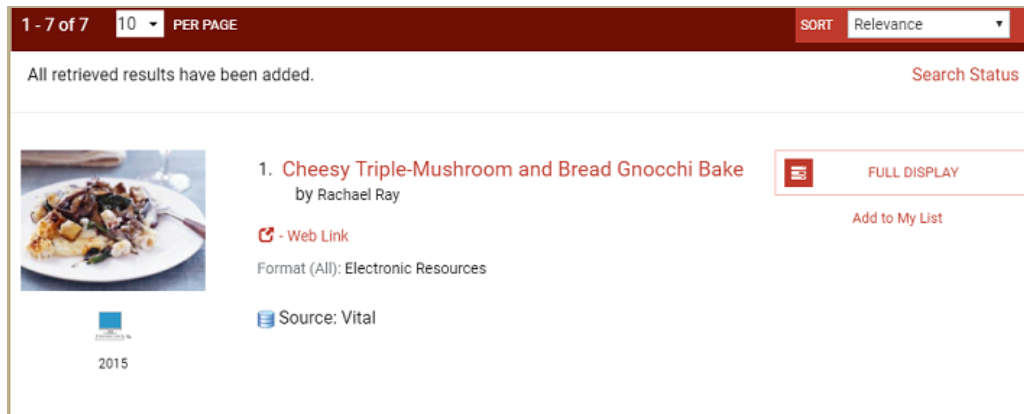


Note:

Searching for Vital resources is currently supported in Keyword and Phrase searching only.

Alternatively, you can specify that Vital database search results should be included by default in PowerPAC search results. Search results include Vital results as well as other types of materials, without the patron having to deliberately select the Vital database in the **Select Databases** feature. The following example is a brief search result for a Vital digital asset.

What's New in Polaris and Leap 5.6



1 - 7 of 7 10 PER PAGE SORT Relevance

All retrieved results have been added. Search Status

1. **Cheesy Triple-Mushroom and Bread Gnocchi Bake**
by Rachael Ray

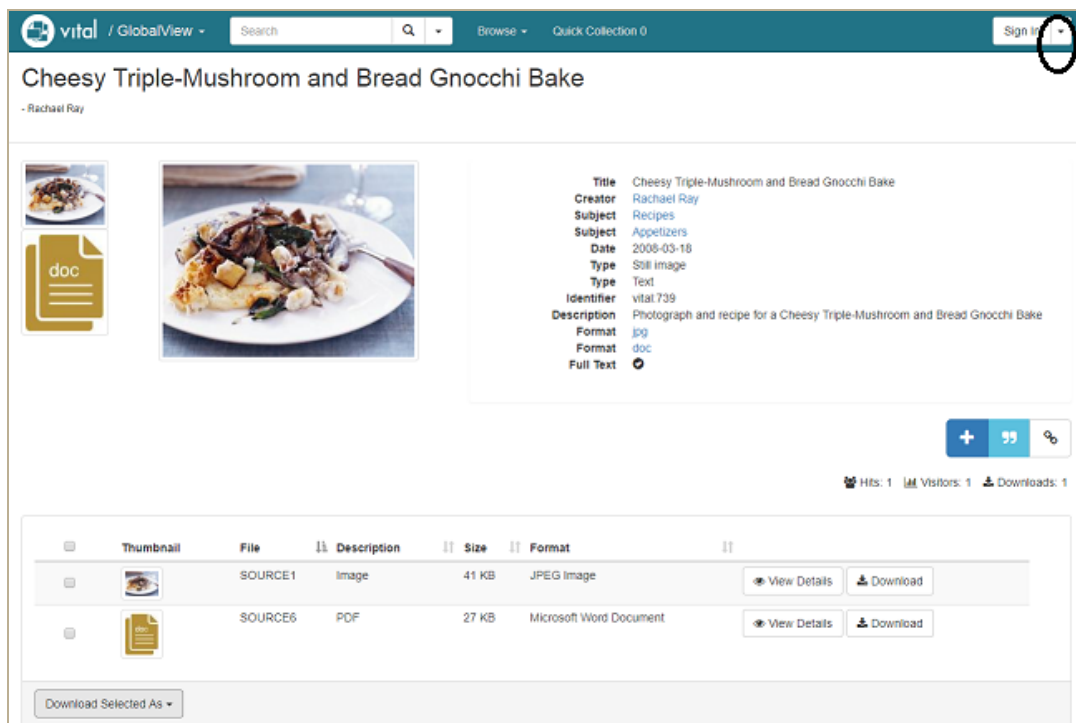
Web Link FULL DISPLAY
Add to My List

Format (All): Electronic Resources

Source: Vital

2015

When the patron selects **Web Link** for a Vital digital asset, the Vital interface opens in a new browser tab. From here, patrons can continue to search the repository and download materials. Online help is available by selecting the arrow in the upper right corner.



vital / GlobalView - Search Browse - Quick Collection 0 Sign In

Cheesy Triple-Mushroom and Bread Gnocchi Bake

- Rachael Ray

Title: Cheesy Triple-Mushroom and Bread Gnocchi Bake
Creator: Rachael Ray
Subject: Recipes
Subject: Appetizers
Date: 2009-03-18
Type: Still image
Type: Text
Identifier: vital.739
Description: Photograph and recipe for a Cheesy Triple-Mushroom and Bread Gnocchi Bake
Format: jpg
Format: doc
Full Text: [icon]

Hits: 1 | Visitors: 1 | Downloads: 1

Thumbnail	File	Description	Size	Format	
	SOURCE1	Image	41 KB	JPEG Image	View Details Download
	SOURCE6	PDF	27 KB	Microsoft Word Document	View Details Download

Download Selected As ▾

For more information about the Vital digital asset management solution, go to www.iii.com.

Setting Up the Vital Search Target in System Administration

Register the Vital server by setting up a new server record in Polaris Administration. You will need the IP address and logon information for the Vital server. See "Set up a server record for a Z39.50 or other search server" in Polaris staff client help.

Set up the Vital repository as a search target using the PowerPAC profile **Remote databases: Usage settings**. For more information about setting up remote search targets, see "Managing Federated Search Targets" and "Configure remote database usage settings" in Polaris staff client help.

Using the PowerPAC profile **Remote databases: Usage settings**, you can set the Vital database search results to be included by default in PowerPAC search results. See "Setting a Default Remote Database for PowerPAC Searches" on page 7. When you set this option, a patron can still choose to omit Vital results by deselecting the database in the **Select Databases** window. If you set up Vital as a remote search target but do not specify that it be included in search results by default, patrons can deliberately select it for searching using the **Select Databases** option.

Setting a Default Remote Database for PowerPAC Searches

You can now specify a remote database or databases to be included by default in PowerPAC search results. When you have set this option, patrons do not have to deliberately select the databases for searching using the **Select Databases** feature, but they can deselect them to omit the database results from a search if they choose.

Tip:

You can use this feature to integrate Vital digital resources by default in PowerPAC search results. See "Searching Vital Digital Resources in PAC" on page 4

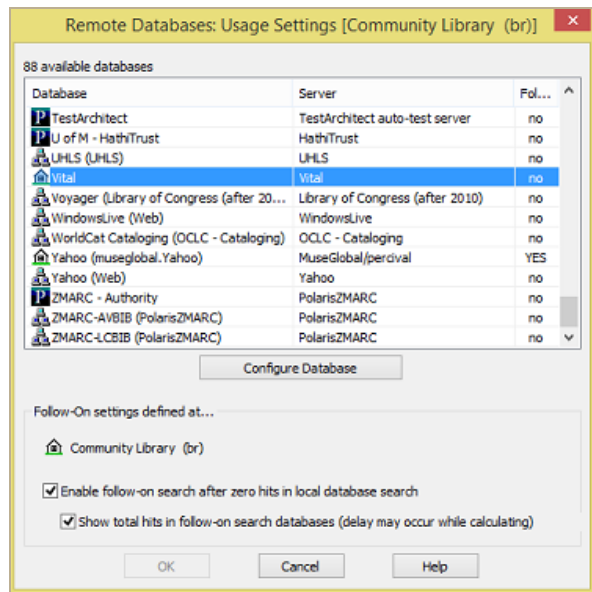
Be sure the database servers are registered in Polaris, and that resource groups have been specified if necessary. See "Set up a server record for a Z39.50 or other search server" in Polaris staff client help.

Note:

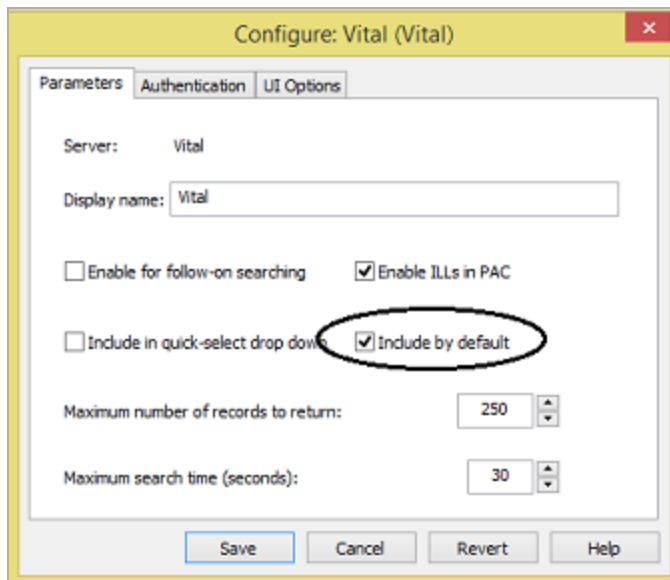
The PowerPAC profile **Remote databases: Maximum number that can be searched at once** sets the maximum number of databases that can be searched at one time. The system honors this limit when including remote databases to be searched by default. For example, if you set the maximum number that can be searched at once to 10, but select 12 to be searched by default, only the first 10 will be selected in PowerPAC.

Use the existing PowerPAC profile **Remote databases: Usage settings** to specify databases to include in search results by default:

1. Select the database, and select **Configure Database**.



2. Select (check) **Include by default**.



3. Click **Save**.

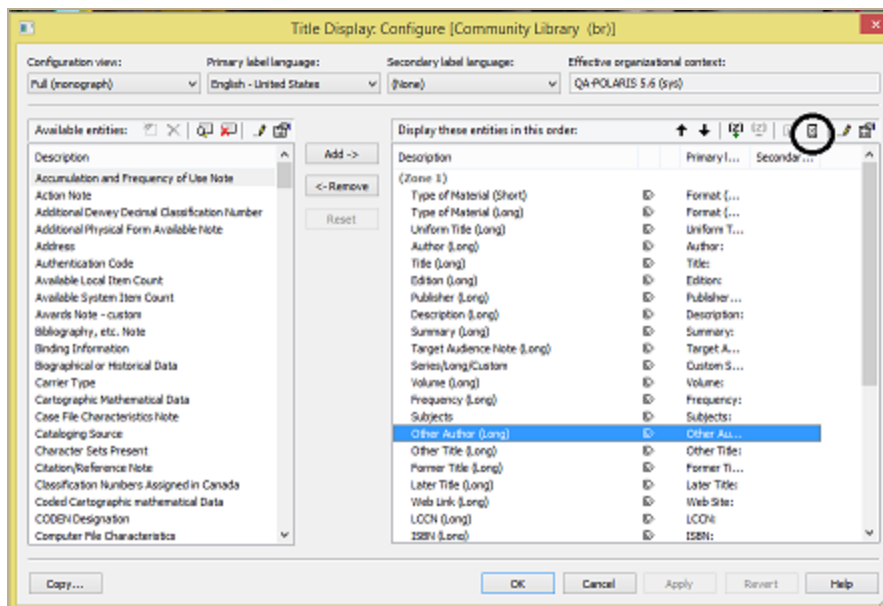
For more information about setting up remote search targets, see "Managing Federated Search Targets" and "Configure remote database usage settings" in Polaris staff client help.

Configuring the PowerPAC Title Display for Small Screen (Phone) Display

Using the PowerPAC profile **Title Display: Configure**, you can now suppress title entities from the PowerPAC results display at mobile (650 px or narrower) width. This saves user data use and excessive scrolling through title information.

All title entities that are set to display for a given configuration view will display at mobile width by default. To suppress a title display entity from the mobile display:

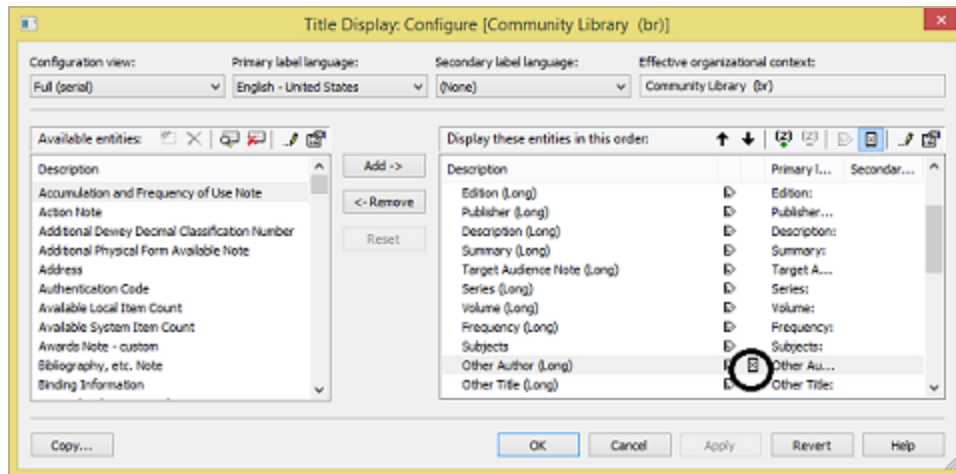
1. Select the configuration view that you want to modify; for example, **Full (monograph)**.
2. Select the entity in the display list and click the phone icon at the top of the list.



3. Click **Apply**.

When you have selected an entity to suppress from the mobile display, an icon by the entity in the display list indicates that it will be suppressed.

What's New in Polaris and Leap 5.6



For more information about setting up the PowerPAC title display, see "Configuring the PowerPAC Title Display" in Polaris staff client help.

Using Google's reCAPTCHA on the PAC Donations Page

For Polaris libraries that use PayPal Payflow Pro for credit card payments through Polaris PowerPAC or Mobile PAC, Google's free reCAPTCHA feature adds human verification to the process of submitting a donation to the library. This minimizes the possibility of a robotic "user" making many small fake donations to the library to verify stolen credit card information. Genuine donors identify a picture or select **I'm not a robot** to continue with the donation process. For more information about reCAPTCHA, see

<https://www.google.com/recaptcha/intro/index.html>.

Note:

This development applies only to Polaris libraries using PayPal Payflow Pro. Other ecommerce vendors provide different security solutions.

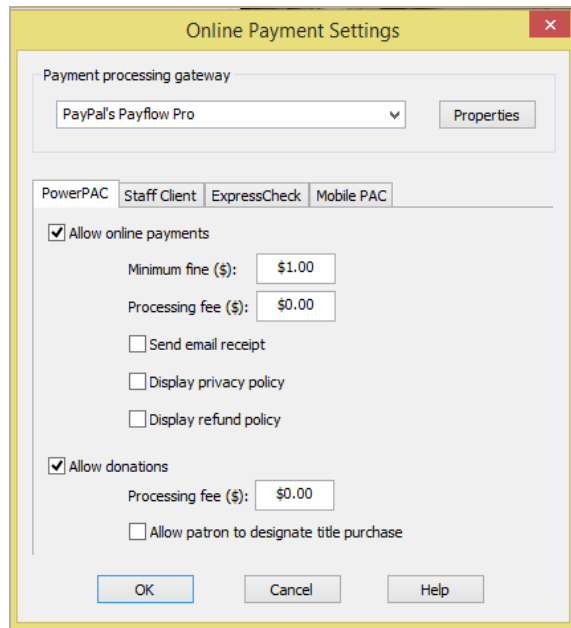
When reCAPTCHA is enabled, users cannot proceed past the first donations page in PowerPAC or Mobile PAC until they pass the reCAPTCHA test.

To implement reCAPTCHA, you will need a Google account. Using your Google account credentials, obtain your domain-specific site key and secret key from Google:

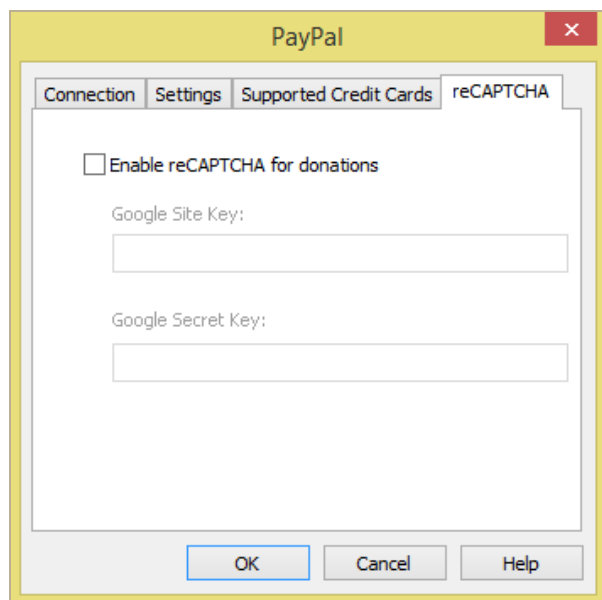
1. Go to: www.google.com/recaptcha
2. Select the **Get reCAPTCHA** button in the upper right corner.
3. Log in with your Google account email and password and follow the instructions.
4. Record your reCAPTCHA site key and secret key.

