



# What's New in Polaris and Leap

7.1

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## Polaris Installation Notes

**Important:**

When the new Polaris release is installed on a workstation, the file path changes from 7.0 to 7.1 as in the following examples:

C:\ProgramData\Polaris\7.1

C:\Program Files\Polaris\7.1

C:\Program Files (x86)\Polaris\7.1

## New or Modified Polaris Administrative Settings

Two system administration settings have been modified to facilitate the new features for Polaris staff client and Leap in 7.1.

Setting	Purpose	Level
<b>New Parameter</b>		
Check-in: Item blocks, allow checkin	<p>Specifies whether a patron can use the self-check unit to check in an item with blocks (Library blocks, free text blocks, or System blocks.)</p> <p>For more information, search the Polaris staff client help for "Self-Check Parameters."</p>	System, Library, and Branch
<b>New Profile</b>		
Acquisitions / Serials >Ignore fund limit/balance errors in acquisition APIs	<p>Specifies whether the API ignores negative balance and over encumbrance messages, and allows staff to release a purchase order anyway. When enabled (Yes), the API continues through the messages and releases the purchase order. When disabled (No), the API stops the release action.</p>	System, Library, and Branch

## Polaris API Changes

The following methods have been added or updated:

Method Name	Purpose
MultipartGet	Returns a list of volumes (multi-part sets) or designations (serial issues) when they exist for the specified bibliographic record, patron, and pickup location. Specifying a pickup location is optional.

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

## Working with Spine Label Printing in Leap

You can create, view, and edit spine labels in Leap. Leap honors a few of the spine label printing settings in the Polaris Administration (staff client) as well. For more information about spine labels, search for "Printing Spine Labels" and "Set Label Profiles" in the Polaris staff client help.

This section covers the following topics:

- [Spine Label Printing System Administration](#)
- [Configuring Spine Label Printing](#)
- [Printing Spine Labels](#)

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### Spine Label Printing System Administration

Leap supports spine label printing using a PDF printing function. If you are a system administrator, you might need to check and configure the printing-related settings in Polaris Administration (staff client). The following sections tell you where to find the label settings that you might need to configure:

- [Configuring Label Generation](#)
- [Configuring Margin Handling](#)
- [Configuring PDF Fonts](#)

For additional information, search the Polaris Staff Client documentation for "Printing Cataloging Labels."

#### Configuring Label Generation

In the Polaris Administration (staff client), open **Administration > System > Profiles > Staff Client**, and ensure **Labels: Automatically generate label for each item record created** is set to **Yes** or **No**, depending on your library's preferences.

#### Configuring Margin Handling

Margin-handling is different in Leap than in the staff client. If your margin settings need adjustment, you can make changes in Polaris Administration (staff client) under

**Administration > System > Profiles > Staff Client > Labels: Options** or at the workstation level.

### Configuring PDF Fonts

Leap's PDF printing can use any font you designate as an embedded font. You are responsible for licensing fees and restrictions if you select a licensed font. Check the designated font by going to Polaris Administration (staff client) **Administration > System > Profiles > Staff Client > Labels: Options**.

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### Configuring Spine Label Printing

Leap supports spine label printing using a PDF printing function. Leap honors the Polaris Administration (staff client) spine label printing settings. If you already have your spine label settings configured in Polaris Administration (staff client), then configure your default label options in Leap and print.

**Note:**

PDF printing can use any font you designate as an embedded font. You are responsible for licensing fees and restrictions if you select a licensed font. For more information, see [Spine Label Printing System Administration](#).

### To configure default label options in Leap

1. In Leap, open the user settings by doing the following:
  - a. Select your user name in the toolbar.
  - b. Select **Settings**.  
The Leap User Settings, Print Options page opens.
2. In the Label Options section, under **Label Type**, select the appropriate label type for your printer.
3. (Optional) If you want the label type you selected to appear as the default when you open that Label Manager in Leap, select **Use as Label Manager default**.
4. Select one of the following label print methods under **Label Options**:

- **On Demand** - Leap opens Label Manager when you request a label so that you can view the label before printing it. The On Demand method works best if you want to edit your label content before printing.
  - **Batch** - Leap queues the label when you request it, so you can print labels in bulk later. To print queued labels, go to Label Manager. The Batch option works well for creating sheets of labels for multiple items. Batch printing is limited to 500 labels at a time.
  - **Quick print** - Leap prints the label at the designated printer without opening Label Manager in Leap. The Quick print method works best with continuous-feed printers.
5. Select **SAVE**.
  6. [Print a spine label](#) or two, and review the results. Margin-handling is different in Leap than in the staff client. If there are problems with the first printing, have your system administrator check the printing-related settings in Polaris Administration (staff client). For more information, see [Spine Label Printing System Administration](#).
- 

## Printing Spine Labels

You can now print spine labels from any workstation in Leap.

**Note:**

Before you print, you must configure settings in Polaris Administration (staff client) and in Leap. For more information, see [Configuring Spine Label Printing](#).

### To print spine labels

1. Use the Find tool to find the item that needs a printed label, and open the item record.
2. Select **ACTIONS > Print Label**. One of the following happens, depending on your user setup:
  - **On Demand** - Leap opens Label Manager so you can view the label before printing it.

- **Batch** - Leap queues the label, but does not print it. You can repeat steps 1 and 2 to add more labels to the print queue.
  - **Quick Print** - Leap prints the label at the designated printer.
3. For batch print jobs, select **Utilities > Label Manager** to open Label Manager.
  4. (Optional) Select the label type from the list at the upper left.  
The preview changes to show the type of label you select.
  5. Review the label layout. If necessary, you can make changes and enter carriage returns directly in the label page display. When finished, select **SAVE**.

**Note:**

When troubleshooting font sizes on PDF labels:

- Check the page size in your printer driver.
- Make sure your PDF reader view is set to "Default."

6. Do one of the following:
  - To clear all of your labels and start with a blank sheet, select **ACTIONS > Clear Labels**. Start again with step 2.
  - To send all labels to your designated printer, select **ACTIONS > Print Labels**. Your browser's print preview opens.
7. Select **Print**. Your browser's Print dialog opens.
8. Check the settings, and select **Print**. Leap sends the queued labels to the printer.

## Working with Serial Holdings Records in Leap

You can use Leap to manage the Serial Holdings Record (SHR). A serial holding record is one record for all the serials or parts you receive in one series.

For the permissions needed to manage SHRs, search the Polaris staff client help for "Serials Workflow Permissions."

### To get to the Serial Holdings Record workflow

1. Go to **Utilities > Serials Check In**.
2. Search for the title of the serial or standing order part and select the title in the search results. The Serials Check In workflow or the Standing Order workflow opens.
3. In the Serials Check In workflow header, or the Standing Order workflow, select the linked Serial Holdings record ID.

**Serials Check In** ⓘ

SAVE ACTIONS ↕ ↻ 🖨️ CLOSE

The Time-Life book of the family car

Status: **Completed**      Destination: **Southern Adirondack Library System (SAL)**      Non-Public Notes      Non-Public Warning Notes

Serial holdings record ID: **380**      Copy no.: 1      Bib control number: **796535**

Call number:      Collection: **(None)**      Material type: **Book**

The Serial Holdings Record workflow appears.

You can use the Serial Holdings Record workflow to manage the serial and its issues or parts as a whole. From the Serial Holdings Record workflow you can do the following:

- View and edit the [Serial Holdings Record Header and Details](#)
  - Fill in the workflow header.
  - Set the **Holdings Display** (impacts the serial's display in the PAC).
  - View linked publication patterns.
- Read and enter [Serial Holdings Record Notes](#)

- Electronic Access
  - Shared Public
  - Non-Public and Non-Public/Warning
  - View and enter details about [Serial Holdings Record Orders](#)
    - Purchase Orders
    - Subscription Details
    - Membership Details
  - View and enter details about [Serial Holdings Record Claims](#) - Claim notices are sent for serials issues or parts that are not received as expected.
- 

## View and Edit Serial Holdings Record Header and Details

The Serial Holdings Record (SHR) workflow starts with header information. From the header, you can view information about the serial holdings record such as Status, Destination, and ISSN/ISBN. You can click the Bib control number to open the Bibliographic Record workflow. You can view serial holdings record properties by hovering your cursor over the **i**.

You can use the menus in the header to do the following:

- Delete the SHR - Select **Actions** > **Delete**.
- Return to Serials Check In - Select **Links** > **Serials Check In**.

You can also do the following using the Serial Holdings Record workflow Details tab:

- [Edit Header Information](#)
- [Set the Holdings Display](#)
- [View linked Publication Patterns](#)

### Edit the Header Information

#### To edit the header information

1. Go to the Details section. The Details section contains all the editable fields displayed in the header.

2. Enter the information for the following fields:

- **Status** - Select the overall status for the serial holding. Assigning "Not currently received" as a status disables automatic prediction for this serial holdings record.
- **Destination** - Select the branch that will house the series.
- **Collection** - Select the collection where the series will be located.

**Note:**

The selections available in the Collection list are dependent on the organization you selected for destination branch.

- **Copy No.** - Enter the copy number.
  - **Material type** - Select the format of the series.
3. To change the **Bib control number**, select the **Find** button beside the **Bib control number** field. The Bibliographic Find Tool opens.

**Note:**

Change the Bib control number only if you want to change the links and associations with this SHR, including the links to the subscription record, purchase orders, or invoices.

## Set the Holdings Display

### To set the holdings display

1. Enter the shelving scheme:
  - a. Select a **Call Number Scheme**.
  - b. Enter a **Prefix**.
  - c. Enter a **Classification**.
  - d. Enter a **Cutter**.
  - e. Select **Display in PAC** if you want this information to appear in PowerPAC and Children's PAC. The display also depends on the retention information you enter. The checked in issues display according to the retention information. For more information, search the staff client help for "Displaying

## Serial Titles in the PAC."

**Note:**

If you leave **Display in PAC** cleared, no serial issues display for the title (unless there are linked item records that are set to display).

2. Select completeness and retention information:
  - a. Select a **Completeness Code** that best describes the current state of the series.
  - b. Select a **Retention Designator**.

**Note:**

If you select **Retained for a limited period**, then select **Latest retained** or **Previous retained** and the number of editions, issues, months, supplements, weeks or years of this serial title to retain. If you select **Latest retained**, the latest publications are retained, including the current one. If you select **Previous retained**, the previous publications, not including the current ones, are retained.

### View Linked Publication Patterns

The Publication Patterns table lists the publication patterns linked to the serial holdings record.

Next, read and enter [Notes](#) in the Serial Holdings Record workflow.

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### View and Edit Serial Holdings Record Notes

The Notes tab of the Serial Holdings Record workflow gives you the ability to leave notes for patrons and library staff, and to read the notes left by other staff members. You can enter the following types of notes in the Notes view:

- [Electronic Access Notes](#)
- [Shared Public Notes](#)

- [Non-public Notes](#)
- [Non-public/Warning Notes](#)

### **Electronic Access Notes**

For electronically delivered subscriptions, type a Listserv, URL, or email address used to manage online electronic journal subscriptions or standing orders. Only library staff can read this note.

### **Shared Public Notes**

Enter notes that display in the Polaris PowerPAC. You can type up to 4,000 characters in the Shared public note box. Enter line breaks where you want the text to break in the Polaris PowerPAC. Patrons and library staff can read this note.

For more information, search the Polaris staff client help for "Enter public notes for a serial holdings record."

### **Non-public Notes**

Enter a free-text note about special processing required for a title in this series. Only library staff can read this note and it appears in the Serials Check In workflow.

### **Non-public/Warning Notes**

Enter a free-text note about special attention that you want given to this title. Only library staff can read this note and it appears in the Serials Check In workflow.

Next, view and enter details about [Orders](#).

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## Working with Serial Holdings Record Orders

You can do the following on the Orders tab of the Serial Holdings Record workflow:

- [View and Edit Purchase Order Information](#)
- [Set Subscription Details](#)
- [Enter Membership Details](#)

## View and Edit Purchase Order Information

### To view and edit purchase order information

1. Select **Owner** and enter **Plan** information.  
Standard Address Number (**SAN**) appears automatically when you select an owner organization.
2. To enter supplier information, select the **Find** button beside the **Supplier** field. The Supplier Find Tool opens.

## Set Subscription Details

Use the Subscription Details section to specify the subscription start and duration information.

### To enter subscription details

1. Enter a **Start Number**.

**Note:**

**Start Date** and **Expiration Date** are only editable for standing order parts.

2. Select (using the calendar) or type the **Intent to Cancel Date**.

## Enter Membership Details

### To enter membership details

1. Select **Designation** to indicate that the subscription is included in a membership to a professional organization.  
**Member Name** and **Member Organization** become editable.
2. Enter the **Member Name**.
3. Enter the name of the **Member Organization**.

**Note:**

**Member Name** and **Member Organization** are visible only in these fields and only to library staff.

Next, view and enter details about [Claims](#).

## Viewing Serial Holdings Record Claims

Claim notices are sent for issues or parts of serials that are not received as expected. Claims can be sent automatically from Leap based on claiming intervals defined in the supplier record you enter in the Polaris staff client. For more information about entering claiming intervals, search the Polaris staff client help for "Serial Holdings Record Workform - Orders View."