Next, set up reCAPTCHA in Polaris system administration. The reCAPTCHA settings are available at system, library, and branch levels:

1. In system administration, select **Parameters, Credit Card Payment, Online payments: Configure** for the organization. The Online Payment Settings dialog box opens.



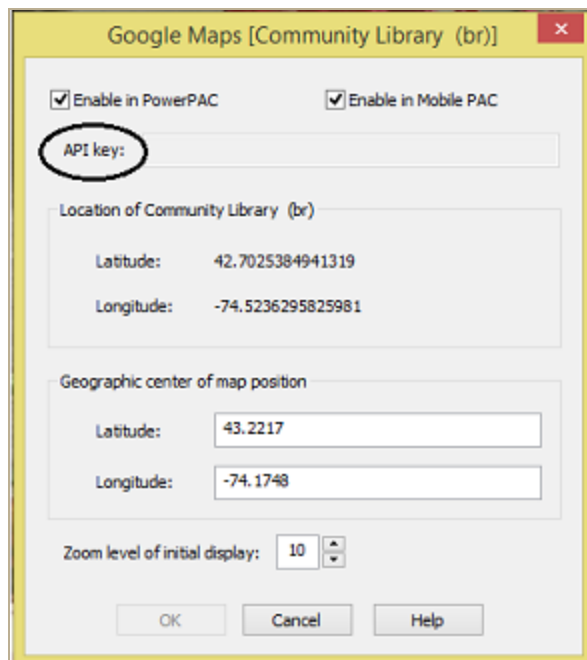
2. Select **PayPal's Payflow Pro** in the **Payment processing gateway** list.
3. Click **Properties**. The PayPal properties dialog box opens.
4. Select the new **reCAPTCHA** tab.



5. Select (check) **Enable reCAPTCHA for donations**.
6. Type your site key in the **Google site key** field.
7. Type your secret key in the **Google secret key** field.
8. Click **OK**.

Google Maps API Key

Map It is a Polaris PAC feature that uses Google Maps to provide a visual guide to the location of items linked to titles in the patron's search results list. Beginning in June 2016, Google Maps requires an API key. If you are implementing Map It for the first time, you will need to obtain your Google Maps API key and enter it in the PAC profile **Google Maps**.



The image shows a dialog box titled "Google Maps [Community Library (br)]". It contains several configuration options:

- Two checked checkboxes: "Enable in PowerPAC" and "Enable in Mobile PAC".
- A text input field labeled "API key:" which is circled in black.
- A section titled "Location of Community Library (br)" containing:
 - Latitude: 42.7025384941319
 - Longitude: -74.5236295825981
- A section titled "Geographic center of map position" containing:
 - Latitude: 43.2217
 - Longitude: -74.1748
- A "Zoom level of initial display" dropdown menu set to 10.
- Buttons for "OK", "Cancel", and "Help" at the bottom.

If you implemented Map It before June 2016, you do not need to supply the API key.

- For more information about the Map It feature in Polaris PAC, see "Map It (Google Maps) in PAC" in Polaris staff client help.
- For more information about obtaining the Google Maps API key, go to <https://developers.google.com/maps/faq#keysystem>

Responsive PowerPAC Updates

Polaris PowerPAC 5.5 was largely redesigned for responsive display on desktop computer screens, tablets, and phones. In Polaris 5.6, the following additional feature displays are now responsive to the user's device:

- Polaris Fusion resources in search results
- Patron Account - My Shopping Cart
- Community Profiles
- ContentXChange Personal Page features

Change a Purchase Order Number After Release

If you have permission to modify purchase orders, you can now change the purchase order number and/or purchase order number suffix on a released purchase order.

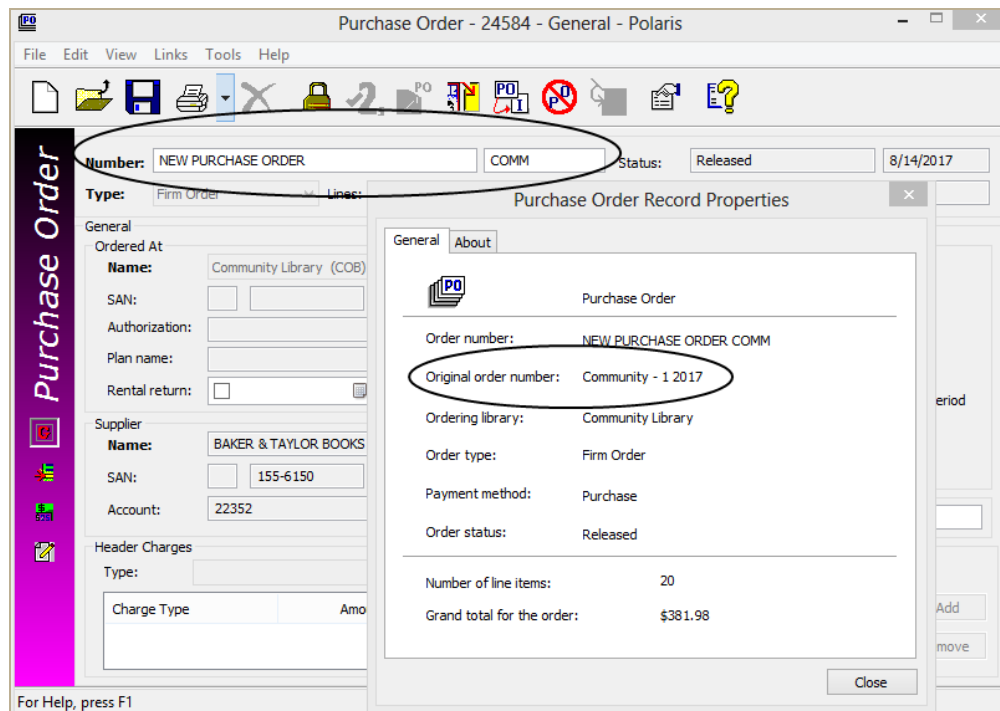
Note:

If the purchase order has a status other than Released, or if the purchase order has already been transmitted via EDI, the purchase order number and suffix cannot be modified.

To modify the purchase order number or suffix on a released purchase order:

1. Open a purchase order with a status of Released in the Purchase Order workflow.
2. Select the purchase order number or purchase order number suffix, and type a different number in the box.
3. Save the purchase order.

The purchase order is saved with the new purchase order number and/or suffix. The General tab of the Purchase Order workflow's Properties sheet displays the original purchase order number, and the About tab displays the user ID and the date/time associated with the change. This helps in tracing fund encumbrances associated with the original purchase order number.



The new purchase order number also appears on the Source and Acquisition view of the Item Record workflow for linked on-order items.

What's New in Polaris and Leap 5.6

Item Record 11391902 - Source and Acquisition - Polaris

File Edit View Links Tools Help

Barcode: Record status: Final ILL EContent Non-circulating Display in PAC

Title: Baby feelings = Los sentimientos del bebé. **Bib control number:** 1381533

Author: Parent item: Item control number: 11391902

Call number: E Price: \$5.99 Issue control no.:

Owner: Community Library (br) Shelf location: (None)

Assigned: Community Library (COB) Temporary location:

Collection: Adult Fiction (ADF) Circulation status: On-Order 8/14/2017 3:15:21 PM

Acquisition/Donor:

Purchase order: NEW PURCHASE ORDER COMM Price: \$5.99 PO release date: 8/14/2017 3:15:20 PM

Invoice: First available date:

Funding source: 2012 - Adult DVDs Fiction

Donor first name: Middle: Last name:

Donor organization:

Import

Date: Bib control number: Source:

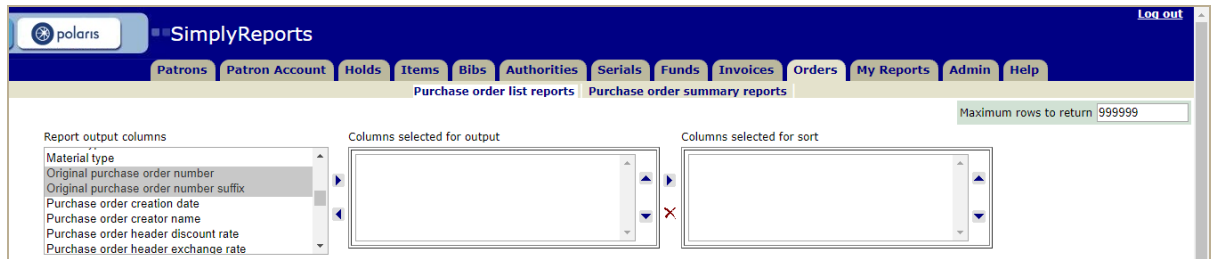
Statistics

Year-to-date circulation:	<input type="text" value="0"/>	Year-to-date in-house use:	<input type="text" value="0"/>	Inventory date:	<input type="text"/>
Previous year-to-date circulation:	<input type="text" value="0"/>	Previous year-to-date in-house use:	<input type="text" value="0"/>	Vendor account:	<input type="text"/>
Lifetime circulation:	<input type="text" value="0"/>	Lifetime in-house use:	<input type="text" value="0"/>	Resource group:	<input type="text"/>

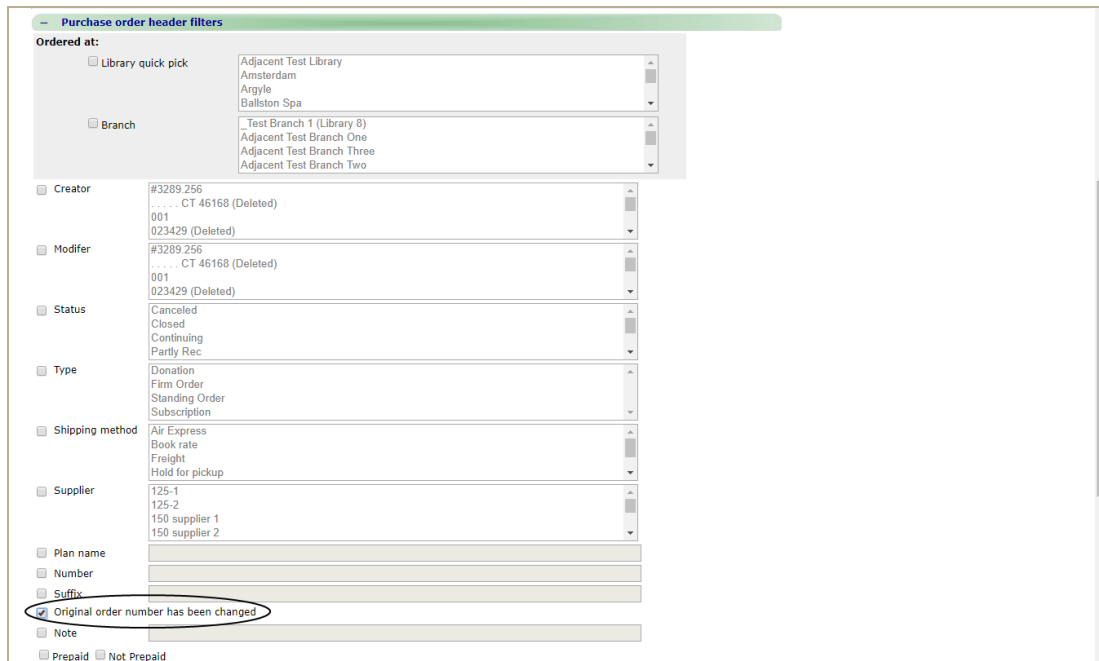
For Help, press F1 NUM

Original Purchase Order Number and Suffix in SimplyReports

The **Original purchase order number** and **Original purchase order number suffix** columns were added as report output columns for Purchase Order list and summary reports in SimplyReports.



In addition, the **Original order number has been changed** check box was added to the Purchase order Header filters. When this box is checked, the report output is limited to purchase orders where the original purchase order number and/or suffix was changed.



INN-Reach Requests: Fill Now Blocked for Items from Different Agencies

In previous versions of Polaris, when a staff member used Fill Now to substitute an item for the original item in an INN-Reach request, the action was blocked if the item was not attached to the same bibliographic record as the original item. In Polaris 5.6 staff client and Web client (Leap), the system also checks to be sure that the item belongs to the same agency as in the original request. If it does not, the action is blocked and the following message is displayed:

This item [nnnnn] is not eligible to fill this INN-Reach request because it is not located at the same INN-Reach agency as the pending item.

Note:

INN-Reach is a separately licensed feature. Contact Innovative for more information about implementing the INN-Reach integration with Polaris for your consortium.

INN-Reach Peer-to-Peer Circulation

The Polaris integration with INN-Reach, Innovative's user-initiated direct consortial borrowing system, now supports INN-Reach Peer-to-Peer circulation.

Note:

INN-Reach is a separately licensed feature. Contact Innovative for more information about implementing the INN-Reach integration with Polaris for your consortium.

INN-Reach Peer-to-Peer circulation allows patrons from Polaris local libraries to borrow materials from multiple participating INN-Reach central catalogs. Each participating INN-Reach central catalog contains only those records contributed by libraries affiliated with that specific system. However, patrons from each system can search for and request items from all participating INN-Reach peer-to-peer central catalogs.

As in previous versions of Polaris, the library, with the help of an Innovative implementation representative, completes the INN-Reach Configuration and Mapping Excel spreadsheet (see "INN-Reach Configuration and Mapping Spreadsheet" in Polaris staff client help). The spreadsheet now includes central codes and related elements for libraries that will participate in INN-Reach peer-to-peer circulation. If your library already participates in and uploads records to an INN-Reach central catalog, Innovative staff work with you to add peer-to-peer central catalogs and related information to the spreadsheet and upload it again.

INN-Reach Administration Tool Changes

The INN-Reach Administration tool provides new information for libraries participating in INN-Reach Peer-to-Peer circulation:

- **General, Configuration and Mappings view** - A new **Peer-to-Peer** column displays the Central code if more than one Central has been defined in the InnReachCentrals table. In the example below, **p2ir1** indicates the Central to which the library contributes records and circulates materials; **p2ir2** with the check mark indicates the peer-to-peer Central that can circulate materials to **p2ir1** patrons; however, the library does not contribute records to **p2ir2**

Polaris to INN-Reach
Home
Status ▾
Log Files ▾
Diagnostics ▾

Configuration and Mappings

The INN-Reach configuration data listed below is defined in this local Polaris ILS server database instance and applies to this local Polaris site.

General

INN-Reach enabled on this local Polaris server	Yes
INN-Reach Cloud Service Base URI	https://qa-api.ii.com/innreach/v1/
INN-Reach Cloud Service Authorization URI	https://qa-api.ii.com/auth/v1/oauth2/token
INN-Reach Local Server Code	ploc3
Default Agency code	plag3
Email address to send service alert messages	bryan.rubenaus@ii.com; joanne.zukowski@ii.com; marycay.phelps@ii.com; joanne.reid@ii.com; kristen.linkogan@ii.com

Central Servers

Central Server Name	Code	Discovery Layer URL	Peer-to-Peer
Emeryville Central Test	p2r1	http://qavtroentp2ir01.ii.com/search	
Evilville Peer Central Test	p2r2	http://qavtroentp2ir02.ii.com/search	✓

- **Diagnostics, API Message Diagnostics view** - A new column displays the Central code if more than one Central has been defined in the InnReachCentrals table.

Polaris to INN-Reach
Home
Status ▾
Log Files ▾
Diagnostics ▾

API Message Diagnostics

■ Success
■ Warning
■ Error
■ Not Implemented

Inbound

Outbound

Last 7 days ▾
Tracking ID 🔍

Date/Time	Direction	Central	Message Type	Tracking ID	HTTP Status
✓ 9/10/2017 4:00:05 AM	⇒ inbound	p2r2	Get Locations		200 - OK
✓ 9/10/2017 4:00:05 AM	⇒ inbound	p2r1	Get Locations		200 - OK
✓ 9/11/2017 4:00:19 AM	⇒ inbound	p2r2	Get Locations		200 - OK
✓ 9/11/2017 4:00:19 AM	⇒ inbound	p2r1	Get Locations		200 - OK
✓ 9/11/2017 10:06:23 AM	⇐ outbound	p2r1	702 - Local Check-out	4391	200 - OK
✓ 9/11/2017 10:12:30 AM	⇐ outbound	p2r1	702 - Local Check-out	4392	200 - OK
✓ 9/11/2017 10:18:37 AM	⇐ outbound	p2r1	702 - Local Check-out	4393	200 - OK
✓ 9/11/2017 10:43:19 AM	⇒ inbound	p2r1	100 - Create Item Hold	4402	200 - OK
✓ 9/11/2017 10:48:29 AM	⇐ outbound	p2r1	400 - Transfer Request	4402	200 - OK

Tracking IDs are not unique across Central servers. The same Tracking ID may appear for two different Central servers.