### **To view the claiming intervals for a supplier's subscription number**

1. Find the supplier's subscription number printed on claim notices.
2. Enter the supplier's subscription number in the **Subscription ID** field. The claiming intervals appear in the table.

## Working with Suppliers in Leap

You can now create, edit, delete, and view suppliers in Leap.

This section covers the following topics:

- [Create a Supplier](#)
- [Add or Edit Optional Supplier Record Field Data](#)
- [View or Edit a Supplier](#)
- [Copy Supplier Contact Information](#)
- [Delete a Supplier](#)

---

### Create a Supplier

You can create a supplier record in Leap if you have the **Suppliers: Create** permission enabled in Polaris Administration. For more information about supplier permissions, search for "Acquisitions Workflow Permissions" in the Polaris staff client help.

**Note:**

If your library is part of a consortium using a single Polaris installation, each library creates a supplier record with a separate account number.

### To create a supplier

1. Select **New > Supplier**.

A New Supplier workform appears.

### New Supplier - 1

SAVE
CLOSE

<b>Name</b>	<b>Alternative Name</b>	<b>Currency</b>
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text" value="USD"/>
<b>SAN</b>	<b>Account Number</b>	<b>Owner</b>
<input style="width: 20%;" type="text"/> : <input style="width: 20%;" type="text"/>	<input style="width: 20%;" type="text"/>	<input style="width: 95%;" type="text" value="Community Library (COB)"/>

---

Details
Orders
Payments
Claims

**EDI Setup**

EDI Orders   
  Enriched EDI Orders   
  ASN Shipments

<b>FTP Address</b>	<b>POA/INV Directory</b>
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
<b>Username</b>	<b>PO File Directory</b>
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
<b>Password</b>	<b>PO File Extension</b>
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

2. Enter a unique name for the supplier in the **Name** box.
3. [Enter data in some or all of the optional supplier record fields.](#)
4. Select **SAVE**.

---

## Add or Edit Optional Supplier Record Field Data

When you create or edit a supplier record, you can enter or edit data in any of the following optional fields:

- [Supplier header fields](#)
- [Details view fields](#)
- [Orders view fields](#)
- [Payments view fields](#)
- [Claims view fields](#)

### Edit Supplier Header Fields

To edit supplier header fields

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1. Enter an alternate supplier name in the **Alternative Name** box.
2. Select a currency from the **Currency** list.
3. Enter the supplier's seven-digit standard address number (SAN) in the **SAN** box.

**Notes:**

- Leap requires the SAN for EDI orders. If you select the **EDI Orders** checkbox on the Details view, you must also enter a SAN for the supplier.
- If your library uses Polaris Titles to Go, the SAN in the supplier record must match the profile set up in Polaris Administration. For more information, search for "Setting Up Titles to Go" in the staff client help.

4. Do one of the following:
  - If the **Address/Profile ID** setting on the [Details view](#) is set to **Account Number**, enter your library's account number in the **Account Number** box.
  - If the **Address/Profile ID** setting on the [Details view](#) is set to **SAN/SAN Suffix**, enter your library's SAN suffix in the **Account Number** box.
5. Select the supplier owner from the **Owner** list.

**Note:**

The supplier owner is the organization that owns the supplier account. Only organizations with the **Suppliers: Create** permission appear in the **Owner** list.

## Edit Details View Fields

### To edit Details view fields

1. If the supplier accepts EDI orders, select **EDI Orders**.

Leap enables the EDI Setup settings. Required fields are marked with asterisks.

**Note:**

Leap requires the SAN for EDI orders. If you select **EDI Orders**, you must also enter a SAN in the [supplier header](#) settings.

2. If your library and the supplier have an agreement for the supplier to provide shelf-ready cataloging services, select **Enriched EDI Orders**.

**Note:**

Enriched EDI includes cataloging services offered by the supplier, such as branch stickers on books and other materials, fully-cataloged MARC records, and 852 or 949 tags in the bibliographic records that automatically create item records. The type of services and the costs vary according to vendor. For more information, search for "Importing and Ordering Processes" in the staff client help.

3. If the supplier provides an advance shipping notice, select **ASN Shipments**.

**Note:**

If you select **ASN Shipments**, EDI invoices are not created automatically. For more information, search for "Receive using the Advanced Shipping Notice" in the staff client help.

4. Enter the supplier's FTP address in the **FTP Address** box.

**Note:**

The username and the corresponding password are assigned to your library by the supplier. These credentials are required in order to access the supplier's FTP site and transmit EDI transaction files.

5. Enter the password in the **Password** box.
6. Enter the directory for purchase order acknowledgments and invoices in the **POA/INV Directory** box. The supplier places outgoing purchase order acknowledgments and invoices in this directory and Leap picks up the files from this location.

**Note:**

If the supplier uses OUT and IN folders, this directory maps to the supplier's OUT folder.

7. Enter the directory for purchase order files in the **PO File Directory** box. Leap places incoming purchase order files in this directory and the supplier picks them up for processing.

**Note:**

If the supplier uses OUT and IN folders, this directory maps to the supplier's IN folder.

8. Enter the file extension for EDI X12 purchase orders in the **PO File Extension** box.

**Note:**

The file extension is specified by the supplier.

9. Select one of the following **Address/Profile ID** options:
  - **Account Number** - Select this option if the supplier requires the library account number in the Address/Profile ID transaction field in the EDI X12 purchase order transmission.
  - **SAN/SAN Suffix** - Select this option if the supplier requires the SAN suffix in the Address/Profile ID transaction field in the EDI X12 purchase order transmission.
10. (Optional) Enter notes for the supplier in the **Notes** box.
11. (Optional) If your library has an approval or blanket purchasing arrangement with the supplier, enter plan information in the **Plan** box.

## Edit Orders View Fields

### To edit Orders view fields

1. Enter contact information in the **Contact Information** fields.
2. To copy supplier contact information from the Orders view to the Payments or Claims view, select **Copy**. For more information, see [Copy Supplier Contact Information](#).
3. If the supplier offers a discount to your library, enter the discount percentage in the **Discount (%)** box.

**Note:**

This discount is applied to all purchase orders for this supplier, but you can edit the discount for each individual order, if necessary.

4. If Polaris Acquisitions is integrated with Advantage 3 or another financial system, enter an identifying number in the **External Financial System ID** box.

## Edit Payments View Fields

### To edit Payments view fields

1. Enter contact information in the **Contact Information** fields.
2. To copy supplier contact information from the Payments view to the Orders or Claims view, select **Copy**. For more information, see [Copy Supplier Contact Information](#).

## Edit Claims View Fields

### To edit Claims view fields

1. Enter contact information in the **Contact Information** fields.
2. To copy supplier contact information from the Claims view to the Orders or Payments view, select **Copy**. For more information, see [Copy Supplier Contact Information](#).
3. Enter a number from 1 through 5 in the **Max Claims** box. This setting determines the number of claims your library will submit to the supplier before canceling an ordered item.
4. If you want to generate cancellation notices for this supplier, select **Cancel Notice**.
5. To automatically cancel purchase order line items after the claim cycle is over, select **Auto Cancel Waiting Period** and enter a number in the box. The number specifies the number of days Leap waits after the last claim is sent before canceling an ordered item.
6. If you want to generate claim notices for this supplier, select **Claim Notice** and then select **Print** or **Email**.
7. Enter a number in the **Days After Release/Expected Arrival** box. This setting determines the number of days between the time a purchase order line item is released and the time the first claim is generated.

**Note:**

If you are entering serials claiming criteria, this setting determines the number of days between the time a serial issue is expected and the time the first claim is generated.

8. Enter a number in the **Days After 1st Claim** box. This setting determines the number of days after the first claim is generated that the second claim is generated.

9. Enter a number in the **Days After 2nd Claim** box. This setting determines the number of days after the second claim is generated that the third claim is generated.
  10. Enter a number in the **Days After 3rd Claim** box. This setting determines the number of days after the third claim is generated that the fourth claim is generated.
  11. Enter a number in the **Days After 4th Claim** box. This setting determines the number of days after the fourth claim is generated that the fifth claim is generated.
- 

## View or Edit a Supplier

You can [view suppliers](#) if you have the **Suppliers: Access** permission enabled in Polaris Administration. You can [edit suppliers](#) if you also have the **Suppliers: Modify** permission. For more information about supplier permissions, search for "Acquisitions Workflow Permissions" in the Polaris staff client help.

### Viewing a Supplier

#### To view a supplier

1. Use the Find Tool to find and open the supplier.
2. Select any of the following supplier record views to see additional information:
  - **Details**
  - **Orders**
  - **Payments**
  - **Claims**

### Editing a Supplier

#### To edit a supplier

1. Use the Find Tool to find and open the supplier.
2. Select any of the following views to [edit supplier record information](#):
  - **Details**
  - **Orders**
  - **Payments**
  - **Claims**
3. Select **SAVE**.

## Copy Supplier Contact Information

You can copy supplier contact information from the Orders, Payments, or Claims view and paste it into another view in the supplier record. This means that you don't need to retype contact information for suppliers that use the same address for orders, payments, or claims.

### To copy supplier contact information

1. Navigate to the Orders, Payments, or Claims view that contains the contact information you want to copy.
2. Select **COPY**.
3. Do one of the following:
  - Select the view you want to copy the contact information to.
  - To copy contact information from the current view to both other supplier record views, select **Both**.

**Note:**

If copying contact information would cause existing data to be overwritten, Leap prompts you to confirm the action. Select **CONTINUE**.

Leap copies supplier contact information to the specified view or views.

---

## Delete a Supplier

You can delete suppliers in Leap if the following conditions are true:

- You have the **Suppliers: Delete** permission enabled in Polaris Administration. For more information about supplier permissions, search for "Acquisitions Workflow Permissions" in the Polaris staff client help.
- There are no purchase orders or invoices linked to the supplier.

### To delete a supplier

1. Use the Find Tool to find and open the supplier.
2. Select **ACTIONS > Delete**.

Leap prompts you to confirm the deletion.

3. Select **CONTINUE**.

Leap deletes the supplier.

## Working with Fiscal Years in Leap

You can now create, edit, delete, and view fiscal years in Leap.

This section covers the following topics:

- [Create a Fiscal Year](#)
- [View or Edit a Fiscal Year](#)
- [Delete a Fiscal Year](#)

For information on adding a fund to a fiscal year, see [Create a Fund](#).

---

### Create a Fiscal Year

You can create fiscal years in Leap if you have the **Fiscal Years: Create** permission enabled in Polaris Administration. For more information about fiscal year permissions, search for "Acquisitions Workflow Permissions" in the Polaris staff client help.

#### To create a fiscal year

1. Select **New > Fiscal Year**.

A New Fiscal Year workform appears.

The screenshot shows a web form titled "New Fiscal Year - 1". At the top right are two buttons: "SAVE" (green) and "CLOSE" (red). The form has several input fields: "Name" (a text box), "Status" (a dropdown menu showing "Open"), "Status Date" (a date field showing "1/6/2022"), "Owner" (a dropdown menu showing "Community Library (COB)"), "Start Date" (a date field showing "1/6/2022" with a calendar icon), "End Date" (a date field showing "1/6/2023" with a calendar icon), and "Note" (a large text area). Below the "Name" field is a link labeled "Details" with a checkmark icon.

2. Enter a unique name for the fiscal year in the **Name** box.
3. Select the fiscal year owner from the **Owner** list.

**Note:**

The fiscal year owner is the organization that uses the fiscal year. Only organizations with the **Fiscal Years: Create** permission appear in the **Owner** list.

4. Select a start date and an end date for the fiscal year.
5. (Optional) Enter a note in the **Note** box.

**Note:**

The note text you enter appears on the Fiscal Year workflow.

6. Select **SAVE** to save the new fiscal year.

You can add funds to the new fiscal year. For more information, see [Create a Fund](#).

---

## View or Edit a Fiscal Year

You can [view fiscal years](#) if you have the **Fiscal years: Access** permission enabled in Polaris Administration. You can [edit fiscal years](#) if you also have the **Fiscal years: Modify** permission for the organization that owns the fiscal year. For more information about fiscal year permissions, search for "Acquisitions Workflow Permissions" in the Polaris staff client help.

### Viewing a Fiscal Year

#### To view a fiscal year

1. Use the Find Tool to find and open the fiscal year.
2. Select **Funds** to open the Funds view, where you can see a list of the funds that are linked to the fiscal year. On the Funds view, you can:
  - Type in the **Filter** box to filter the list.
  - Select any column heading to re-sort the list.

### Editing a Fiscal Year

#### To edit a fiscal year

1. Use the Find Tool to find and open the fiscal year.
  2. (Optional) Edit fiscal year information. See [Create a Fiscal Year](#) for more information about fiscal year fields.
  3. (Optional) To add a new fund to the fiscal year, do the following:
    - a. Select **Funds**.  
The Funds view appears.
    - b. Select **NEW FUND**.  
The New Fund workform appears.
    - c. Follow the instructions in [Create a Fund](#).
  4. Select **SAVE**.
- 

## Delete a Fiscal Year

You can delete fiscal years in Leap if all of the following conditions are true:

- You have the **Fiscal years: Delete** permission enabled in Polaris Administration. For more information about fiscal year permissions, search for "Acquisitions Workflow Permissions" in the Polaris staff client help.
- The fiscal year has a status of Open.
- There are no funds attached to the fiscal year.