	Date/Time	Direction	Central	Message Type	Tracking ID	HTTP Status
✓ Details	7/31/2017 5:02:24 PM	→ inbound	p2i1	200 - Create Patron Hold	2279	200 - OK
✓ Details	7/31/2017 5:05:34 PM	← outbound	p2i1	202 - Unshipped Item Received	2279	200 - OK
✓ Details	7/31/2017 5:05:34 PM	← outbound	p2i1	203 - Item Received	2279	200 - OK
✓ Details	8/1/2017 1:25:13 PM	→ inbound	p2i2	200 - Create Patron Hold	2279	200 - OK

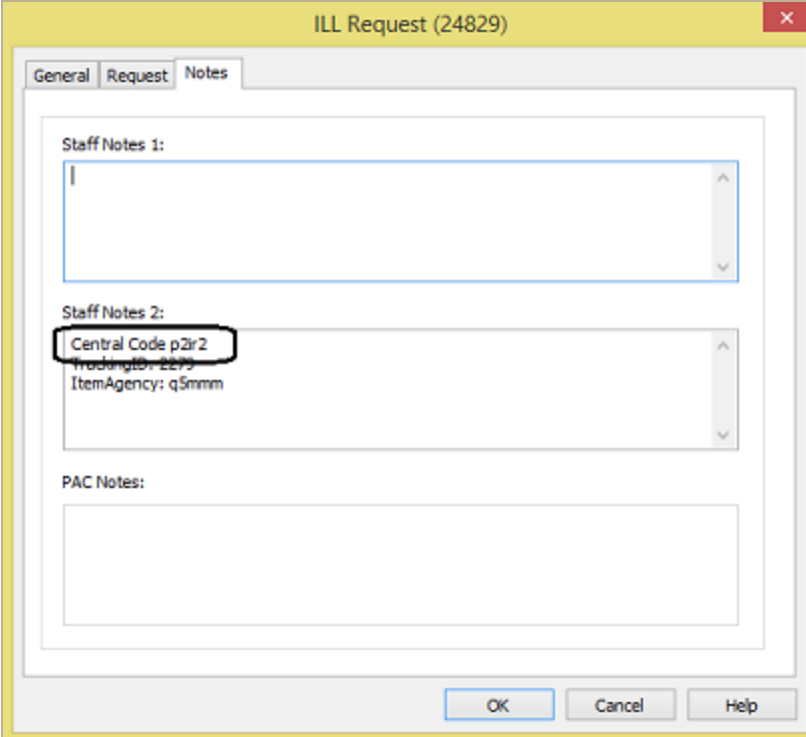
In that case, you can click a Tracking ID link to filter the list of API messages to messages from the Central associated with that hold request.

	Date/Time	Direction	Central	Message Type	Tracking ID	HTTP Status
✓ Details	7/31/2017 5:02:24 PM	→ inbound	p2i1	200 - Create Patron Hold	2279	200 - OK
✓ Details	7/31/2017 5:05:34 PM	← outbound	p2i1	202 - Unshipped Item Received	2279	200 - OK
✓ Details	7/31/2017 5:05:34 PM	← outbound	p2i1	203 - Item Received	2279	200 - OK

For more information about INN-Reach Administration tool features, see "INN-Reach Admin Tool" in Polaris staff client help.

Polaris Request Workform Changes

When the library is configured for INN-Reach Peer-to-Peer circulation, the Central code for the circulating INN-Reach catalog appears in the INN-Reach (non-local) Hold Request - Holds view, Non-public note field if the Polaris library is the lending library, and in the ILL Request, Notes tab, Staff Notes 2 field if the Polaris library is the borrowing library. The example below shows the ILL Request workform.



The screenshot shows a dialog box titled "ILL Request (24829)" with a yellow border and a red close button in the top right corner. The dialog has three tabs: "General", "Request", and "Notes", with "Notes" selected. The "Notes" tab contains three text areas:

- Staff Notes 1:** An empty text area with a vertical scrollbar on the right.
- Staff Notes 2:** A text area containing the text "Central Code p2r2", "From: p2r - 2273", and "ItemAgency: q5mmm". The text "Central Code p2r2" is circled in black.
- PAC Notes:** An empty text area with a vertical scrollbar on the right.

At the bottom of the dialog, there are three buttons: "OK", "Cancel", and "Help".

For more information about INN-Reach circulation features and workflows in Polaris, see "Implementing and Using INN-Reach Integration" in Polaris staff client help.

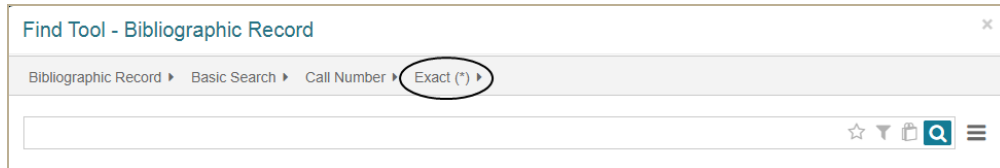
Polaris Updates for MARC Technical Notices

Polaris version 5.6 includes updates that incorporate the changes announced in the following MARC technical notices:

- [December 02, 2016](#)
- [January 13, 2017](#)
- [February 17, 2017](#)
- [February 24, 2017](#)
- [March 10, 2017](#)
- [March 24, 2017](#)
- [May 19, 2017](#)
- [June 21, 2017](#)

Leap - Find Tool Implicit Truncation

Implicit truncation was implemented in the Leap Find Tool for all appropriate search types that are based on a string. If the search type supports implicit truncation, **Exact (*)** is selected by default.



Leap - Search for Patron Record Sets

If you have the permission **Patron Record Sets: Access**, you can now search for and access patron record sets in Leap.

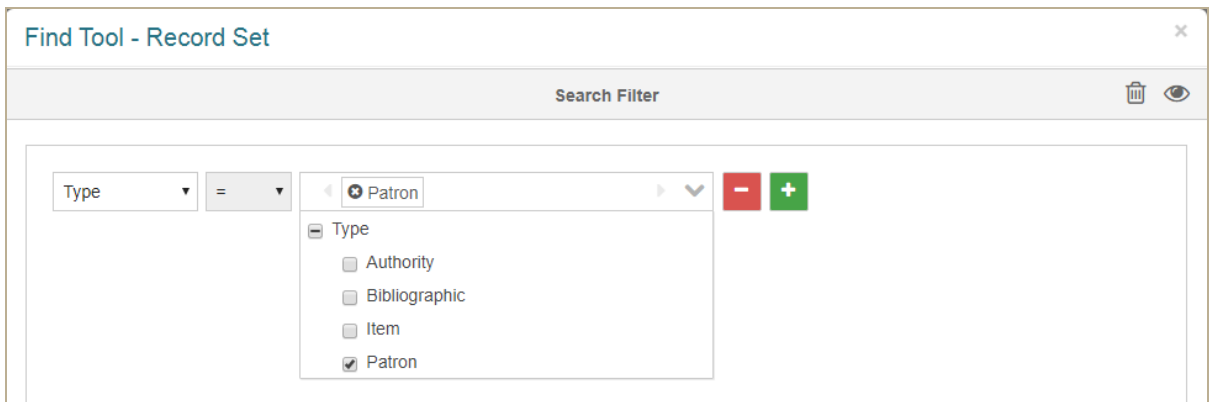
Note:

If your library has set the Staff Client profile, **Find tool: Filter search results by permission to Yes**, only the patron record sets to which you have access appear in the search results.

You can filter record set search results by **Type | Patron** on the main Find Tool page.

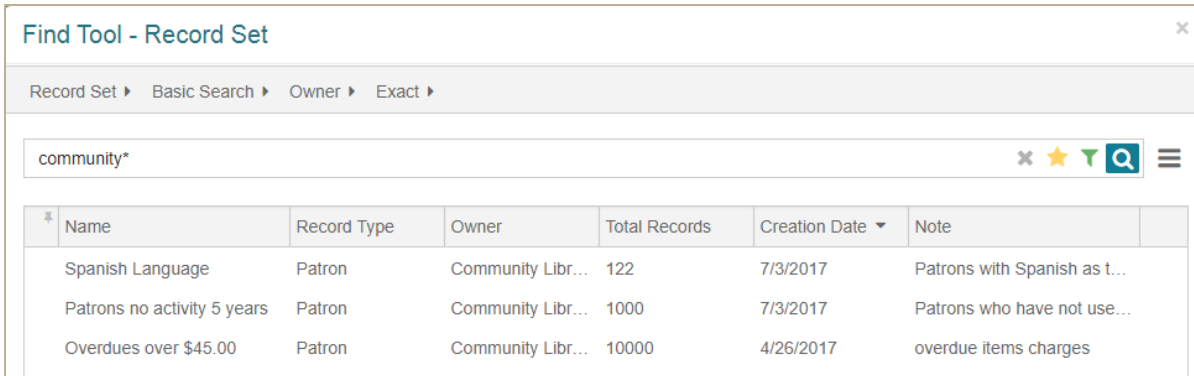


Or, you can apply an additional search filter for **Type | Patron**.



Patron record sets appear in Find Tool search results with the following columns:

- **Name**
- **Record Type**
- **Owner**
- **Total Records**
- **Creation Date**
- **Note**




#	Name	Record Type	Owner	Total Records	Creation Date	Note
	Spanish Language	Patron	Community Libr...	122	7/3/2017	Patrons with Spanish as t...
	Patrons no activity 5 years	Patron	Community Libr...	1000	7/3/2017	Patrons who have not use...
	Overdues over \$45.00	Patron	Community Libr...	10000	4/26/2017	overdue items charges

To open a patron record set, select it in the Find Tool results list, and click **Open**. See "Leap - Patron Record Set Workform" on page 27.

Leap - Patron Record Set Workform

If you have the permissions **Patron record sets: Access** and **Patron record sets: Modify**, you can now open and modify patron record sets in Leap.

 **Patron Record Set** i

SAVE
ACTIONS ▾
REFRESH
RESULTS
CLOSE

Name

Owner

Record Set ID

Note

Record Count

FIND TOOL

ACTIONS ▾

<input type="checkbox"/>	BARCODE	NAME	STREET	CITY	STATE	POSTAL CODE	LIBRARY
<input type="checkbox"/>	1000402232010	Allen, Amanda	PO Box 267	APOPKA	FL	32703-	Stillwater Public Library
<input type="checkbox"/>	1000401514731	Allen, Wilfredo	1327 Palma Avenue	APOPKA	FL	32704-	Hamilton Hill Branch - Schenectady County Public L
<input type="checkbox"/>	1000400095930	Amara, Flora	3 Hill Clyde Ac	ALTAMONTE SPRINGS	FL	32714-	Duane Branch - Schenectady County Public Library

If you have permission to access, but not modify, patron record sets, the Patron Record Set workform opens in read-only mode. The workform also opens in read-only mode when an object lock is applied because another user has the record set open in Leap or the Polaris staff client.

When you attempt to open a patron record set that another user has open, the following message appears: **The record is being modified by [username]**. The Patron Record Set workform opens in read-only mode with a locked indicator to the right of the information icon.

When the Patron Record Set is open in read-only mode because you lack the modify permission or another user has the record set open, you cannot modify the record set. However, you can still link to the patron records listed in the workform (as long as you have permission to access the records), filter the list, return to the Find Tool results list, refresh the workform, or close it.

Patron Record Set Header Elements and Features

The Patron Record Set workform has the following header elements:

- An information icon that you can click to display the record set properties: Record set ID, Name, Creator, Creation Date, Modifier, and Modification date.



The screenshot shows a modal window titled "Record Set" with an information icon. Below the title is a section labeled "RECORD SET PROPERTIES" containing the following details:

RECORD SET ID: 63467
NAME: SPANISH LANGUAGE
CREATOR: LAURA.PEER
CREATION DATE: 7/3/2017 1:47:18 PM
MODIFIER: LAURA.PEER
MODIFICATION DATE: 7/3/2017 1:52:32 PM

- **SAVE, ACTIONS, REFRESH, RESULTS,** and **CLOSE** buttons.
- Editable fields - **Name, Owner,** and **Notes**
- Display-only fields - Record Set ID and Record Count

Patron Record Set Table View

Below the workform header is a table listing the records belonging to the record set. The table view has the following elements and features:

- Check boxes to select records - Click the check box to the left of the record, or click the check box in the column header to select all records.
- **ACTIONS** menu - The **Add from File** option is available without selecting records in the list. See "Leap - Add Patron Records to a Record Set from a File" on page 55. When at least one record is selected, you can click one of the following options: **Add to New Record Set**, **Add to Existing Record Set**, or **Remove Selected Records**.
- **Filter Records** box - Start typing in the box to filter the list.
- Sortable columns - Click one of the column headers to sort the list by that column: **Barcode**, **Name**, **Street**, **City**, **State**, **Postal Code**, **Library** (branch).
- **Scan or enter patron barcode** box - Scan the barcode on the patron's library card, or type the patron's barcode and press **Enter** to add the patron to the record set.
- **FIND TOOL** button - Click the button to open the Find Tool and search for patron records to add to the record set. The Find Tool opens with **Patron** as the selected record type. When you select one or more patron records in the Find Tool results list, and click **OPEN**, the patron records are added to the record set, except for any duplicate records.
- Links to listed patron records - Click a record listed in the table to open it in the Patron Record workform. When you close the record, you are returned to the record set.

If a record set is large, the table view lists a portion of the records, and a count at the bottom of the workform indicates the number of records displayed out of the total number of records in the record set. You can click **MORE** to load more records to the table display.

Leap - Create a New Empty Patron Record Set

You can create a new empty patron record set from the **New** menu in the Leap application header.

Note:

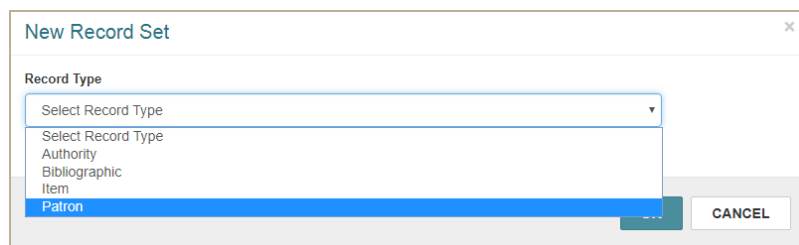
To create patron record sets, you must have the permission **Patron record sets: Create**.

To create a new empty patron record set:

1. Select **New | Record Set**.



The New Record Set dialog box appears.



2. Select **Patron** in the **Record Type** drop-down list box.
3. Click **OK**.

The New Patron Record Set workform opens.

A screenshot of a workform titled 'New Patron Record Set 1'. At the top right are buttons for 'SAVE', 'ACTIONS', 'REFRESH', and 'CLOSE'. Below the title are several input fields: 'Name' (text box), 'Owner' (dropdown menu showing 'Community Library (br)'), 'Record Set ID' (text box with '1'), 'Note' (text box), and 'Record Count' (text box with '0'). At the bottom, there is a search bar with 'Scan or enter barcode', a 'FIND TOOL' button, and a table header with columns: BARCODE, NAME, STREET, CITY, STATE, POSTAL CODE, LIBRARY. There is also a 'Filter Records' button and a status indicator '0 of 0 record(s) retrieved'.

4. Type a name in the **Name** box.
5. (Optional) To change the record set owner, select it in the **Owner** drop-down list box.

Note:

The branches in the **Owner** drop-down list box are those for which you have permission to create patron record sets.

6. (Optional) Type a note in the **Note** box.
7. Click **SAVE**.

The record set is saved.

Language String Added for Creating a New Patron Record Set

Language String	Default
SW_CI_RECSET_NEW_CREATE_OBJECTTYPE_OPTION4	Patron



Leap - Create a Patron Record Set from All Find Tool Results

You can now export all patron record search results from the Find Tool to create a new patron record set.

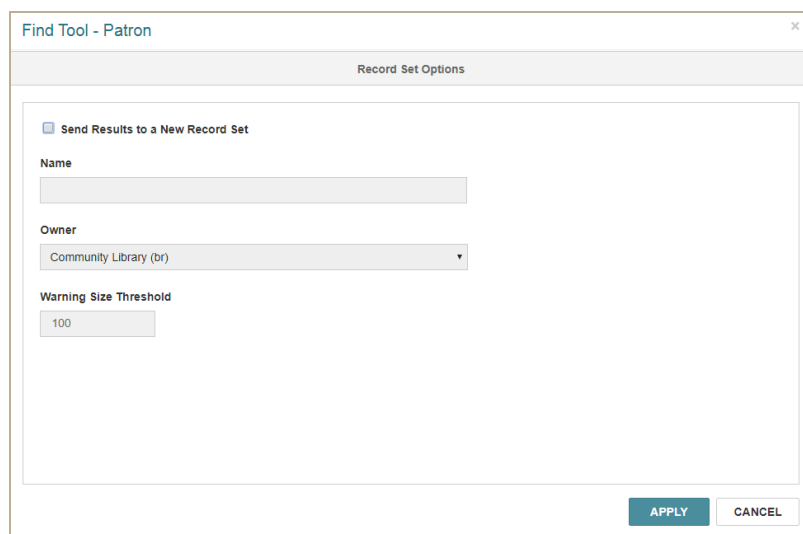
Note:

To create record sets, you must have the permission **Patron record sets: Create**.

To create a patron record set from the Find Tool:

1. Click **FIND**.
2. Click , or click  to open the **Options** menu and select **Record Set Options**.

The Record Set Options dialog box appears.



3. Select the **Send Results to a New Record Set** check box.
4. Type a name for the record set in the **Name** box.
5. (Optional) To change the record set owner, select it from the **Owner** drop-down list box.

Note:

The branches in the **Owner** drop-down list box are those for which you have permission to create patron record sets.