### To delete a fiscal year

1. Use the Find Tool to find and open the fiscal year.
2. Select **ACTIONS > Delete**.  
Leap prompts you to confirm the deletion.
3. Select **CONTINUE**.  
Leap deletes the fiscal year.

## Working with Fund Records in Leap

Fund records track the finances for the purchase of library materials and services for the linked fiscal year. You can set up funds for sources of money that are based on fiscal budgets, gifts, grants, donations, and endowments. In addition, you can set up deposit funds to track accounts where you have deposited a certain amount of money with a supplier.

Once you set up your acquisitions budget, Leap makes the funds available to link to purchase orders and invoices. When you release the purchase order or pay the invoice, the system automatically encumbers or expends the linked funds.

### To get to the Funds workflow

- [Create a New Fund](#).

OR

- Find the funds record you want to edit, and open it in the Funds workflow.

You can use the Funds workflow to manage the Fund, view its transaction history, and manage donors and balances.

**Note:**

To view and edit information in the Funds workflow, you need the following permissions:

- Access Acquisitions: Allow
- Funds: Access, Modify

From the Funds workflow you can do the following:

1. View and edit the [Fund Record](#).
2. Adjust fund balances, transfer money, and delete a fund using [Fund Actions](#).

---

## Create a Fund

### To create a fund from the Fiscal Year workflow

1. Go to the [Fiscal Year workflow](#).
2. Open the Funds view by selecting **Funds**.

The screenshot shows the 'Fiscal Year' form with the 'Funds' tab selected. The form includes fields for Name, Status, Status Date, Owner, Start Date, End Date, and a Note field. The 'Funds' tab is highlighted with a red box.

3. Select **+New Fund**.

The screenshot shows the 'Fiscal Year' form with the 'Funds' tab selected. A '+ NEW FUND' button is highlighted with a red box. Below the button is a table with columns: NAME, ALTERNATE NAME, TYPE, STATUS, TOTAL ALLOCATED, ENCUMBERED, EXPENDED, and FREE BALANCE. A 'Filter' input field is also visible.

NAME	ALTERNATE NAME	TYPE	STATUS	TOTAL ALLOCATED	ENCUMBERED	EXPENDED	FREE BALANCE
First Fund	Fund of the first	Regular	Open	\$0.00	\$0.00	\$0.00	\$0.00

The New Fund workflow opens.

4. Fill in the fields with the information as described in Fund Record Header and Details.
5. Click **SAVE**. A success message displays and the filled-in Fund workflow opens.

## View or Edit a Fund

You can now use Leap to manage the fund record.

### View a Fund Record

#### To get to the Fund workflow

- Find the fund record you want to edit, and open it in the Fund workflow.

You can use the Fund workflow to manage the fund, its balances, and its transfers.

### Edit a Fund Record

#### To edit fund information

1. Go to the Fund workflow.
2. Enter or edit information in some or all of the fields in the following fund record views:

- Header

The Funds workflow starts with header information. From the header, you can select the fiscal year name to open the Fiscal Year workflow. You can view funds properties by hovering your cursor over the **i**.

You can use the menus and link in the header to do the following:

- Delete the Fund - select **Actions > Delete**.
- Return to the fiscal year - select the linked fiscal year name.

- Details

#### To edit the Funds details

- **External Name** - Enter the public name of the fund or the name used for the fund in an external system.
- **Type** - Select the type of fund: Deposit Account, Donation, or Regular.

**Note:**

If you choose a fund type of Donation, you must enter the

name of the donor or donor organization on the Donor view of the Fund workflow.

- **Owner** - Select the owner of the fund from the list.
  - **Funding Source** - Enter where the money comes from.
  - **Transfers** - Select if you want to allow transfers to or from other funds within the same fiscal period.
  - **Display** - Select if you want the fund to display in fund lists. If you clear this option, users are unable to select the fund to pay for materials, but you can open the fund in the Fund workflow.
  - **Note** - Enter a note to library staff.
- History

The History view allows you to view a history of all the transactions for the fund. Leap displays the transactions in a sortable and filterable table. The table has controls on the bottom row that allow you to select how the table displays.

#### To interact with the transaction table

- Filter the items in the table - Use the **Filter** field to limit the number of rows of line items that you see in the table.

**Note:**

When you filter items, you filter the entire table, not just the page you see.

- Sort the table by column heading - Use the arrow in the header line of each column to display rows in ascending or descending order.

**Note:**

When you sort items in the table, you sort the entire table, not just the page you see.

- Select the number of items per page - Use the **Items per page** list at the bottom of the table to select the number of items to display in each page.

- Navigate through pages - Select the arrows beside the **Items per page** list at the bottom of the table to navigate forward and backward in the pages of the table.
- Balances

The Fund Balances view allows you to view the fund allocations and totals, and allows you to edit the fund limits. The fields in this view are editable according to the fund status and the fund type, refer to the following table for editable fields by fund status and type:

Fund Status	Fund Type	Editable Fields in Balances View
Open	Donation, Regular	<p><b>Encumbrance Limits:</b> Line Item Cannot Exceed, Orders Cannot Exceed, Fund Cannot Exceed</p> <p><b>Expenditure/Debit Limits:</b> Line Item Cannot Exceed, Invoices Cannot Exceed, Fund Cannot Exceed, Exceed Free Balance By</p>
Open	Deposit Account	<p><b>Expenditure/Debit Limits:</b> Line Item Cannot Exceed, Invoices Cannot Exceed, Fund Cannot Exceed</p>
Encumbrances Closed	Donation, Regular	<p><b>Encumbrance Limits:</b> Line Item Cannot Exceed, Orders Cannot Exceed, Fund Cannot Exceed</p> <p><b>Expenditure/Debit Limits:</b> Line Item Cannot Exceed, Invoices Cannot Exceed, Fund Cannot Exceed, Exceed Free Balance By</p>
Encumbrances Closed	Deposit Account	<p><b>Expenditure/Debit Limits:</b> Line Item Cannot Exceed, Invoices Cannot Exceed, Fund Cannot Exceed</p>

Fund Status	Fund Type	Editable Fields in Balances View
Closed	Donation, Regular, Deposit Account	None

- Set Encumbrance Limits to trigger warning messages during acquisitions processing if any of the following exceed the specified amount:
  - Line Item
  - Orders
  - Fund
- Set Expenditure/Debit Limits to trigger warning messages during acquisitions processing if any of the following exceed the specified amount:
  - Line Item
  - Invoices
  - Fund
  - Free Balance
- Donor

The Donor view in the Fund workform is where you can record and view all the information about the donor of a fund. The fields in the donor view are editable only if the Fund Status is "Open" or "Encumbrances closed" and the Fund Type is "Donation".

**Note:**

When you release a purchase order that uses a donor fund and create on-order items, the donor information is copied to the Source and Acquisition view of the Item Record workform. When you pay for the order, the donor funds and the items that were purchased using the donor funds are listed in the Items by Donor Fund Report. For more information, search the Polaris Staff Client help for "Acquisitions Reports".

- a. Select the type of donation in the **Fund Category** list.

**Note:**

Fund categories are defined in the Polaris Staff Client. For more information, search the Polaris Staff Client help for "Polaris Administration".

- b. Select the date when the fund is renewed in the **Renewal Date** field.
- c. Enter the name of the donor or the **Donor Organization**.
- d. Enter the Contact information for the donor.
- e. Type **Donor Notes**.

3. Select **SAVE**.

---

## Perform Fund Actions

Using the Actions menu on the Fund workform, you can perform the following actions:

[Adjust Fund Balances](#)

[Transfer Money](#)

[Delete a Fund](#)

### Adjust Fund Balances

On the Fund workform, you can use the Actions menu to adjust fund balances.

#### To adjust fund balances

1. Go to the [Fund workform](#).
2. Select **Actions > Adjust Fund Balances**.

**Fund** ⓘ

SAVE ACTIONS ↕ ↻ 📄 CLOSE

Adjust Fund Balances  
Delete  
Transfers Display

Name: **Books** Alternative name: **SLMBOOKS**  
Type: **Regular** Owner: **Digital Branch Two (TB12L7)**  
Balance: **\$4,071.10** Fiscal year: **SLM FY 2007 - test 2** Parent fund:

Details History Balances Donor

Name: Books Alternative Name: SLMBOOKS External Name: SLMBooks Ext  
Type: Regular Owner: Digital Branch Two (TB12L7) Funding Source: test  
Transfers Display  
Note: General note input by karen

The Adjust Fund Balances dialog opens.

Adjust Fund Balances

Assign "Beginning allocation"  
 Supplementary allocation  
 Reduction in allocation

Amount: \$50.00  
Note: Adding 50 dollars

UPDATE FUND CANCEL

3. Select one of the available values to adjust:

- **Assign "Beginning allocation"** - add the beginning budgeted amount. You can only perform this action once. When you assign the beginning allocation, the other two options become available.
  - **Supplementary allocation** - add more money to the fund. You can do this multiple times.
  - **Reduction in allocation** - reduce the budgeted amount. You can do this multiple times.
4. Enter the currency **Amount**.
  5. (Optional) Enter a **Note**.
  6. Select **Update Fund**.

## Transfer Money

On the Fund workform, you can use the Actions menu to transfer money between funds.

**Note:**

To transfer money between funds, you need the permissions mentioned in [Fund Record](#) plus the following permission:  
Funds: Transfer money between funds

## To transfer money between funds

1. Go to the [Fund workform](#).
2. Select **Actions > Transfer Money**.

**Fund** ⓘ

SAVE ACTIONS ↕ ↻ 📄 CLOSE

Name: Comics Alternative name: SLMBOOKSPAPcomic  
Type: Regular Owner: Community Library (COB)  
Balance: (\$3,350.71) Fiscal year: SLM FY 2007 - test 2 Parent fund: Paperbacks

Adjust Fund Balances  
Transfer Money  
Delete

Details History Balances Donor

Name: Comics Alternative Name: SLMBOOKSPAPcomic External Name:   
Type: Regular Owner: Community Library (COB) Funding Source:   
 Transfers  Display  
Note:

The Transfer Money dialog opens.

Transfer Money

From: Comics (SLMBOOKSPAPcomic)

To: Books (SLMBOOKS)

Amount: \$1,000.00

Note: Optional note

TRANSFER CANCEL

3. Select a Fund to transfer **To** from the list. Only Funds that share a Fiscal Year with your original fund appear in the list.

**Note:**

You cannot transfer funds between the following fund types:

- Deposit Account funds and Regular funds
- Deposit Account funds and Donation funds

4. Enter the currency **Amount**.
5. (Optional) Enter a **Note**.
6. Select **TRANSFER**.

### Delete a Fund

To delete a fund, you must have **Funds: Delete** permission. You can delete only funds that have no financial transaction history. For example, the fund must have:

- no allocations
- no free balance
- no expenditures
- no encumbrances

### To delete a fund:

1. Go to the [Fund workform](#).
2. Select **Actions > Delete**.

The screenshot shows a 'Fund' management interface. At the top, there is a header with the title 'Fund' and an information icon. Below the header, there are several buttons: 'SAVE' (green), 'ACTIONS' (dropdown menu), a refresh icon, a print icon, and 'CLOSE' (red). The 'ACTIONS' dropdown menu is open, showing three options: 'Adjust Fund Balances', 'Transfer Money', and 'Delete'. The 'Delete' option is highlighted with a red box. Below the header, there is a form with the following fields: 'Name: Fund First', 'Alternative name: First Fund', 'Type: Regular', 'Owner: Community Library (COB)', 'Balance: \$0.00', 'Fiscal year: RCR Fiscal Year', and 'Parent fund:'. Below the form, there is a navigation bar with 'Details', 'History', 'Balances', and 'Donor' tabs. The 'Details' tab is selected. Below the navigation bar, there are three columns of input fields: 'Name' (Fund First), 'Alternative Name' (First Fund), and 'External Name' (First fund for access). Below these fields, there are three dropdown menus: 'Type' (Regular), 'Owner' (Community Library (COB)), and 'Funding Source'. Below the dropdown menus, there are two checkboxes: 'Transfers' and 'Display', both of which are checked. Below the checkboxes, there is a 'Note' field with the text 'Create Fund test.'

The Delete Fund dialog opens.

3. Select **Continue**. Leap deletes the fund and returns you to the Fiscal Year workform.

## Working with Invoices in Leap

In addition to viewing and paying invoices in Leap, you can now also edit and delete them. You can also undo an invoice payment.

This section covers the following topics:

- [Edit an Invoice](#)
- [Edit an Invoice Line Item](#)
- [Delete an Invoice](#)
- [Delete an Invoice Line Item](#)
- [Undo an Invoice Payment](#)

### Edit an Invoice

You can edit invoices if you have the **Invoices: Modify** permission. For more information about acquisitions permissions, search for "Acquisitions Permissions" in the Polaris staff client help.

The status of an invoice determines the invoice fields you can edit.