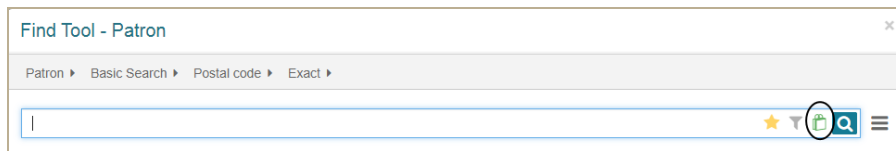
- To change the default setting for the number of records that cause the large record set warning message to appear, type a different number in the **Warning Size Threshold** box.

Note:

The default threshold is set in the Polaris Administration Staff Client profile, **Find Tool/record-set-to-record-set creation: Record set size warning threshold**. If the **Warning Size Threshold** is set to 10001 or above, the warning message does not appear because only 10000 records are returned in the results.

- Click **APPLY**.


The Record Set Options dialog box closes, and the Find Tool appears with the record set icon outlined in green, indicating the search results will be sent to the record set.



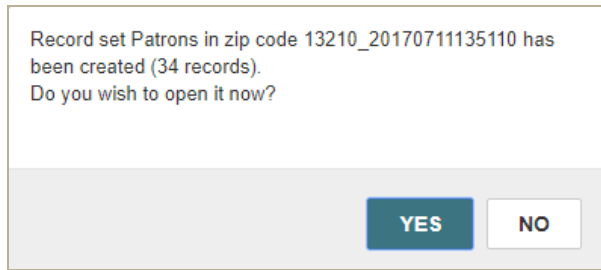
- Enter the search criteria for the patron records you want to add to the record set.

Note:

To send the records to the record set without displaying them in the Find Tool results list, select the **Count Only** check box.

- Click .
- If the Large Record Set dialog box appears, click **CREATE** to continue creating the record set.

The message **Record set created successfully** appears, and a dialog box displays the name of the new record set and the number of records in it.



11. Click **YES** to open the record set.

The record set is created and opens in the appropriate workflow. The record set name you entered is appended with the date and time in the following format: **Name_20170711135110**

Patron Record Set i

SAVE
ACTIONS ▾
REFRESH
CLOSE

Name <input type="text" value="Patrons in zip code 13210_20170711135110"/>	Owner <input type="text" value="Community Library (br)"/>	Record Set ID <input type="text" value="63584"/>
Note <input type="text"/>	Record Count <input type="text" value="34"/>	

←
FIND TOOL
ACTIONS ▾

<input type="checkbox"/>	BARCODE	NAME	STREET	CITY	STATE	POSTAL CODE	LIBRARY
<input type="checkbox"/>	1001900144202	Acosta, Sarah R	86 Sweet Road	SYRACUSE	NY	13210	Community Library
<input type="checkbox"/>	1000600712177	Anderson, George P	82 Spring St	SYRACUSE	NY	13210	Community Library
<input type="checkbox"/>	12291954667	Andrews, Eric	123 Main Street	SYRACUSE	NY	13210	Community Library
<input type="checkbox"/>	1229195478	Andrews, Monica Feliz	986 Onondaga Blvd.	SYRACUSE	NY	13210-1234	Community Library

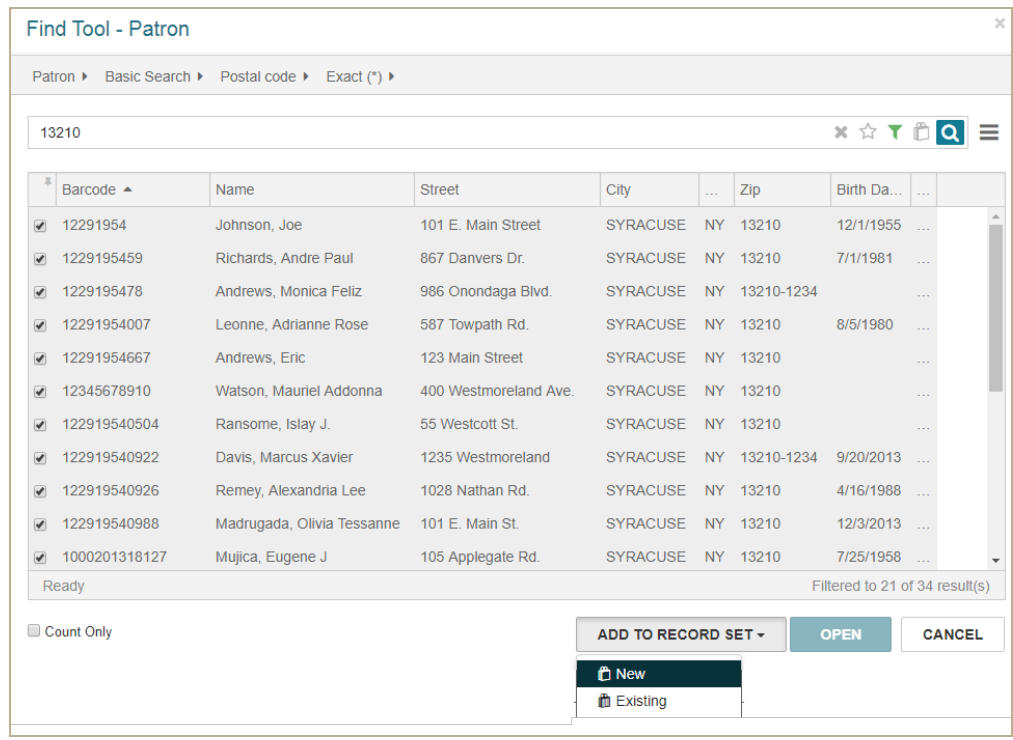
Leap - Create a Patron Record Set from Selected Find Tool Results

You can create a new patron record set by selecting patron records in the Find Tool results list and then adding them to the new record set.

Note:
To create record sets, you must have the permission **Patron record sets: Create**.

To create a new patron record set from selected Find Tool results:

1. Click **FIND** to open the Find Tool.
2. Search for patron records.
3. In the Find Tool results list, select the check boxes next to the records you want to add to a record set.
4. Select **ADD TO RECORD SET | New**.



A New Patron Record Set workform opens containing the records you selected in the Find Tool results list.

New Patron Record Set 1 i

SAVE
ACTIONS ▾
REFRESH
CLOSE

Name

Owner

Record Set ID

Note

Record Count

↵

FIND TOOL

ACTIONS ▾

	BARCODE	NAME	STREET	CITY	STATE	POSTAL CODE	LIBRARY
<input type="checkbox"/>	12291954	Johnson, Joe	101 E. Main Street	SYRACUSE	NY	13210	Community Library
<input type="checkbox"/>	1229195459	Richards, Andre Paul	867 Danvers Dr.	SYRACUSE	NY	13210	Community Library
<input type="checkbox"/>	1229195478	Andrews, Monica Feliz	986 Onondaga Blvd.	SYRACUSE	NY	13210-1234	Community Library
<input type="checkbox"/>	12291954007	Leonne, Adrienne Rose	587 Towpath Rd.	SYRACUSE	NY	13210	Community Library
<input type="checkbox"/>	12291954667	Andrews, Eric	123 Main Street	SYRACUSE	NY	13210	Community Library
<input type="checkbox"/>	12345678910	Watson, Mauriel Addonna	400 Westmoreland Ave.	SYRACUSE	NY	13210	Community Library

5. Type a name for the record set in the **Name** box.
6. (Optional) To change the record set owner, select it in the **Owner** drop-down list.

Note:

The branches in the **Owner** drop-down list box are those for which you have permission to create patron record sets.

7. (Optional) Type a note in the **Note** box.
8. Click **SAVE**.

The patron record set is saved.

Leap - Create a Record Set from the Patron Record Workform

You can add a patron record to a newly created patron record set from the Patron Record workform.

To add a patron record to a new record set from the Patron Record workform:

Note:

To create record sets, you must have the permission **Patron record sets: Create**.

1. Search for and open the patron record.
The Patron Record workform appears.
2. Select **ACTIONS | Add to New Record Set**.

MR. EUGENE J MUJICA ⓘ
 1000201318127
 COMMUNITY LIBRARY BLOCKS NOTES

REGISTRATION ACTIONS ▾ ↻ CLOSE

Add to New Record Set
 Add to Existing Record Set

Check Out (0)
 Out (9) / Overdue (9)
 Account (\$0.00)
 Claims (0) / Lost (0)
 Holds (1) / Held (0)
 More ▾

Scan or enter item barcode
 ↵
 Find Tool
 Auto-RFID
 Reset Due Date
 Special Loan

<input type="checkbox"/>	BARCODE	CALL NUMBER	TITLE	DUE DATE	ACTION	SHELF LOCATION	ASSIGNED BRANCH	MATERIAL TYPE
--------------------------	---------	-------------	-------	----------	--------	----------------	-----------------	---------------

The New Patron Record Set workform opens. The new record set contains the record you added.

New Patron Record Set 2 ⓘ SAVE ACTIONS ▾ ↻ REFRESH CLOSE

Name:
 Owner: Community Library (br) ▾ Record Set ID: 2
 Note: Record Count: 1

Scan or enter barcode
 ↵
 FIND TOOL
 ACTIONS ▾
 Filter Records

<input type="checkbox"/>	BARCODE	NAME	STREET	CITY	STATE	POSTAL CODE	LIBRARY
<input type="checkbox"/>	1000201318127	Mujica, Eugene J		SYRACUSE	NY	13210	Community Library

3. Type a name for the record set in the **Name** box.
4. (Optional) To change the record set owner, select it in the **Owner** drop-down list.

Note:

The branches in the **Owner** drop-down list box are those for which you have permission to create patron record sets.

5. (Optional) Type a note in the **Note** box.
6. Click **SAVE**.

Leap - Create a Record Set of Linked Item Records from a Patron Record Set

From a patron record set, you can now automatically create a record set containing the items linked to the patron records.

To create a record set of linked item records from a patron record set:

Note:

To create item record sets, you must have the permission **Cataloging record sets: Create**.

1. Open the Patron Record Set workflow.
2. Select **ACTIONS** in the workflow header.
3. Select **Create Item Record Set**.

The screenshot shows the 'Patron Record Set' workflow interface. At the top, there are buttons for 'SAVE', 'ACTIONS', 'REFRESH', 'RESULTS', and 'CLOSE'. The 'ACTIONS' dropdown menu is open, showing two options: 'Create Item Record Set' (highlighted with a red circle) and 'Delete Record Set'. Below the buttons, there are input fields for 'Name' (with a placeholder '13210 zip code'), 'Note', 'Owner' (with a dropdown menu), 'Record Set ID' (with a value of '62171'), and 'Record Count' (with a value of '33'). At the bottom, there is a table with columns: BARCODE, NAME, STREET, CITY, STATE, POSTAL CODE, and LIBRARY. The table contains four rows of data.

BARCODE	NAME	STREET	CITY	STATE	POSTAL CODE	LIBRARY
1001900144202	Acosta, Sarah R	86 Sweet Road	SYRACUSE	NY	13210	Community Library
1000600712177	Anderson, George P	82 Spring St	SYRACUSE	NY	13210	Community Library
12291954667	Andrews, Eric	123 Main Street	SYRACUSE	NY	13210	Community Library
1229195478	Andrews, Monica Feliz	986 Onondaga Blvd.	SYRACUSE	NY	13210-1234	Community Library

The Item Record Set Setup dialog box opens.

4. Type a name for the record set.
5. (Optional) To change the owner, select an entry from the **Owner** drop-down list box.

Note:

The branches that appear in the **Owner** list are those for which you have the permission **Item record sets: Create**.


6. (Optional) To limit the items added to the record set by circulation status, select the **Circ status** filter check boxes. Only linked items with the selected status or statuses will be added to the record set.
7. (Optional) To limit the items added to the record set by the patron code of the linked patron record, select the code or codes in the **Patron code** filter. Only items linked to patron records with a selected status are added.
8. (Optional) To include deleted item records, check the **Include items with a record status of 'deleted'** check box.
9. Click **CREATE**.

If the number of records exceeds the threshold set in Polaris Administration, the Large Record Set dialog box appears.

10. If the Large Record Set message appears, and you want to continue, click **CREATE**.

The **Record set created successfully** message appears, and the Item Record Set workflow opens. The date and time the record set was created is appended to the record set name, for example: **20170505153919**. The **Note** field indicates the record set from which the record set of linked records was created.

What's New in Polaris and Leap 5.6


Item Record Set i

SAVE
ACTIONS ▾
REFRESH
CLOSE

Name

Owner

Community Library (br) ▾

Record Set ID

63993

Note

Record Count

293

↵

FIND TOOL

Auto-RFID

ACTIONS ▾

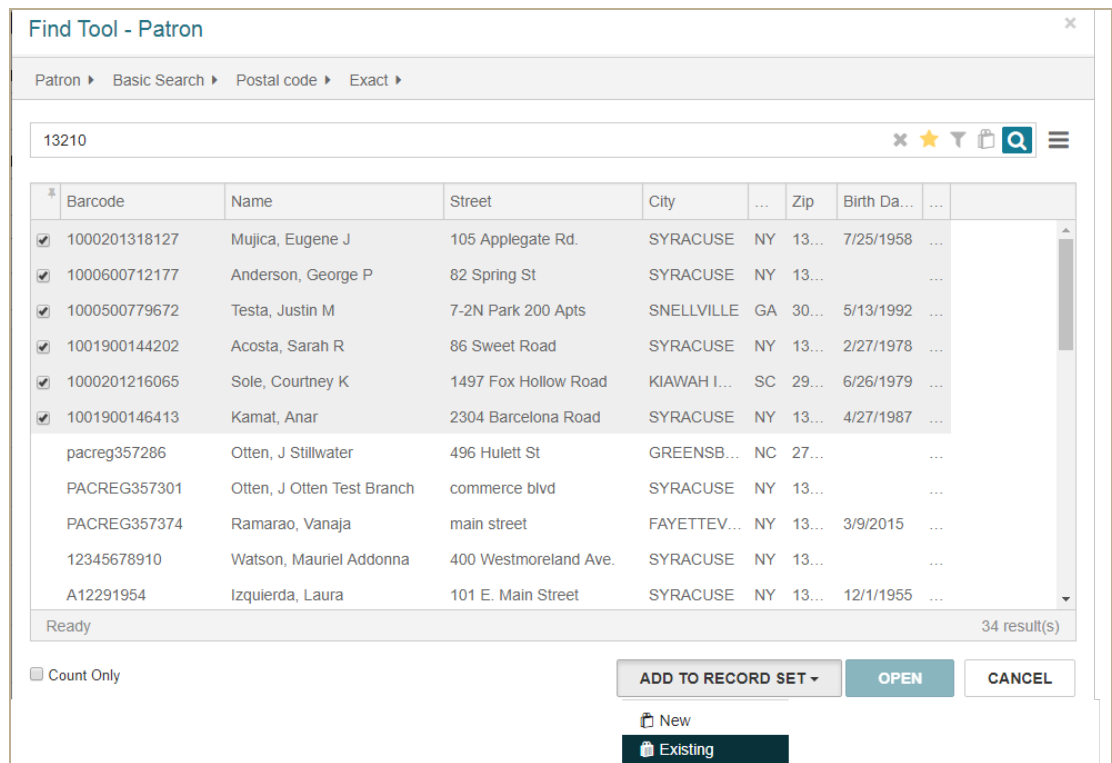
<input type="checkbox"/>	TITLE	ASSIGNED BRANCH	COLLECTION	MATERIAL TYPE	SHELF LOCATION	CALL NO.	VOL.	STATUS	BARCODE	LAST ACTIVITY DATE ▲	RECORD STATUS	CONTROL NUMBER
<input type="checkbox"/>	Cruzando el rio [compact audio disc]	Test Branch 25 (Library 8)	Adult Nonfiction (ANF)	Book				Out	BulkCreate004070282	7/24/2017	Final	4070282
<input type="checkbox"/>	What is a dinosaur?	Hudson Falls Free Library	Children's Easy Readers (JE)	Book		JP 567.91 Arv		Out	0003700410974	7/24/2017	Final	1949985
<input type="checkbox"/>	The cat in the hat	Community Library	Children's Easy Readers (JE)	Book		JE Fict Seu		Out	0001900184977	7/24/2017	Final	1635906
<input type="checkbox"/>	The making of Henry VIII.	Link Downtown Branch	Adult Nonfiction (ANF)	Book		942.05 b		Out	0000800278178	6/29/2017	Final	1329385

Leap - Add Patron Records from Find Tool Results to an Existing Record Set

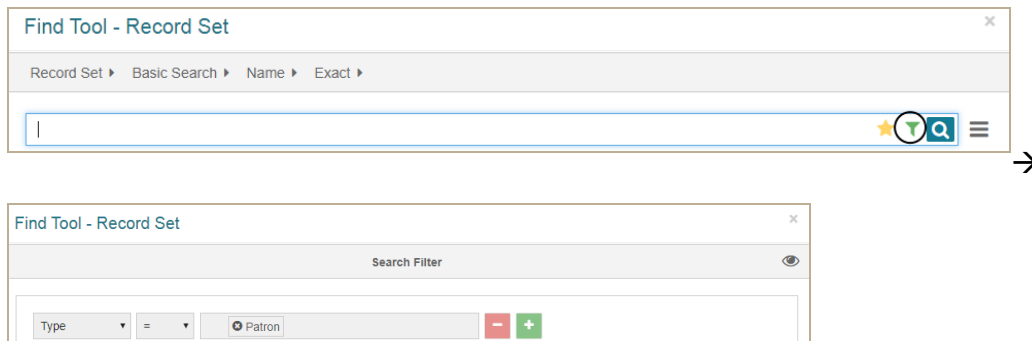
You can select patron records in the Find Tool results list and add them to an existing patron record set.

To add patron records from the Find Tool results to an existing patron record set:

1. Click **FIND** to open the Find Tool.
2. Search for patron records.
The search results are listed.
3. Select the patron records you want to add to an existing patron record set.
4. Select **ADD TO RECORD SET | Existing**.



The Find Tool opens with Record Set selected and a filter applied so that only patron record sets are found.



5. Search for the patron record set.

The record sets matching the search criteria are listed in the Find Tool results.

6. Select the record set.

The Patron Record Set workform opens with the new records added to it.

Note:

If any of the selected records already belong to the existing record set, a message indicates the number of records that were not added to the record set because they were duplicates.

7. Click **SAVE**.

Leap - Copy Patron Records from One Record Set to Another

You can copy patron records from one record set to another existing patron record set.

To copy records from one patron record set to another existing patron record set:

1. Open the record set in the Patron Record Set workform.
2. Click the check boxes next to the records you want to copy.
3. Select **ACTIONS | Add to Existing Record Set**.

The screenshot shows the 'Patron Record Set' workform. At the top, there are buttons for 'SAVE', 'ACTIONS', 'REFRESH', and 'CLOSE'. Below these are fields for 'Name' (Spanish Language), 'Owner' (Community Library (br)), 'Record Set ID' (63467), 'Note' (Patrons with Spanish as their primary language), and 'Record Count' (122). A 'FIND TOOL' is visible above a table of records. The table has columns for 'BARCODE', 'NAME', 'STREET', 'CITY', and 'BRANCH'. An 'ACTIONS' dropdown menu is open over the table, showing options: 'Add to New Record Set', 'Add to Existing Record Set', and 'Remove Selected Records'. The 'Add to Existing Record Set' option is highlighted.

BARCODE	NAME	STREET	CITY	BRANCH
1004300052868	Acosta, Elena C	2840 Caroline Avenue	FORT MYERS	Amsterdam Free Library
1000401482327	Galchin, Alba E	1 Brookwood Dr	DOBBS FERRY	Schenectady Branch - Central
1000402265580	List, Veronica	10 Huntwood Dr	DELAND	Schenectady Branch - Central
1000402244775	Chase, Selma R S	102 Ruggles Rd	DEBARY	Schenectady Branch - Central

The Find Tool opens with Record Set selected and a filter automatically applied so that only patron record sets are found.

The screenshot shows the 'Find Tool - Record Set' search interface. It has a search bar with a magnifying glass icon and a 'Filter' icon. The search filter is set to 'Record Set' and the search criteria is 'Basic Search > Name > Exact'. An arrow points from this screenshot to the next one.

The screenshot shows the 'Find Tool - Record Set' search interface with a search filter applied. The filter is set to 'Patron'. There are minus and plus buttons next to the filter name.

4. Search for the existing record set.
5. Select the record set in the Find Tool results list, and click **OPEN**.

The record set containing the copied records opens in the Patron Record Set workflow.

Note:

If the existing record set already contains any of the copied records, they are not added.

6. Click **SAVE** to save the record set with the added records.

Leap - Copy Records from a Patron Record Set to a New Record Set

You can copy records from a patron record set to new patron record set. The records remain in the record set from which they were copied, and they appear in the new record set.

To copy records from a patron record set to a new patron record set:

1. Open the Patron Record Set workflow.
2. Click the check box next to the records you want to copy.
3. Select **ACTIONS | Add to New Record Set** above the list view.

The screenshot shows the 'Patron Record Set' workflow interface. At the top, there are buttons for 'SAVE', 'ACTIONS', 'REFRESH', and 'CLOSE'. Below these are input fields for 'Name' (Spanish Language), 'Owner' (Community Library (br)), 'Record Set ID' (63467), and 'Note' (Patrons with Spanish as their primary language). Below the form is a search bar with 'Scan or enter item barcode' and a 'FIND TOOL' button. A table of records is displayed with columns for BARCODE, NAME, STREET, CITY, and LIBRARY. An 'ACTIONS' dropdown menu is open over the table, showing options: 'Add to New Record Set', 'Add to Existing Record Set', and 'Remove Selected Records'. The first three records in the table are checked.

	BARCODE	NAME	STREET	CITY	LIBRARY
<input checked="" type="checkbox"/>	1004300052868	Acosta, Elena C	2840 Caroline Avenue	FORT MYERS	Amsterdam Free Library
<input checked="" type="checkbox"/>	1000401482327	Galchin, Alba E	1 Brookwood Dr	DOBBS FERRY	Schenectady Branch - Central
<input checked="" type="checkbox"/>	1000402265580	List, Veronica	10 Huntwood Dr	DELAND	Schenectady Branch - Central

The New Patron Record Set workflow opens with the copied records listed.

New Patron Record Set 1 i

SAVE
ACTIONS ▾
REFRESH
CLOSE

Name

Owner

Community Library (br)
▾

Record Set ID

1

Note

Record Count

3

Scan or enter item barcode ↵

FIND TOOL

ACTIONS ▾

Filter Records

<input type="checkbox"/>	BARCODE	NAME	STREET	CITY	STATE	POSTAL CODE	LIBRARY
<input type="checkbox"/>	1004300052068	Acosta, Elena C	2840 Caroline Avenue	FORT MYERS	FL	33905-	Amsterdam Free Library
<input type="checkbox"/>	1000401482327	Galchin, Alba E	1 Brookwood Dr	DOBBS FERRY	NY	10522-	Schenectady Branch - Central
<input type="checkbox"/>	1000402265580	List, Veronica	10 Huntwood Dr	DELAND	FL	32724-	Schenectady Branch - Central

3 of 3 record(s) retrieved

4. Type a name for the new record set in the **Name** box.
5. (Optional) To change the record set owner, select it in the **Owner** box.

Note:

The branches in the **Owner** drop-down list box are those for which you have permission to create patron record sets.

6. (Optional) Type a note in the **Note** box.
7. Click **SAVE**.

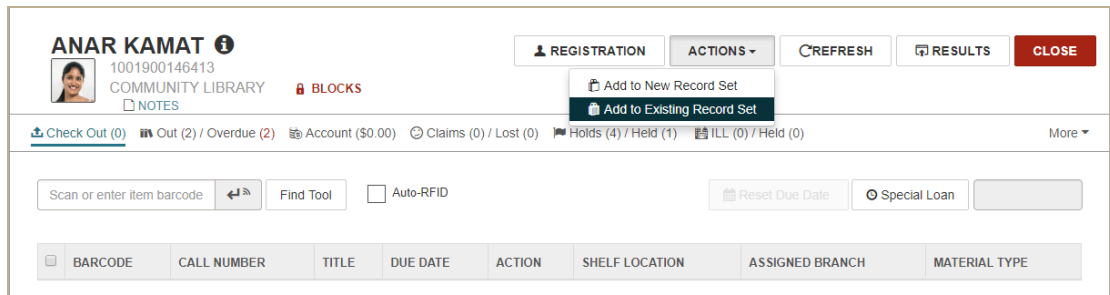
A message confirms that the record set was created successfully.

Leap - Add a Patron Record to an Existing Record Set from the Patron Record Workform

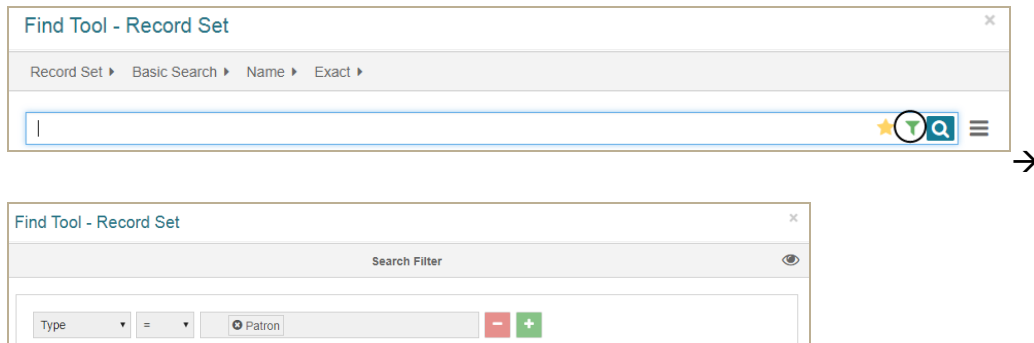
You can now add a patron record to an existing patron record set from the Patron Record workform.

To add a patron record to an existing record set:

1. Open the Patron Record workform.
2. Select **ACTIONS | Add to Existing Record Set**.



The Find Tool opens with Record Set selected and a filter applied so that only patron record sets are found.



3. Search for and select the record set to which you want to add the record.
4. Click **OPEN**.

Note:

If the record set already contains the record, a message appears, and the record is not added to the record set.

The record set opens in the Patron Record Set workform. The record you selected is added to the record set, and it appears at the top of the list.

What's New in Polaris and Leap 5.6

Patron Record Set ⓘ

SAVE **ACTIONS ▾** **REFRESH** **CLOSE**

Name **Owner** **Record Set ID**

Note **Record Count**

ACTIONS ▾

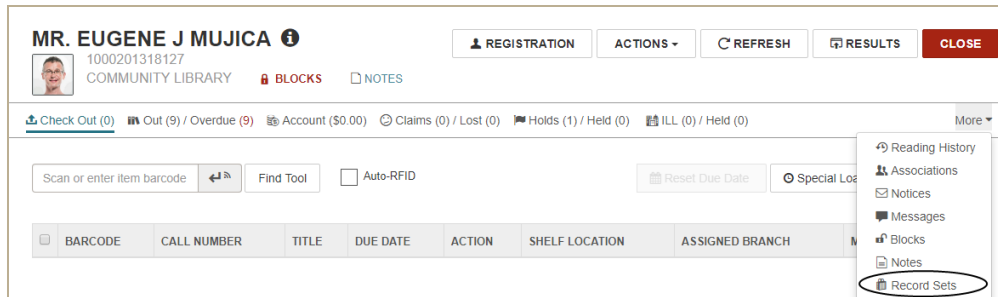
<input type="checkbox"/>	BARCODE	NAME	STREET	CITY	STATE	POSTAL CODE	LIBRARY
<input type="checkbox"/>	1001900146413	Kamat, Anar	2304 Barcelona Road	SYRACUSE	NY	13210	Community Library
<input type="checkbox"/>	1000201254512	Adams, Ernest E, Jr	PRM Claims	KIAWAH ISLAND	SC	29455	Saratoga Springs Public Library
<input type="checkbox"/>	1000200290798	Adams, Faye E	Palmateer Constance	KIAWAH ISLAND	SC	29455	Stillwater Public Library

Leap - Record Set View of Patron Record Workform

The Patron Record workform includes a new Record Set view where you can view or open the record sets to which the patron record belongs. You can use the filter to filter the list of record sets.

To see the record sets that a patron record belongs to:

1. Open the Patron Record workform
2. Select **More | Record Sets**



The Record Sets view appears with a list of all the record sets to which the patron record belongs. The record sets are listed in the following columns: **NAME, OWNER, TOTAL RECORDS, CREATION DATE, NOTE.**



Note:

You can type in the **Filter record sets** box to filter the list of record sets.

3. To open a patron record set listed in this view, click a row.

The Patron Record Set workform opens for the selected record set.

Language String for Filter Record Sets

Language String	Default
SW_CI_PTIND_RECORDSETS	Filter record sets

Leap - Modify a Patron Record Set

If you have the required permissions, you can modify an existing patron record set by adding or removing records on the Patron Record Set workform. As records are added or removed, the **Record Count** field is updated. You can also modify the **Name**, **Owner**, and **Notes** fields in the record set workform header.

Add Patron Records to a Record Set

To add records to a patron record set:

1. Search for and open the patron record set you want to modify.

The Patron Record Set workform appears.


<input type="checkbox"/>	BARCODE	NAME	STREET	CITY	STATE	POSTAL CODE	LIBRARY
<input type="checkbox"/>	1000402232010	Allen, Amanda	PO Box 267	APOPKA	FL	32703-	Stillwater Public Library
<input type="checkbox"/>	1000401514731	Allen, Wilfredo	1327 Palma Avenue	APOPKA	FL	32704-	Hamilton Hill Branch - Schenectady County Public L
<input type="checkbox"/>	1000400095930	Amara, Flora	3 Hill Clyde Ac	ALTAMONTE SPRINGS	FL	32714-	Duane Branch - Schenectady County Public Library

2. Click **FIND TOOL**.

Note:

You can also scan or enter the patron's barcode to add the record to the record set.

The Find Tool opens with Patron selected as the record type.

3. Enter the search criteria and click .
4. In the Find Tool results list, select one or more records to add to the record set by clicking on the check boxes in the left column.

Find Tool - Patron
✕

Patron ▶ Basic Search ▶ Language ▶ Exact ▶

▶ ▼ ☆ 🔍 ☰

#	Barcode	Name	Street	City	...	Zip	Birth Da...	Library
	1000200951555	Metcalfe, BarbaraAnn	Corinth Elem	KIAWAH I...	SC	29...	12/8/1950	Digital Br...
	1000201188256	Lucas, Andrea L	Ingraham Lesley	SEABROOK	SC	29...	3/29/1973	Saratoga...
	1000200049335	Morrissey, Aldo C	12 Pinecrest Drive	KIAWAH I...	SC	29...		Stillwater...
<input checked="" type="checkbox"/>	1000201048914	Ozzi, David L	155 B Jerry St	KIAWAH I...	SC	29...	12/28/1...	Schenec...
	1000400061619	Brundage, Barbara K	222 Vanburen Ave	MC INTOSH	FL	32...	3/23/2001	Schenec...
	1000402230089	Seeman, Jason M	Liebers Sylvia 6-46	MC INTOSH	FL	32...		Schenec...
	1000400089354	Werner, Roberto J	4 Midnight Dr	DELAND	FL	32...		Schenec...
	1000401740880	Wielt, PATRICIA	14 Pinewood Drive	MC INTOSH	FL	32...		Schenec...
	1000400095930	Amara, Flora	3 Hill Clyde Ac	ALTAMON...	FL	32...		Duane B...
	1000401390678	Marchese, Elena H	17 Tiffany Pl	DEBARY	FL	32...		Schenec...
	1000400093489	Morgan, Joan C	42 Friar Tuck Way	APOPKA	FL	32...		Schenec...

Ready
154 result(s)

Count Only

5. Click **OPEN**.

The selected records are added to the record set. If any of the records being added already belong to the record set, a message informs you that duplicates were found and displays the number of records that were actually added.

Remove Records from a Patron Record Set

To remove patron records from a record set:

1. Search for and open the patron record set you want to modify.

The Patron Record Set workform appears.

Patron Record Set i

SAVE
ACTIONS ▾
REFRESH
CLOSE

Name

Owner

Record Set ID

Note

Record Count

FIND TOOL

ACTIONS ▾

	BARCODE	NAME	STREET	CITY	STATE	POSTAL CODE	LIBRARY
<input type="checkbox"/>	1000402232010	Allen, Amanda	PO Box 267	APOPKA	FL	32703-	Stillwater Public Library
<input type="checkbox"/>	1000401514731	Allen, Wilfredo	1327 Palma Avenue	APOPKA	FL	32704-	Hamilton Hill Branch - Schenectady County Public L
<input type="checkbox"/>	1000400095930	Amara, Flora	3 Hill Clyde Ac	ALTAMONTE SPRINGS	FL	32714-	Duane Branch - Schenectady County Public Library

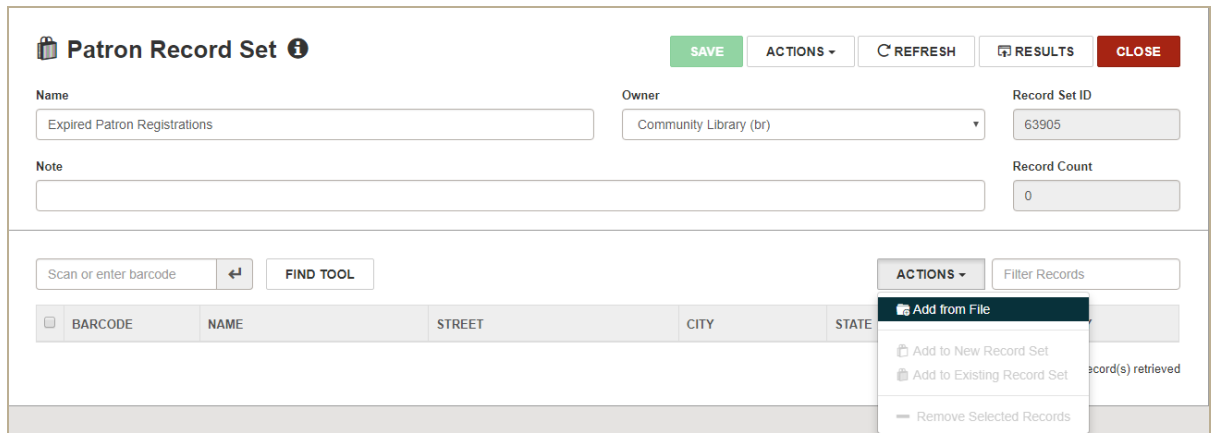
2. Check the box in the column to the left of the barcode for each record you want to remove from the record set.
3. Click **ACTIONS** above the table, and select **Remove Selected Records**.
The records are removed from the record set, but they remain in the Polaris database.
4. Click **SAVE** to save the record set.