If the invoice status is	You can
Open	Edit all fields mentioned in this documentation
PrePaid	Edit the following fields on the Details view: Closing Alert Date, Payment Due Date, Receipt Date, Shipped Date, and Note
Credited, Paid, or PartPaid	Edit the Note field on the Details view
Open or PartPaid	Delete a line item
<i>Any status</i>	Edit payment history information

### To edit an invoice

1. Use the Find Tool to find and open the invoice.
2. Do one or more of the following:
  - [Edit invoice header information.](#)
  - [Edit invoice record details.](#)
  - [Add a header charge or credit.](#)
  - [Delete a header charge or credit.](#)
  - [Apply a discount or add sales tax.](#)
  - [Edit payment history information.](#)
  - [Edit a line item.](#)
  - [Delete a line item.](#)
3. Select **SAVE** to save your changes.

### Edit Invoice Header Information

You can edit some fields in the invoice header if the invoice has a status of Open.

The screenshot shows the 'Invoice' header information form. At the top left, it says 'Invoice' with an information icon. To the right are buttons for 'SAVE' (green), 'ACTIONS' (dropdown), 'REFRESH' (refresh icon), 'RESULTS' (results icon), and 'CLOSE' (red). Below these are several input fields: 'Number' (text box with '3012941292'), 'Suffix' (text box with 'EDI'), 'Lines' (text box with '42'), and 'Type' (dropdown menu with 'Regular' selected). A second row of fields includes 'Invoice Date' (calendar icon, '1/11/2008'), 'Status' (text box with 'Open'), 'Status Date' (text box with '1/12/2008'), 'Total' (text box with '\$555.35'), and 'Method' (dropdown menu with 'Purchase' selected).

### To edit invoice header information

1. On the Invoice workform, do one or more of the following:
  - In the **Number** box, enter a unique invoice number.
  - In the **Suffix** box, enter an invoice number suffix.
  - Select an invoice type from the **Type** list. You can only edit the invoice type if the invoice has no line items.
  - Select a payment method from the **Method** list. You can only edit the method if the invoice has no line items.

**Note:**

The available payment methods depend on the invoice type selected.

- In the **Invoice Date** box, enter the invoice creation date.
2. Do one of the following:
- Select **SAVE**.
  - Continue [editing the invoice](#).

**Edit Invoice Record Details**

The status of the invoice determines which fields you can edit on the Details view. For more information, see [Edit an Invoice](#).

The screenshot shows a web interface for editing an invoice record. At the top, there are navigation tabs: Details (selected), Line Items, Charges, and Payment History. Below this, the form is organized into two main sections: 'Account Identifiers' and 'Invoice Details'.  
 In the 'Account Identifiers' section:  
 - 'Owner' is a dropdown menu showing 'Bolton Free Library (BOL)'.  
 - 'Supplier' is a text input field with 'B&T BOOKS - L358576' and a 'FIND' button.  
 - 'SAN' consists of two text input fields with '312-4274' and a colon separator.  
 - 'Account' is a text input field with '0001'.  
 In the 'Invoice Details' section:  
 - 'Transmission Method' is a dropdown menu showing 'Electronic'.  
 - 'EDI File Name' is a text input field with 'OUT105854058545.INT'.  
 - 'Closing Alert Date' and 'Payment Due Date' are date pickers.  
 - 'Receipt Date' and 'Shipped Date' are date pickers, with 'Shipped Date' currently set to '1/11/2008'.

**To edit information on the Details view**

1. On the Invoice workform, select the Details view.
2. Do one or more of the following:
  - Select the library that owns the invoice from the **Owner** list.

**Note:**

Only organizations with the **Invoices: Create** permission appear in the **Owner** list.

- To choose a different supplier, select **FIND**. Use the Find Tool to search for a supplier and select it. Then select **OPEN**.
  - Enter plan information in the **Plan** box.
  - Select the invoice transmission method from the **Transmission Method** list.
  - To indicate that the invoice should be closed by a certain date (and that no payments or credits should be made after this date), enter a date in the **Closing Alert Date** box.
  - Enter a payment due date in the **Payment Due Date** box.
  - Enter the date that the invoice materials were received in the **Receipt Date** box.
  - Enter the date that invoice materials were shipped in the **Shipped Date** box.
  - Enter any notes about the invoice in the **Note** box.
3. Do one of the following:
- Select **SAVE**.
  - Continue [editing the invoice](#).

### **Add a Header Charge or Credit**

You can add a header charge or credit to an invoice with a status of Open.

[Details](#) | [Line Items](#) | [Charges](#) | [Payment History](#)

---

**Payment Details**

**Line Item Subtotals**

Materials: \$495.00

Charges and credits: \$0.00

**Totals**

Sales tax: \$25.92

Unpaid: \$543.02

Credited: \$0.00

Paid: \$0.00

Grand Total: \$543.02

**Header Charge Subtotals**

Charges and credits: \$22.10

**Rate (%)**

Discount applied: 42.5

Sales tax: 5

**Header Charges**

	CHARGE TYPE	AMOUNT	FUND	FISCAL YEAR
<input type="checkbox"/>	Credit	(\$2.00)	Audiovisual	BOL FY 2008

**To add a header charge or credit to an invoice**

1. On the Invoice workform, select the Charges view.
2. Select **ADD CHARGE**.

The Add Header Charge dialog appears.

**Add Header Charge**

Type: Cataloging Services

Amount: \$0.00

Fund: B1 (Bolton FY)

OK CANCEL

3. Select a charge or credit type from the **Type** list.

**Note:**

You can change the name of the Other charge type to suit your library's purposes. For more information, search for "Rename the Purchase Order and Invoice Header Other Charge Type" in the Polaris staff client help.

4. In the **Amount** box, enter the charge or credit amount.
5. Select a fund from the **Fund** list.

**Note:**

The Fund Drop-down List Box Display setting in Polaris Administration (staff client) determines which funds appear in the list. For more information, search for "Specify How Funds are Displayed in Acquisitions" in the Polaris staff client help.

6. Select **OK**.

Leap saves your changes. The new charge or credit appears in the **Header Charges** table.

### Delete a Header Charge or Credit

You can delete a header charge or credit if the invoice has a status of Open.

#### To delete a header charge or credit

1. On the Invoice workform, select the Charges view.
2. Select the checkbox beside the charge or credit you want to delete.
3. Select **DELETE**.  
Leap prompts you to confirm the deletion.
4. Select **CONTINUE**.  
Leap deletes the charge or credit.

### Apply a Discount or Add Sales Tax

You can apply a discount or add sales tax to an invoice if the invoice has a status of Open.

#### To apply a discount or add sales tax

1. On the Invoice workform, select the Charges view.
2. Do one or both of the following:
  - In the **Discount applied** box, enter the discount percentage.
  - In the **Sales tax** box, enter the sales tax percentage.

Leap applies the discount or tax.

### Edit Payment History Information

The screenshot shows the 'Payment History' tab selected in a software interface. The interface is divided into two main sections: 'Account Identifiers' and 'Invoice Details'.

**Account Identifiers Section:**

- Owner:** Bancroft Public Library (Salem) (SLM) (dropdown menu)
- Supplier:** Baker and Taylor-SLM (text field) with a 'FIND' button.
- SAN:** Two input fields with a colon separator. The first field contains '312-4142'.
- Plan:** An empty text input field.
- Account:** 1000 (text field)

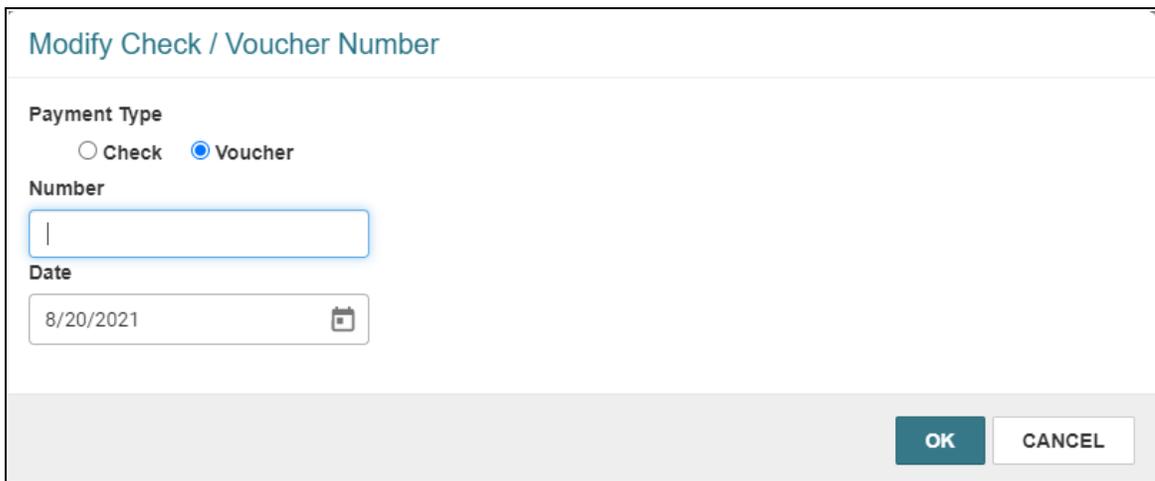
**Invoice Details Section:**

- Transmission Method:** Electronic (dropdown menu)
- EDI File Name:** An empty text input field.
- Closing Alert Date:** A date picker field.
- Payment Due Date:** A date picker field.
- Receipt Date:** A date picker field.
- Shipped Date:** 7/15/2007 (date picker field)

### To edit invoice payment history information

1. On the Invoice workform, select the Payment History view.
2. (Optional) Enter text in the **Filter** box to filter the list of payment entries.
3. Select the payment entry you want to edit.
4. Select **MODIFY CHECK/VOUCHER**.

The **Modify Check/Voucher Number** dialog appears.



The screenshot shows a dialog box titled "Modify Check / Voucher Number". It contains the following elements:

- Payment Type:** Two radio buttons, "Check" (unselected) and "Voucher" (selected).
- Number:** A text input field.
- Date:** A date input field showing "8/20/2021" with a calendar icon.
- Buttons:** "OK" and "CANCEL" buttons at the bottom right.

5. Do one or more of the following:
  - Select **Check** or **Voucher** to change the payment type.
  - Enter text in the **Number** box to edit the check or voucher number.
  - Enter a new payment date in the **Date** box.
6. Select **OK**.

Leap saves your changes.

---

### Edit an Invoice Line Item

#### To edit an invoice line item

1. On the Invoice workform, select the Line Items view.
2. (Optional) Enter text in the **Filter** box to filter the list of line items.
3. Select the line item you want to edit.

The Invoice Line Item workform appears.

### Invoice Line Item i

SAVE
REFRESH
CLOSE



**Black mad wheel**  
By Malerman, Josh, author.

Invoice number: **SDP version 2Quell Test**  
Horror

Suffix:

ISBN/ISSN: **9780062259684 (hardcover)**

Status: **Credited**

Status date: **12/15/2021**

Other no.:

Line no.: **2**

Bib control number: **1572437**

Purchase order number:

✓ Details
☰ Segments

Title Details

<b>ISBN/ISSN</b> <input style="width: 90%; border: none; border-bottom: 1px solid #ccc;" type="text" value="9780062259684 (hardcover)"/>	<input type="button" value="FIND"/>	<b>Bib Control Number</b> <input style="width: 90%; border: none; border-bottom: 1px solid #ccc;" type="text" value="1572437"/>	<b>Bib Template</b> <input style="width: 95%; border: none; border-bottom: 1px solid #ccc;" type="text"/>
<b>Title</b> <input style="width: 95%; border: none; border-bottom: 1px solid #ccc;" type="text" value="Black mad wheel"/>	<b>Author</b> <input style="width: 95%; border: none; border-bottom: 1px solid #ccc;" type="text" value="Malerman, Josh, author."/>		
<b>Publisher</b> <input style="width: 95%; border: none; border-bottom: 1px solid #ccc;" type="text"/>	<b>Date</b> <input style="width: 90%; border: none; border-bottom: 1px solid #ccc;" type="text" value="2017"/>	<b>Edition</b> <input style="width: 90%; border: none; border-bottom: 1px solid #ccc;" type="text" value="First edit"/>	<input type="checkbox"/> Alert <input checked="" type="checkbox"/> Display in PAC

4. Do one or more of the following:

- [Edit line item details.](#)
- [Edit a line item segment.](#)
- [Edit charges for a line item segment.](#)
- [Delete a line item segment.](#)

5. Do one of the following:

- Select **SAVE**.
- Continue [editing the invoice](#).

### Edit Line Item Details

The invoice type, combined with the status of the invoice line item, determines the invoice line item details you can edit:

- For invoice types other than Miscellaneous, you can edit most of the fields mentioned in this documentation when the line item status is Open or Free. You cannot edit the Title or Author, which come from the linked bibliographic record.

- For Miscellaneous invoices, you can edit a smaller subset of fields when the line item status is Open or Free. Since Miscellaneous invoices have no linked bibliographic record, you can edit the Title and Author.
- Some fields can only be edited when the line item status is Open.
- The Alert flag and Alert Note can always be edited, regardless of the invoice or line item status.

### To edit invoice line item details

1. On the Invoice Line Item workform, select the Details view.
2. Do one or more of the following:
  - Select a new ISBN or ISSN from the **ISBN/ISSN** list. The list contains the numbers that are present in the bibliographic record's 020 and 022 tags. Selecting a new ISBN or ISSN updates the line item's price information.
  - Enter text in the **Title** box.
  - Enter text in the **Author** box.
  - Select the **Alert** checkbox to display an alert icon for line item on the Line Items view of the Invoice workform.
  - Select a number from the **Other No.** list. The list contains the numbers that are present in the bibliographic record's 024 tag.
  - Select a material type from the **Material Type** list.