Leap - Add Patron Records to a Record Set from a File

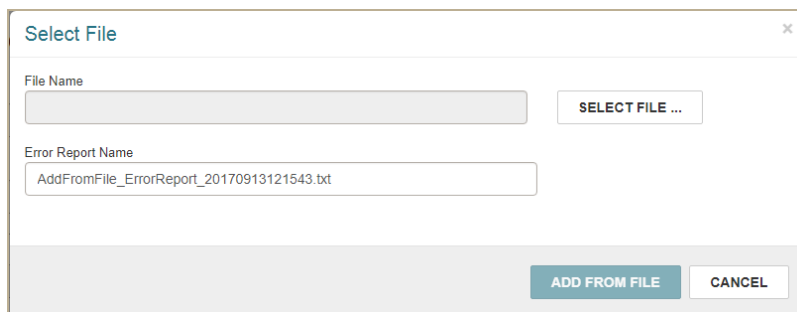
You can now add patron records to a record set from a file containing patron IDs that match to patron records already in the Polaris database. The file must be in one of the following formats: .txt, .csv, or .xls/.xlsx, and the patron IDs must be in the file. If it is an Excel file, you can specify which column contains the patron ID.

To add patron records from a file containing patron IDs:

1. Open the Patron Record Set workflow.
2. Click **ACTIONS** above the table list, and select **Add from File**.

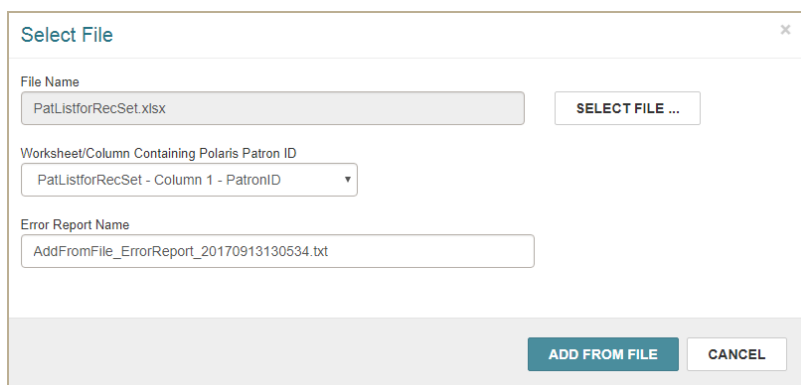


The Select File dialog box opens. The name of the error report appears in the Error Report Name box.



3. Click **SELECT FILE...** to browse to the file.
4. Select the file, and click **Open**.

The name of the file appears in the **File Name** box. If it is an Excel file, the **Worksheet/Column Containing PolarisID** drop-down list displays the columns in the Excel file. This list box does not appear for other file formats because the patron ID column is the only column in the file.



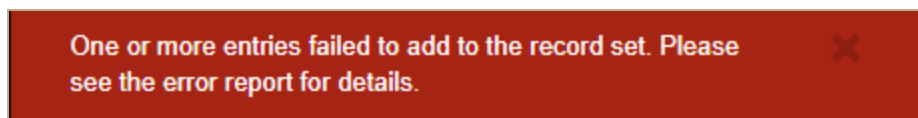
5. If the file is in Excel format, select the column that contains the patronID from the **Worksheet/Column containing PolarisID** drop-down list.
6. Click **ADD FROM FILE**.

The dialog box closes and the Patron Record Set workform reappears.

While the records are being added, the **Loading...** message appears.

When the records are added to the record set, the **Record Count** box displays the updated record count.

If any records are already in the record set, a message box appears.



One or more entries failed to add to the record set. Please see the error report for details.

Note:

The error report is saved in the following file:

C:\ProgramData\Polaris[version]\AddFromFile_ErrorReportYYYYMMDDHHMMSS.txt.

You can open the report to see details about the failed entries.

7. Click **SAVE**.

The record set is saved.

Language Strings Added to WebAdmin for Add from File

Language String	Default
SW_CI_RECSET_ADD_FROM_FILE	Add from File
SW_CI_SELECT_FILE_DLG_HEADER	Select File
SW_CI_SELECT_FILE_DLG_LBL_FILE_NAME	File Name
SW_CI_SELECT_FILE_DLG_BROWSE_BTN	Select File ...
SW_CI_SELECT_FILE_DLG_LBL_WRKSHT_COLUMN_PATRONID	Worksheet/Column containing Polaris Patron ID
SW_CI_SELECT_FILE_DLG_LBL_REPORT_FILE_NAME	Error Report Name
SW_CI_SELECT_FILE_DLG_REPORT_FILE_NAME	AddFromFile_ErrorReport
SW_CI_SELECT_FILE_DLG_REPORT_FILE_NAME_MISSING	Please provide a name for the error report.
SW_CI_SELECT_FILE_DLG_ADD_BTN	Add from File
SW_CI_SELECT_FILE_DLG_CANCEL_BTN	Cancel

Leap - Delete a Patron Record Set

You can now delete a patron record set in Leap.

Note:

When you delete a patron record set, the patron records remain in the Polaris database, but they are no longer linked to the deleted record set.

To delete a patron record set:

1. Open the Patron Record Set workflow.
2. Select **ACTIONS | Delete Record Set**.

Patron Record Set [SAVE] [ACTIONS -] [REFRESH] [RESULTS] [CLOSE]

Name: Secured Patrons for Referral to Bonneville

Owner: Community Library (br) [Delete Record Set]

Record Set ID: 51934

Note: []

Record Count: 3

Scan or enter barcode [] [FIND TOOL] [ACTIONS -] Filter Records

BARCODE	NAME	STREET	CITY	STATE	POSTAL CODE	LIBRARY
1000400411301	Frederick, Patricia G	106 Quaker St	ARLINGTON	VA	22202-	Sharon Springs Free Library
1001800039494	Phelps, Douglas	PO Box 18 Apt #4	CHESAPEAKE	VA	23320	Schenectady Branch - Central
1002400003377	Totten, Richard	1246 Kathan Rd	MIDLOTHIAN	VA	23112-	Raquette Lake Free Library

3 of 3 record(s) retrieved

A confirmation message appears.

Delete Record Set

This record set 51934 will be permanently deleted. Do you want to continue?

[CONTINUE] [CANCEL]

3. Click **CONTINUE** to continue deleting the record set.

The record set is deleted, the workflow no longer appears, and a Record set deleted (9002) transaction is logged.

Add Items to a Record Set from a File

You can now add items to a record set by selecting a file that contains item barcodes matching to items already in the database. The file must be in one of the following formats: .txt, .csv, or .xls/.xlsx, and the item barcodes must be in the file. If it is an Excel file, you can specify the column that contains the barcode.

Notes:

You must have the following Cataloging permissions to add items to a record set from a file of item barcodes:

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

You do not require access permissions for all the items you are adding to the record set.

To add items to an item record set from a file of barcodes that match to items in the Polaris database:

1. Open the Item Record Set workflow for the record set to which you are adding the item records.
2. Select the **ACTIONS** button above the list of items, and select **Add from File** from the drop-down list.

Item Record Set [SAVE] [ACTIONS] [REFRESH] [CLOSE]

Name: Owner: Record Set ID:

Note: Record Count:

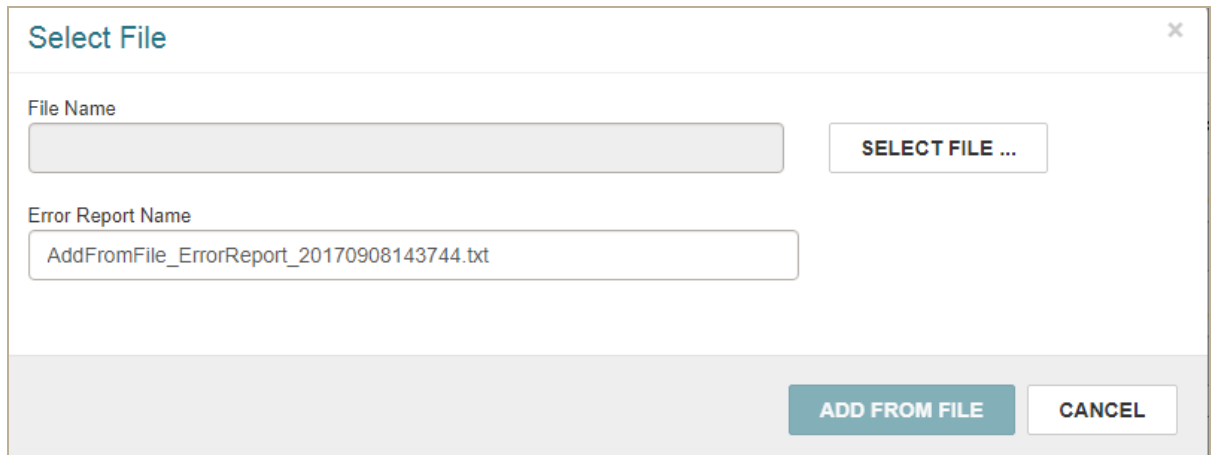
Scan or enter barcode Auto-RFID

	TITLE	ASSIGNED BRANCH	COLLECTION	MATERIAL TYPE	SHELF LOCATION	CALL NO.	VOL.	STATUS	BARCODE	RECORD STATUS	CONTROL NUMBER
<input type="checkbox"/>	50 ways to have fun with old newspapers	Greenwich Free Library	Children's Nonfiction (JNF)	Book		793.8 Sev		In-Transit	000...		1981864

ACTIONS dropdown menu:

- Add from File
- Add to New Record Set
- Add to Existing Record Set
- Remove Selected Records

The Select File dialog box opens. The name of the error report appears in the **Error Report Name** box.



Select File [X]

File Name

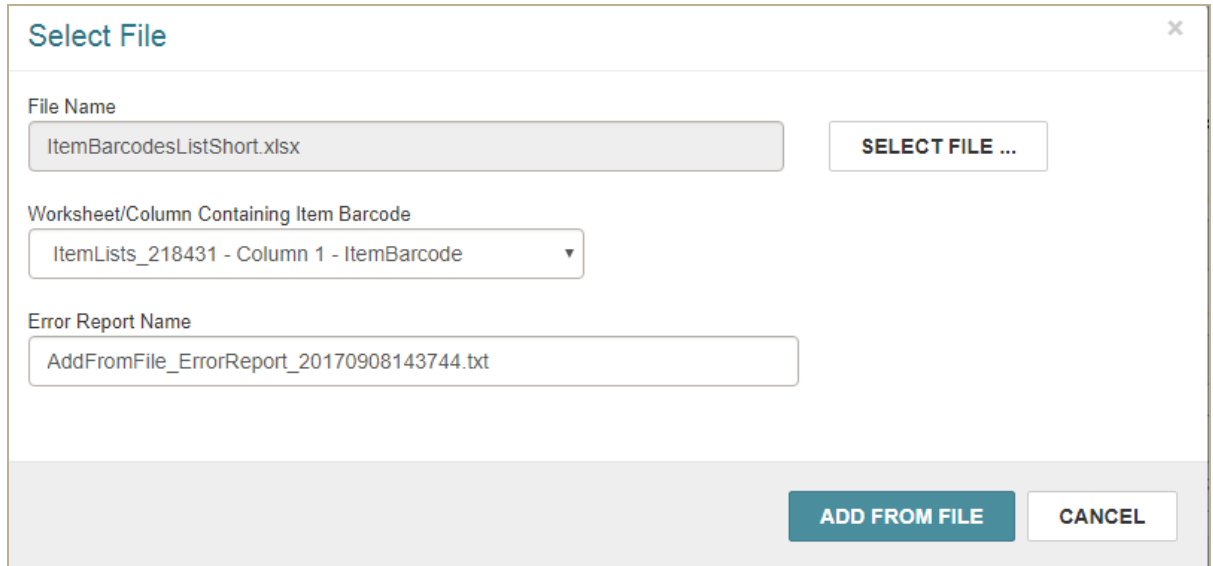
Error Report Name

3. Click **SELECT FILE...** to open the file explorer.
4. Select the file with the item barcodes.

Note:

The file must be in .txt, .csv, or .xls/.xlsx format.

The Select File dialog box displays the name of the selected file. If it is an Excel file, the **Worksheet/Column Containing Item Barcode** drop-down list box appears with a list of the columns in the file. This list box does not appear for other file formats because the barcode column is the only column in the file.



Select File [X]

File Name

Worksheet/Column Containing Item Barcode

Error Report Name

5. If it is an Excel file, select the column that contains the barcode, if it is not already selected, in the **Worksheet/Column Containing Item Barcode** drop-down list box.
6. Click **ADD FROM FILE**.

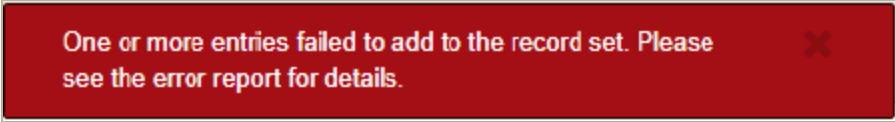
The Item Record Set workform opens with the records added above any existing records.

The record count is updated.

Note:

If the barcode in the file matches both provisional and final status records, all matches will be added to the record set.

If any errors occur, including duplicate entries, a message appears. You can open the error report for more details.

A red rectangular error message box with a white border and a small 'X' icon in the top right corner. The text inside reads: "One or more entries failed to add to the record set. Please see the error report for details." data-bbox="230 225 639 259"/>

One or more entries failed to add to the record set. Please see the error report for details.

Note:

The error report is saved in the following file:

C:\ProgramData\Polaris[version]\AddFromFile_ErrorReportYYYYMMDDHHMMSS.txt.

You can open the report to see details about the failed entries.

7. Save the record set.

Saving the record set with additional rows will log a **9004 Record set modified** transaction.

Leap - Convert a Hold to an ILL Request

You can convert an Active, Inactive, Expired, or Not Supplied hold request to an ILL request from the Patron Record workform or the Hold Request workform.

Note:

The following permissions are required to convert hold requests to ILL requests and to override any request limits:

ILL requests: Convert holds (overridable)

Hold requests: Delete (overridable)

Override Request Limits: Allow (overridable)

Override Request Blocks: Allow (overridable)

Convert a Hold Request to an ILL Request from the Patron Record Workform

To convert a hold request to an ILL request from the Patron Record workform:

1. Open the Patron Record workform for the patron who placed the hold request.
2. Click the **Holds/ Held** tab to go to the Holds view.
3. Select the check box next to the hold request you want to convert.

Note:

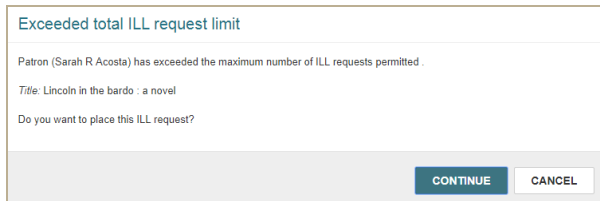
The **Convert** option is available only when a hold request with a status of Active, Inactive, Expired or Not Supplied is selected. This option is not available for non-local INN-Reach requests.

4. Click the **Convert to ILL** button, or on a narrower display, select **More | Convert to ILL**.

The screenshot shows the Patron Record workform for Sarah R Acosta. At the top, there are buttons for REGISTRATION, ACTIONS, REFRESH, and CLOSE. Below this, there are tabs for Check Out (0), Out (3) / Overdue (3), Account (\$0.00), Claims (2) / Lost (0), **Holds (4) / Held (0)**, and ILL (3) / Held (1). A toolbar contains buttons for New Hold, Cancel, Reactivate, Delete, Fill Now, **Convert To ILL** (circled), Deny, Ask Me Later, and More. Below the toolbar is a table of hold requests.

<input type="checkbox"/>	AUTHOR ▼	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS	PICKUP BRANCH	QUEUE	HOLD UNTIL	GROUP
<input type="checkbox"/>	Hall, Lynn.	The giver.	Book	Fict Hal YA	8/15/2014	Out to patron	Community Library			
<input type="checkbox"/>	Heyer, Georgette, 1902-1974.	The nonesuch.	Book	Fict	8/26/2015	Shipped	Hadley-Luzerne Public Library	1		
<input checked="" type="checkbox"/>	Ko, Lisa, author.	The leavers : a novel	Book		8/31/2017	Not Supplied	Community Library			
<input type="checkbox"/>	Le Guin, Ursula K., 1929-	Very far away from anywhere else	Book	FICT Leg YA	8/19/2015	Shipped	Galway Public Library	1		

The hold request is converted to an ILL request if the patron has not exceeded the ILL request limit. If the patron has exceeded the ILL request limit, a message box appears. Click **CONTINUE** to convert the hold to an ILL



The screenshot shows a message box with a light gray background and a thin border. At the top, the title "Exceeded total ILL request limit" is displayed in a blue font. Below the title, the text reads: "Patron (Sarah R. Acosta) has exceeded the maximum number of ILL requests permitted." followed by "Title: Lincoln in the bardo : a novel" and "Do you want to place this ILL request?". At the bottom right, there are two buttons: "CONTINUE" in a dark blue box and "CANCEL" in a light gray box.

Note:

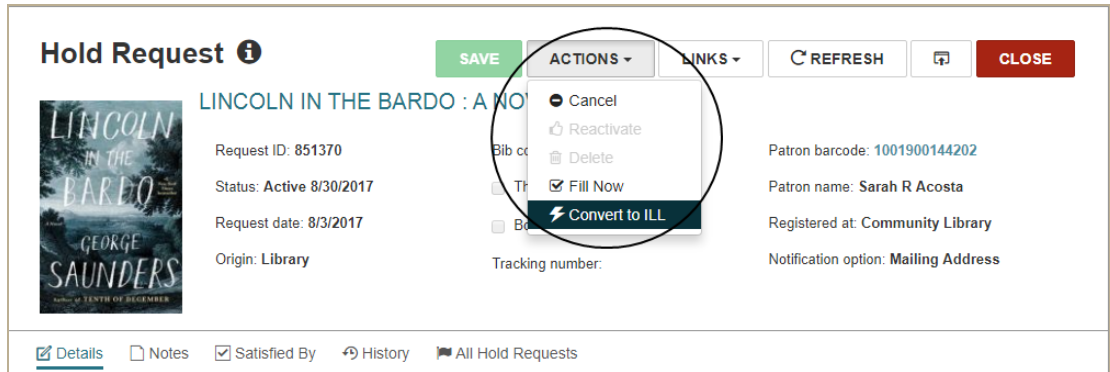
If the request is a duplicate, the Duplicate hold requests box appears with a list of duplicates. You can click **CONTINUE** or **CANCEL**.

The hold request is converted to an ILL request. See "Convert a Hold Request to an ILL Request Process" on page 65.

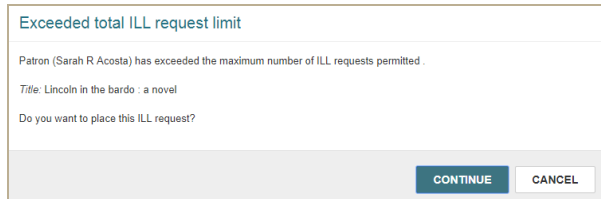
Convert a Hold Request to an ILL Request from the Hold Request Workform

To convert a hold request to an ILL request from the Hold Request workform:

1. Open the Hold Request workform for the request you want to convert.
2. Select **ACTIONS | Convert to ILL**



The hold request is converted to an ILL request if the patron has not exceeded the ILL request limit. If the patron has exceeded the ILL request limit, a message box appears. Click **CONTINUE** to convert the hold to an ILL



Note:

If the request is a duplicate, the Duplicate hold requests box appears with a list of duplicates. You can click **CONTINUE** or **CANCEL**.

The hold request is converted to an ILL request. See "Convert a Hold Request to an ILL Request Process" on page 65.

Convert a Hold Request to an ILL Request Process

When you convert a hold request to an ILL request, the following processing occurs:

- The hold request is converted to an ILL request with a status of Inactive.
- The hold request is removed from patron holds list and deleted.
- The hold count is updated.
- A transaction is logged - 6033 ILL Request created.
- The ILL request appears in the ILL view of the Patron Record workflow.

Leap - Unlock a New Hold Request

You can create a hold request from a patron record and unlock it so that you can enter the bibliographic information. This option is available only when creating a single hold request for a patron.

If the bibliographic record for the title is already in the Polaris database, you can search for the bibliographic record (or an item record linked to the bibliographic record) to fill in the bibliographic fields in the hold request and then unlock it. When you unlock a hold request, the request is unlinked to the bibliographic record, and all the bibliographic fields can be edited except the **Call NO** and **Serial Copy** fields.

Or, if the bibliographic record for the title is not in the Polaris database, you can unlock the hold request first and then type the bibliographic information.

To create an unlocked hold request:

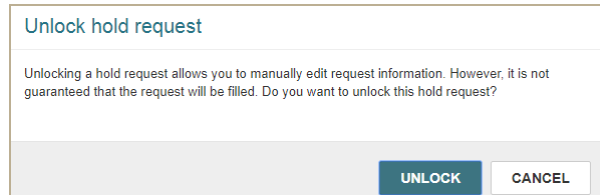
1. Open the Patron Record workflow.
2. Click the **Holds/Held** tab to go to the holds view.
3. Click **New Hold**.

The New Hold area expands.

The screenshot shows the 'New Hold' form in the Polaris system. At the top, the patron's name 'MR. GEORGE P ANDERSON' is displayed along with their ID '1000600712177' and library affiliation 'COMMUNITY LIBRARY'. There are buttons for 'REGISTRATION', 'ACTIONS', 'REFRESH', and 'CLOSE'. Below this, a navigation bar shows various hold categories: 'Check Out (0)', 'Out (0) / Overdue (0)', 'Account (\$4.40)', 'Claims (0) / Lost (0)', 'Holds (2) / Held (0)', and 'ILL (2) / Held (0)'. The main form area has a toolbar with 'New Hold', 'Cancel', 'Reactivate', 'Delete', 'Fill Now', 'Convert To ILL', 'Deny', 'Ask Me Later', and 'More'. The form itself has sections for 'Activation' (9/5/2017), 'Expiration' (9/20/2017), and 'Pickup' (Community Library). There are 'PLACE HOLD', 'UNLOCK', and 'CANCEL' buttons. The bibliographic section includes a 'Title' search bar with a 'FIND TOOL' button, a 'Barcode' scanner, and fields for 'Author', 'Series', 'Publisher', 'Date', 'Edition', 'Call NO', 'LCCN', 'Format', 'Pages', 'Issue', 'Serial Copy', and 'Volume'. There are also radio buttons for 'ISBN' and 'ISSN'.

4. Enter the bibliographic information and unlock the hold request using one of these methods:
 - Click **FIND TOOL** to search for and select a bibliographic or item record. The bibliographic information fields are filled in, and the data is read-only. Then, click **UNLOCK**.
 - Click **UNLOCK** without selecting an existing title. Use this method if you want to enter the bibliographic information manually.

The Unlock Hold Request message box appears.



5. Click **UNLOCK** to continue and close the message box.
6. Type or edit the bibliographic information as necessary.
7. Save the hold request.

The hold request is saved.

Note:

When a hold request is unlocked, you may not be able to fulfill it. However, you can convert the hold request to an ILL request and fill it with an item from another library.

The holds view is refreshed, the hold counts are updated, and the transaction is logged.

Leap - Export an ILL Request

You can now export Inactive ILL requests to other third-party vendors, such as OCLC, from the ILL Request or Patron Record workflow. INN-Reach requests cannot be exported.

Note:

To export ILL requests, you must have the following branch-specific Circulation permission for the branch designated as the pickup branch: **ILL Request: Modify**.

Export an ILL Request from the ILL Request Workflow

To export an ILL request from the ILL Request workflow:

1. Open the ILL Request workflow for the request you want to export.
2. Select **ACTIONS | Export**.

Note:

This option is available only if the ILL request has an Inactive status.

The screenshot displays the ILL Request workflow for 'The underground railroad: a novel' by Colson Whitehead. The interface includes a 'SAVE' button, an 'ACTIONS' dropdown menu, and buttons for 'REFRESH', 'RESULTS', and 'CLOSE'. The 'ACTIONS' menu is open, showing options: 'Export', 'Receive', 'Return', 'Cancel', and 'Delete'. The 'Export' option is highlighted. The request details shown are: Request ID: 24939, Status: Inactive 8/14/2017, Previous status: Inactive, Bib control number, Item barcode, barcode: 122919540926, Patron name: Remey, Alexandria Lee, Patron phone: 3159568899, and E-mail address: bademail@twcnny.rr.com.

Export an ILL Request from the Patron Record Workflow

To export an ILL request from the Patron Record workflow:

1. Select the ILL view (or if the tab is not visible, select **More | ILL**).
2. Click the check box next to the ILL request you want to export.
3. Click the **Export** button.

Note:

You can multi-select ILL requests and click the **Export** button. The button is active only when all the selected ILL requests have a status of Inactive.

ALEXANDRIA LEE REMEY ⓘ
 122919540926
 COMMUNITY LIBRARY

REGISTRATION ACTIONS REFRESH CLOSE

Check Out (0) Out (1) / Overdue (1) Account (\$0.00) Claims (1) / Lost (0) Holds (6) / Held (2) ILL (1) / Held (0) ILL

Export Receive Return Cancel Delete Filter ILLs

<input checked="" type="checkbox"/>	AUTHOR	TITLE	FORMAT	ACTIVATION DATE	STATUS	ITEM	PICKUP BRANCH
<input checked="" type="checkbox"/>	Whitehead, Colson	The underground railroad: a novel	Book		Inactive		Community Library

Export an ILL Request Process

When you click **Export** from either of these workforms, the following processing occurs:

- The message: **ILL request exported successfully** appears.
- The status of the ILL request status is updated to **Active** with a new status date
- Bibliographic elements are no longer editable
- The transaction 6034 - **ILL Request become active** is logged
- If your library is set up to export to OCLC, an OCLC request is created for the review file.
- If your library does not export to OCLC, the request becomes active and the library manually requests the item from a non-integrated vendor.

Language String Added for Export Success Message

Language String	Default
SW_CI_ILLREQ_EXPORT_SUCCESS	ILL request exported successfully.

Leap - Receive an ILL Item

You can receive an ILL item from the ILL Request workflow or the ILL view of the Patron Record workflow. When you receive an ILL item from either workflow, the Brief Item Entry dialog box appears where you enter information to create the brief item and bibliographic record.

To create the ILL item, an ILL item template must have been created for the receiving branch.

Note:

The following Polaris Circulation permissions are required to receive an ILL request:

Create on-the-fly records: Allow

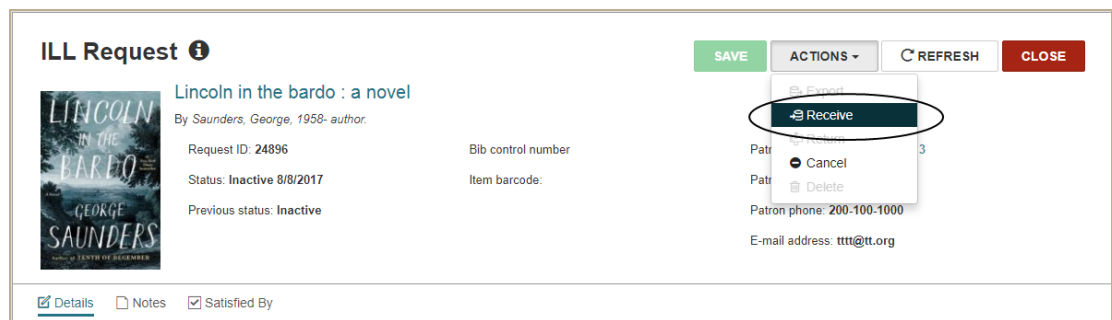
ILL requests: Access

ILL requests: Modify

Receive an ILL Item from the ILL Request Workflow

To receive an ILL item from the ILL Request workflow:

1. Open the ILL Request workflow for the requested item you want to receive
2. Select **ACTIONS | Receive**.

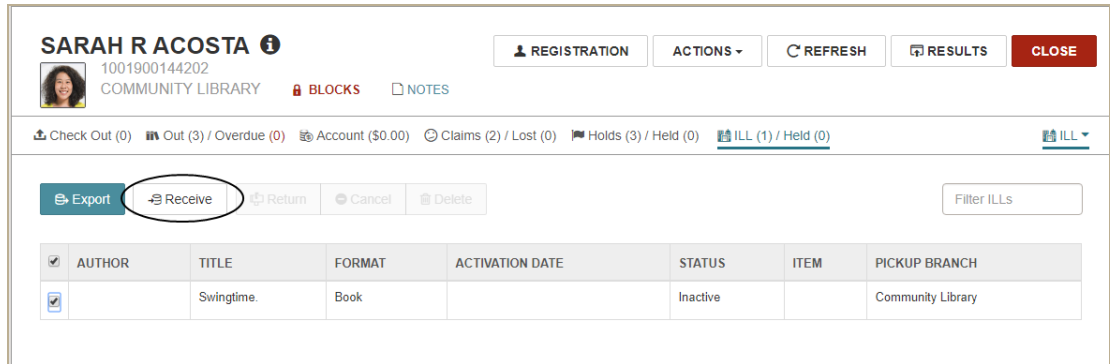


The Brief Item Entry dialog box appears. See "Create the ILL Item " on page 72.

Receive an ILL Item from the Patron Record Workform

To receive an ILL item from the Patron Record workform:

1. Open the Patron Record workform
2. Select the ILL tab (or if the tab is not visible, select **More | ILL**) to go to the ILL view.
3. Click the check box next to the ILL request you want to receive, and click **Receive**.



The Brief Item Entry dialog box appears. See "Create the ILL Item " on page 72.

Create the ILL Item

When you click **Receive** on the ILL Request workform or the ILL view of the Patron Record workform, the Brief Item Entry dialog box appears if your logged-in branch has created an ILL item record template.

Note:

If there is no ILL item template for your logged-in branch, the following message appears: **There is no 'ILL Item' item record template for [branch]. Please create one.**

Brief Item Entry

Barcode *

Title

Author

Call Number

Material Type

Loan Period

Fine Code

Free Text Block

To create the ILL item, enter the following information on the Brief Item Entry dialog box:

1. Type the item barcode in the Barcode box.

Note:

No barcode validation occurs for ILL items, but if the barcode is a duplicate, the following message appears: This barcode is a duplicate and cannot be used to create an ILL item.

1. (Optional) Type the call number in the **Call Number** box (classification number, limited to 255 characters).
2. (Optional) Type a blocking note in the **Free Text Block** box (limited to 255 characters).
3. (Optional) Change the default selections in the **Material Type**, **Loan Period**, or **Fine Code** boxes.
4. Click **CONTINUE**.

A brief bibliographic record and an ILL item are created, and one of the following messages appears:

- **This ILL item was created. Item status is Held** - This message appears if the item is received at the same branch as the designated pickup branch.
- **This ILL item was created. Item status is Transferred** - This message appears if the item is received at a branch other than the designated pickup branch. If the item is transferred to another pickup branch, and in-transit slips are enabled, an in-transit slip is generated.

Receive ILL Processing

In addition to creating the brief bibliographic record and ILL item, the following processes occur when the ILL item is received:

- A hold notice is generated for the patron if the item was received at the pickup branch, or the notice is generated when the item is checked in at the pickup branch.
- The patron's ILL Held count is updated.
- If enabled, an ILL slip or ILL pickup slip is printed.
- **Created via ILL processing** appears on the Item Record workflow, History view

Leap - Return an ILL Item

You can now return an ILL item from the ILL Request workflow or the ILL view of the Patron Record workflow. To return an ILL item, the ILL request must have a status of Received and the linked item must have a status of In or In-Transit.

Note:

The following Polaris Circulation permissions are required to return an ILL item:

ILL requests: Access

ILL requests: Modify

Return an ILL Item from the ILL Request Workflow

To return an ILL item from the ILL Request workflow:

1. Open the ILL Request workflow for the ILL item you want to return.
2. Select **ACTIONS | Return**.

Note:

This **Return** option in the **ACTIONS** menu is enabled only when the ILL request has a status of Received and the linked item record has a status of In or In-transit.

The screenshot displays the 'ILL Request' interface for the book 'LINCOLN IN THE BARDO A NOVEL' by SAUNDERS GEORGE. The interface includes a book cover, title, author, and various identifiers. A top navigation bar contains buttons for 'SAVE', 'ACTIONS', 'REFRESH', 'RESULTS', and 'CLOSE'. The 'ACTIONS' dropdown menu is open, showing options: 'Export', 'Receive', 'Return' (highlighted), 'Cancel', and 'Delete'. The 'Return' option is enabled, indicated by a checkmark icon.

ILL Request ⓘ

SUCCESS LINCOLN IN THE BARDO A NOVEL

By SAUNDERS GEORGE 04(1958)99 AUTHOR

Request ID: 24755 Bib control number 1390809 Barcode: 12291954007

Status: Received 8/14/2017 Item barcode: SAF9876543210 Name: Leone, Adrienne Rose

Previous status: Received Patron phone: 3158888888

E-mail address: lleone!@gmail.com

SAVE ACTIONS ▾ REFRESH RESULTS CLOSE

Export
Receive
Return
Cancel
Delete

Return an ILL Item from the Patron Record Workform

Open the Patron Record workform for the patron who requested the item.

Select the ILL tab (or if the tab is not visible, select **More | ILL**) to go to the ILL view.

Select the check box next to the ILL item you want to return, and click **Return**.

Note:

This **Return** button is enabled only when the ILL request has a status of Received and the linked item record has a status of In or In-transit.

The screenshot shows the Patron Record Workform for ADRIANNE ROSE LEONNE. The interface includes a header with the patron's name, ID (12291954007), and library (COMMUNITY LIBRARY). There are buttons for REGISTRATION, ACTIONS, REFRESH, and CLOSE. Below the header, there are statistics for various library metrics, including ILL (2) / Held (2). A toolbar contains buttons for Export, Receive, Return (circled), Cancel, and Delete. A table below lists ILL items with columns for AUTHOR, TITLE, FORMAT, ACTIVATION DATE, STATUS, ITEM, and PICKUP BRANCH.