**Note:**  
The Material Types policy table determines the material types that appear in this list. For more information, search for "Material Types Policy Table" in the Polaris staff client help.

  - Enter the date when invoice materials were shipped in the **Shipped Date** box.
  - Enter text in the **Alert Note** box.
  - Edit the **Unit Price**. Leap automatically updates the Discount Price to reflect the Discount Rate.
  - Edit the **Discount Rate**. Leap automatically updates the Discount Price.
  - Edit the **Discount Price**. Leap automatically updates the Discount Rate.
3. Select **SAVE**.

## Edit a Line Item Segment

You can edit an invoice line item segment if the following conditions are true:

- The invoice line item has a status of Open or Free.
- The segment has a status of Open or Free.

The segment fields you can edit depend on whether the payment status is Open or Free.

### To edit a line item segment

1. On the Invoice Line Item workform, select the Segments view.
2. Select the Orders view.
3. (Optional) Enter text in the **Filter** box to filter the list of segments.
4. Select the checkbox beside the segment you want to edit.
5. Select **EDIT**.

The Edit Segment dialog appears.

6. Do one or more of the following:
  - Select a library or branch from the **Destination** list.

**Note:**

The destination you select must have at least one fund.

- Select a collection from the **Collection** list.
  - Select a fund from the **Fund** list.
7. Select **OK**.

## Edit Charges for a Line Item Segment

You can edit charges for a line item segment if the following conditions are true:

- The invoice line item has a status of Open or Free.
- The segment has a status of Open or Free.

### To edit charges for a line item segment

1. On the Invoice Line Item workform, select the Segments view.
2. Select the Charges view.
3. (Optional) Enter text in the **Filter** box to filter the list of segments.
4. Select the checkbox beside the segment for which you want to edit charges.

5. Select **EDIT**.

The Edit Segment dialog appears.

6. Edit one or more of the charges on the Edit Segment dialog.
7. Select **OK**.

### Delete a Line Item Segment

You can delete an invoice line item segment if the following conditions are true:

- The invoice line item has a status of Open or Free.
- The segment has a payment status of Open or Free.

#### To delete an invoice line item segment

1. On the Invoice Line Item workform, select the Segments view.
2. Select the Orders view.
3. (Optional) Enter text in the **Filter** box to filter the list of segments.
4. Select the checkbox beside the segment you want to delete.

**Note:**

If an invoice line item has only one segment, you cannot delete it.

5. Select **DELETE**.

Leap prompts you to confirm the deletion.

6. Select **CONTINUE**.

Leap deletes the segment.

---

### Delete an Invoice

You can delete invoices in Leap if the following conditions are true:

- You have the **Invoices: Delete** permission enabled in Polaris Administration. For more information about fiscal year permissions, search for "Acquisitions Workflow Permissions" in the Polaris staff client help.
- The invoice has a status of Open.

#### To delete an invoice

1. Use the Find Tool to find and open the invoice.
2. Select **ACTIONS > Delete**.  
Leap prompts you to confirm the deletion.
3. Select **CONTINUE**.  
Leap deletes the invoice.

---

## Delete an Invoice Line Item

You can delete an invoice line item if all of the following conditions are true:

- You have the **Invoices: Delete** permission enabled in Polaris Administration. For more information about fiscal year permissions, search for "Acquisitions Workflow Permissions" in the Polaris staff client help.
- The invoice has a status of Open or PartPaid.
- The invoice line item has a payment status of Open or Free.

### To delete an invoice line item

1. Use the Find Tool to find and open the invoice.
2. On the Invoice workform, select the Line Items view.
3. (Optional) Enter text in the **Filter** box to filter the list of line items.
4. Select the checkbox beside the line item you want to delete.
5. Select **DELETE**.  
Leap prompts you to confirm the deletion.
6. Select **CONTINUE**.  
Leap deletes the line item and any links to associated purchase order line items.  
(Purchase order line items are not deleted.)

---

## Undo an Invoice Payment

You can undo an invoice payment if all of the following conditions are true:

- You have the **Invoices: Pay, Undo payment, Credit** permission enabled in Polaris Administration. For more information about fiscal year permissions, search for

"Acquisitions Workflow Permissions" in the Polaris staff client help.

- If the invoice type is Miscellaneous:
  - The invoice status is Paid.
  - The payment method is Purchase.
  - All invoice line items have a status of Paid or the invoice has header charges.
- For all other types of invoices:
  - The invoice status is Paid.
  - The payment method is Purchase.
  - All invoice line items have a status of Paid.

### **To undo a payment**

1. Use the Find Tool to find and open the invoice.
2. Select **ACTIONS > Undo Payment**.

Leap prompts you to confirm the action.

3. Select **CONTINUE**.

Leap does the following:

- Reverses the invoice payment.
- Adjusts linked funds.
- Logs the transaction in the payment history.
- Returns the invoice to the Open status. The invoice can now be edited again.

## Working with Purchase Orders in Leap

You can create, view, edit, release, send, and delete [purchase order records](#)<sup>1</sup> in Leap. You can also create, view, edit, and delete purchase order lines items. For more information about purchase orders, search for "Purchase Orders" in the Polaris staff client help.

This section covers the following topics:

- [Bulk Add Records to a Purchase Order](#)
- [View or Edit a Purchase Order](#)
- [View and Edit Purchase Order Line Item Information](#)
- [Release, Send, or Delete a Purchase Order](#)

---

### Bulk Add Records to a Purchase Order

Leap allows you to add bibliographic records, created from a vendor's MARC records, in bulk to a new or an existing purchase order. This topic covers the following:

- [Bulk Add Bibliographic Records to a New Purchase Order](#)
- [Bulk Add Bibliographic Records to an Existing Purchase Order](#)

Before Importing MARC records from a vendor for the first time, check the following settings in the Polaris system administration (staff client) **Administration > Explorer > System > Parameters > Acquisitions / Serials**:

- To automatically populate the purchase order number, set **Generate Purchase Order Number** to **Yes**.
- To require users to enter more data in the Line Default Data fields, set **Bulk add to PO: Replace invalid fields with default data** to **Yes**.

**Note:**

You must have the following permissions to bulk add records to a purchase order:

---

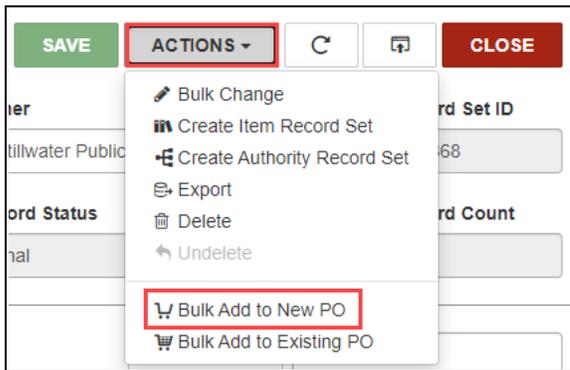
<sup>1</sup>A purchase order record is the record you create when you order titles from a supplier.

- Access Acquisitions
- Purchase Orders: Access
- Purchase Orders: Create

### Bulk Add Bibliographic Records to a New Purchase Order

To bulk add bibliographic records to a new purchase order

1. Create or find a bibliographic record set.
2. Open the Bibliographic Record Set workflow.
3. Select **ACTIONS** > **Bulk Add to New PO**.



The Add to New Purchase Order dialog opens.

Add to New Purchase Order

---

**Header**

PO number:

Owner:

Type:

Method:

Supplier:

---

**Line Default Data**

Material type:  Quantity:

Destination:  List price:

Collection:  Discount (%):

Fund:

4. Enter information in all of the Header fields. If you want to search for the purchase order after Leap creates it, note the purchase order number for later. Keep in mind the following:
  - a. Leap automatically enters the purchase order number when **Generate Purchase Order Number** is set to **Yes** in the Polaris system administration (staff client).
  - b. Leap automatically enters the following information:
    - Owner - defaults to the branch you are logged in on or the first branch you have permissions for

- Type - defaults to Firm
- Method - defaults to Purchase

c. You must enter Supplier using the Find Tool.

5. Enter information in the Line Default Data fields.

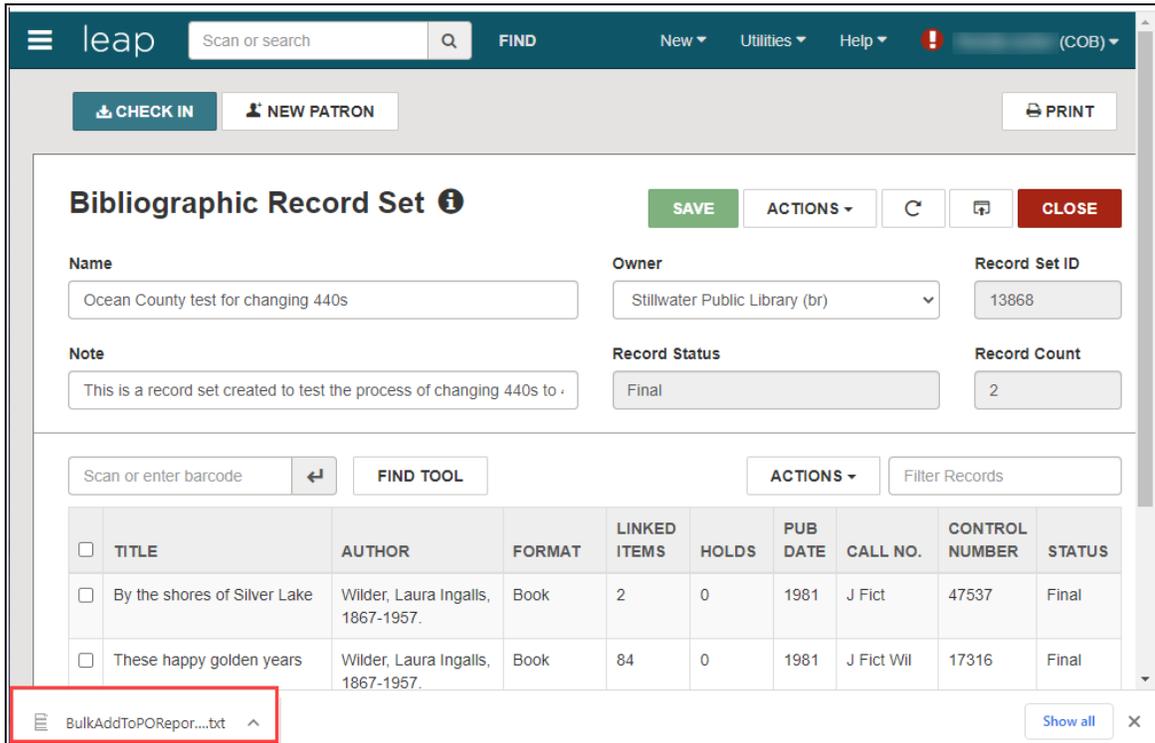
If your library administrator has set **Bulk add to PO: Replace invalid fields with default data** to **Yes**, you can edit the fields below. If it is set to **No**, you can edit only the fields marked with an asterisk (\*).

- Material type \*
- Quantity
- Destination
- List price
- Collection
- Discount \*
- Fund

6. Select **CONTINUE**.

Leap displays a message when the purchase order is created.

Leap saves a Bulk Add text report on the server, and a link to the report appears in the browser downloads.



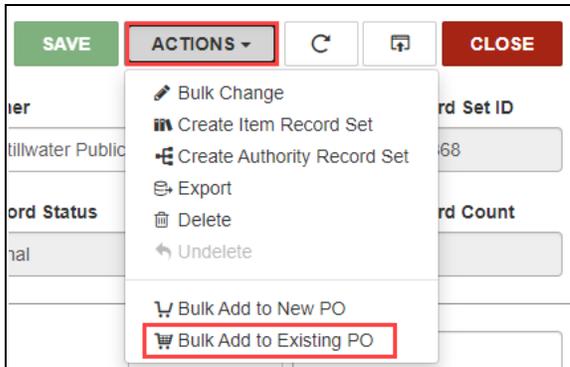
7. (Optional) If you want to open the purchase order, use the Find Tool to search for it by number.

### Bulk Add Bibliographic Records to an Existing Purchase Order

#### To bulk add bibliographic records to an existing purchase order

1. Create or find a bibliographic record set.
2. Open the Bibliographic Record Set workflow.

3. Select **ACTIONS > Bulk Add to Existing PO**.



The purchase order Find Tool opens.

4. Search for the purchase order you want to use, select it from the search results, and select **OPEN**. If you want to search for the purchase order after Leap adds record to it, note the purchase order number for later.

The Add to Existing Purchase Order dialog opens.

**Add to Existing Purchase Order**

---

**Header**

PO number:

Owner:  ▼

Type:  ▼

Method:  ▼

Supplier:

---

**Line Default Data**

Material type:  ▼      Quantity:

Destination:  ▼      List price:

Collection:  ▼      Discount (%):

Fund:  ▼

The Header fields are filled automatically.

5. Enter information in the Line Default Data fields.

If your library administrator has set **Bulk add to PO: Replace invalid fields with default data** to **Yes**, you can edit the fields below. If it is set to **No**, you can edit only the fields marked with an asterisk (\*).

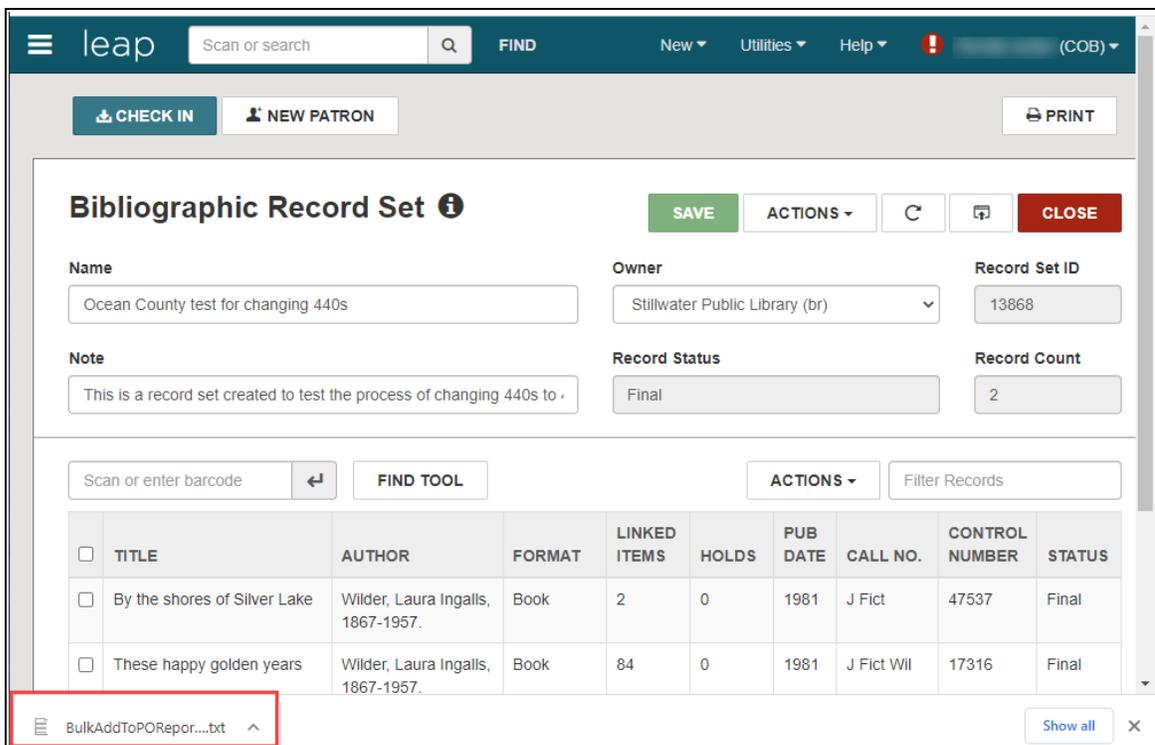
- Material type \*
- Quantity
- Destination

- List price
- Collection
- Discount \*
- Fund

6. Select **CONTINUE**.

Leap displays a message when the purchase order is created.

A link to the Bulk Add text report appears in the browser downloads.



7. (Optional) If you want to open the purchase order, use the Find Tool to search for it by number.

### View or Edit a Purchase Order

You can use Leap to manage the purchase order record. A purchase order record is the record you create when you order titles from a supplier.

## View a Purchase Order Record

### To get to the Purchase Order workflow

- Find the purchase order record you want to edit, and open it in the Purchase Order workflow.

You can use the Purchase Order workflow to manage the purchase order, its line items, and its segments.

#### **Note:**

To view and edit information in the Purchase Order workflow, you need the following permissions:

- Access Acquisitions: Allow
- Purchase Orders: Access
- Purchase Orders: Modify

## Edit a Purchase Order Record

### To edit purchase order information

1. Go to the Purchase Order workflow.
2. Enter or edit information in some or all of the fields in the following purchase order record views:

- Header

The Purchase Order workflow starts with the Header. The fields are editable depending on the purchase order status.

If the purchase order has a status of Pending, you can edit the following:

- **Number** - Enter a new purchase order number.
- **Suffix** - Enter a new purchase order suffix.

The rest of the fields are read-only and editable only during the purchase order creation process.

- Details

#### **To View Account Identifiers and Change Supplier**

On the Details view, you can view the account identifiers for the owner of the purchase order and the supplier. The fields are editable depending on the purchase order status. See the following table for a complete list:

Purchase Order Status	Editable Fields in Details View
Pending	Number, Suffix, Owner, Plan, Supplier, SAN, Account, Authorization, Rental Return Date, External Financial System ID, and Note
Canceled	Rental Return Date, External Financial System ID, and Note
Continuing	Rental Return Date, External Financial System ID, and Note
Partly Received	Rental Return Date, External Financial System ID, and Note
Received	Rental Return Date, External Financial System ID, and Note
Released	Rental Return Date, External Financial System ID, and Note
Closed	None

The rest of the fields are read-only and editable only during the purchase order creation process.

If the purchase order has a status of Pending, you can edit the following:

- **Owner** - Select a new owning library and SAN. The owning library SAN cannot be modified directly, only by changing the owning organization.
- **Plan** - Enter a plan.
- **Supplier, SAN and Account** - Edit the Supplier fields. Use the Find button to open the Find Tool for Suppliers. Choosing a supplier from the search results enters the new supplier into the Supplier field and fills in the SAN and Account information.

**Important:**

If you update the supplier, Leap updates the Claims view based on the new supplier record.

**To View and Edit Order Details**

On the Details view, you can view the order details such as authorization, EDI file name, and EDI creation date. The fields are editable depending on the purchase order status. See the [Purchase Order Status table](#) for a complete list.

If the purchase order has a status of Pending, you can do the following:

- **Authorization** - Enter the name of the person or group who authorized the order.
  - **Rental Return Date** - Select the date on which rental items must be returned.
  - **External Financial System ID** - If there is another identification associated with this purchase order, you can enter it here.
  - **Note** - Type a note to other staff members.
- **Line Items**

Each line item is a distinct record that contains unique information about a title. Within each line item, segments contain distribution and fund information for copies of the title. The Purchase Order workflow allows you to view a table of purchase order line items, sort the table, and access the workflow for each line item.

The table displays an Alert (!) column if any of the line items have alerts associated with them. Select the line item row to open the Purchase Order Line Item workflow, and toggle the Alert on or off for the line item.

**To sort line items**

- Use the **Filter** field to limit the number of rows of line items that you see in the table.
- Select the arrow in the header line of each column to sort rows in ascending or descending order.

**To access the line item workflow**

- Select a row to open the [Purchase Order Line Item workflow](#).
- Charges

### To edit order details

The Charges view starts with the Order Details. The fields are editable depending on the purchase order status.

If the purchase order status is Pending, you can edit the following:

- **Discount applied** - Type a number that represents the percentage of discount applied.
- **Sales tax** - Enter a number that represents the percentage of sales tax applied.

The rest of the fields are read-only and editable only during the purchase order creation process.

### To add a header charge

- Select **Add Charge**. A dialog opens.
- Select the **Type** of header charge.
- Enter the **Amount**.
- Select the associated **Fund**.
- Select **OK**.
- The header charge is added into the Header Charges table.

**Note:**

You can add only one of each charge type: Cataloging Services, Other, Shipping, Service, and Special Handling.

### To sort the table

- You can sort the header charges in the table by ascending or descending order by selecting the arrow beside the column heading.

### To delete header charges

- a. Select one or more rows in the Header Changes table.

**Note:**

Select the checkbox in the table heading to select or clear all rows.

- b. Select **Delete**.  
The selected charges disappear from the table.

- Instructions to Supplier

The Instructions to Supplier view allows you to add instructions to the supplier of your purchase order. You cannot edit the fields on this view if the purchase order status is Closed.

**To enter or edit shipping and binding information**

- a. Select **Shipping Method**.
- b. Select a **Do Not Ship Before** date.
- c. Select the **Binding Substitution** you would accept.

**To capture communication with the supplier**

- Enter **Special Instructions** to the supplier.
- If the order is confirmed, select the **Order Confirmed Date**.
- If the order is canceled, select an **Order Canceled Date**.
- If you've decided on delayed billing, select a statement identifying the month in the **Delayed Billing** field.
- Select a statement about **Backorder** that applies to this purchase order and supplier.
- Select a statement about how you would like **Cataloging Services** provided by the supplier.

**To enter invoicing information**

- Enter the number of **Copies** of the invoice that you want the supplier to send.

- Select a statement about **Sequencing** that applies to this supplier's invoicing.
- Select the **Delivery Method** you prefer for the invoice.
- Claims

You can schedule claim notices to be sent to the supplier for purchase orders that are not received as expected. The Claims view in the Purchase Order workform allows you to fine-tune claims information.

#### To enter claims information

- a. Enter the number of **Max Claims** your library will submit to the supplier before canceling an ordered item. You can enter any number from 1 through 5. The fields in the Claim Waiting Period section becomes editable.
  - b. Enter the number of **Days After Release/Expected Arrival**, or the number of days between the time a staff member releases the purchase order line item to the time Leap generates the first claim.
  - c. Enter the number of days between each subsequent claim.
  - d. Select **Cancel Notice** to generate a cancellation notice.
  - e. Select **Auto Cancel Waiting Period** to enter the number of days to wait before canceling purchase order line items automatically after the claim cycle is over.
  - f. Select **Claim Notice** to immediately generate a claim notice.
3. Select **SAVE**.

---

## View and Edit Purchase Order Line Item Information in Leap

Purchase order line items contain information about the titles you are ordering. Each line item contains at least one segment with the distribution and fund information for the copies of that title.

**Note:**

To view and edit information in the Purchase Order Line Item workform, you need the following permissions:

- Access Acquisitions: Allow
- Purchase Orders: Access
- Purchase Orders: Modify

**To get to the Purchase Order Line Item workform**

1. Go to the [Purchase Order](#) workform.
2. Select the **Line Items** view.
3. Select a row in the line items table.  
The Purchase Order Line Item workform opens.

You can use the links in the header to do the following:

- Go to the bibliographic record - select the linked **Bib control number**.
- Return to the purchase order record - select the linked **Purchase order number**.

**To edit purchase order line item information**

1. Go to the Purchase Order Line Item workform.
2. Enter or edit information in some or all of the following purchase order line item record views:
  - Details

The details fields are editable depending on the purchase order status. See the following table for a complete list:

Purchase order line item Status	Editable Fields in Details View
Pending	ISBN/ISSN, Other No., Alert, Material Type, Unit Price, Discount Rate, and Discount Price
Backordered, Claimed, Currently Received, Exceptional Condition, Never Published, Not Yet Published, On Order, Out of Print, Partly Received, Pending Claim, Received, Return Requested, Returned	Alert

Purchase order line item Status	Editable Fields in Details View
Closed	None

In this field	Enter
<b>ISBN/ISSN</b>	Select a number from the dropdown list. Select <b>FIND</b> or enter a new number to change the linked bibliographic record. Selecting an existing ISBN or ISSN updates the price information. Entering a value triggers the bibliographic Find Tool to search for that ISBN and clears the title and the bibliographic details.
<b>Other No.</b>	Select a number from the dropdown list. The list contains any UPCs present in the bibliographic record.
<b>Alert</b>	Select to display an alert icon (!) for this line item where it appears in the Purchase Order workflow.
<b>Unit Price</b>	Enter the price for one unit of this line item.
<b>Discount Rate</b>	(Optional) Enter the discount percentage for one unit of this line item. If you enter Discount Rate and Unit Price, Leap calculates the Discount Price.
<b>Discount Price</b>	(Optional) Enter the discounted price for one unit of this line item. If you enter Discount Price and Unit Price, Leap calculates the Discount Rate.

- Segments  
A purchase order line item must have at least one segment. Use the **Segments** view of the Purchase Order Line Item workflow to view, edit, and delete segments.

In the Segments view, you can see the segments listed in a table. The table lists segments in the following views:

- **Orders** - Select a segment to edit or delete it.
- **Charges** - Select segment to edit the segment's charges.
- **Totals** - View the totals for the line item and segments.

**Purchase Order Line Item** SAVE ACTIONS ↕ ↻ CLOSE

Along came a spider [sound recording]  
By Patterson, James, 1947-

Purchase order number: **AMS17**      Status: **Pending**      Line no.: 1  
 Suffix:      Status date: **12/21/2018**      Bib control number: **782195**  
 ISBN/ISSN: **780736655248**      Other no.: **5364**      Material type:

[Details](#) [Segments](#) [Notes](#) [Instructions To Supplier](#) [Claims](#)

Total Order Quantity: 2

View: **Orders** ▾  
Charges  
Totals

	SEGMENT	QUANTITY	DESTINATION	COLLECTION	FUND	FISCAL YEAR	STATUS	PAYMENT STATUS
<input checked="" type="checkbox"/>	1	1	Saratoga Springs Public Library		2017BRollTest (2017RT)	2017a	Pending	Open
<input type="checkbox"/>	2	1	Saratoga Springs Public Library		2019 Test 3 Materials Fund Rolled over (2019MF3)	2019 Test 3 Rolled over	Pending	Open

**To filter and sort each view of the table**

- Use the **Filter** field to limit the number of rows of segments that you see in the table.
- Select the arrow in the header line of each column to sort rows in ascending or descending order.

**To edit or delete a segment**

You can edit or delete a segment from the **Orders** view of the purchase order line item segment.

**To edit a segment's order**

- a. Go to the **Purchase Order Line Item** workform > **Segment** view.

**Purchase Order Line Item** ⓘ
SAVE ACTIONS ↕ C CLOSE

Along came a spider [sound recording]  
By Patterson, James, 1947-

Purchase order number: **AMS17**    Status: **Pending**    Line no.: 1  
 Suffix:    Status date: **12/21/2018**    Bib control number: **782195**  
 ISBN/ISSN: **780736655248**    Other no.: **5364**    Material type:

---

Details **Segments** Notes Instructions To Supplier Claims

Total Order Quantity: 2 View: Orders ▾

EDIT DELETE Filter

<input type="checkbox"/>	SEGMENT	QUANTITY	DESTINATION	COLLECTION	FUND	FISCAL YEAR	STATUS	PAYMENT STATUS
<input checked="" type="checkbox"/>	1	1	Saratoga Springs Public Library		2017BRollTest (2017RT)	2017a	Pending	Open
<input type="checkbox"/>	2	1	Saratoga Springs Public Library		2019 Test 3 Materials Fund Rolled over (2019MF3)	2019 Test 3 Rolled over	Pending	Open

The Orders view for the Segments opens.

- b. Select a table row.

**Purchase Order Line Item** ⓘ
SAVE ACTIONS ↕ C CLOSE

Along came a spider [sound recording]  
By Patterson, James, 1947-

Purchase order number: **AMS17**    Status: **Pending**    Line no.: 1  
 Suffix:    Status date: **12/21/2018**    Bib control number: **782195**  
 ISBN/ISSN: **780736655248**    Other no.: **5364**    Material type:

---

Details **Segments** Notes Instructions To Supplier Claims

Total Order Quantity: 2 View: Orders ▾

EDIT DELETE Filter

<input type="checkbox"/>	SEGMENT	QUANTITY	DESTINATION	COLLECTION	FUND	FISCAL YEAR	STATUS	PAYMENT STATUS
<input checked="" type="checkbox"/>	1	1	Saratoga Springs Public Library		2017BRollTest (2017RT)	2017a	Pending	Open
<input type="checkbox"/>	2	1	Saratoga Springs Public Library		2019 Test 3 Materials Fund Rolled over (2019MF3)	2019 Test 3 Rolled over	Pending	Open

- c. Select **EDIT**.  
The Edit Segment dialog opens.

**Edit Segment**

**Quantity**

**Destination**

**Collection**

**Fund**

**OK** **CANCEL**

- d. Enter or select the following values:
- **Quantity** - Enter the number of units for this segment order.
  - **Destination** - Select the destination library or branch for this segment order.
  - **Collection** - (optional) Select the collection this order belongs to.
  - **Fund** - Select the fund that pays for this order.
- e. Select **OK**.

**To delete a segment**

- a. Go to the **Purchase Order Line Item** workform > **Segment** view.  
The Orders view for the Segments opens.
- b. Select a table row.

c. Select **DELETE**.

**Purchase Order Line Item** ⓘ SAVE ACTIONS ▾ C CLOSE

Along came a spider [sound recording]  
By Patterson, James, 1947-

Purchase order number: **AMS17** Status: **Pending** Line no.: 1  
 Suffix: Status date: **12/21/2018** Bib control number: **782195**  
 ISBN/ISSN: **780736655248** Other no.: **5364** Material type:

Details Segments Notes Instructions To Supplier Claims

Total Order Quantity: 2 View: Orders ▾

EDIT DELETE

☐	SEGMENT	QUANTITY	DESTINATION	COLLECTION	FUND	FISCAL YEAR	STATUS	PAYMENT STATUS
<input checked="" type="checkbox"/>	1	1	Saratoga Springs Public Library		2017BRollTest (2017RT)	2017a	Pending	Open
<input type="checkbox"/>	2	1	Saratoga Springs Public Library		2019 Test 3 Materials Fund Rolled over (2019MF3)	2019 Test 3 Rolled over	Pending	Open

The Delete Segment dialog opens.

d. Select **OK**.

**To edit a segment's charge**

a. Go to the **Purchase Order Line Item** workform > **Segment** view.

**Purchase Order Line Item** ⓘ SAVE ACTIONS ▾ C CLOSE

Along came a spider [sound recording]  
By Patterson, James, 1947-

Purchase order number: **AMS17** Status: **Pending** Line no.: 1  
 Suffix: Status date: **12/21/2018** Bib control number: **782195**  
 ISBN/ISSN: **780736655248** Other no.: **5364** Material type:

Details Segments Notes Instructions To Supplier Claims

Total Order Quantity: 2 View: Orders ▾

EDIT DELETE

☐	SEGMENT	QUANTITY	DESTINATION	COLLECTION	FUND	FISCAL YEAR	STATUS	PAYMENT STATUS
<input checked="" type="checkbox"/>	1	1	Saratoga Springs Public Library		2017BRollTest (2017RT)	2017a	Pending	Open
<input type="checkbox"/>	2	1	Saratoga Springs Public Library		2019 Test 3 Materials Fund Rolled over (2019MF3)	2019 Test 3 Rolled over	Pending	Open

The Orders view for the segments opens.

b. Select the Charges view.

<input type="checkbox"/>	SEGMENT	QUANTITY	DESTINATION	COLLECTION	FUND	FISCAL YEAR	STATUS	PAYMENT STATUS
<input type="checkbox"/>	1	1	Saratoga Springs Public Library		2017BRollTest (2017RT)	2017a	Pending	Open
<input type="checkbox"/>	2	1	Saratoga Springs Public Library		2019 Test 3 Materials Fund Rolled over (2019MF3)	2019 Test 3 Rolled over	Pending	Open

The Charges view for the Segments opens.

c. Select a table row.

d. Select **EDIT**.

The Edit Segment dialogue for charges opens.

e. Select **OK**.

- Notes

The Notes view of the Purchase Order Line Item workform gives you the ability to leave notes for patrons and library staff, and to read the notes left by other staff members. You can enter the following types of notes in the Notes view:

- **Public Note** - Enter a note for staff and patrons. The note is carried over when an item record is created, and it appears in the Details view of the item in the PAC.
- **Non-Public Note** - Enter a note for library staff only.
- Instructions to Supplier  
The Instructions to Supplier view allows you to add instructions to the supplier of your purchase order. The fields are editable depending on the purchase order status. See the following table for a list:

POLI Status	Editable Fields in Instructions to Supplier View
Pending	All
Canceled	Note and Order Confirmed Date
Backordered, Claimed, Currently Received, Exceptional Condition, Never Published, Not Yet Published, On Order, Out of Print, Partly Received, Pending Claim, Received, Return Requested, Returned	Note, Order Confirmed Date, and Rental Return Date
Closed	None

**To enter or edit binding information**

- a. Select **Binding Format**.
- b. Select the **Binding Substitution** you would accept.

**To capture communication with the supplier**

- a. Select a statement about how you would like **Cataloging Services** provided by the supplier.
- b. If the order is confirmed, select the **Order Confirmed Date**.
- c. Select a statement about **Backorder** that applies to this purchase order and supplier.

- d. Enter a **Quantity** for this item.
- e. Enter a **Note** to the supplier.

**To capture rental information**

- a. Enter the exact title of the piece in **Title Ordered As**.
- b. Select the date a rental item is due to be returned in **Rental Return Date**.
- c. Select **Membership** if your library ordered the items through a membership in an organization.

- **Claims**

You can schedule claim notices to be sent to the supplier for purchase orders that are not received as expected. The Claims view in the Purchase Order Line Item workflow allows you to fine-tune claims information.

**To enter claims information**

- Enter the number of **Max Claims** your library will submit to the supplier before canceling an ordered item. You can enter any number from 1 through 5. The fields in the Claim Waiting Period section become editable.
- Enter the number of **Days After Release/Expected Arrival**, or the number of days between the time a staff member releases the purchase order line item and the time Leap generates the first claim.
- Enter the number of days between each subsequent claim.
- Select **Cancel Notice** to generate a cancellation notice.
- Select **Auto Cancel Waiting Period** to enter the number of days to wait before canceling purchase order line items automatically after the claim cycle is over.
- Select **Claim Notice** to generate a claim notice.
- Enter **Claim Cycle**, or the number of days after each claim to send a new notice.

- Select a **Claim Alert Date**, the date that the item generates an entry on the Claim Alert List, which means it is eligible to be claimed.

3. Select **SAVE**.

---

## Release, Send, or Delete a Purchase Order

The Purchase Order Actions menu in Leap allows you to do the following:

[Release a Purchase Order](#)

[Send a Purchase Order](#)

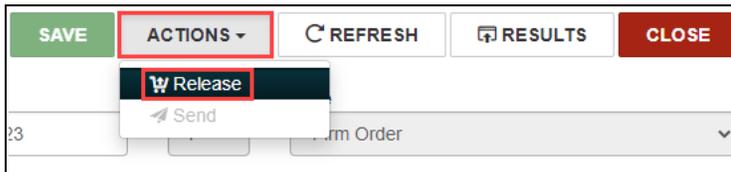
[Delete a Purchase Order](#)

### Release a Purchase Order

You can only release purchase orders with a status of Pending.

#### To release a purchase order

1. Go to the purchase order workform.
2. Select **ACTIONS > Release**.



The Create on-order item records dialog opens.

3. Select one of the following options:
  - To release the purchase order and generate on-order item records, select **YES**. Continue to step 4.
  - To release the purchase order without generating on-order item records, select **NO**. Continue to step 4.
  - To stop the purchase order release process, select **CANCEL**.

The Payment Options dialog opens.

4. Select one of the following payment options:

If you want to	Do this
<p>Pay on receipt of invoice</p>	<p>a. Fill in the <b>Amount</b>.</p> <div data-bbox="699 426 1422 674" style="border: 1px solid black; padding: 5px;"> <p>Payment Options</p> <hr/> <p>Options</p> <p>Payment Plan <span style="float: right;">Amount</span></p> <p><input checked="" type="radio"/> Pay on receipt of invoice <input type="radio"/> Prepay <span style="float: right; border: 1px solid red; padding: 2px;">\$5.95</span></p> <p style="text-align: right;"><span style="background-color: #00728f; color: white; padding: 2px 10px;">CONTINUE</span> <span style="border: 1px solid #ccc; padding: 2px 10px;">CANCEL</span></p> </div> <p>b. Select <b>CONTINUE</b>.</p>
<p>Prepay</p>	<p>a. Select one of the following payment methods:</p> <ul style="list-style-type: none"> <li>• Check</li> <li>• Voucher</li> </ul> <div data-bbox="777 968 1422 1346" style="border: 1px solid black; padding: 5px;"> <p>Payment Options</p> <hr/> <p>Options</p> <p>Payment Plan <span style="float: right;">Amount</span></p> <p><input type="radio"/> Pay on receipt of invoice <input checked="" type="radio"/> Prepay <span style="float: right; border: 1px solid red; padding: 2px;">\$5.95</span></p> <p>Payment Details</p> <p>Payment Method</p> <p><input type="radio"/> Check <input checked="" type="radio"/> Voucher</p> <p>Number <span style="float: right;">Date</span></p> <p><input style="width: 100px;" type="text"/> <span style="float: right; border: 1px solid #ccc; padding: 2px;">11/16/2021</span></p> <p style="text-align: right;"><span style="background-color: #00728f; color: white; padding: 2px 10px;">CONTINUE</span> <span style="border: 1px solid #ccc; padding: 2px 10px;">CANCEL</span></p> </div> <p>b. Enter the number for the check or voucher.</p> <p>c. Select a date for the check or voucher.</p> <p>d. Select <b>CONTINUE</b>.</p>

### Send a Purchase Order

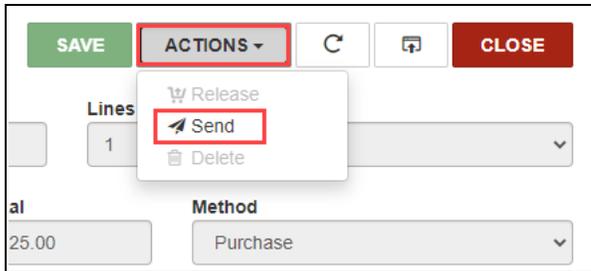
You can send purchase orders only under the following conditions:

- the purchase order has a status of Released or Continuing
- your library has EDI enabled

- the vendor has EDI ordering

### To send a purchase order

1. Go to the purchase order workflow.
2. Select **ACTIONS > Send**.



The Send Purchase Order dialog opens.

3. Select **CONTINUE**.

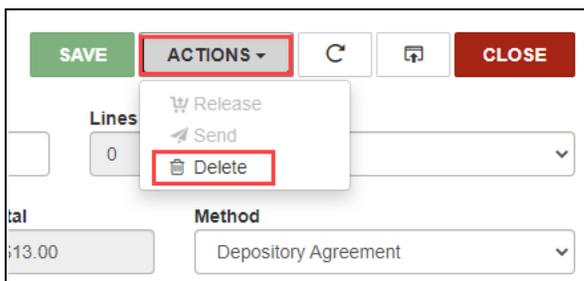
### Delete a Purchase Order

You can delete purchase orders only under the following conditions:

- the purchase order has a status of Canceled or Pending
- your user profile has the **Purchase Orders: Delete** permission
- none of the purchase order line items have transactions associated with them

### To delete a purchase order

1. Go to the purchase order workflow.
2. Select **ACTIONS > Delete**.

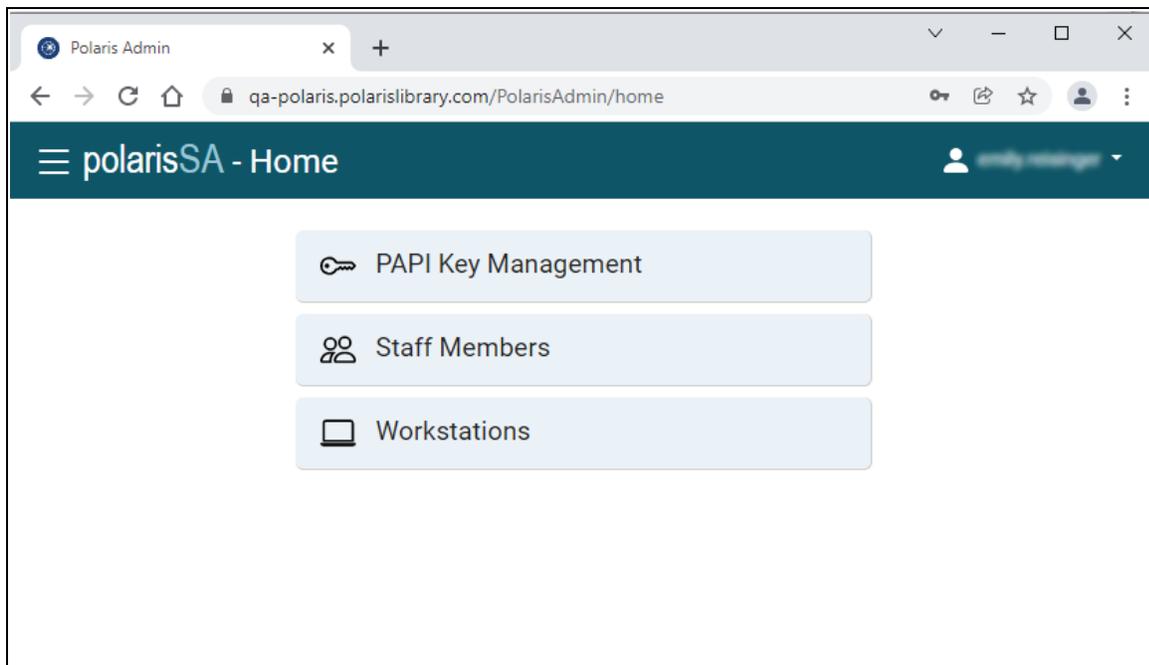


The Delete Purchase Order dialog opens.

3. Select **CONTINUE**.

## Configuring Polaris Administration Settings in the Web

You can now use the new Polaris Administration (web-based) user interface to configure certain administrative settings instead of signing in to the Polaris staff client.



You can sign in to Polaris Administration (web-based) if your Polaris user account has the **Access administration: Allow** permission.

This section covers the following topics:

- [Overview of 7.1 Polaris Administration \(Web-Based\) Functionality](#)
- [Installing and Configuring Polaris Administration \(Web-Based\)](#)

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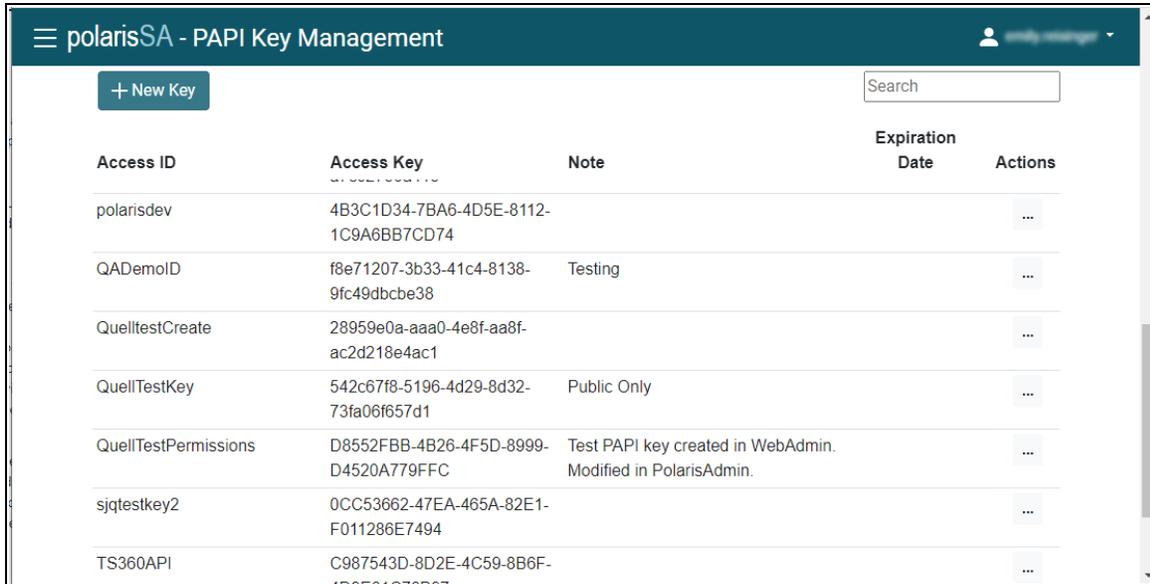
### Overview of 7.1 Polaris Administration (Web-Based) Functionality

In version 7.1, you can use Polaris Administration (web-based) to edit the following administrative settings:

- PAPI Key Management
- Staff Members
- Workstations

On the PAPI Key Management view, you can:

- Add an access key.
- Edit an access key.
- Delete an access key.



The screenshot displays the 'polarisSA - PAPI Key Management' interface. At the top left, there is a menu icon and the title 'polarisSA - PAPI Key Management'. To the right of the title is a user profile icon and the text 'polaris manager'. Below the title bar, there is a '+ New Key' button on the left and a search input field on the right. The main content area contains a table with the following columns: 'Access ID', 'Access Key', 'Note', 'Expiration Date', and 'Actions'. The table lists several keys, including 'polarisdev', 'QADemoID', 'QuelltestCreate', 'QuellTestKey', 'QuellTestPermissions', 'sjqtestkey2', and 'TS360API'. Each row has a three-dot menu icon in the 'Actions' column.

Access ID	Access Key	Note	Expiration Date	Actions
polarisdev	4B3C1D34-7BA6-4D5E-8112-1C9A6BB7CD74			...
QADemoID	f8e71207-3b33-41c4-8138-9fc49dbcbe38	Testing		...
QuelltestCreate	28959e0a-aaa0-4e8f-aa8f-ac2d218e4ac1			...
QuellTestKey	542c67f8-5196-4d29-8d32-73fa06f657d1	Public Only		...
QuellTestPermissions	D8552FBB-4B26-4F5D-8999-D4520A779FFC	Test PAPI key created in WebAdmin. Modified in PolarisAdmin.		...
sjqtestkey2	0CC53662-47EA-465A-82E1-F011286E7494			...
TS360API	C987543D-8D2E-4C59-8B6F-4B5A1C70B07			...

On the Staff Members view, you can:

- Add a staff member.
- Edit a staff member.

Name	Active	Organization	Actions
PolarisSuperUser	✓	QA-ECHO 7.1	...
PolarisExec	✓	QA-ECHO 7.1	...
OPAC Default	✓	Amsterdam Free Library	...
Amsterdam Patron Update	✓	Bolton Free Library	...
Argyle Patron Update	✓	Argyle Free Library	...
Ballston Patron Update	✓	Ballston Spa Public Library	...
Bancroft Patron Update	✓	Bancroft Public Library (Salem)	...
Bolton Patron Update2	✓	Bolton Free Library	...
Burnt Hills Patron Update	✓	Burnt Hills - Town of Ballston Community Library	...
Caldwell Ask Us	✓	ZZZ-Caldwell-Lake George Library	...

On the Workstations view, you can:

- Add a workstation.
- Edit a workstation.

Name	Enabled	Organization	Actions
3M	✓	Schenectady Branch - Central	...
A Cocca		Clifton Park-Halfmoon Public Library	...
alink-w8		Link Logan East Branch	...
ams102	✓	Amsterdam Free Library	...
ams103	✓	Amsterdam Free Library	...
ams12	✓	Amsterdam Free Library	...
ams20	✓	Amsterdam Free Library	...
ams21	✓	Amsterdam Free Library	...
ams7	✓	Amsterdam Free Library	...
ams7400	✓	Amsterdam Free Library	...

## Installing and Configuring Polaris Administration (Web-Based)

You can install Polaris Administration (web-based) by selecting the "Polaris Administration" component during the Polaris server software installation process.

Before using Polaris Administration (web-based), you must configure it for your library. For more information, see the Polaris Installation Guide (7.1).

For help getting started with Polaris Administration (web-based), contact Innovative .

## Working with Permissions and Notes for PAPI Keys in Leap

New PAPI key permissions let you specify the PAPI endpoints that are enabled for use by each PAPI access ID. You can also now enter a note for each PAPI access ID. This functionality is available in the new [Polaris Administration \(web-based\)](#) interface.

**Edit PAPI Key**

**Access ID**  
AXIS360BANDTPKYDN

**Access Key**  
c2c90926-4f76-4567-9388-6c25f771fe98

**Expiration Date**  
[Calendar icon]

**Note**  
[Text area]

**Permissions**  
Public

- Api
- ApiKeyValidate
- AuthenticatePatron
- BibBooleanSearch
- BibGet
- BibHoldingsGet
- BibKeywordSearch
- CollectionsGet
- DatesClosedGet
- DeprecatedBibKeywordSearch
- HeadingsSearch
- HoldRequestCancel
- HoldRequestCreate
- HoldRequestPickupBranch
- HoldRequestReactivate

**Edit Key** **Cancel**

You can select **Public** or **Private** to enable all public or private endpoints. You can also select any combination of public and private endpoints to enable a custom set of endpoints.

**Note:**

PAPI access IDs that your library has already created have all permissions enabled.

## Improved Logging for Transactions Performed By PAPI

The Polaris Transactions Database now logs the API key associated with each transaction (for example, creation of a hold request, or a patron registration update) that is performed by PAPI.

A new TransactionSubTypeID 324 ("PAPI Access ID") appears in the TransactionDetails table for transactions performed by PAPI.

This information gives you more insight into how your library's third-party integrations are being used.

## Improvements to Polaris API Documentation

PAPI documentation has been improved in the following ways:

- The topics have been rearranged to group topics covering public and protected endpoints.
- The overview has been rewritten to be more accurate, current, and concise.
- The document history has been moved to an appendix.
- The document is now available in HTML through <https://documentation.iii.com/>.

In previous versions, the Polaris API documentation was available only as a PDF. In Polaris 7.1, you can view and search the documentation in a browser. This improvement means that you can share documentation topics with others by sending hyperlinks.

## Duplicate Detection for RDA Publication Dates

A new system defined duplicate detection rule is available in the Bibliographic Deduplication database table in Polaris Administration: "The last 264 \$c of the incoming record matches the last 264 \$c of an existing record."

If your library uses RDA (Resource Description and Access) cataloging rules, you can use this rule to identify records with matching 264 \$c fields. Note that to be considered a duplicate, the entire text of the 264 \$c must match in both records. Punctuation is ignored.

## SIP Alert for Item Blocks

You can now specify whether the SIP service places an alert on items checked in when the item record contains one or more of the following blocks:

- Library assigned
- Free text
- System (excluding missing part blocks)

If your library administrator sets **Check-in: Item blocks, allow checkin** to **No** (check in not allowed), Polaris returns an alert in the SIP 10 message when an item record is checked in that contains one of the blocks listed.

For more information, search the Polaris staff client help for "Set SIP self-check parameters."

## Improved Serials Display on the Bibliographic Record Workflow

The Items view of the Bibliographic Record workflow now displays a Designation column when an item attached to the bibliographic record has designation information (from a linked issue record). This makes it easier to place an item-level request for a patron without needing to open individual item records to find the correct issue.

### Bibliographic Record i

SAVE
ACTIONS ▾
LINKS ▾
↻
CLOSE

Rolling stone.

**Control number:**

**Owner:**

**Record status:**

Display in PAC
  Do not overlay
  Host
  ILL

---

Preview
**Items**
MARC
Headings
Statistics
Record Sets
Resources
Outreach Patrons

NEW ITEM
Filter Items

ASSIGNED BRANCH	COLLECTION	MATERIAL TYPE	SHELF LOCATION	CALL NUMBER	VOLUME	DESIGNATION	STATUS	BARCODE	L
Amsterdam Free Library	Reference (REF)	Book		SERIAL	October 28, 2004		In	0004300566868	1
Southern Adirondack		Periodical				(Oct. 6 2008)	Out (1/20/2022)	0004300515311	1

In addition, Leap now only displays the Volume column when at least one item attached to the bibliographic record has volume information.