<input type="checkbox"/>	AUTHOR	TITLE	FORMAT	ACTIVATION DATE	STATUS	ITEM	PICKUP BRANCH
<input type="checkbox"/>	SILVIS RANDALL 04(1950)99 AUTHOR	TWO DAYS GONE	Book	4/17/2017 2:59:29 PM	Received	Held	Community Library
<input checked="" type="checkbox"/>	SAUNDERS GEORGE 04(1958)99 AUTHOR	LINCOLN IN THE BARDO A NOVEL	Book	4/17/2017 2:59:29 PM	Received	In-Transit	Community Library

Return an ILL Item Process

The following automatic processing occurs:

- If the item is In-transit, this message appears: **Item has an In Transit status. Please check the item in.**
- The ILL request status is updated to Returned with a new status date.
- The linked item record gets a status update to Returned-ILL.
- The item record history includes a new row **Return via ILL processing**.
- If the ILL item was requested through INN-Reach, the lending library is notified via the INN-Reach API that the item is being sent back.

Language String Added for Cancel Success Message

Language String	Default
SW_CI_ILLREQ_RETURN_SUCCESS	ILL request returned successfully.

Leap - Cancel an ILL Request

You can now cancel an ILL request from the ILL Request workflow or the ILL view of the Patron Record workflow. To cancel an ILL request, it must have a status of Inactive or Active.

Note:

The following Polaris Circulation permissions are required to cancel an ILL request:

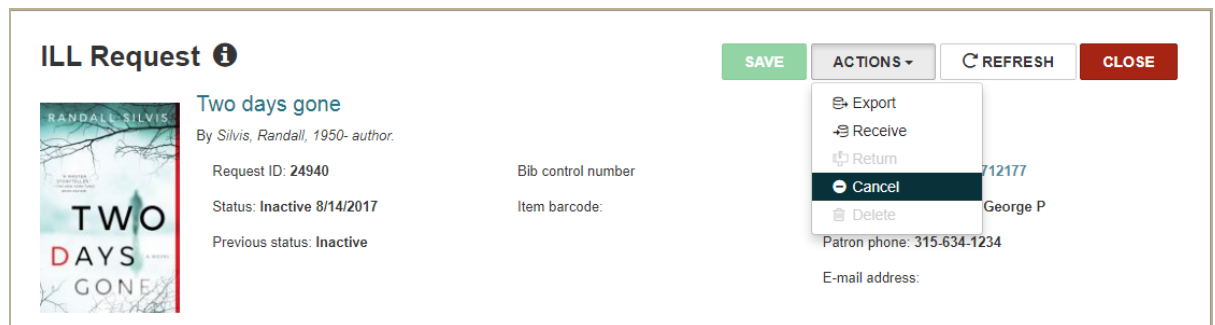
ILL requests: Access

ILL requests: Modify

Cancel an ILL Request from the ILL Request Workflow

To cancel the ILL request from the ILL Request workflow:

1. Open the ILL Request workflow for the request you want to cancel.
2. Select **ACTIONS | Cancel**.



Cancel an ILL Request from the Patron Record Workform

To cancel an ILL request from the Patron Record workform:

1. Open the Patron Record workform for the patron who placed the request.
2. Select the ILL tab (or if the ILL tab is not visible, select **More | ILL**) to go to the ILL view.
3. Select the check box next to the ILL item you want to cancel, and click **Cancel**.

<input checked="" type="checkbox"/>	AUTHOR	TITLE	FORMAT	ACTIVATION DATE	STATUS	ITEM	PICKUP BRANCH
<input checked="" type="checkbox"/>	Silvis, Randall, 1950- author.	Two days gone	Book		Inactive		Community Library

Cancel an ILL Request Processing

When you cancel an ILL request, the following processing occurs:

- The ILL request workform is refreshed.
- The following elements on the ILL Request workform become read-only:
 - Bibliographic elements
 - Pickup branch
 - Need by date
- The status is updated to Canceled with a new status date.

Note:

If the item has been ordered and the request was not through INN-Reach, a staff member must notify the lending institution that the request was canceled. If the item was requested through INN-Reach, the lending library receives an automatic cancellation notice via the INN-Reach API.

- A cancellation notice is added to the notification queue if the library has these notices set up.
- The following transaction is logged: 6037 ILL Request canceled.

Language String Added for Cancel Success Message

Language String	Default
SW_CI_ILLREQ_CANCEL_SUCCESS	ILL request cancelled successfully.

Leap - Delete an ILL Request

You can now delete an ILL request from the ILL Request workflow or the ILL view of the Patron Record workflow. The ILL request must have a status of Inactive, Cancelled, or Returned to be deleted.

Note:

The following Polaris Circulation permission is required to delete an ILL request:

ILL Requests: Delete

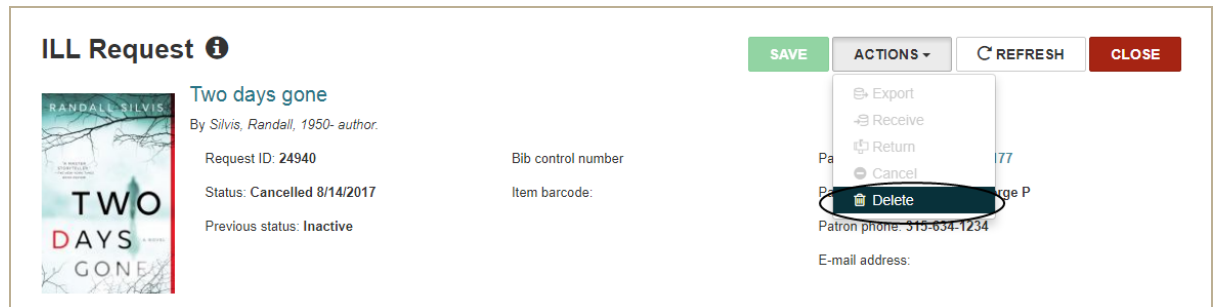
Delete an ILL Request from the ILL Request Workflow

To delete an ILL request from the ILL Request workflow:

1. Open the ILL Request workflow for the request you want to delete.
2. Select **ACTIONS | Delete**.

Note:

This menu option is available only for requests with a status of Inactive, Cancelled, or Returned.



Delete an ILL Request from the Patron Record Workform

To delete an ILL request from the Patron Record workform:

1. Open the Patron Record workform for the patron who placed the request.
2. Select the ILL tab (or if the ILL tab is not visible, select **More | ILL**) to go to the ILL view.
3. Select the check box next to the ILL request you want to delete.
4. Click **Delete**.

Note:

This button is available only when you have selected an ILL request with a status of Inactive, Cancelled, or Returned.

The screenshot shows the Patron Record Workform for MR. GEORGE P ANDERSON. The ILL tab is selected, and a table displays one ILL request. The table has columns for AUTHOR, TITLE, FORMAT, ACTIVATION DATE, STATUS, ITEM, and PICKUP BRANCH. The request is for 'Two days gone' by Silvis, Randall, 1950- author, with a status of 'Cancelled' and a pickup branch of 'Community Library'. The 'Delete' button is visible above the table.

<input checked="" type="checkbox"/>	AUTHOR	TITLE	FORMAT	ACTIVATION DATE	STATUS	ITEM	PICKUP BRANCH
<input checked="" type="checkbox"/>	Silvis, Randall, 1950- author.	Two days gone	Book		Cancelled		Community Library

Delete ILL Process

When the request is deleted, the following processing occurs:

- If the status of the request is Inactive or Cancelled, no other records are linked so only the ILL request is deleted.
- If the status of the request is Returned, the linked item and brief bibliographic records are deleted. If a Returned ILL request's linked item has a fee attached to it, a dialog box appears.

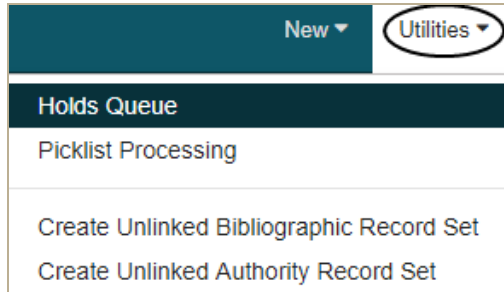
Leap - Holds Queue Filter

You can now filter the hold requests in the Holds Queue in Leap.

Note:
The Holds Queue cannot be modified when a filter is applied.

To filter the holds in the Holds Queue:

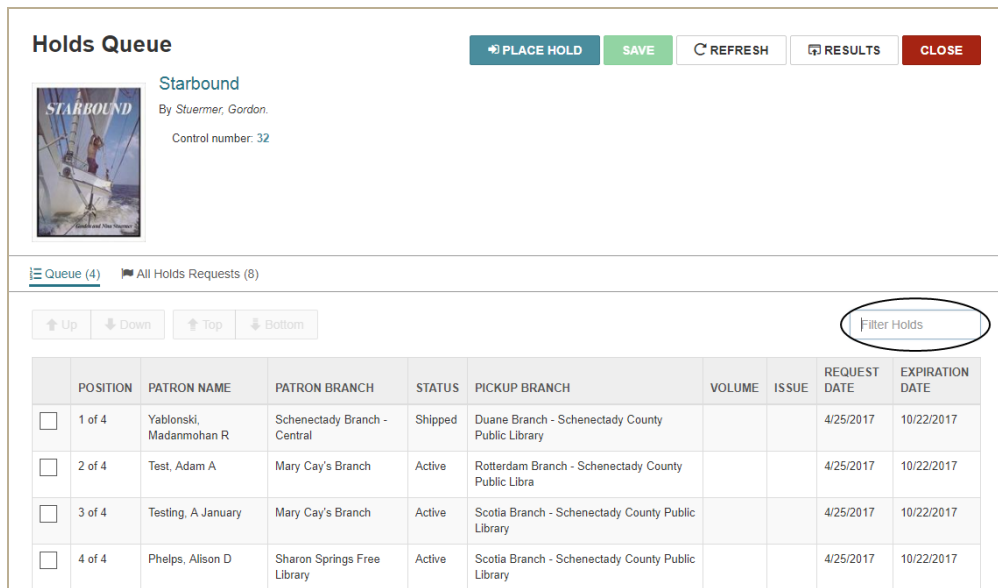
1. Select **Utilities | Holds Queue**.



The Find Tool opens.

2. Search for the bibliographic record.

The Holds Queue workform opens for that title.



3. Start typing in the **Filter holds** box.

Note:
On both the Queue and All Requests view, you can filter the list based on characters in any column.

The list immediately responds displaying the rows that have text matching the characters entered.

Example:

If you type **Ship**, the list displays the rows with a Shipped status.

Leap - Link to Hold Request from Hold in Patron Record

You can now open the Hold Request workflow by clicking the **Request ID** link from the hold request details displayed in the Patron Record.

To open the Hold Request workflow from the Patron Record workflow:

1. Open the Patron Record workflow.
2. Click the **Holds/Held** tab to go to the Holds view.

ANAR KAMAT ⓘ
1001900146413
COMMUNITY LIBRARY

REGISTRATION ACTIONS ↕ ↻ CLOSE

Check Out (0) Out (2) / Overdue (2) Account (\$0.00) Claims (0) / Lost (0) **Holds (5) / Held (1)** More ▾

New Hold Cancel Reactivate Delete Fill Now More ▾ Filter Holds

<input type="checkbox"/>	AUTHOR	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS ▾	PICKUP BRANCH	QUEUE	HOLD UNTIL	GROUP
<input type="checkbox"/>	Ko, Lisa, author.	The leavers : a novel	Book		9/8/2017	Active	Community Library	1		

3. Click the hold in the list to view the hold details.
4. Click the **Request ID** link.

Request ID 853119 Bib control number 1395762 Activation 9/8/2017 SAVE CLOSE

Pickup Community Library Expiration 9/23/2017

Status Active 9/8/2017 Request date 9/8/2017 Origin Library

This item only Borrow by mail Tracking number

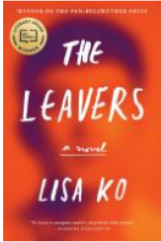
Title The leavers : a novel Barcode Format Book

Author Ko, Lisa, author. ISBN/ISSN 9781616206888 : Pages

The Hold Request workflow opens.

Hold Request i

SAVE
ACTIONS ▾
LINKS ▾
REFRESH
CLOSE



THE LEAVERS : A NOVEL

Request ID: 853119	Bib control number: 1395762	Patron barcode: 1001900146413
Status: Active 9/8/2017	<input type="checkbox"/> This item only	Patron name: Anar Kamat
Request date: 9/8/2017	<input type="checkbox"/> Borrow by mail	Registered at: Community Library
Origin: Library	Tracking number:	Notification option: Mailing Address

Details
Notes
 Satisfied By
[History](#)
[All Hold Requests](#)

Pickup	Activation	Expiration
<input type="text" value="Community Library"/>	<input type="text" value="9/8/2017"/>	<input type="text" value="9/23/2017"/>
Title	Barcode	Format
<input type="text" value="The leavers : a novel"/>	<input type="text"/>	<input type="text" value="Book"/>
Author	ISBN/ISSN	Pages
<input type="text" value="Ko, Lisa, author."/>	<input type="text" value="9781616206888 :"/>	<input type="text"/>

5. Click **CLOSE** on the Hold Request workform to return to the Hold/Held view of the Patron Record workform.

Leap - Staff Email Added to Lock Information

When you open a locked record in Leap, you can now click the locked icon to see the email address of the staff member who has the record open.

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COMMUNITY LIBRARY

REGISTRATION ACTIONS REFRESH CLOSE

BLOCKS NOTES

Check Out (0) Out (2) / Overdue (2) Account (\$0.00) Claims (0) / Lost (0) Holds (5) / Held (1) ILL (1) / Held (0) More ▾

Scan or enter item barcode Find Tool Auto-RFID Reset Due Date Special Loan

BARCODE	CALL NUMBER	TITLE	DUE DATE	ACTION	SHELF LOCATION	ASSIGNED BRANCH	MATERIAL TYPE
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For the patron record, the locked information includes the patron status and patron registration locks.

The record is being modified by another staff member

PATRON STATUS IS LOCKED BY:
 USER: POLARISEXEC
 WORKSTATION: PEER
 OBJECT ID: 280953
 OBJECT TYPE: 44
 LOCK DATE: 9/11/2017
 EMAIL: POLARISEXEC@III.COM

PATRON RECORD IS LOCKED BY:
 USER: POLARISEXEC
 WORKSTATION: PEER
 OBJECT ID: 280953
 OBJECT TYPE: 27
 LOCK DATE: 9/11/2017
 EMAIL: POLARISEXEC@III.COM

CLOSE

Language String Added for Email on Locked Information

Language String	Default
SW_CI_LOCKINFO_STAFF_EMAIL	Email

Leap - Properties for Library-Assigned and Free-Text Blocks

You can now click the new **Properties** button on the Blocks view of the Patron workflow to open the Block Properties window where you can see the details for library-assigned and free-text blocks.

To see details for a library-assigned or free-text block:

1. Open the Patron Record workflow.
2. Click the Blocks tab to go to the Blocks view.
3. Click the check box next to a library-assigned or free-text block.
4. Click the **Properties** button.

The screenshot shows the Patron Record workflow for Harold T Smythe. At the top, there are buttons for REGISTRATION, ACTIONS, REFRESH, RESULTS, and CLOSE. Below these are statistics for Check Out, Out/Overdue, Account (\$10.50), Claims (1) / Lost (0), Holds (0) / Held (0), and ILL (0) / Held (0). The 'Blocks' tab is selected. In the 'Blocks' view, there are buttons for Add Block, Delete, and Properties (circled in red). A table below shows the blocks:

<input checked="" type="checkbox"/>	BLOCK DESCRIPTION	CREATION DATE
<input type="checkbox"/>	Patron owes money and has accrued fees. Amount due: \$20.50	
<input type="checkbox"/>	Patron has exceeded maximum fees and accrued fees permitted. Amount due: \$20.50	
<input checked="" type="checkbox"/>	Address Check Required ▼	9/14/2017

The Block Properties window displays the user name of the staff member who created the block; the date the block was created; the sign-in branch for the staff member who created the block; the workstation where the block was created; and the staff member who modified the block and the date modified (if the block was modified).

The Block Properties window shows the following details:

About

- Created by: laura.peer
- Date created: 9/14/2017 10:46:46 AM
- Library: Community Library
- Workstation: Peer
- Modified by:
- Date modified:

A CLOSE button is located at the bottom right of the window.

Language String Added for Blocks Properties

Language String	Default
SW_CI_PTIND_BLOCKS_PROP	Properties
SW_CI_PTIND_BLOCKS_PROP_HDR	About
SW_CI_PTIND_BLOCKS_PROP_LBL_CREATED_BY	Created by:
SW_CI_PTIND_BLOCKS_PROP_LBL_CREATED_DATE	Date created:
SW_CI_PTIND_BLOCKS_PROP_LBL_CREATED_ORG	Library:
SW_CI_PTIND_BLOCKS_PROP_LBL_CREATED_WORKSTATION	Workstation:
SW_CI_PTIND_BLOCKS_PROP_LBL_MODIFIED_BY	Modified by:
SW_CI_PTIND_BLOCKS_PROP_LBL_MODIFIED_DATE	Date modified: