What's New in Polaris and Leap 5.5

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Polaris Installation Note

When the new Polaris release is installed on a workstation, the file path changes from Polaris Clients 5.2 to Polaris Clients 5.5.

Examples:
c:\ProgramData\Polaris\Polaris Clients 5.5
c:\Program Files\Polaris\Polaris Clients 5.5
c:\Program Files (x86)\Polaris\Polaris Clients 5.5

New and Modified Polaris Administration Settings

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

Location / Name	Purpose	Default	Level
Profiles			
Staff Client Profiles - Added			
Web App: Default view selec-ted when item record opened	Specifies the opening view of the Item Record workform in the Polaris Web application, Leap. See "Leap - Default Opening View for Item Record Workform" on page 94.	Circulation view	System, Library, Branch, Staff, Workstation
PowerPAC Profiles - Added			
Related words options	Enables the **Include related words** link on keyword and phrase search results; sets maximum limit on results list for displaying the link. See "Related Words in PowerPAC Searches" on page 15.	Enabled; limit 1000	System, Library, Branch

Location / Name	Purpose	Default	Level
PowerPAC Profiles - Changed			
Dashboards: Narrow your search & related searches	Related Words facet is available as the first filter on the Narrow Your Search dashboard when the user has selected Include related words for keyword or phrase search results. See "Related Words in PowerPAC Searches" on page 15.	Facet displays	System, Library, Branch
Page header options	Alternate logo (URL), header logo and branch name alignment options apply to medium and wide displays only. Excluding the branch name displays the logo at narrow width. See "Polaris PowerPAC Responsive Design" on page 4.	None; center	System, Library, Branch
PowerPAC Profiles - Deleted			
Layout selection	Obsolete. See "Customizing Polaris PowerPAC 5.5" on page 30.		System, Library, Branch
Patron Services Parameters - Added			
Overdues: maximum overdue fine balance	Define a maximum dollar amount for patron overdue fine balance. See "Maximum Overdue Fine Balance" on page 35.	Disabled; set to $0.00 or Null	System

Polaris PowerPAC Responsive Design

Polaris PowerPAC now uses responsive web design so your patrons can enjoy PowerPAC features on desktop computer screens, tablets, or phones.

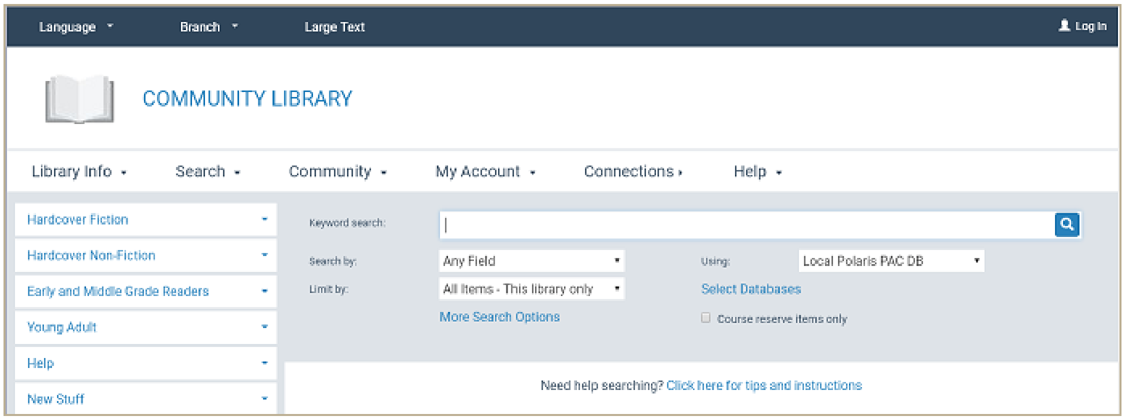
Note:
If your library customizes Polaris PowerPAC at the code level, see also "Customizing Polaris PowerPAC 5.5" on page 30.

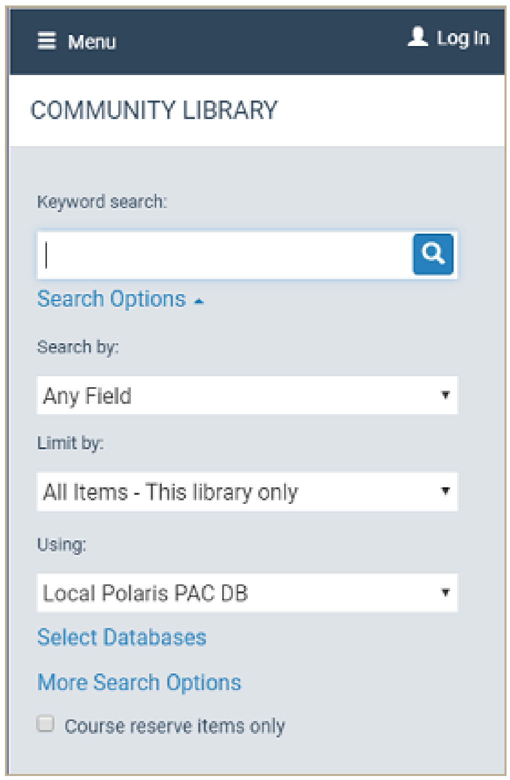
Standard Themes

As in previous versions, you can specify a theme to control overall PowerPAC appearance with the PowerPAC profile **Theme selection**. PowerPAC uses your selected theme on all devices. The standard themes available in previous versions have been mapped to new themes for Polaris PowerPAC 5.5 as follows:

Standard PowerPAC Themes Polaris 5.2 and Earlier	Standard PowerPAC Themes Polaris 5.5
Classic (default)	Ocean (default)
Antique	Pomegranate
Casual	Mint
Formal	Black & Gold
Modern	Gray

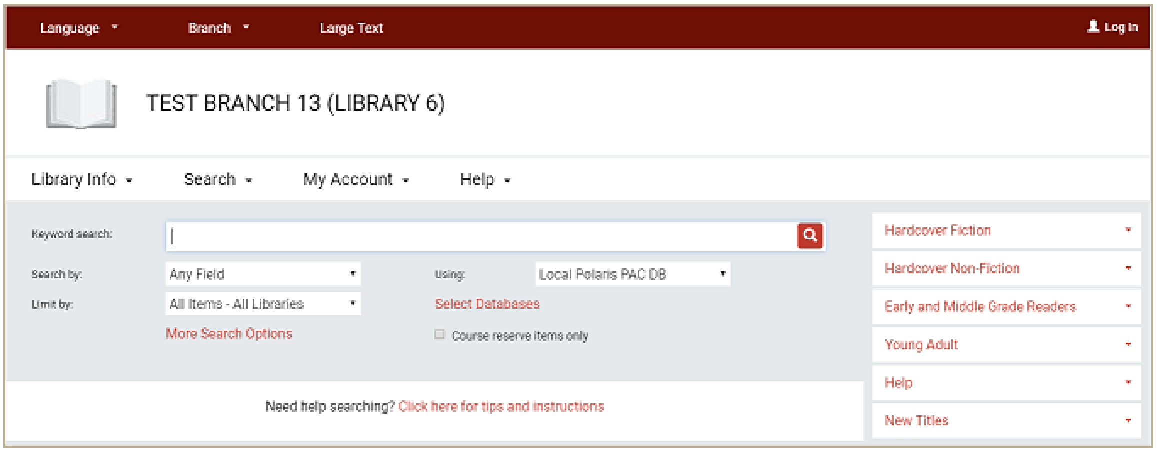
The following examples show the keyword search page using the default Ocean theme, first as displayed on a desktop computer and then as displayed on a phone. The default font for all themes is Roboto, chosen for its clarity and ready availability.


Language
Branch
Large Text
Log In
COMMUNITY LIBRARY
Library Info
Search
Community
My Account
Connections
Help
Hardcover Fiction
Hardcover Non-Fiction
Early and Middle Grade Readers
Young Adult
Help
New Stuff
Keyword search:
Search by:
Any Field
Limit by:
All Items - This library only
Using:
Local Polaris PAC DB
Select Databases
More Search Options
Course reserve items only
Need help searching? Click here for tips and instructions

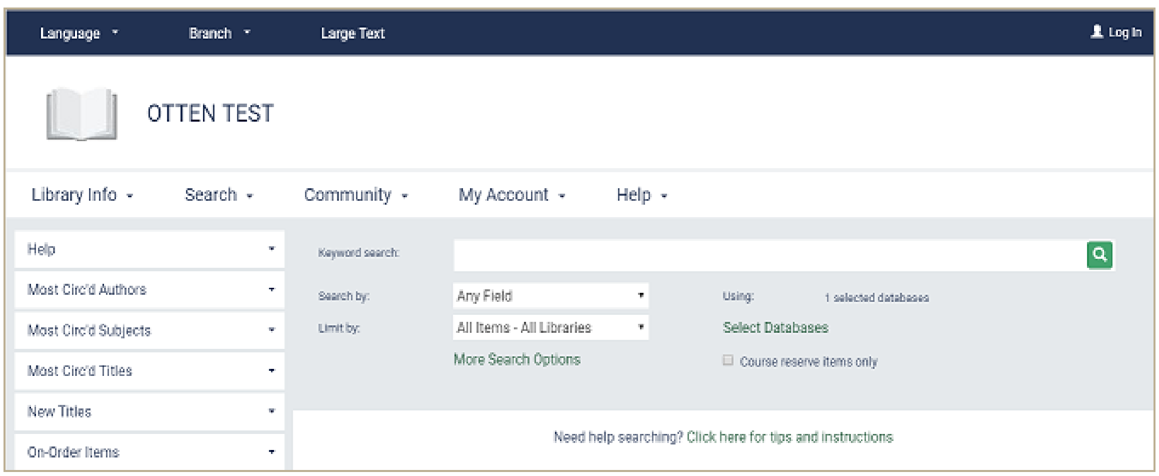

Menu
Log In
COMMUNITY LIBRARY
Keyword search:
Search Options
Search by:
Any Field
Limit by:
All Items - This library only
Using:
Local Polaris PAC DB
Select Databases
More Search Options
Course reserve items only

The following examples show the keyword search page (desktop display) using each of the other new themes.

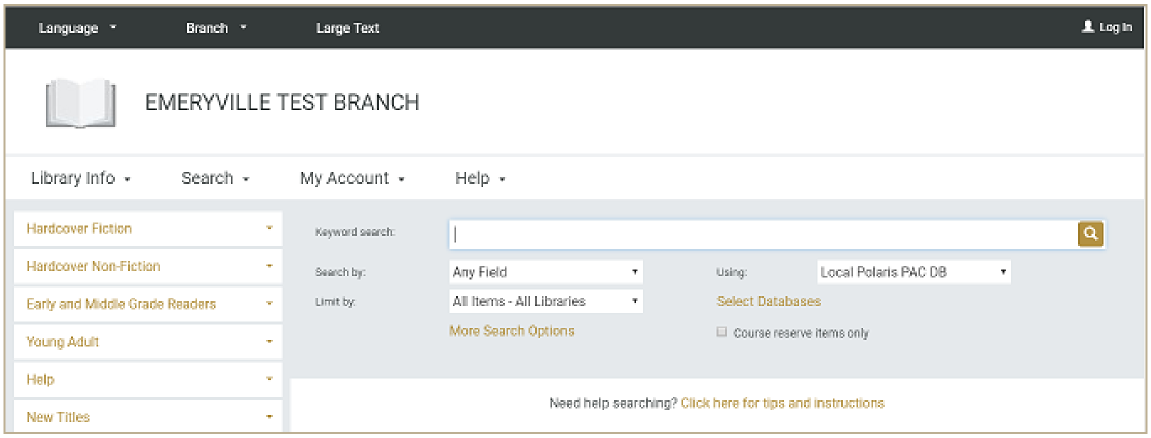
Pomegranate:



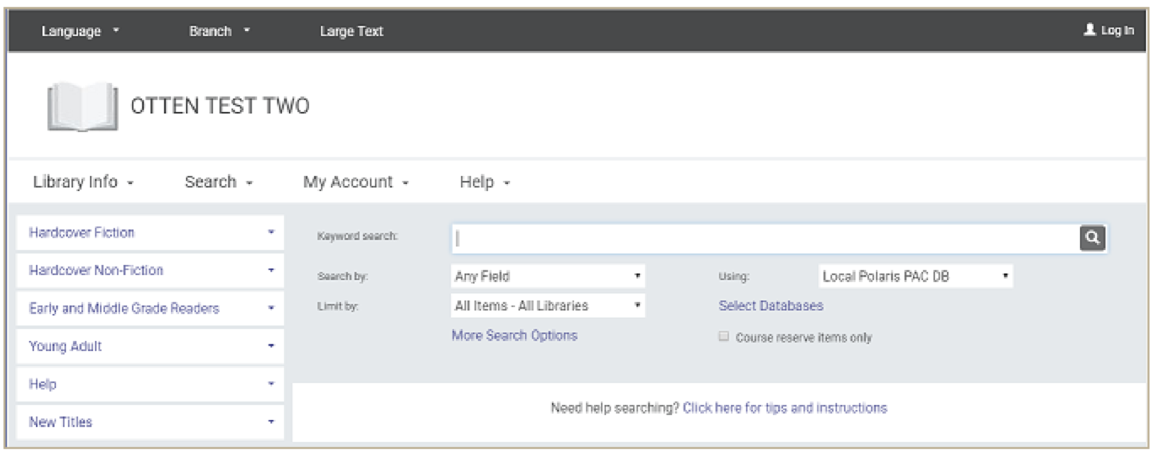
Mint:



Black & Gold:



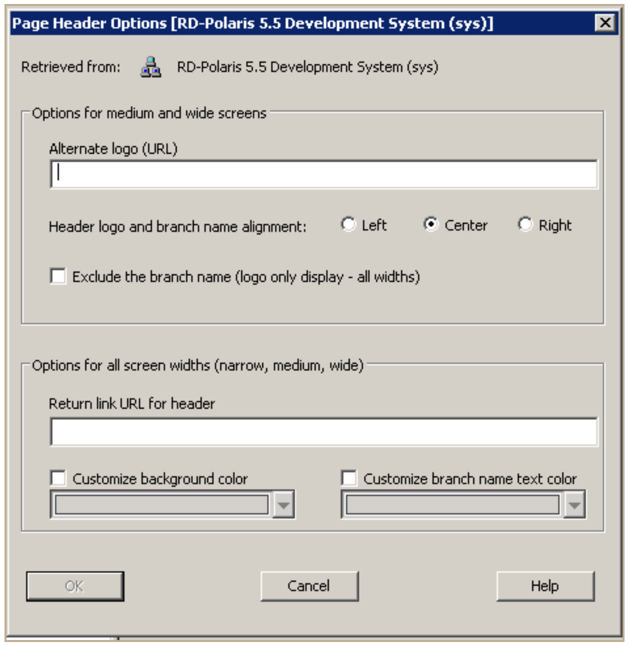
Gray:



Note:
If you want to modify a standard theme, you may want to use the simple Gray theme as the basis for your changes. See "Customizing Polaris PowerPAC 5.5" on page 30.

Page Header

Page header options (PowerPAC profiles) have changed to accommodate the responsive design.

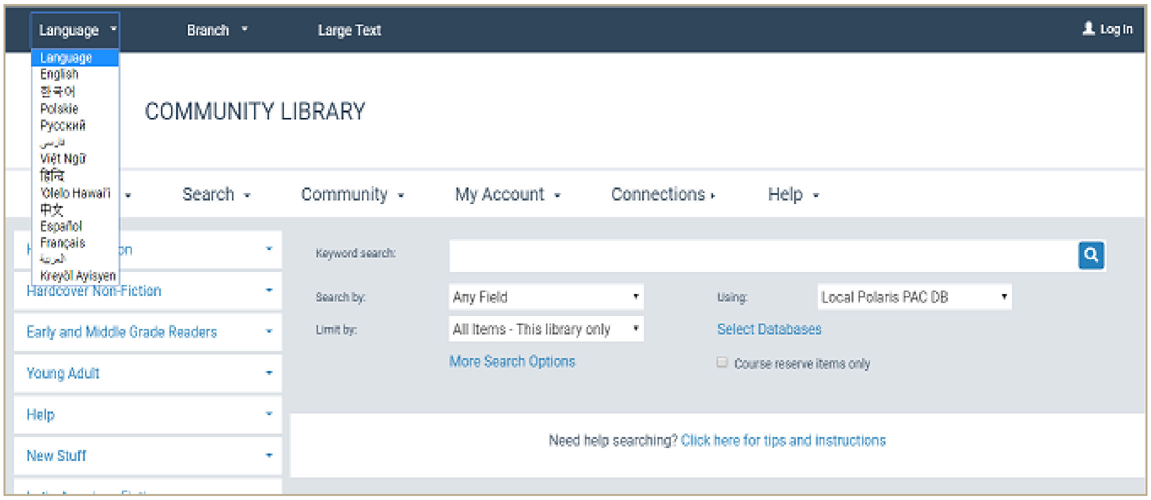


The **Alternate logo (URL)** option applies to medium (tablet) and wide (desktop) displays. The maximum image width is 1500 pixels. The system scales the image for the medium display. As in previous PowerPAC versions, you can specify logo and branch name alignment, and choose to exclude the branch name if it already appears in the logo. If you check **Exclude the branch name (logo only display - all widths)**, the logo is displayed in the narrow width header, appropriately scaled. If you leave this option unchecked, only the branch name is displayed in the narrow width header.

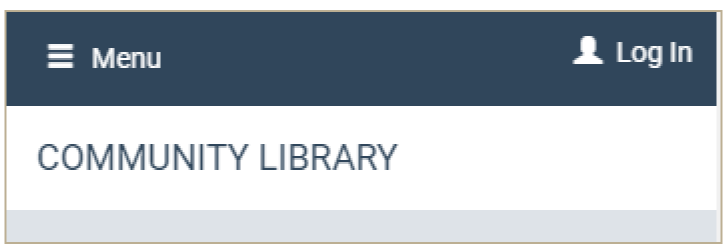
Options for all screen widths include the return link URL, which specifies the page that appears when the user clicks the header logo or branch name, header background color, and branch name text color. For more information about setting these options, see Polaris staff client online help.

Main Menu Options

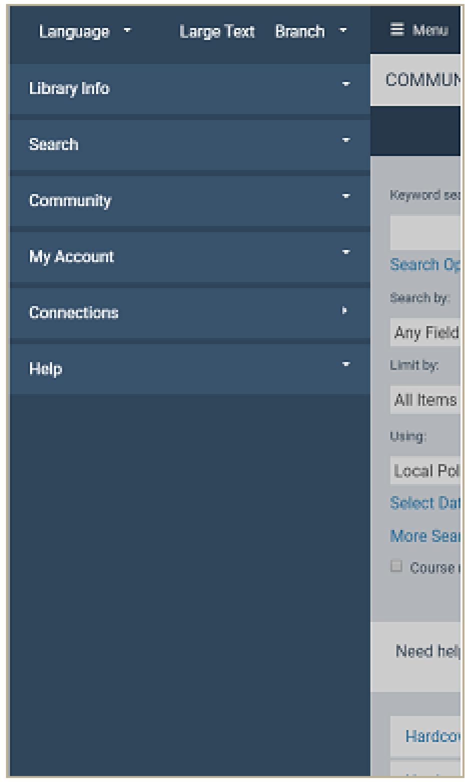
All menu options are available regardless of screen size, but certain options shift to accommodate display on a narrow phone screen. The following example shows Language options on a desktop or tablet screen.



For the narrow screen size (phone), certain options including **Language** move from the default desktop/tablet position to a menu.

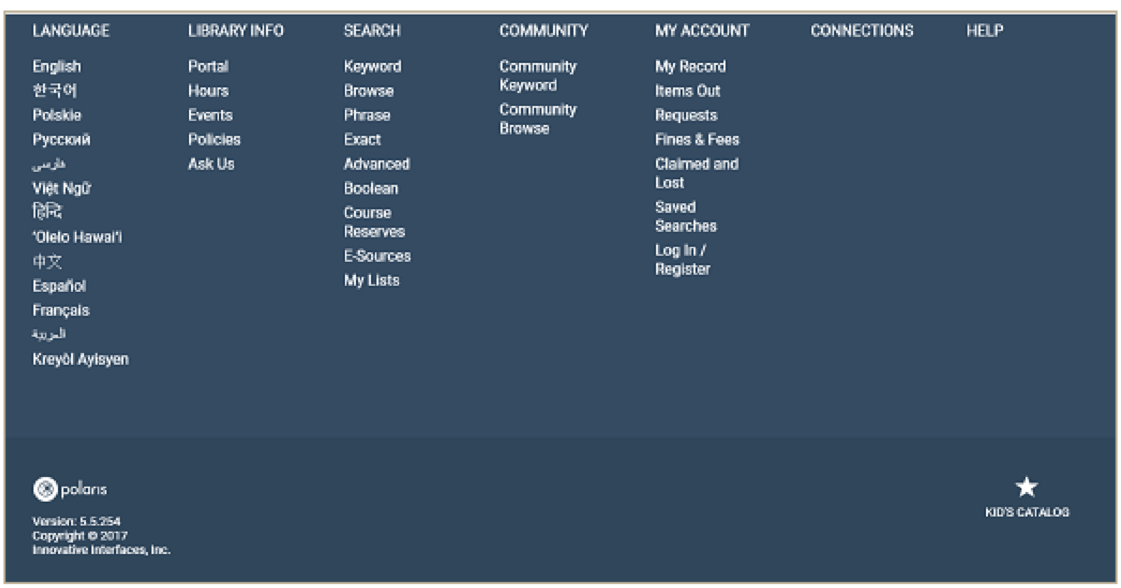


When the user taps **Menu**, a "flyout" menu displays the options that would appear near the top of the page on the desktop/tablet display.



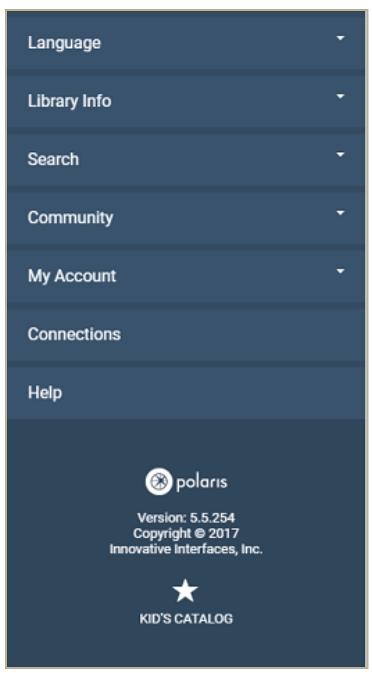
Footer

The desktop footer display is similar to previous PowerPAC versions.



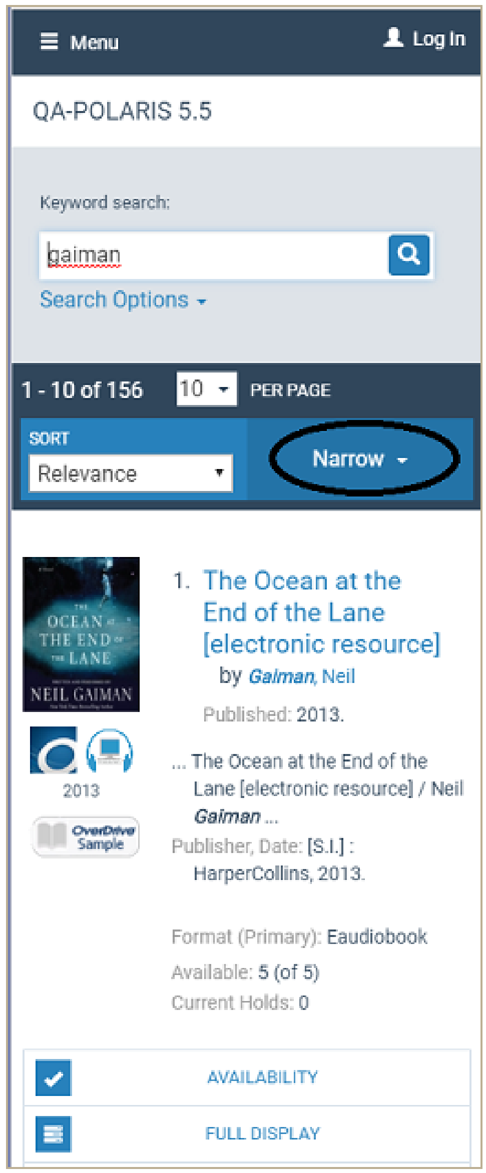
Categories on the tablet display may appear on a second row.

Categories are converted to drop-down selections on the phone display.

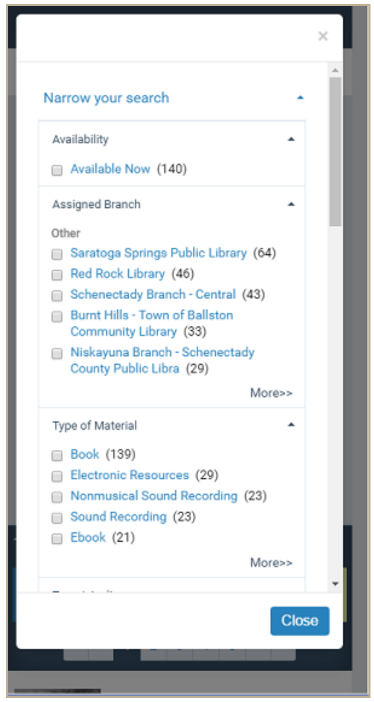


Dashboards

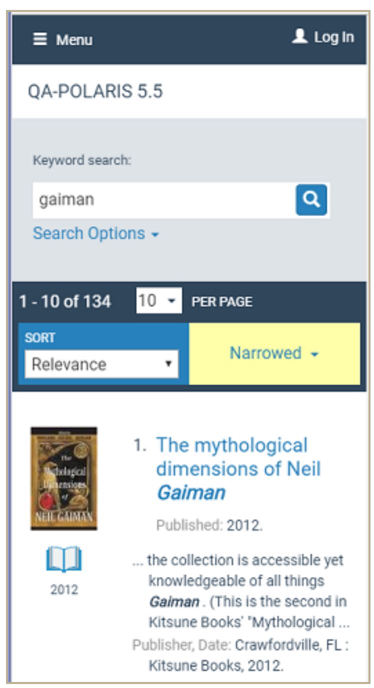
As in previous PowerPAC versions, the dashboard position (right or left) is determined by the PowerPAC profile **Theme dashboard position** for desktop and tablet displays. On the phone display, dashboard elements generally appear below the search bar or search results. The **Narrow your search** dashboard element is an exception. On the phone display, this element appears above the search results list for convenient use.



The user taps **Narrow** to display the filters for selection in a separate window.



Once the user has selected a filter, a **Narrowed** message appears above the search results.



The phone user can then click **Narrowed** to re-open the window that shows the **Narrow your search** options, without having to scroll below the search results to view settings.

Switching between Responsive PowerPAC and Mobile PAC

In previous versions of Polaris, patrons who connected to the PowerPAC portal page, default search page, or patron account pages from a mobile device were automatically redirected to Mobile PAC. The redirection has been removed and the patron now connects to the specified PowerPAC linked page, where the display automatically adjusts to the user's device.

The Mobile Site link in PowerPAC, where applicable, is renamed **Classic Mobile Site** and is located in the page footer.

As in previous versions, the link is displayed when Mobile PAC is licensed and installed, the connection URL is entered in the Server parameter **URL of the Mobile PAC's root**, and the user is not on an in-house workstation. For details, see "Setting Up Mobile PAC" in Polaris staff client help.

The Full Site link in Mobile PAC now opens PowerPAC directly, without an intermediate message page.

Responsive PowerPAC Exceptions

The responsive design does not apply to the following features in Polaris 5.5:

- Community profiles (not fully responsive)
- Polaris Fusion display elements in search results
- Patron account shopping cart
- LibraryThing lightbox
- ChiliFresh Reviews lightbox
- ChiliFresh Connections pages in the patron account
- Polaris PowerPAC Children's Edition

These features are best used from a desktop computer.

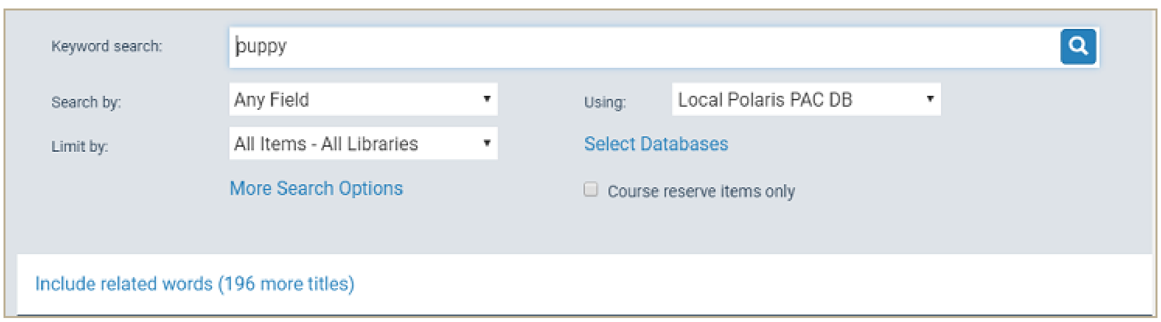
Related Words in PowerPAC Searches

PowerPAC users can now choose to add records containing related words as well as the literal typed search term to keyword and phrase search results. "Related words" include words formed from stemming (for example, regular plurals and verb endings such as walk, walks, walker, walked, walking, but not irregular forms such as mouse/mice or run/ran) and synonyms. Synonyms include common nicknames, proper name variations, and spelling variations. The **Include related words** link is enabled by default; the connection library's setting determines whether to display the option (see "Enabling Related Words" on page 18).

The **Include related words** link is available for keyword and phrase search results when:

- The user enters search terms for a keyword or phrase search and clicks or taps the search icon .
- The user does a keyword or phrase search from the Advanced Search screen.
- The user selects an **Other Searches** entry in the Related Searches dashboard.

The link appears only if additional records are found when the stemming and synonyms rules are applied.



If the user clicks the link, additional records are retrieved. The search results list is then refreshed, and the **Include related words** link disappears until the user does a new search. Any facets that had been selected become unselected for the new search results, and a Related Words facet, if enabled, is added to the top of the **Narrow your search** dashboard element (see "Related Words Facet" on page 16).

The link becomes available again when a search is relaunched; for example:

- The user changes the search terms, the **Search by** selection, or the **Limit by** selection, and clicks or taps the search icon.
- The user updates a selection in **More Search Options**.
- The user updates a selection in **Select Databases**.

The default **Include related words** strings are **Include related words (nnn more titles)** (plural) or **Include related words ({0} more title)** (singular). You can change the string in Polaris WebAdmin (Language Editor). The PowerPAC string ID for the plural statement is PACML_INCLUDE_RELATED_WORDS_LINK_TEXT. The PowerPAC string ID for the singular statement is PACML_INCLUDE_RELATED_WORDS_SINGUAL.

Search Results Including Related Words

The search results with related words depend on the user's **Search By** selection and return only records containing the related word in the same field (**Any Field**, **Title**, **Author**, **Subject**, **General notes**, **Publisher**, **Genre**, and **Series**). The related words option does not apply to number searches (**ISBN**, **ISSN**, **LCCN**, **Publisher no.**, **SuDoc**, **CODEN**, **STRN**).

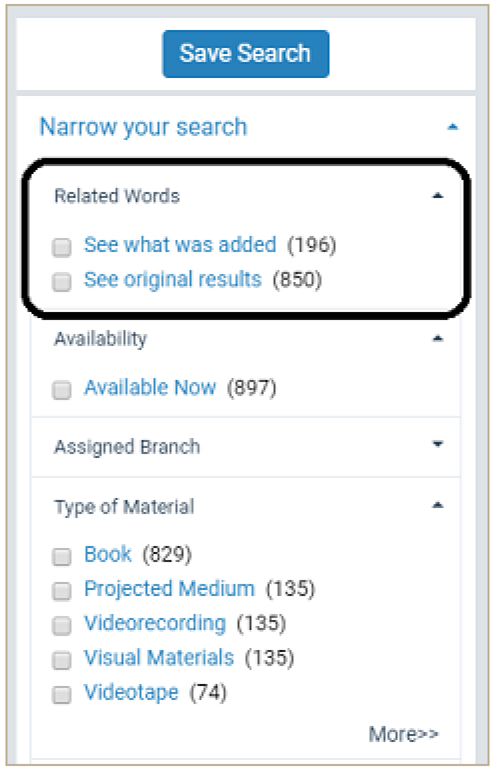
For phrase search results that include related words:

- Individual words in the phrase are processed for related words separately. For example, a phrase search for "fate and fury" retrieves titles with phrases such as "fate and furies," "fates and furies," and "fates and fury."
- The system checks the synonyms table for individual words in the phrase. For example, a phrase search for "colour purple" retrieves titles with "color purple."
- The phrase as a whole is NOT checked for synonyms. For example, a phrase search for "united kingdom" does NOT retrieve titles with "uk." Stemming and synonym pair matching is limited to individual keywords. That is, related terms map a keyword to another keyword. Mapping a single keyword to multiple keywords or multiple keywords to a single keyword is not supported.

Like the user's literal search term, related words appear in italics in the search results on the brief, summary and full displays in PowerPAC. Relevancy ranking also applies to search results that include related words. A match on the exact form of the word carries more weight than a match on other forms.

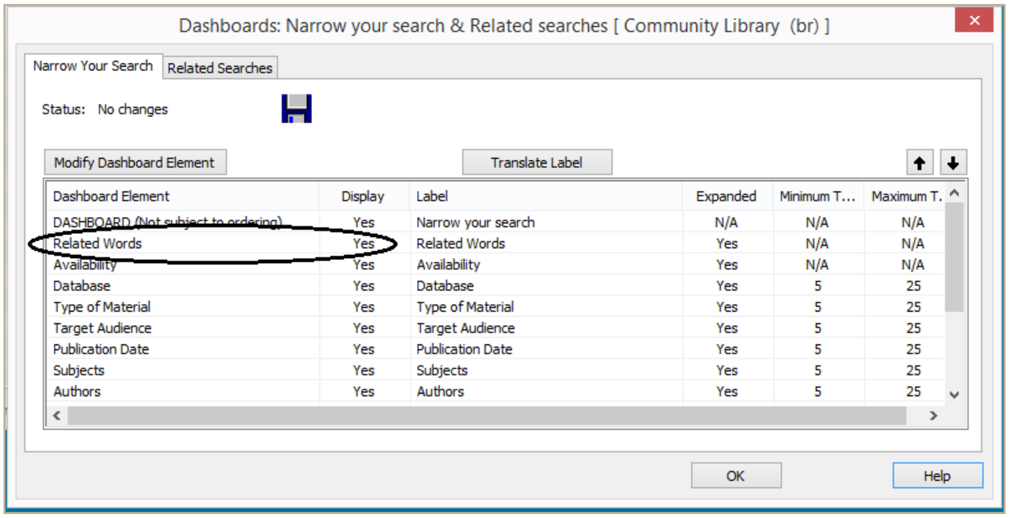
Related Words Facet

A new Related Words facet is available as the first filter on the Narrow Your Search dashboard when the user has selected **Include related words** for search results. The filter consists of two checkbox options: **See what was added (nnn titles)**, and **See original results (nnn titles)**.



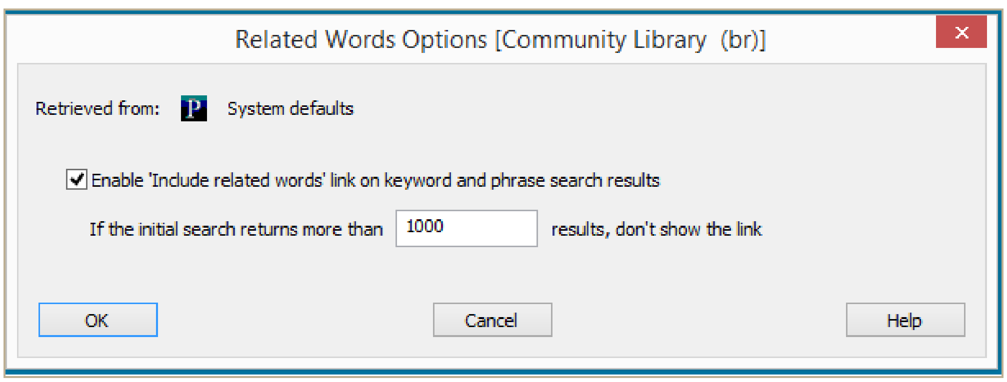
- To see only the related words records, select only **See what was added**.
- To see only the original search results without the related words records, select only **See original results**.
- To see the original search results PLUS the related words records, check or uncheck both checkboxes.

You can control the display of the Related Words facet in system administration with the PowerPAC profile **Dashboards: Narrow your search & related searches**. The facet is set to display by default. For more information about this profile, see Polaris staff client help.



Enabling Related Words

The new PowerPAC profile **Related words options** controls the related words feature, which is enabled by default. The profile is available at the system, library, and branch levels.



To enable the feature if it is not enabled, select **Enable 'Include related words' link on keyword and phrase search results**. When this option is checked, overnight processing occurs (see "Overnight Processing for Related Words" on page 19) and the **Include related words** option appears on the search results screen. If the feature is not enabled, overnight processing occurs, but the **Include related words** option does not appear on the search results screen.

Including related words in the search results increases the number of titles in the search results list. When the feature is enabled, you can specify a maximum number of titles for the search results; if the maximum is exceeded, the **Include related words option** is not displayed. The default value is 1000 results.

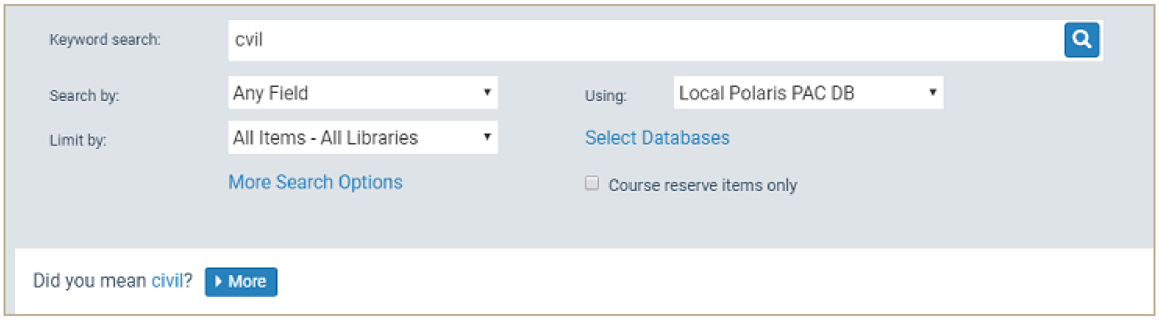
Note:
Be sure the value specified here does not exceed the number specified in the PowerPAC profile **Result set: Maximum number of records to return** for the same organization. If it does exceed **Result set** maximum, the link will never be suppressed.

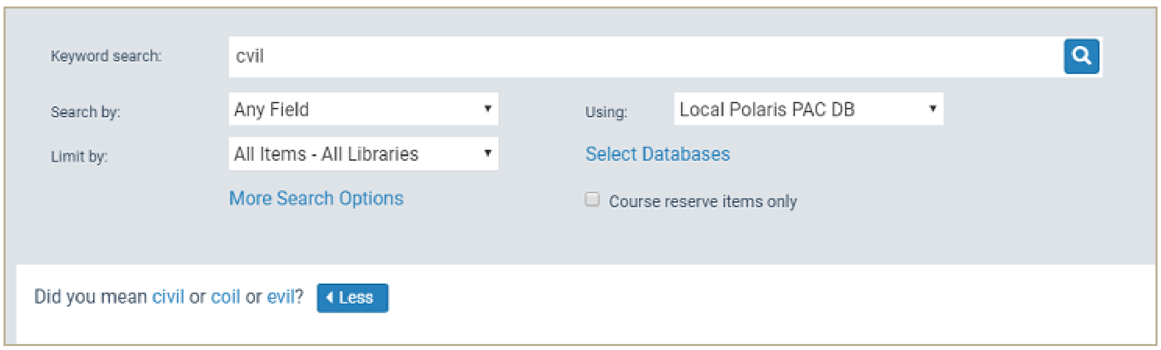
Overnight Processing for Related Words

A step has been added to the nightly CJ Keyword Processing job that applies processing rules and a new Synonyms table to keywords in the BibliographicKeywords table. The job output goes to a new BibliographicKeywordRelations table, which the search engine uses to find records containing words that are related to the user's search terms.

Did You Mean Suggestion Display

The "Did You mean" feature initially displays a single search term suggestion. Additional search suggestions, if any, are now displayed in line when the user clicks or taps **More**.



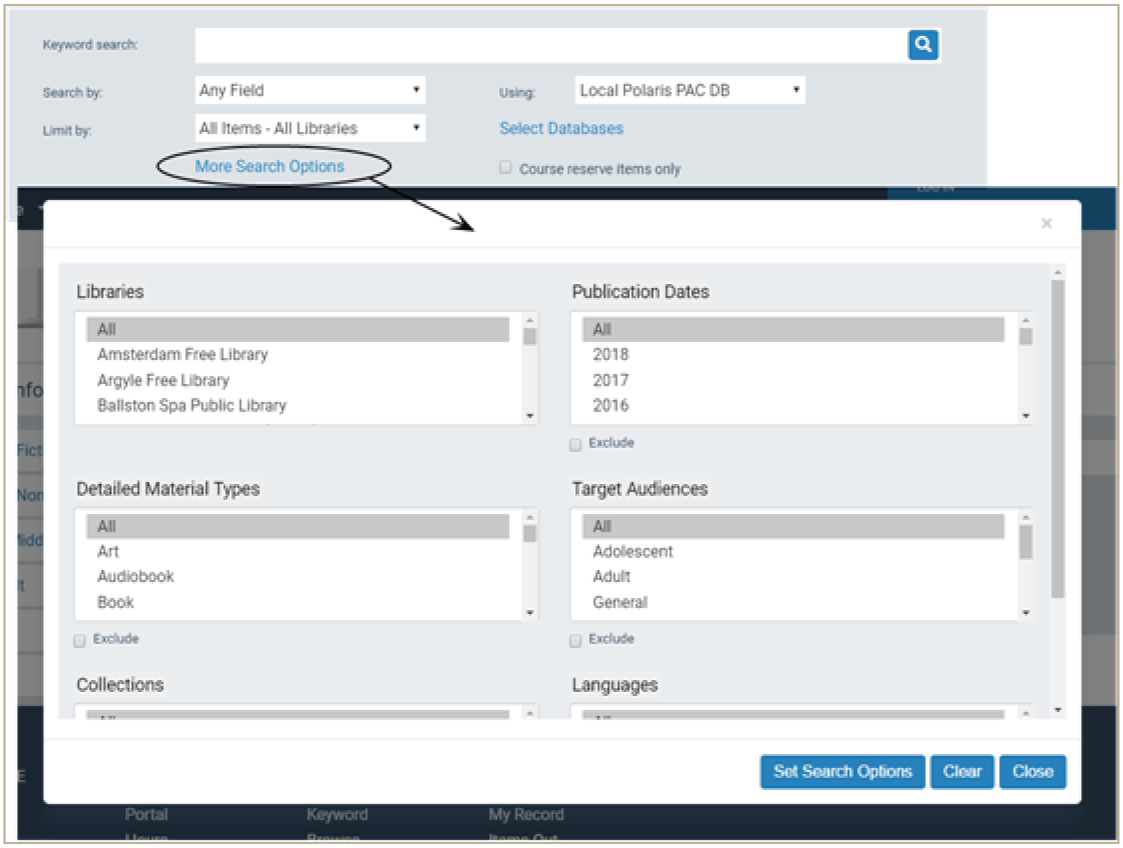


The user can click or tap **Less** to collapse the list of suggestions and display only the first suggestion.

As in previous versions of PowerPAC, the user can click or tap any Did You Mean suggestion to launch a search for that term. For more information, see the topic "Setting Up Did You Mean Term Checking" in Polaris staff client help.

More Search Options Feature in Polaris PowerPAC

As in previous versions of Polaris PowerPAC, the More Search Options feature is available for keyword, phrase, exact, advanced, and Boolean searches.



In Polaris 5.5, More Search Options includes the following changes:

- The **Reset** button is renamed to **Clear**. (This change also applies to the Select Databases feature.)
- When options have already been set and the user reopens the dialog box, makes more changes, and clicks or taps **Clear**, all selections are cleared but the changes are not saved. (Changes made in the More Search Options dialog box are not saved until the user clicks or taps **Set Search Options**.) The **Cancel** button closes the dialog box but saves the selections as they were before the dialog box was reopened. That is, the **Cancel** button now allows the user to cancel the most recent changes but save the previous selections.

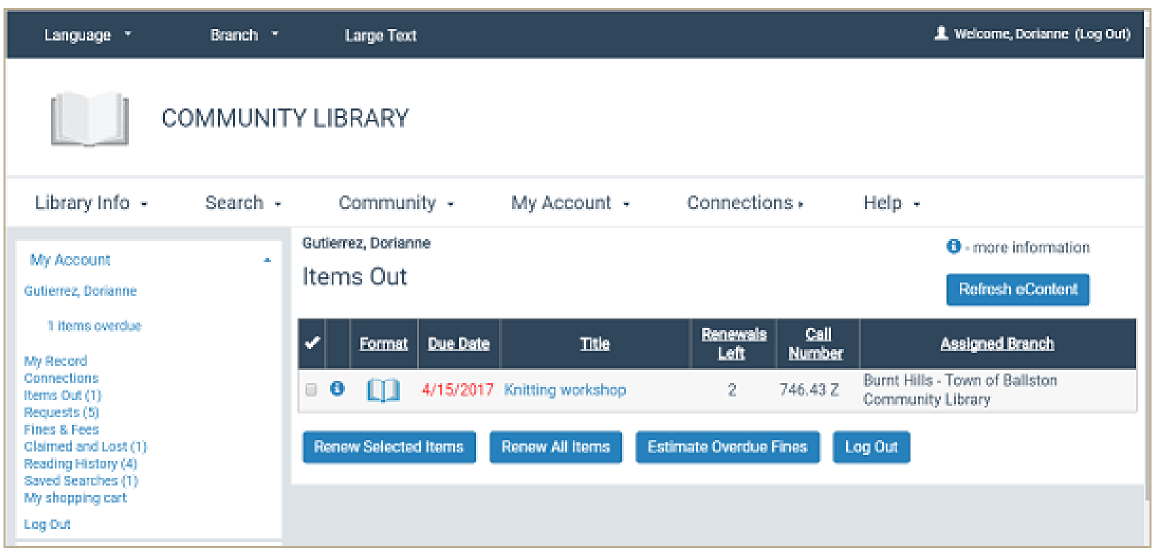
As in previous PowerPAC versions, the user can select multiple search options on a desktop computer by holding down the SHIFT or CTRL keys while selecting the options. On Polaris PowerPAC 5.5 tablet and smart phone displays, the user can also select multiple options; the method depends on the specific device and operating system.

PowerPAC Patron Login

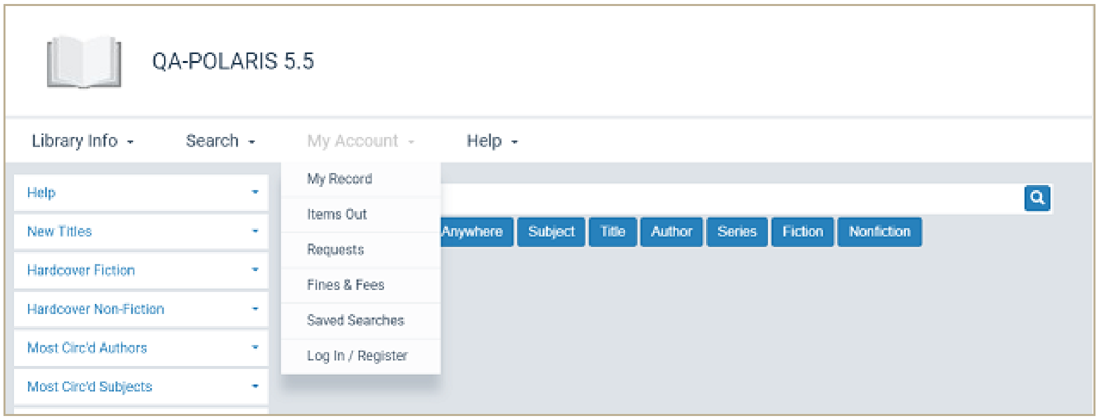
Patrons can now log in by clicking or tapping the **Log In** link at the top of PowerPAC pages.

When the patron has logged in, the link changes to **Welcome [patron name]**, and a **Log Out** link is displayed.

The patron can click or tap the **Welcome** link to display the Items Out page for the patron's account.

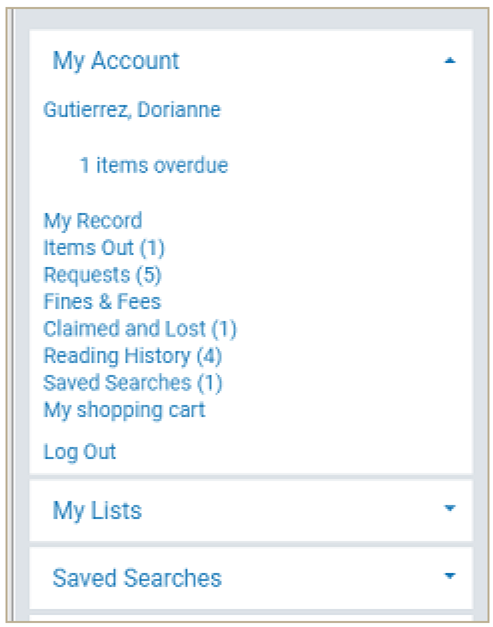


As in previous versions, the My Account menu is available on the desktop or tablet menu bar. (On the phone display, My Account is available from the flyout menu. See "Polaris PowerPAC Responsive Design" on page 4).



When a patron logs in from the My Account menu, the Items Out page is automatically displayed.

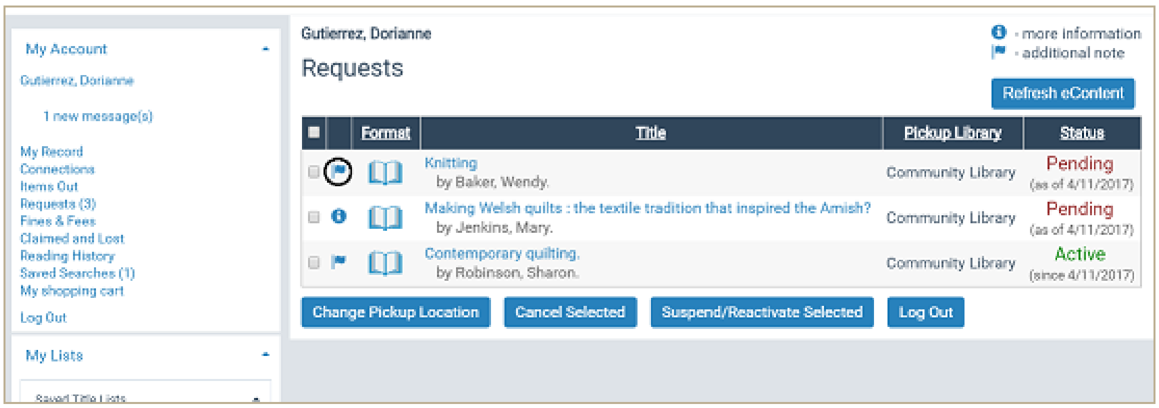
Logged-in patrons can also click or tap links in the dashboard to see My Account features.



PowerPAC Icon Changes

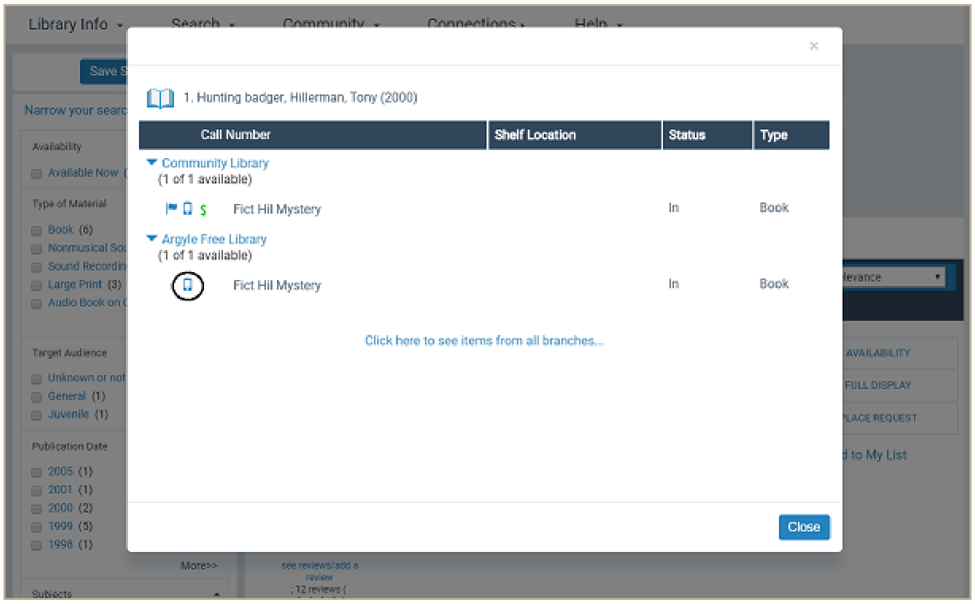
Notes

The pushpin icon for notes in the patron account Requests page and in the Availability view for a title in a user's search results is changed to a flag. The example shows the icon for an additional note (PAC display note) in the PAC patron account Requests page. On a desktop computer display, the user can hover the cursor over the flag icon to see the note, or click the icon to see more information about the request that includes the note. On a touchscreen device, the user taps the icon to see more information about the request that includes the note.



Text It

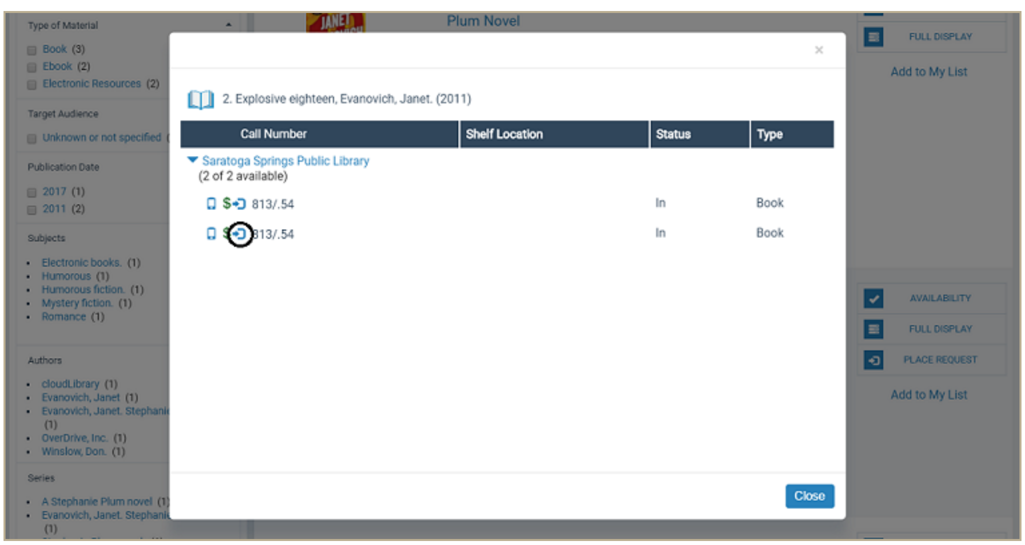
The phone icon to text a call number from the Availability view for an item has been updated to a more modern image.



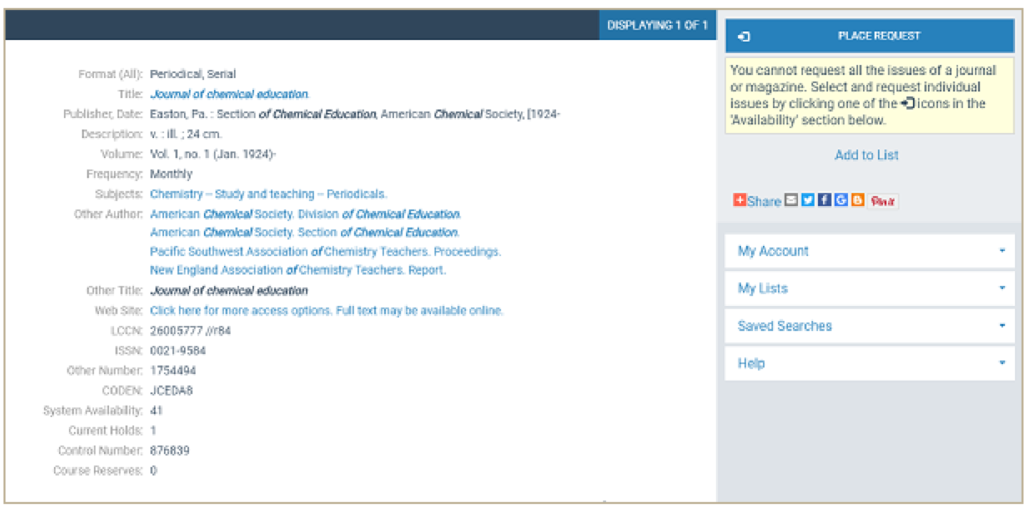
Item-Level Request

The red book icon that represented an item-level request from the title-level serial Place Request page and the Availability views for non-serial and serial items has been replaced by a new request icon. (The same icon is used for the title-level Place Request button in the search results list.)

This example shows the Availability view for a non-serial item in the search results list:



The following examples apply to serial items requested from the search results list and the full display.

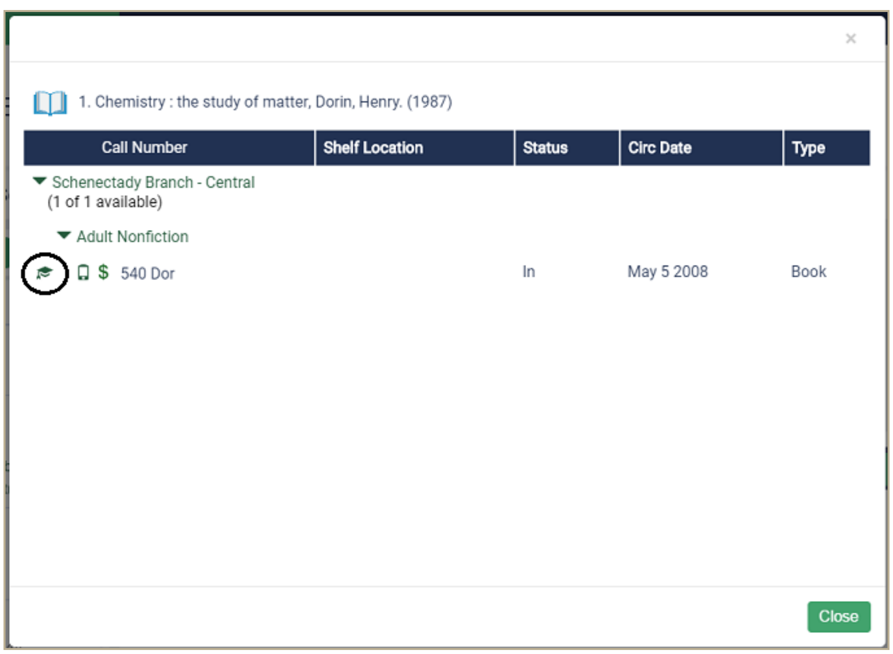


Note:
The language string for the message in the example above is PACML_TITLE_SERIALHOLDS. The default language string for PACML_TITLE_SERIALHOLDS has changed. The default string is now **You cannot request all the issues of a journal or magazine. Select and request individual issues by clicking one of the icons in the '{1}' section below**. This message includes the icon. If you have customized this string, you may want to adjust your custom version as necessary.

The following example shows the Availability drawer in the full display for a serial item.

Course Reserve Icon

A course reserve item is now indicated by a graduation cap icon in the item Availability view
.



RSS Feeds in Polaris PowerPAC

The RSS feed icon for the New Titles web part in the Polaris PowerPAC dashboard has been updated, and is now located near the bottom of the New Titles web part.

For more information about this feature, see "Setting Up RSS Feeds" in Polaris staff client help.

Customizing Polaris PowerPAC 5.5

If your library customizes Polaris PowerPAC at the code level, note that extensive changes were made to version 5.5 in order to make the site fully responsive to all devices. While previous versions of PowerPAC were dynamic in terms of page and content generation, the design and layout were essentially static and targeted to a desktop experience. PowerPAC is now optimized for all devices, so making dramatic changes to the overall layout of the site is more complex.

However, this section describes and summarizes several levels of customization available to you for Polaris PowerPAC 5.5. See "Polaris PowerPAC Responsive Design" on page 4 for a general description of responsive PowerPAC, and information about customizing Polaris PowerPAC 5.5 using options available through system administration settings. Customers who want to make large-scale changes to the overall look and functioning of the PowerPAC site (for example, to match an organization's existing web presence) may want to explore the possibility of building a custom experience based on the functionality offered by the Polaris API.

Custom HTML Content

If you add custom html content for the following pages, be sure that it is responsive:

- Events page (/library/events.aspx)
- Policies page (/library/policies.aspx)
- Portal page (/default.aspx)
- Website page (/library/website.aspx)

Custom CSS Class Definitions and Images

Previous versions of PowerPAC supported a single CSS file (styles.css) which contained all default styling, plus a theme.css file for overriding any of the defaults for a specific theme (standard or custom). PowerPAC 5.5 uses a set of SCSS files, which provide variables for display element attributes including colors and simple layout elements. For example, common theme colors can be adjusted by setting variables in a single place instead of making many changes throughout a static CSS file. Using a utility included with PowerPAC, the SCSS files are then compiled down to a single default site.css file that the browser consumes. For details, see "Creating a Custom Theme for Polaris PowerPAC" in Polaris staff client help or "Customizing Polaris PAC", available on the Customer Supportal.

In addition to the color variables, any of the classes and definitions in the SCSS files that Innovative provides can be overridden in a custom theme.

Note:
If you want to modify a standard theme as the basis for your changes, you may want to start with the simple Gray theme provided by Innovative.

The SCSS definitions also contain styling information for width breakpoints for different size devices and some of the physical layouts of sections of the header, dashboards, and footers. Therefore, some changes to the layout of the pages can be accomplished solely through the CSS in the SCSS files.

As in previous versions, you can replace PowerPAC image files with custom image files for display elements such as format icons.

Custom Layouts for Header, Dashboards, and Footer

In previous versions of PowerPAC, libraries could customize headers, dashboards (panels), and footers using a set of four XSLT templates that resided in the /xsl/panels/classic folder in PowerPAC. You could create your own versions of those files in the /custom folder. In Polaris 5.5, the four XSLT templates have been replaced by a single **site.master** file. The default version of site.master resides in the root level of PowerPAC. To customize that file, first copy the file to your custom theme folder. PowerPAC will check in the custom theme folder and use the site.master version in that folder if it exists; otherwise, the default site.master file is used. You can create custom theme folders as before and include a custom site.master to customize layouts.

Most of the dynamic data content for portions of PowerPAC pages that are rendered via the site.master file are contained in a C# object called PageData. See Polaris staff client help for detailed information about the attributes of the PageData object that are available for use in any customized PowerPAC master page.

For PowerPAC pages that inherit from site.master, the BODY HTML tag contains two new classes that you can use as selectors for scoping section- and page-specific CSS customizations. The page-specific class is of the format **"page-{pagename}"** where **{pagename}** is the name of the ASPX page minus the .aspx file extension. The section-specific class is of the format **"section-{sectionname}"** where **{sectionname}** is the directory in which the page resides.

Example: For the page /polaris/patronaccount/itemsout.aspx, the BODY tag would include the following classes:

<BODY class="section-patronaccount page-itemsout">

Note:
The PowerPAC profile **Layout selection**, which was used to specify a standard ("Classic") or custom layout, is no longer needed and has been removed from Polaris 5.5 system administration.

Page Editing

As with previous versions of PowerPAC, any ASPX or ASCX page can be modified in place. You should have a good understanding of ASP.NET, HTML, C# and a working knowledge of PowerPAC architecture. Any edits to these files will typically have to be redone with each new version, and Innovative reserves the right to modify these files between releases.

PowerPAC Features Customization Summary

The following table shows features available for customization, the skills necessary to perform customization, and whether your changes persist through upgrade.

Feature	Skills/ Knowledge Required	5.2	5.5	Persists Through Upgrade	Notes
Innovative-designed standard themes (5)	Polaris System Administration	X	X	Yes	See "Standard Themes" on page 4
Dashboard left or right	Polaris System Administration	X	X	Yes	
Custom header logo	Polaris System Administration	X	X	Yes	
Branch name display and alignment	Polaris System Administration	X	X	Yes	
Custom return link	Polaris	X	X	Yes	

Feature	Skills/ Knowledge Required	5.2	5.5	Persists Through Upgrade	Notes
for header logo	System Administration				
Header background and text color	Polaris System Administration	X	X	Yes	
Overall color theme, font family and sizes, spacing, etc.	SCSS, CSS	X	X	See note.	See "Custom CSS Class Definitions and Images" on page 30. Typically changes and overrides to the SCSS files can be set once, but it is advisable to review those changes when upgrading.
Custom image files for format icons, etc.	PowerPAC file structure	X	X	Yes	
Custom pages from a provided custom page template	HTML	X	X	Yes	
Custom menu cat-egories and options	XML	X	X	Yes	Format of HeaderData.xml will not change.
URL deep links into the catalog for searches and titles	N/A	X	X	Yes	URL format and struc-tures for PowerPAC 5.5 have not changed.
Custom display strings defined in WebAdmin	Polaris WebAdmin (Language Editor)	X	X	Yes	

Feature	Skills/ Knowledge Required	5.2	5.5	Persists Through Upgrade	Notes
XSLT template files for headers and footers	XML, XSLT, HTML	X		See note.	Not used in 5.5. See "Custom Layouts for Header, Dashboards, and Footer" on page 31.
Master Site Page (site.master) modifications of headers, dashboards, and footers	HTML, C#, .NET		X	See note.	See "Custom Layouts for Header, Dashboards, and Footer" on page 31. Edits to PowerPAC's site.master page in general can be used with minor edits in future versions, but Innovative reserves the right to modify the default site.master page.
Edit ASPX and ASCX files	HTML, C#, .NET	X	X	See note.	See "Page Editing" on page 32. Innovative reserves the right to change the content area of each PowerPAC page between versions.

Maximum Overdue Fine Balance

Polaris Administrators can use the new System-level Patron Services parameter **Overdues: maximum overdue fine balance** to define a maximum amount for overdue fine balances so that patron accounts never exceed a certain dollar amount for overdue fines. By default, this parameter is disabled (set at $0.00). To enable this parameter, the amount must be set above $0.00. Once enabled, the maximum overdue fine balance is applied at the System level–to all patron accounts for all branches.

When a maximum overdue fine balance amount greater than zero is entered in the parameter, the system checks the total current overdue fine balance in patrons' accounts before adding overdue fines. As each overdue item is checked in or renewed, the patron's account is charged the overdue fine until the total current balance reaches the dollar amount limit defined in the parameter. Once the limit is reached, fines for subsequent overdue items are not added to the patron's account.

If a dollar amount is entered in the parameter, the limit is checked when overdue fines are assessed during check-ins or renewals from: the Polaris staff client; self-check units (Polaris ExpressCheck and SIP); Leap; PowerPAC (renewals); and the Polaris API.

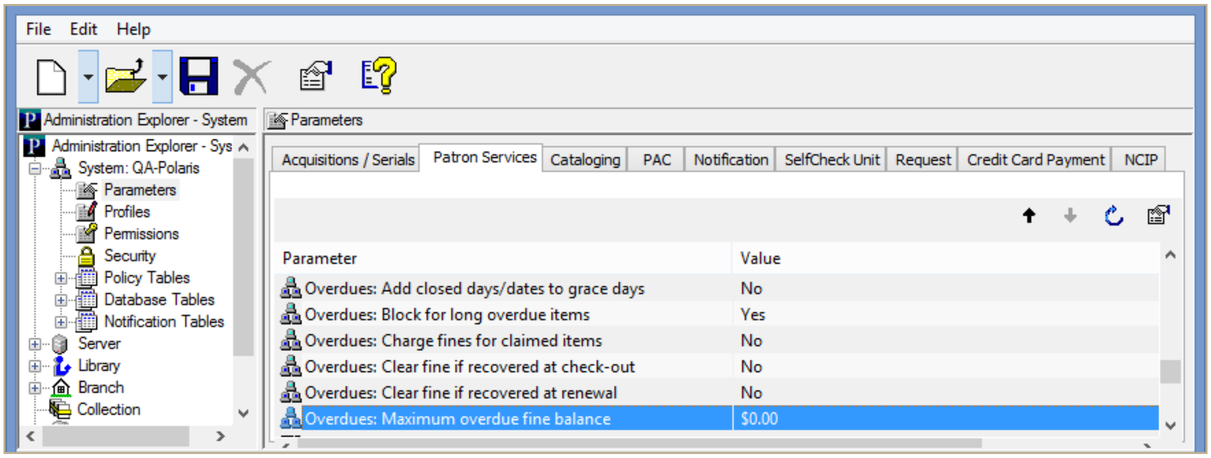
> **Note:**
> When enabled, this parameter sets the maximum dollar amount for total current overdue fines only. The limit is applied to overdue fines that are charged automatically to a patron's account at check in or renewal; it does not apply to manually-added charges, replacement costs, or other fees.

The following parameters also affect how overdue fines are assessed:

- Overdues: Charge fines for claimed items
- Overdues: Clear fine if recovered at renewal
- Overdues: Clear fine if recovered at check-out
- Check in: Auto-charge fine from item work form and find tool context menu
- Lost item charge options - For information on recommendations for selecting options for this parameter when a maximum fine balance is set, see "Maximum Fine Balance and Lost Item Charge Options" on page 37.

To set a maximum overdue fine balance amount for all patron accounts in your library system:

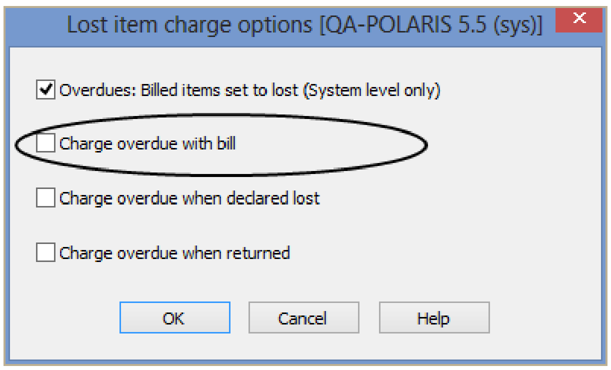
1. Select **Administration** | **Explorer** | **System** to open the Administration Explorer at the System level.
2. Under System, click **Parameters**.
3. Click the **Patron Services** tab and scroll down to the Overdues parameters.



4. Double-click **Overdues: Maximum overdue fine balance** and enter a dollar amount.
5. Select **File | Save** to save the setting.

Maximum Fine Balance and Lost Item Charge Options

If your library specifies a maximum overdue fine balance amount in the **Overdues: Maximum overdue fine balance** Patron Services parameter, it is recommended that your library does not include charges for overdue fines with bills for lost items. To avoid discrepancies between the overdue fine amounts on bills for lost items and the overdue fine balance in the patron's account, do not select the option **Charge overdue with bill** for the **Lost item charge options** parameter if your library has specified a maximum overdue fine balance limit.



Maximum Fine Balance and Estimated Fines

If your library specifies a maximum overdue fine balance amount in the **Overdues: Maximum overdue fine balance** Patron Services parameter, estimated fine amounts may not match the fine amounts actually added to patrons' accounts when items are checked-in or renewed. This is because the overdue amount added to a patron's account at check-in or renewal depends upon the patron's existing overdue fine balance and how close it is to maximum fine threshold. Estimated fines will be adjusted based on the maximum overdue fine limit on an item-by-item basis.

Updates for MARC Technical Notice

Polaris 5.5 includes updates to coding to comply with the changes in the following Library of Congress, MARC Standards technical notice:

- MARC TECHNICAL NOTICE (November 2, 2016)

EDI Integration with The Penworthy Company

Polaris 5.5 supports EDI (electronic data interchange) ordering and invoicing with The Penworthy Company (www.penworthy.com). If your library is interested in sending EDI orders to Penworthy, contact Innovative customer support. This feature is available for Polaris versions 5.2 and later.

As with other EDI vendors, set up a supplier record for Penworthy and enable EDI settings. Penworthy's SAN is 990-2392. See Polaris staff client help for more information about these procedures.

> **Note:**
> Penworthy limits PO numbers to a maximum of 15 characters. If your Penworthy PO number exceeds 15 characters, the PO release is blocked.

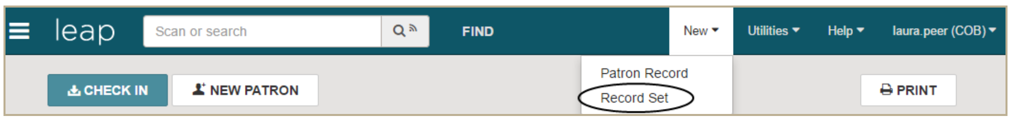
Leap - Create a New Empty Cataloging Record Set

You can create a new empty item, bibliographic, or authority record set from the **New** menu in the Leap application header.

> **Note:**
> To create cataloging record sets, you must have the Cataloging permission **Cataloging record sets: Create**.

To create a new empty cataloging record set:

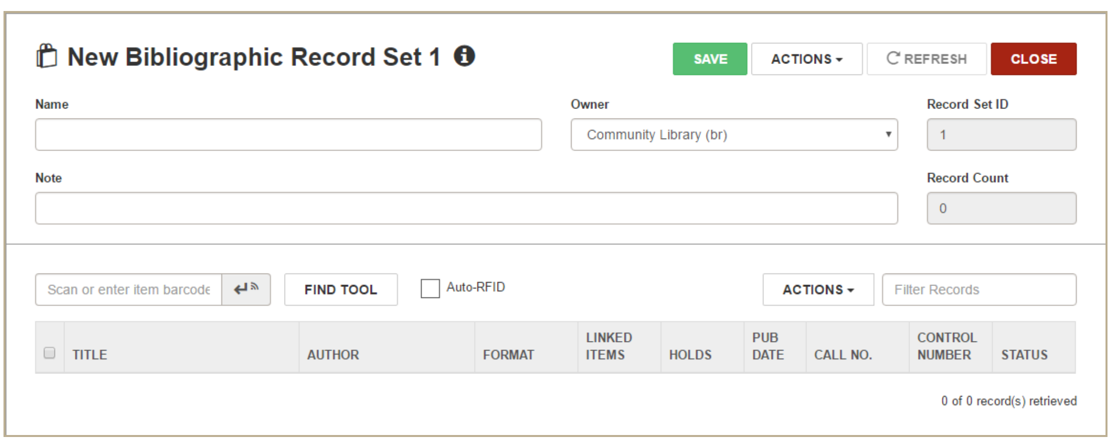
1. Select **New | Record Set**.



The New Record Set dialog box appears.

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

A new record set workform opens for the type of record you selected.



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

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

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

   The record set is saved.

Language Strings Added to Web Admin for Creating an Empty Record Set

Language String	Default
SW_CI_RECSET_NEW_CREATE_OBJECTTYPE_OPTION0	Select Record Type
SW_CI_RECSET_NEW_CREATE_OBJECTTYPE_OPTION1	Authority
SW_CI_RECSET_NEW_CREATE_OBJECTTYPE_OPTION2	Bibliographic
SW_CI_RECSET_NEW_CREATE_OBJECTTYPE_OPTION3	Item
SW_CI_RECSET_NEW_CREATE_OBJECTTYPE_ERR	Please select a record type.
SW_CI_RECSET_NEW_BTN_CANCEL	Cancel
SW_CI_RECSET_NEW_BTN_CREATE_OK	Ok

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

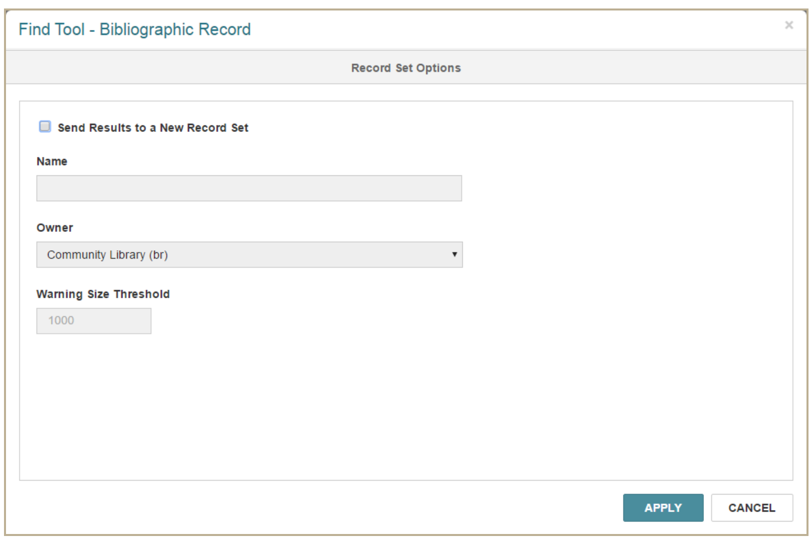
You can now export cataloging record search results from the Find Tool to create a new record set.

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

To create a cataloging record set from the Find Tool:

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

   The Record Set Options dialog box appears.



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

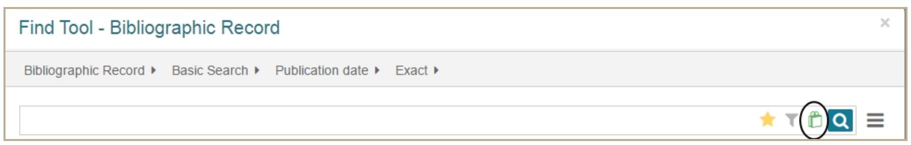
Note:
The branches in the **Owner** drop-down list box are those for which you have permission to create cataloging record sets.

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

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

7. Click **APPLY**.

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



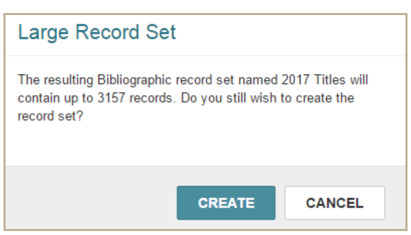
   Note:
   If you change the record type in the Find Tool after naming the record set in the Record Set Options dialog box, the record set is not created.

8. Enter the search criteria for the cataloging records you want to add to the record set.

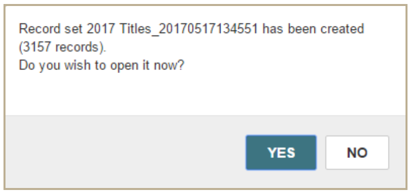
   Note:
   To send the records to the record set without displaying them in the Find Tool results list, select the **Count Only** check box.

9. Click .

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

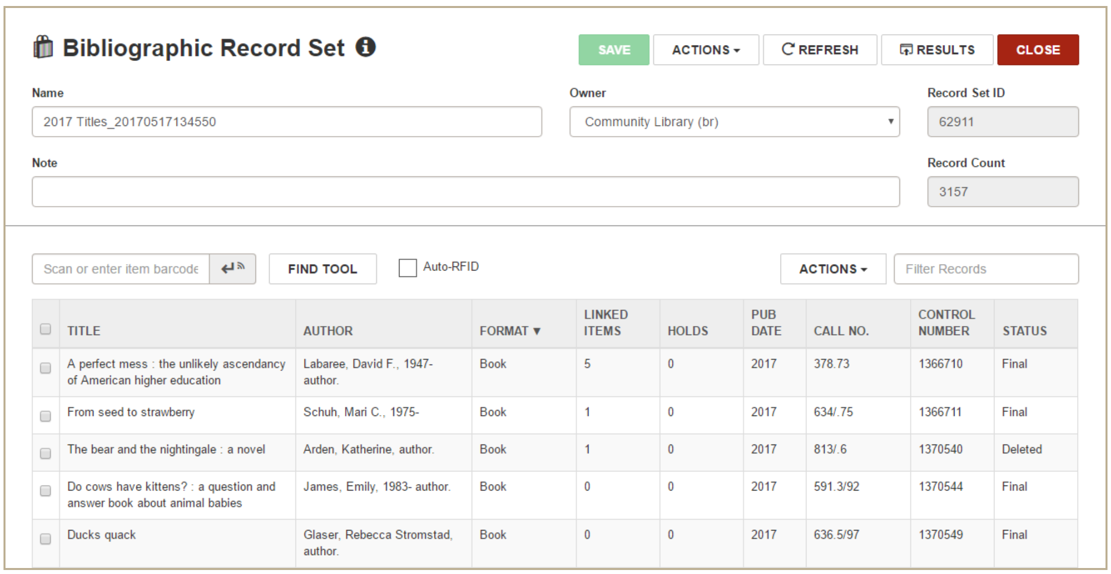


The message **Record set created successfully** appears, and a dialog box displays the name of the new record set and the number of records in it.



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

    The record set is created and opens in the appropriate workform. The record set name you entered is appended with the date and time in the following format: ***Name*_20170517134550**



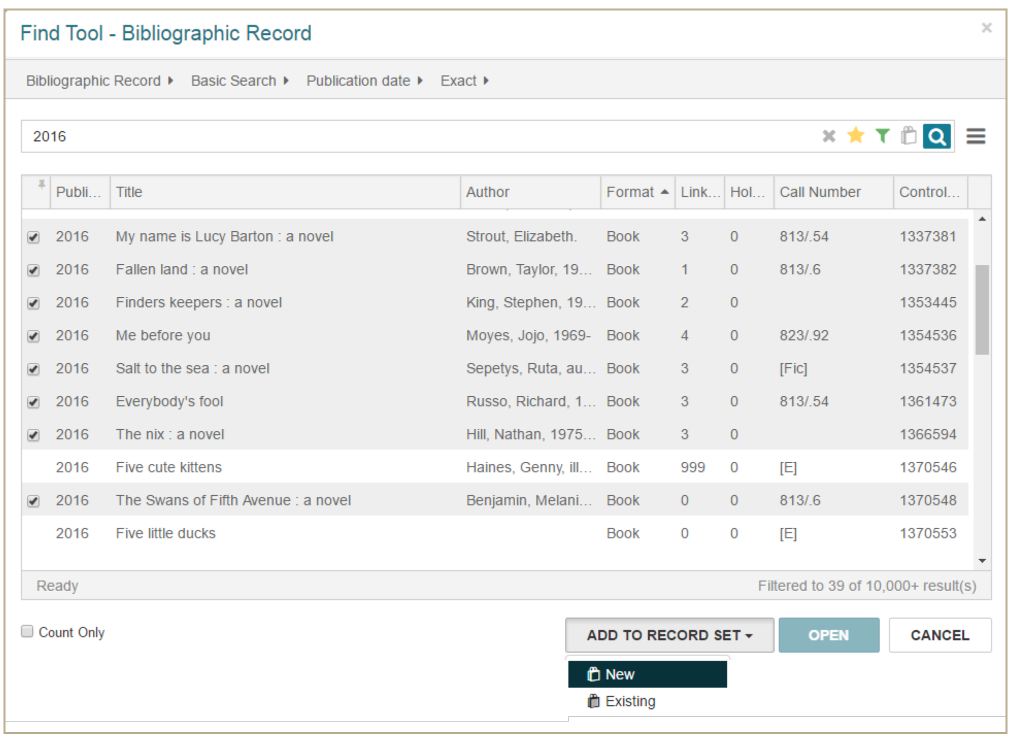
Leap - Create a Cataloging Record Set from Selected Find Tool Results

You can create a new cataloging record set by selecting cataloging records in the Find Tool results list and then adding them to the new record set. When you select the records in the Find Tool results list, the records are added to a cataloging record set of the same type. For example, if you select bibliographic records and select **ADD TO RECORD SET | New**, the records are added to a new bibliographic record set.

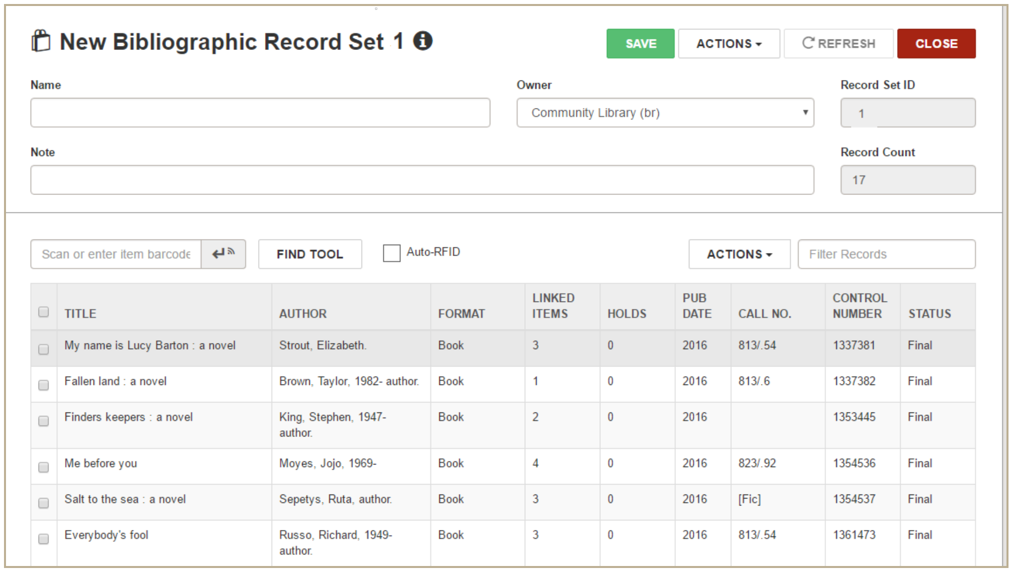
> **Note:**
> To create record sets, you must have the Cataloging permission **Cataloging record sets: Create**.

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

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



A new record set workform opens containing the records you selected in the Find Tool results list.



5. Type a name for the record set in the **Name** box.
6. Select the record set owner in the **Owner** box.

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

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

The cataloging record set is saved.

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

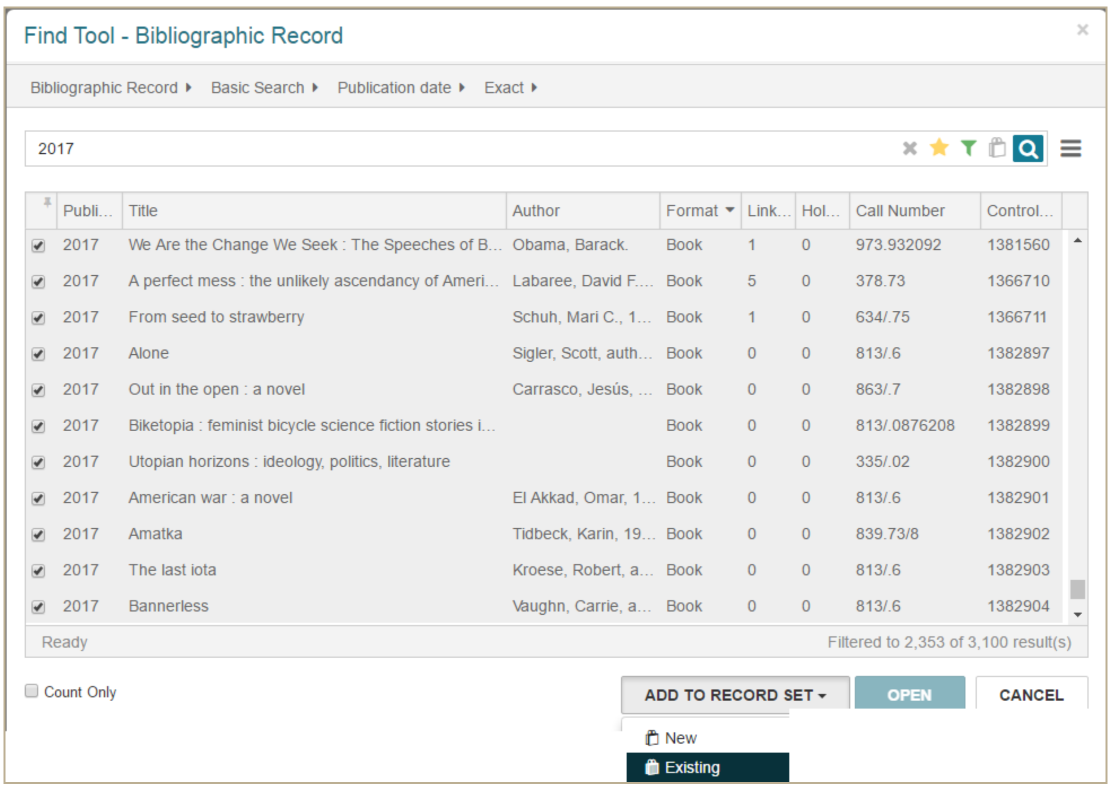
You can search for cataloging records, select the records in the Find Tool search results, and add them to an existing record set.

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

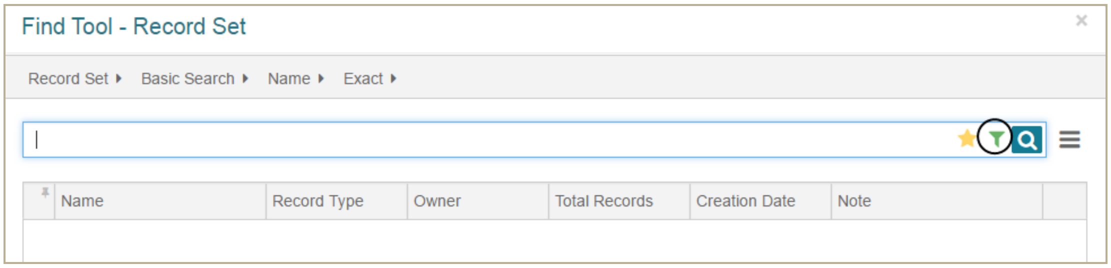
1. Click **FIND** to open the Find Tool.
2. Search for bibliographic, item, or authority records.

   The search results are listed.

3. Select the records you want to add to an existing record set.
4. Select **ADD TO RECORD SET | Existing**.



The Find Tool opens with the filter set to search for record sets matching the record type selected. For example, if you selected bibliographic records to add to an existing record set, the filter is set to limit the search results to bibliographic record sets.



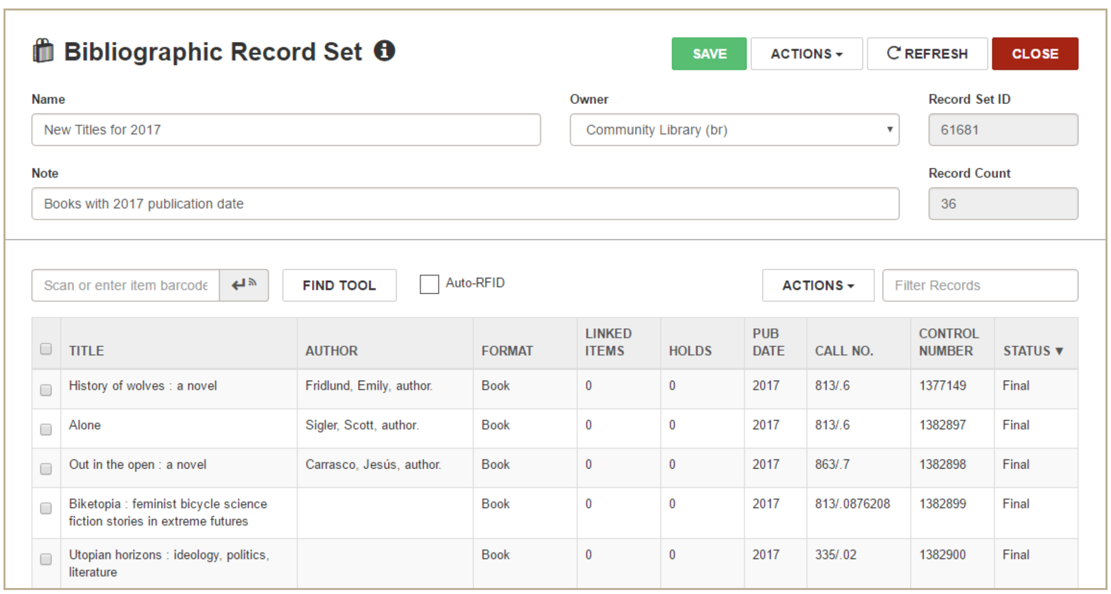
5. Search for the record set.

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

6. Select the record set.

   The record set workform opens with the records added to it.

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



7. Save the record set.

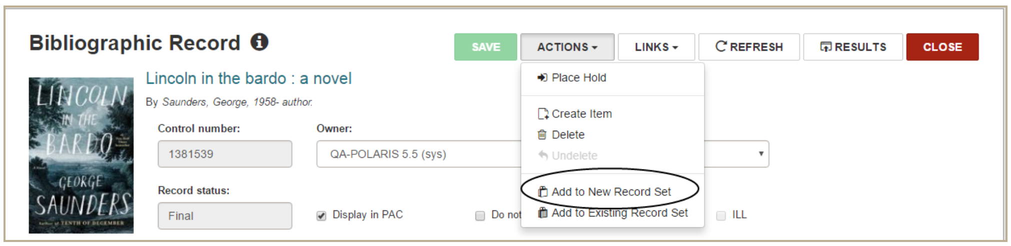
Leap - Create a Record Set from a Cataloging Record

You can create a new cataloging record set from the Item Record, Bibliographic Record, or Authority Record workform.

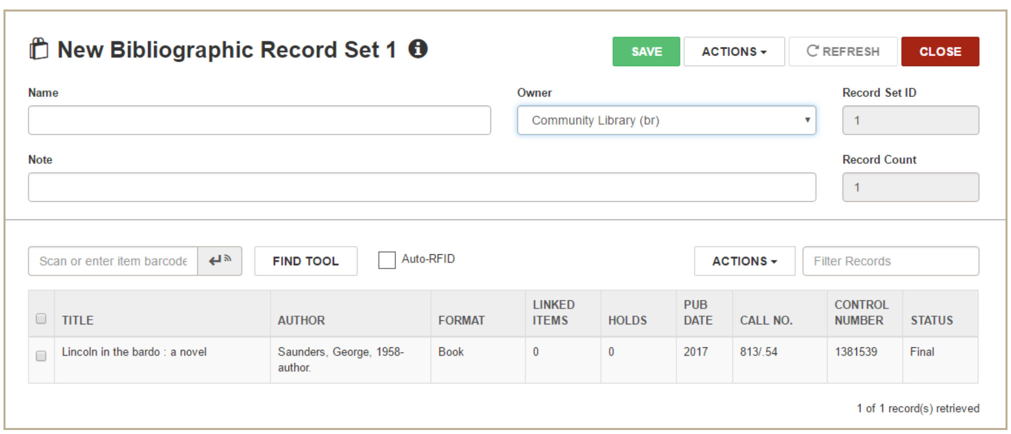
To create a new record set from a cataloging record:

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

1. Open the Item Record, Bibliographic Record, or Authority Record workform.
2. Select **ACTIONS | Add to New Record Set**.



The Item Record Set, Bibliographic Record Set, or Authority Record Set workform opens. The new record set contains the record you added.



3. Type a name for the record set in the **Name** box.
4. Select the owner from the **Owner** drop-down list.

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

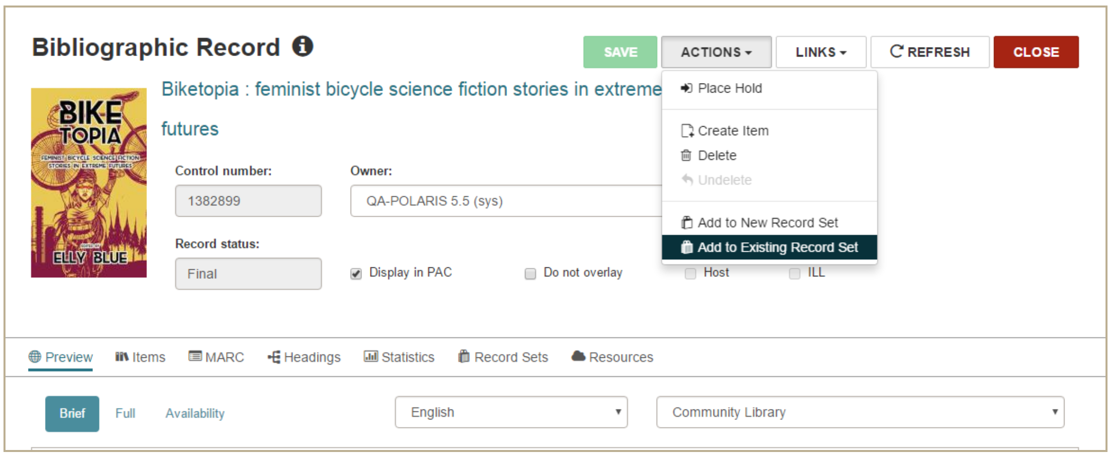
5. (Optionally) Type a note in the **Note** box.
6. Click **SAVE**.

Leap - Add a Cataloging Record to an Existing Cataloging Record Set

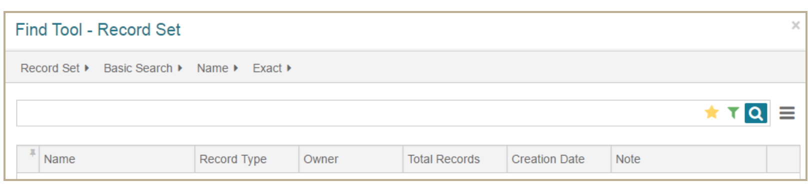
You can now add a record to an existing cataloging record set from the Bibliographic Record, Item Record, or Authority Record workform.

To add a cataloging record to an existing record set:

1. Open the record in the Bibliographic Record, Item Record, or Authority Record workform.
2. Select **ACTIONS | Add to Existing Record Set**.



The Find Tool opens.

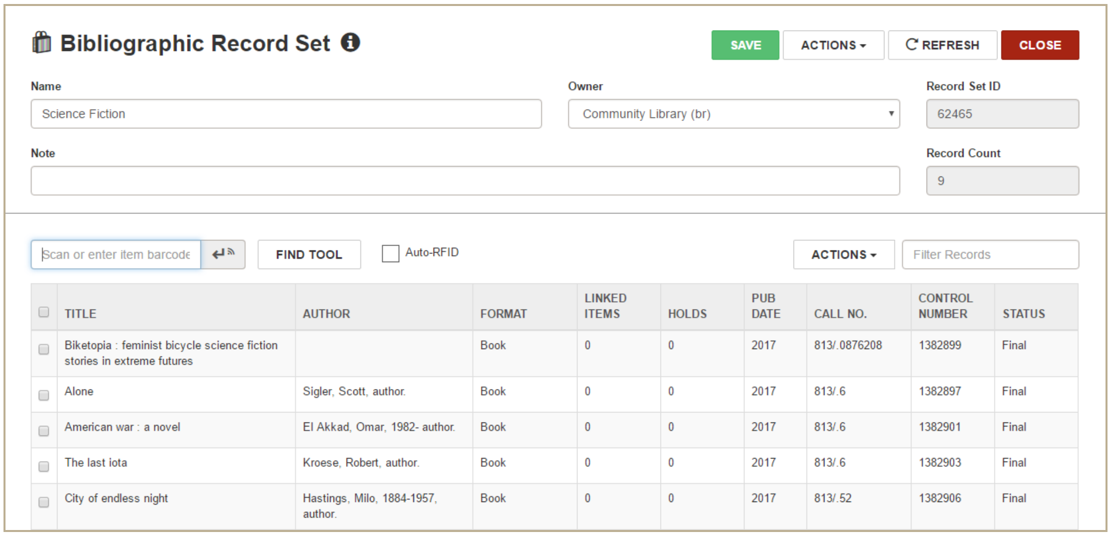


A filter is applied that limits the search by the type of record. For example, if you select **Add to Existing Record Set** from the Bibliographic Record workform, the search is automatically limited to bibliographic record sets.

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

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

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



TITLE	AUTHOR	FORMAT	LINKED ITEMS	HOLDS	PUB DATE	CALL NO.	CONTROL NUMBER	STATUS
Biketopia : feminist bicycle science fiction stories in extreme futures		Book	0	0	2017	813/.0876208	1382899	Final
Alone	Sigler, Scott, author.	Book	0	0	2017	813/.6	1382897	Final
American war : a novel	El Akkad, Omar, 1982- author.	Book	0	0	2017	813/.6	1382901	Final
The last iota	Kroese, Robert, author.	Book	0	0	2017	813/.6	1382903	Final
City of endless night	Hastings, Milo, 1884-1957, author.	Book	0	0	2017	813/.52	1382906	Final

Leap - Create a Record Set of Linked Records from Another Record Set

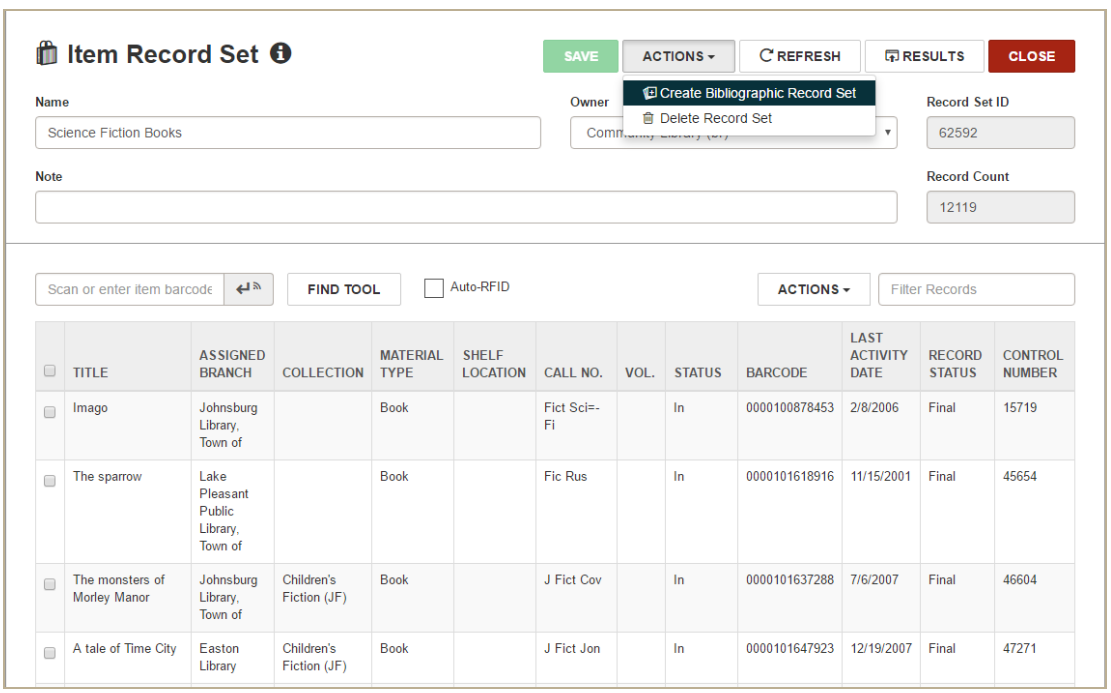
You can now automatically create record sets of linked cataloging records as follows:

- From the Item Record Set workform, create a new bibliographic record set containing the linked bibliographic records.
- From the Bibliographic Record Set workform, create a new item record set containing the linked item records.
- From the Bibliographic Record Set workform, create an authority record set containing the linked authority records.
- From the Authority Record Set workform, create a new bibliographic record set containing the linked bibliographic records.

To create a record set of linked cataloging records from a cataloging record set:

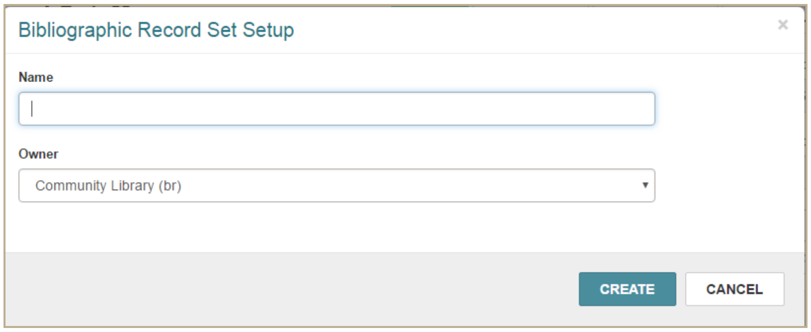
Note:
To create cataloging record sets, you must have the Cataloging permission **Cataloging record sets: Create**.

1. Open the Bibliographic Record Set workform, the Item Record Set workform, or the Authority Record Set workform.



2. Select **ACTIONS** in the workform header.
3. Select the appropriate option: **Create Bibliographic Record Set**, **Create Item Record Set**, or **Create Authority Record Set**.

   The Record Set Setup dialog box opens for the type of record set you are creating.

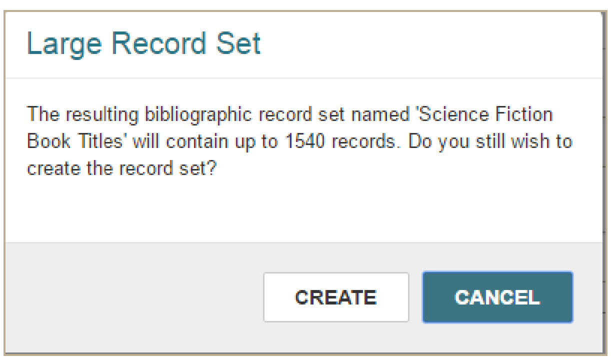


4. Type a name for the record set.
5. To change the owner, select an entry from the **Owner** drop-down list box.

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

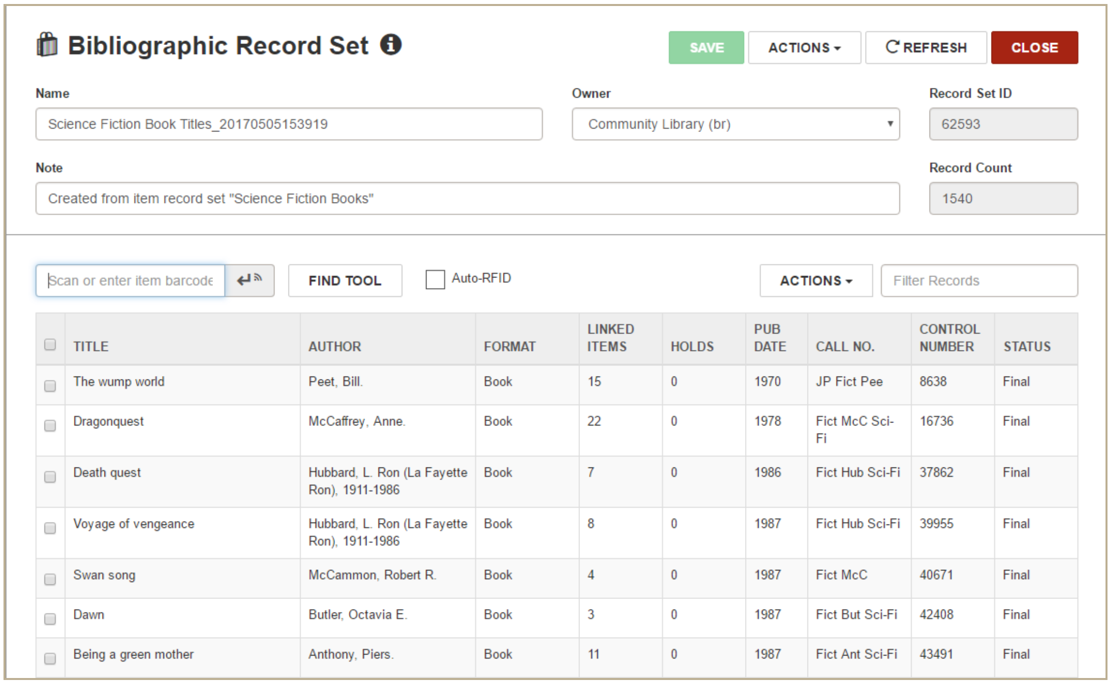
6. Click **CREATE**.

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



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

   The following message **Record set created successfully** appears, and the cataloging record set containing the linked records opens in the appropriate workform. The name you entered for the record set is appended with the date and time the record set was created: **20170505153919**. The **Note** field indicates the record set from which the record set of linked records was created.



Language Strings Added to Web Admin for Creating a Record Set of Linked Records

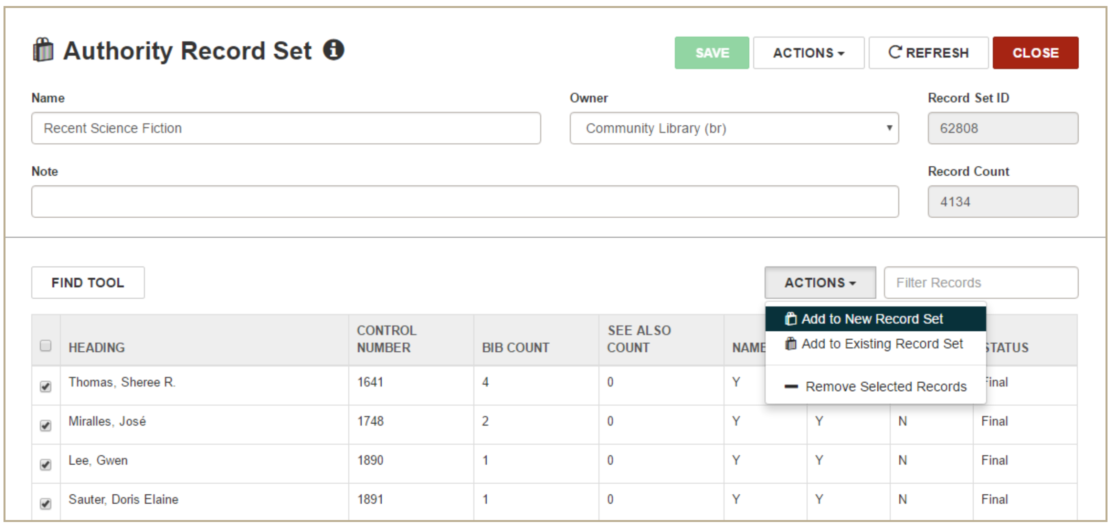
Language String	Default
SW_CI_RECSET_ASSOCIATED_BIB_LINK	Create Bibliographic Record Set
SW_CI_RECSET_ASSOCIATED_ITEM_LINK	Create Item Record Set
SW_CI_RECSET_ASSOCIATED_AUTH_LINK	Create Authority Record Set
SW_CI_RECSET_ASSOCIATED_ACK_TITLE	Large Record Set
SW_CI_RECSET_ASSOCIATED_CREATE	Create

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

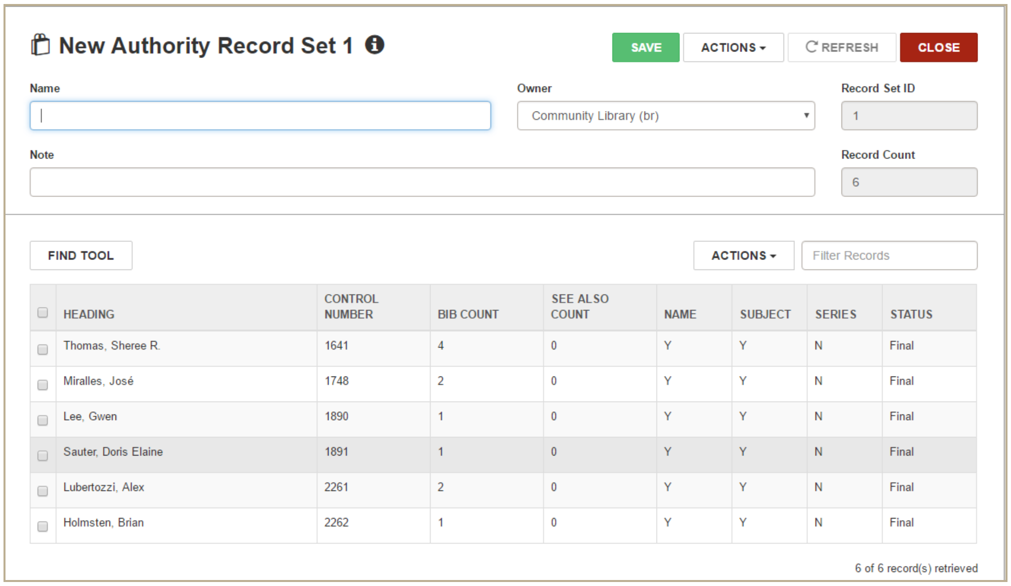
You can copy records from one cataloging record set to another new record set of the same type. The records remain in the record set from which they were copied, and they appear in the new record set.

To copy records from one cataloging record set another:

1. Open the Bibliographic Record Set, Item Record Set, or Authority Record Set workform.
2. Click the check box next to the records you want to copy.
3. Select **ACTIONS | Add to New Record Set** above the list view.



A new record set opens containing the copied records.



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

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

6. Click **SAVE**.

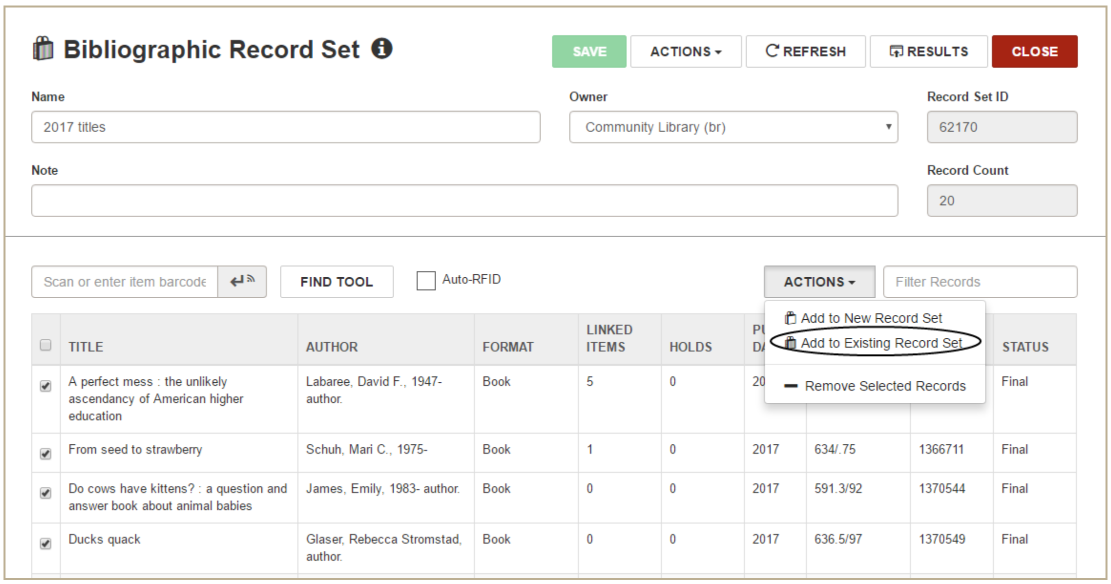
A message confirms that the record set was created successfully.

Leap - Copy Records from One Record Set to Another

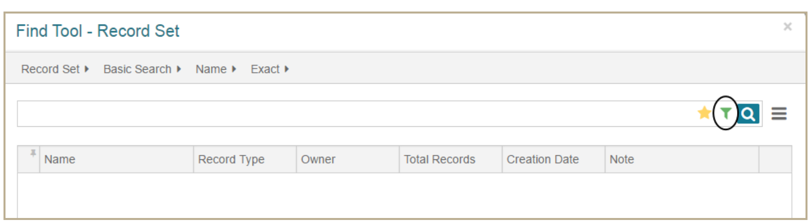
You can copy records from one cataloging record set to another existing cataloging record set of the same type.

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

1. Open the record set in the Bibliographic Record Set, Item Record Set, or Authority Record Set workform.
2. Click the check box next to the records you want to copy.
3. Select **ACTIONS | Add to Existing Record Set**.



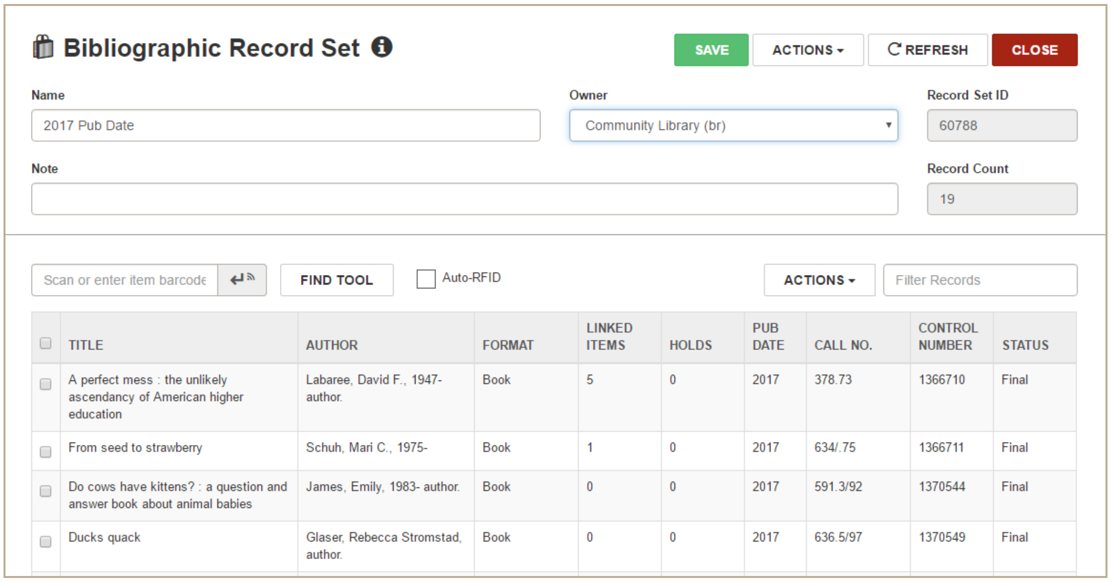
The Find Tool opens with the filter already applied for the type of record set.



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

   The record set containing the copied records opens in the appropriate record set workform: Bibliographic Record Set, Item Record Set, or Authority Record Set.

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



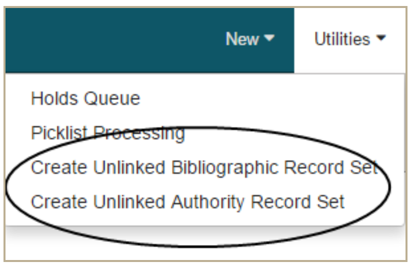
6. Click **SAVE** to save the record set with the added records.

Leap - Create a Record Set of Unlinked Cataloging Records

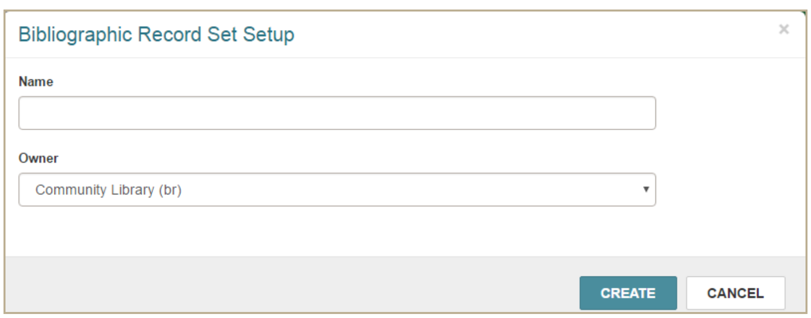
You can automatically create a record set of unlinked bibliographic or authority records.

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

1. Select **Utilities | Create Unlinked Bibliographic Record Set** or **Create Unlinked Authority Record Set**.



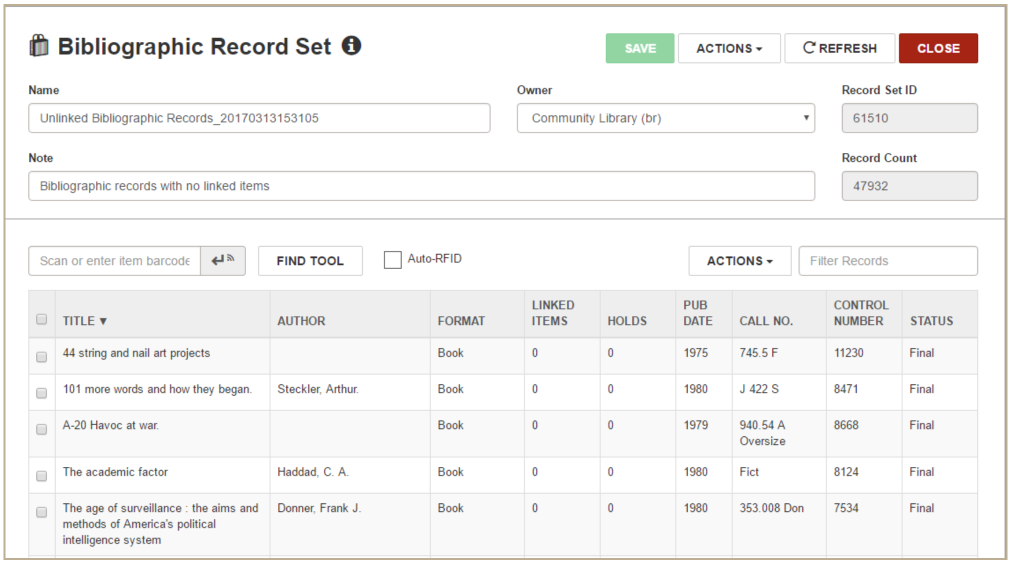
The Bibliographic Record Set Setup or Authority Record Set Setup dialog box appears.



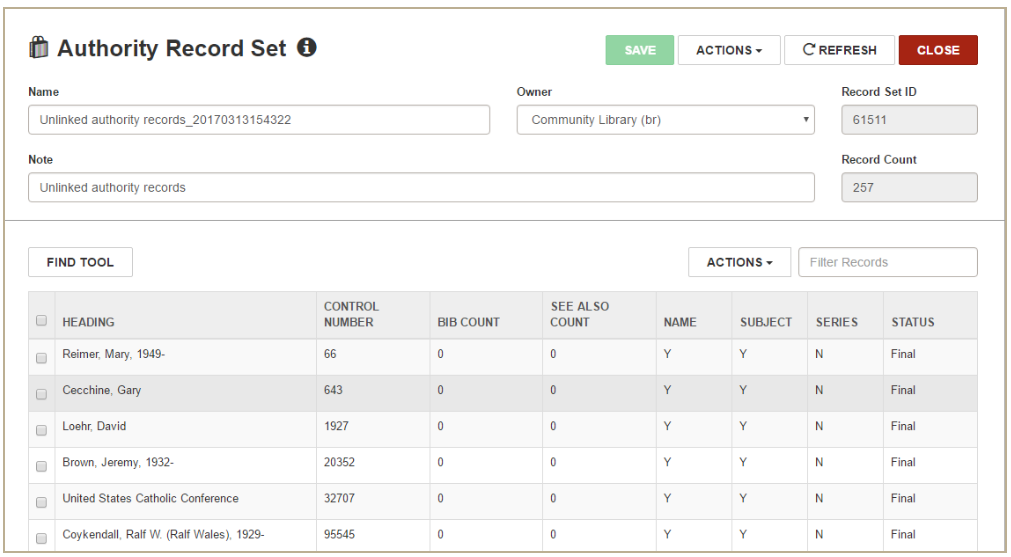
2. Type a name for the record set, and select a record set owner in the **Owner** box.

   The record set of the unlinked records appears.

   - If you created a bibliographic record set, the following note appears on the Bibliographic Record Set workform: **Bibliographic records with no linked items.**



- If you created an authority record set, the following note appears on the Authority Record Set workform: **Unlinked authority records**.

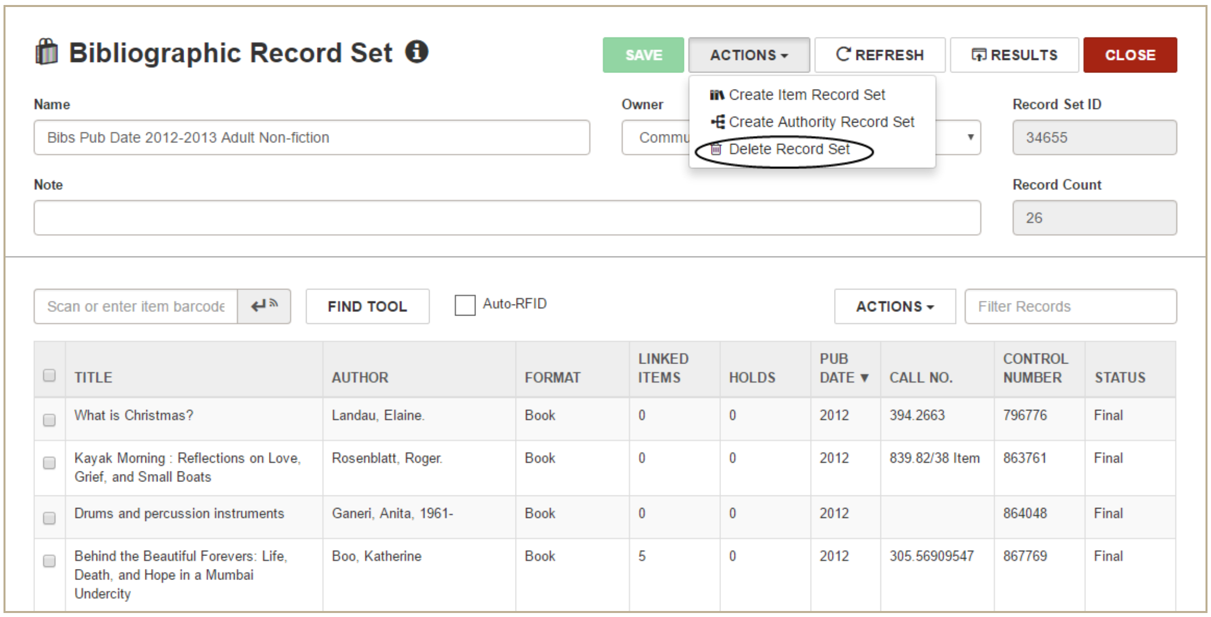


Leap - Delete a Cataloging Record Set

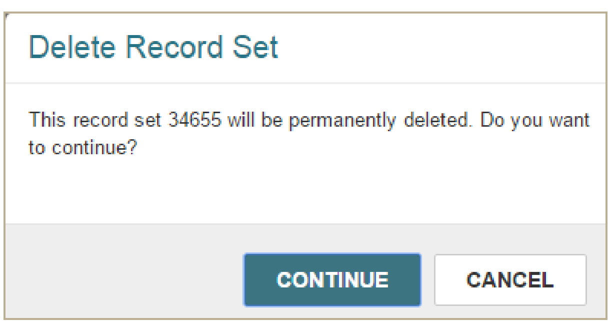
You can now delete a cataloging record set in Leap.

To delete a cataloging record set:

1. Open the Item Record Set, Authority Record Set or Bibliographic Record Set workform.
2. Select **ACTIONS | Delete Record Set**.



A confirmation message appears.



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

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

Language Strings Added to Web Admin for Deleting a Record Set

Language String	Default
SW_CI_RECSET_CONFIRM_ACTION_DEL_TITLE	Delete Record Set
SW_CI_RECSET_CONFIRM_ACTION_DEL_MSG	This record set [record set ID] will be permanently deleted.
SW_CI_RECSET_CONFIRM_DEL_YES	Continue
SW_CI_RECSET_CONFIRM_DEL_CANCEL	Cancel

Leap - Delete/Undelete an Item Record

If you have the required permissions, you can now delete or undelete an item record from the Item Record workform in Leap.

The following Cataloging Administration permissions, parameters, and profiles that control item record deletion in the staff client also apply when deleting/undeleting item records in Leap:

- Permission
  - **Item records: Delete/Undelete**
- Parameter
  - **Item record delete: Allow if there are holds**
- Profile
  - **Retain deleted item records**

See also:

- "Delete an Item Record " on page 65.
- "Last Copy Options When Deleting an Item Record" on page 66.
- "Allow Delete if Holds Setting" on page 67.
- "Retain Deleted Item Records Setting" on page 67.
- "Undelete a Deleted Item Record" on page 69.

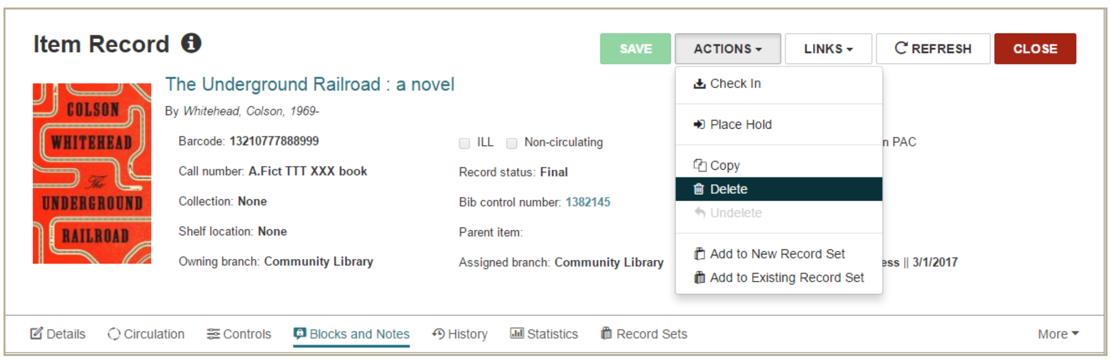
Delete an Item Record

When you delete an item that is the last copy linked to a bibliographic record, you have the option to delete the linked bibliographic record. If you delete the linked bibliographic record and it is the last record linked to an authority record or records, you also have the option to delete the authority records.

> **Note:**
> You can also delete or undelete a bibliographic record from the Bibliographic Record workform and an authority record from the Authority Record workform. See: "Leap - Delete/Undelete a Bibliographic Record" on page 70 and "Leap - Delete/Undelete an Authority Record" on page 75.

To delete an item record in Leap:

1. Open the item record in the Item Record workform.
2. Select **Actions | Delete**.



If the item record does not have a status or links that prevent its deletion, one of the following messages appears, depending on your library's setting for the profile **Retain deleted item records**:

- **The item record will be marked for deletion. Do you want to continue?**
- **The item record will be permanently deleted. Do you want to continue?**

3. Click **Continue** to delete the item record.

   The item is either marked for deletion and retained, or it is permanently deleted from the database, depending on the Cataloging profile setting. See "Retain Deleted Item Records Setting" on page 67.

When the item is the last copy linked to the bibliographic record, you have the option to also delete the bibliographic record (provided you have the required permissions, and the bib does not have links that prevent its deletion). See "Last Copy Options When Deleting an Item Record" on page 66.

Last Copy Options When Deleting an Item Record

When you delete an item record that is the last copy linked to the bibliographic record, the Last Copy Options dialog box appears.

> **Note:**
> The options that appear in the Last copy options dialog box depend on your permissions.

If the Last Copy Options dialog box appears, you can select the applicable option to handle the bibliographic record that no longer has linked item records:

- **Delete** - The bibliographic record is either deleted or marked for deletion. See "Delete a Bibliographic Record" on page 71.
- **Suppress from PAC**
  - The **Display in PAC** flag is removed, and the bibliographic record no longer appears in the PAC.
  - A bibliographic record modified transaction (3003) is logged.

  > **Note:**
  > If you delete a bibliographic record that was the only record linked to an authority record, you can delete the unlinked authority record. See "Last Record Options When Deleting a Bibliographic Record" on page 71.
- **Retain** - No changes are made to the bibliographic record.

Language Strings Added to Web Admin for Last Copy Options

Language String	Default
SW_CI_WRKFLW_LSTCPY_DELETE	Delete
SW_CI_WRKFLW_LSTCPY_SUPPRESS	Suppress from PAC
SW_CI_WRKFLW_LSTCPY_RETAIN	Retain
SW_CI_WRKFLW_LSTCPY_OPEN	Open record set
SW_CI_WRKFLW_LSTCPY_OPTIONS_MSG	The following record options are available:
SW_CI_WRKFLW_LSTCPY_PRINT	Print list

Allow Delete if Holds Setting

When you attempt to delete an item record that has an item-specific hold request linked to it, the setting for the parameter **Item record delete: Allow if there are holds is checked**:

- If the parameter is set to **No**, the Item Record Links (Unbreakable) dialog box appears, and the deletion is stopped.
- If the parameter is set to **Yes**, but other items linked to the same bibliographic record can also satisfy the request, the Item Record Links (breakable) dialog box appears with the following message: **This item record has 1 hold request associated with it. These requests will become Not Supplied**. If no other items can satisfy the hold, the dialog box displays this message: **This item record has 1 hold request associated with it. No other items are available to satisfy the hold request. Deleting this item will cancel 1 hold request.**

Retain Deleted Item Records Setting

When an item record is deleted using Leap, and the Cataloging profile, **Retain deleted item records** is set to **No**, the following processing occurs:

- The item is permanently deleted from the database.
- A Item record deleted (3007) transaction is logged.
- Linked item-specific hold requests are set to Not Supplied.
- Linked bibliographic-level hold requests are set to Canceled (when no other item can satisfy the hold).
- Links to any item record sets are removed.
- The item record is removed from the Claims view or Lost/Paid view.
- Links from patron accounts display DELETED.
- Links to purchase orders or invoices are removed.

When an item record is deleted, and the Cataloging profile, **Retain deleted item records** is set to **Yes**, the following processing occurs:

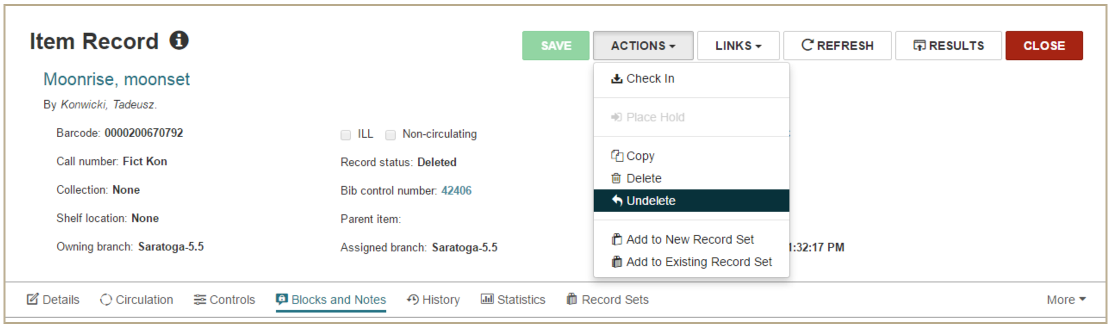
- The item record is marked as deleted.
- The modification date and record status date are updated.
- The **Display in PAC** check box is cleared.
- A Marked for deletion row is added to the item record history.
- Linked item-specific hold requests are set to Not Supplied.
- Linked bibliographic-level hold requests are set to Canceled (when no other item will satisfy the request).

- Item Record set links are removed.
- The item is removed from Claims view or the Lost/Paid view.
- Links to Acquisitions records are removed.

Undelete a Deleted Item Record

To undelete a deleted item record in Leap:

1. Open the deleted item record in the Item Record workform.
2. Select **ACTIONS | Undelete**.

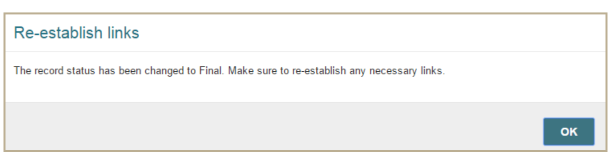


Note:
If a duplicate barcode is found, a duplicate barcode message appears. When you click **OK**, the item is either changed to a status of provisional or it remains in a deleted status. An item record with a duplicate barcode can be saved provisionally if the cataloging profile, **Item records: Records with duplicate barcodes can be saved provisionally**, is set to **Yes**.

If no duplicates are found, the item record is updated as follows:

- The record Status is set to Final.
- The Modifier displays the Username.
- The Modification Date reflects the undelete date.
- The Display in PAC check box is checked.
- An Undeleted row is added to the item record history.
- An Item record undeleted transaction (3028) is logged.

A message confirms that the record status was changed to final and reminds you to re-establish links that were broken when the record was deleted.



3. Click **OK** to close the message box.

Leap - Delete/Undelete a Bibliographic Record

If you have the required permissions, you can now delete or undelete a bibliographic record from the Bibliographic Record workform in Leap.

The following Cataloging Administration permissions, parameters, and profiles that control bibliographic record deletion in the staff client also apply when deleting/undeleting bibliographic records in Leap:

- Permission
  - **Bibliographic records: Delete/Undelete**
- Parameter
  - **Bibliographic record delete: Allow if there are holds**
- Profile
  - **Retain deleted bibliographic records**

See also:

- "Delete a Bibliographic Record" on page 71.
- "Last Record Options When Deleting a Bibliographic Record" on page 71.
- "Retain Deleted Bibliographic Records Setting" on page 73.

- "Retain Deleted Bibliographic Records Setting" on page 73.

Delete a Bibliographic Record

To delete a bibliographic record in Leap:

1. Open the bibliographic record in the Bibliographic Record workform.
2. Select **Actions | Delete**.

- If the **Retain deleted bibliographic records** profile is set to **Yes**, the following message appears: **The bibliographic record will be marked for deletion. Do you want to continue?**
- If the **Retain deleted bibliographic records** profile is set to **No**, the following message appears: **The bibliographic record will be permanently deleted. Do you want to continue?**

3. Click **Continue** to delete the bibliographic record.

   The bibliographic record is either marked for deletion and retained, or it is permanently deleted from the database, depending on the Cataloging profile setting. See "Retain Deleted Bibliographic Records Setting" on page 73.

Last Record Options When Deleting a Bibliographic Record

When you delete a bibliographic record that leaves one or more authority records unlinked to any other bibliographic or authority records, the Last record options dialog box appears.

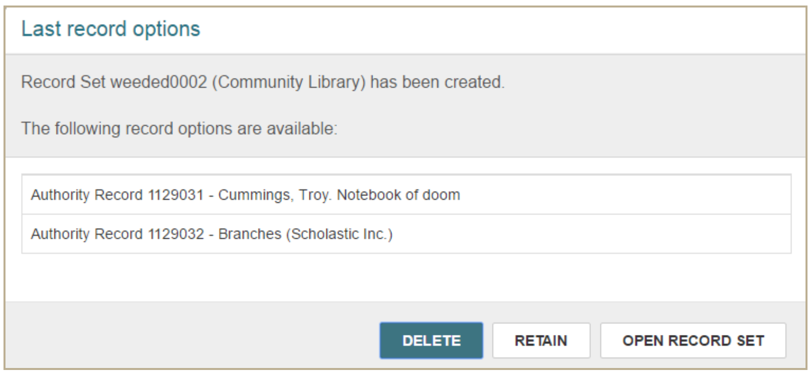
If deleting the bibliographic record leaves only one unlinked authority record, the Last record options dialog box displays the heading with the following options:

> **Note:**
> The options that appear in the Last record options dialog box depend on your permissions.

- Click **DELETE** to mark the authority record as deleted or permanently delete the record. See "Delete an Authority Record" on page 76.
- Click **RETAIN** to retain the authority record.

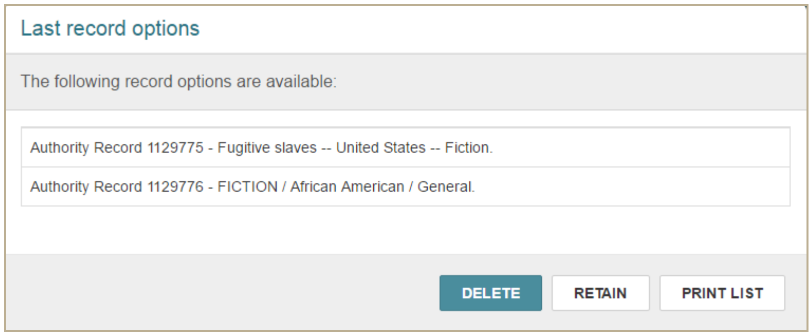
When deleting a bibliographic record leaves multiple authority records unlinked, the Last record options lists all the authority records that are unlinked and different options depending on whether you have permission to create record sets:

- If you have permission to create cataloging record sets, the Last record options dialog box informs you that a record set with the prefix "weeded" has been created. The unlinked authority records are listed with the following options:
  - Click **DELETE** to mark the authority record as deleted or permanently delete the record.
  - Click **RETAIN** to retain the authority records.
  - Click **OPEN RECORD SET** to open the "weeded" record set.



- If you do not have permission to create cataloging record sets, the "weeded" record set is not created. The dialog box lists the records along with the following options:
  - Click **DELETE** to mark the authority records as deleted or permanently delete them from the database.
  - Click **RETAIN** to retain the authority records.
  - Click **PRINT LIST** button to open a pdf listing the authority records that remain unlinked as a result of deleting the bibliographic record.

Note:
To generate the pdf, the Polaris Administration Staff Client profile **Report server** must be set up to override the default report server authentication. On the Report Server Setup dialog box, select the **Override default Report Server authentication** box and enter your username, password, and domain.



Retain Deleted Bibliographic Records Setting

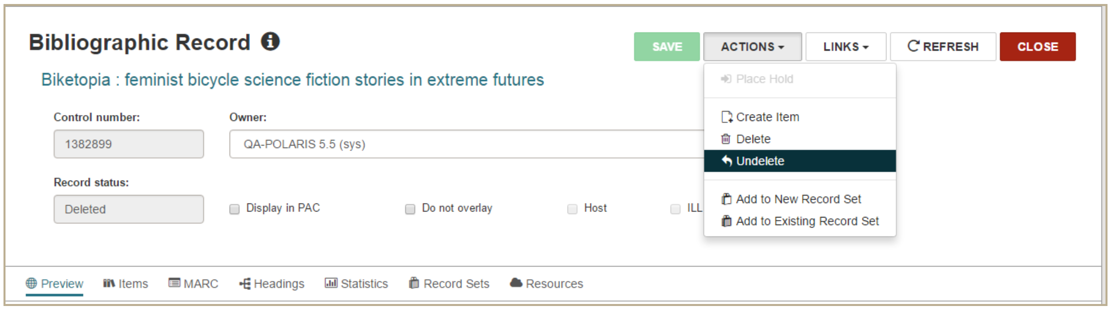
When you delete a bibliographic record, the record is marked for deletion and retained or permanently deleted from the database according to the setting in the Cataloging profile, Retain deleted bibliographic records (Yes/No):

- If your library retains bibliographic records, the following occurs:
  - The bibliographic record is marked for deletion, its status is Deleted, and LDR position 05 (Record Status) is set to 'd' for deleted.
  - The **Display in PAC** box is unchecked.
  - The bibliographic record is unindexed, and only searchable by Record status, Deleted or Control number.
  - A bibliographic record marked for deletion transaction (3024) is logged.
  - Any links to bibliographic record sets are removed.
  - Any linked hold requests are deleted.
  - Any links to Acquisitions records are removed.
- If your library does not retain deleted bibliographic records, the following occurs:
  - The bibliographic record is deleted.
  - A bibliographic record deleted transaction (3001) is logged.
  - Any links to bibliographic record sets are removed.
  - Any linked hold requests are deleted.
  - Any links to Acquisitions records are removed

Undelete a Bibliographic Record

To undelete a deleted bibliographic record in Leap:

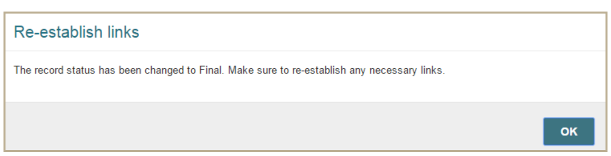
1. Open the deleted bibliographic record in the Bibliographic Record workform.
2. Select **ACTIONS | Undelete**.



The bibliographic record is updated as follows:

- The record Status is set to Final.
- The Modifier displays the Username.
- The Modification Date reflects the undelete date.
- The Display in PAC check box is checked.
- The record is reindexed.
- The Record Status (LDR position 05) is set to c (Corrected or Revised).
- A Bibliographic record undeleted transaction (3027) is logged.

A message confirms that the record status was changed to final and reminds you to re-establish links that were broken when the record was deleted.



3. Click **OK** to close the message box.

Leap - Delete/Undelete an Authority Record

If you have the required permissions, you can now delete or undelete an authority record from the Authority Record workform in Leap. You can also delete an authority record when you delete a bibliographic record that is the last record linked to that authority record.

The following Cataloging Administration permissions, parameters, and profiles that control authority record deletion in the staff client also apply when deleting/undeleting authority records in Leap:

- Permission
  - **Authority records: Delete/Undelete**
- Profile
  - **Retain deleted authority records**

See also:

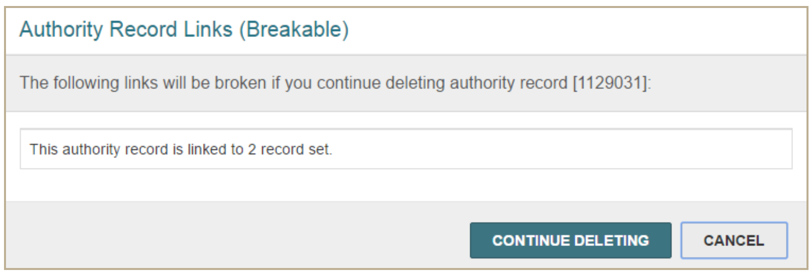
- "Delete an Authority Record" on page 76.
- "Retain Deleted Authority Records Profile Setting" on page 78.
- "Language Strings Added to Web Admin for Deleting Authority Records" on page 78.
- "Undelete a Deleted Authority Record" on page 79.

Delete an Authority Record

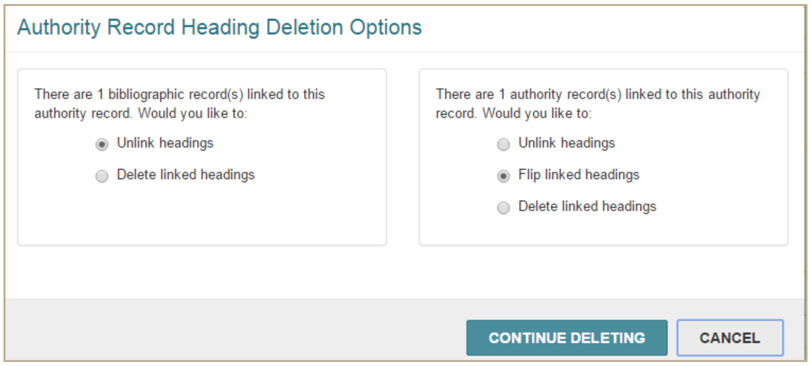
To delete an authority record in Leap:

1. Open the authority record in the Authority Record workform.
2. Select **Actions | Delete**.
3. Click **Continue** to delete the authority record.

- If the authority record belongs to a record set or has other breakable links, the Authority Record Links (Breakable) dialog box appears.



- When you click **CONTINUE DELETING**, one of the following messages appears, depending on whether your library retains deleted authority records or deletes them immediately:
    - **The authority record will be marked for deletion. Do you want to continue?**
    - **The authority record will be permanently deleted. Do you want to continue?**
- If you click **CONTINUE DELETING** and the authority record is linked to other bibliographic or authority records, the Authority Record Heading Deletion Options dialog box appears. The left side of the dialog box lists the options for linked bibliographic records, and the right side of the dialog box lists options for the linked authority records.



For linked bibliographic records, select one of the following options:

- **Unlink headings** - Breaks links to any bibliographic headings linked to this authority record
- **Delete linked headings** - Deletes the heading and tag in linked bibliographic records

For linked authority records, select one of the following options:

- **Unlink headings** - Breaks links to any authority records
- **Flip linked headings** - Converts the 5xx tag (See also from reference) in the linked records to a 4xx (See reference). This option is available only when an authority record is linked to the authority record you are deleting.
- **Delete linked headings** - Deletes the linked authority headings

2. Click **CONTINUE DELETING** to delete the authority record.

   The authority record is either marked for deletion and retained, or it is permanently deleted from the database, depending on the Cataloging profile setting. See "Leap - Delete/Undelete an Authority Record" on page 75.

Retain Deleted Authority Records Profile Setting

When you delete an authority record, the record is marked for deletion and retained or permanently deleted from the database according to the setting in the Cataloging profile, Retain deleted authority records (Yes/No):

- If your library retains deleted authority records, the following occurs:
  - The authority record is marked for deletion, its status is Deleted, and LDR position 05 (Record Status) is set to 'd' for deleted.
  - The **Display in PAC** box is unchecked.
  - The authority record is unindexed, and only searchable by Record status, Deleted or Control number.
  - An authority record marked for deletion transaction (3026) is logged.
  - Any links to authority record sets are removed.
  - The headings are unlinked
- If your library does not retain deleted authority records, the following occurs:
  - The authority record is permanently deleted.
  - An authority record deleted transaction (3004) is logged.
  - Any links to authority record sets are removed.

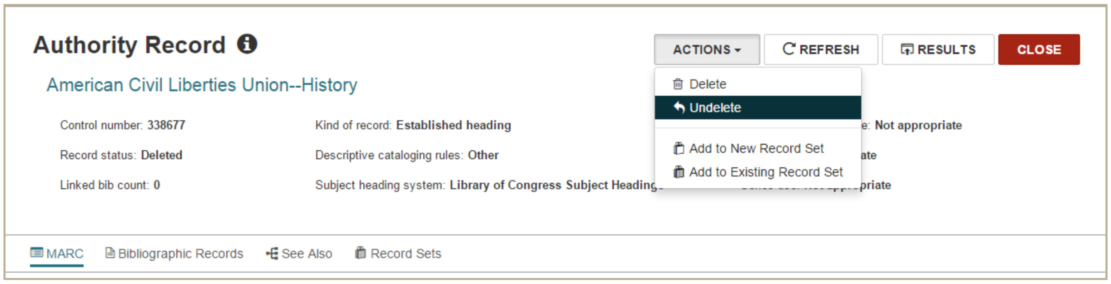
Language Strings Added to Web Admin for Deleting Authority Records

Language String	Default
SW_CI_AUTH_DELETE_OPTIONS_UNLINK	Unlink headings
SW_CI_AUTH_DELETE_OPTIONS_DELETE	Delete linked headings
SW_CI_AUTH_DELETE_OPTIONS_FLIP	Flip linked headings

Undelete a Deleted Authority Record

To undelete an authority record with a Deleted status:

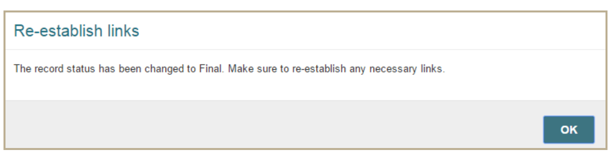
1. Open the deleted authority record in the Authority Record workform.
2. Select **ACTIONS | Undelete**.



The authority record is updated as follows:

- The record Status is set to Final.
- The Modifier displays the Username.
- The Modification Date reflects the undelete date.
- The record is reindexed.
- The Record Status (LDR position 05) is set to c (corrected or revised).
- An Authority record undeleted transaction (3029) is logged.

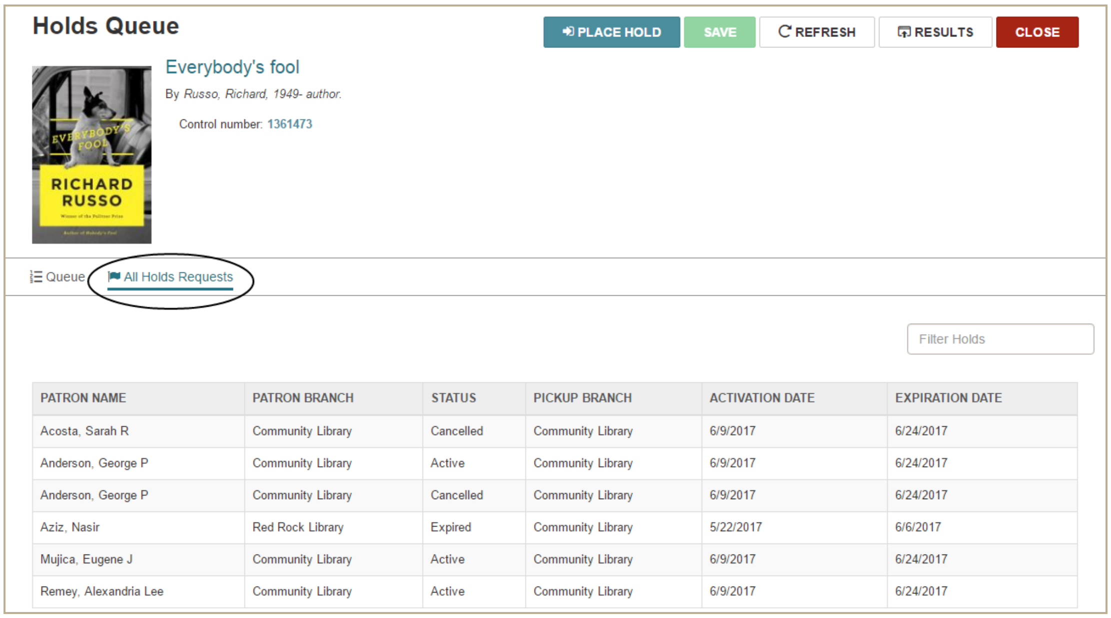
A message confirms that the record status was changed to final and reminds you to re-establish links that were broken when the record was deleted.



3. Click **OK** to close the message box.

Leap - View All Linked Hold Requests from Holds Queue

You can now see all linked hold requests on the new All Hold Requests view of the Holds Queue. All hold requests appear on this view including those with a status of Inactive, Cancelled, Expired, Held, Unclaimed, or Out To Patron. You can filter the hold requests on this view.



The All Hold requests view displays the requests in the following columns:

> **Note:**
> The default sort for the list is by patron name, but you can click any column header to change the sort.

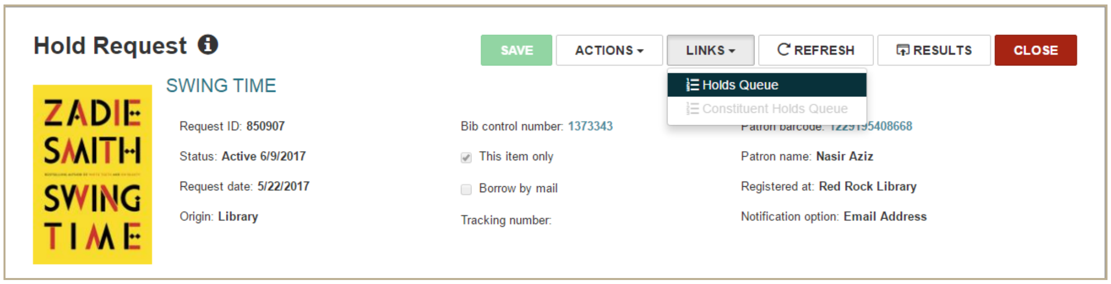
- Patron
- Patron Branch
- Status
- Pickup Branch
- Activation Date
- Expiration Date

Clicking a row opens the Hold Request workform.

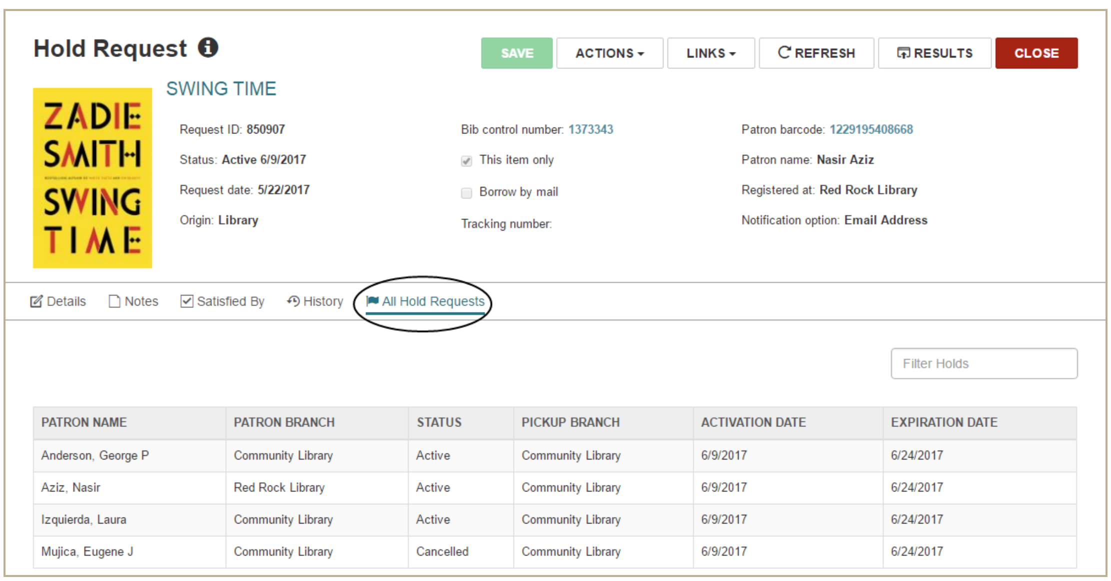
Leap - Link to the Holds Queue and View All Hold Requests from the Holds Workform

The Hold Request workform now includes a new **LINKS** menu with links to the Holds Queue and the Constituent Holds Queue (available only for bound-with titles), and a new **All Hold Requests** view that displays all hold requests for the bibliographic record including requests with an Inactive, Cancelled, Expired, Unclaimed, or Out to Patron status.

To go to the Holds Queue, select **LINKS | Holds Queue**.



To see all hold requests linked to the bibliographic record, click the **All Hold Requests** tab.



The requests appear on the All Hold Requests view with the following columns:

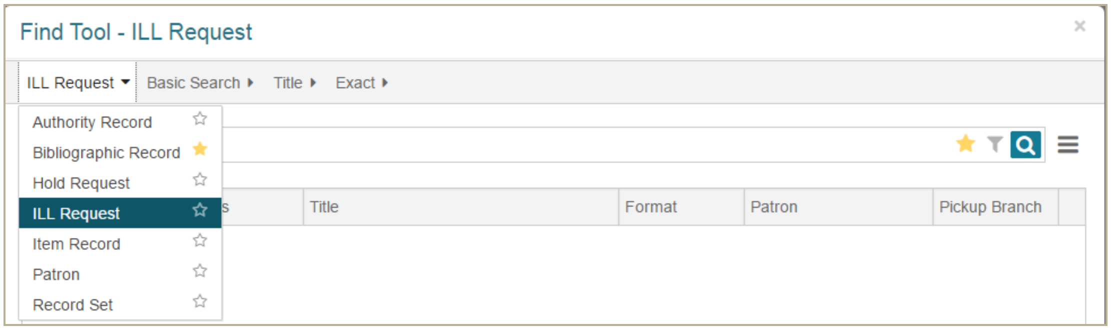
Note:
The default sort for the list is by patron, but you can click any column header to change the sort.

- Patron
- Patron Branch
- Hold Status
- Pickup Branch
- Activation Date
- Expiration Date

Clicking on a row opens the Hold Request workform for that request.

Leap - Search for ILL Requests

You can now search for ILL requests using the Leap Find Tool. When you search for ILL requests, all results appear in the Find Tool results list. However, you can open only the ILL requests for which you have the permission, **ILL requests: Access**.



You can search for ILL requests using the following qualifiers:

- Author
- Format
- ISBN/ISSN
- Need by date
- Patron barcode
- Patron Name (Last, First)
- Patron name (First, Last)
- Pickup Library
- Request date
- Request ID number
- Status
- Title

Search results for ILL requests are displayed in the following columns:

- Date
- Status
- Title
- Format
- Patron
- Pickup Branch

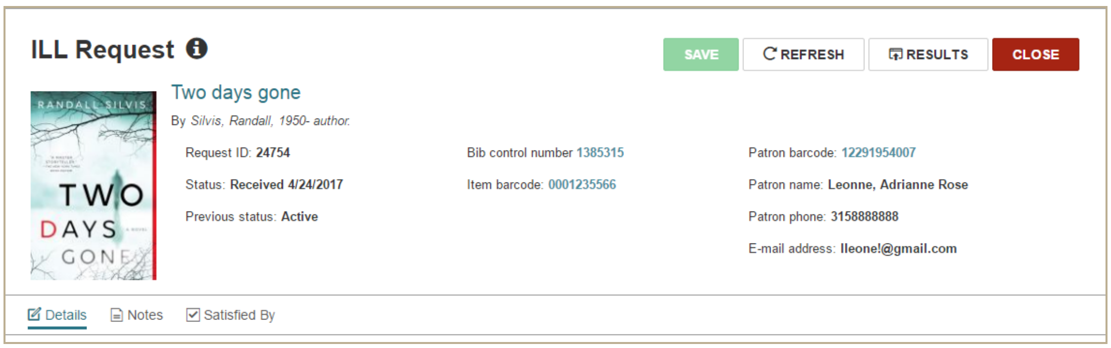
When you click on an ILL request in the Find Tool results list, the ILL Request workform opens. You can return to the Find Tool results list by clicking on the **Results** button. See "Leap ILL Request Workform" on page 85.

Leap ILL Request Workform

The Leap ILL Request workform displays information for an interlibrary loan request. It contains header information, including a Properties window, and the following views:

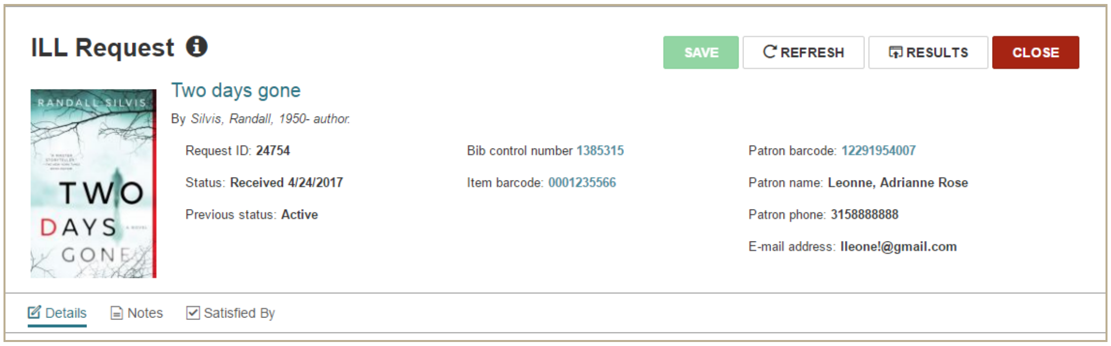
- "ILL Workform - Details View" on page 87.
- "ILL Workform - Notes View" on page 88.
- "ILL Workform - Satisfied By View" on page 88.

ILS Workform Header and Properties Window



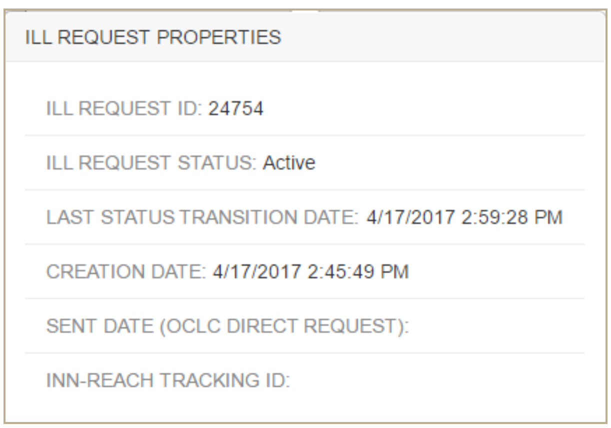
The ILL Request workform header includes the following information:

- Title
- Request ID
- Status
- Previous status
- Bib control #
- Item barcode
- Patron barcode
- Patron name
- Patron phone number
- Patron email address



Hover over or click to open the ILL REQUEST PROPERTIES window that displays the following information:

- ILL Request ID
- ILL Status
- Last status transition date
- Creation date
- Sent date
- INN-Reach tracking ID



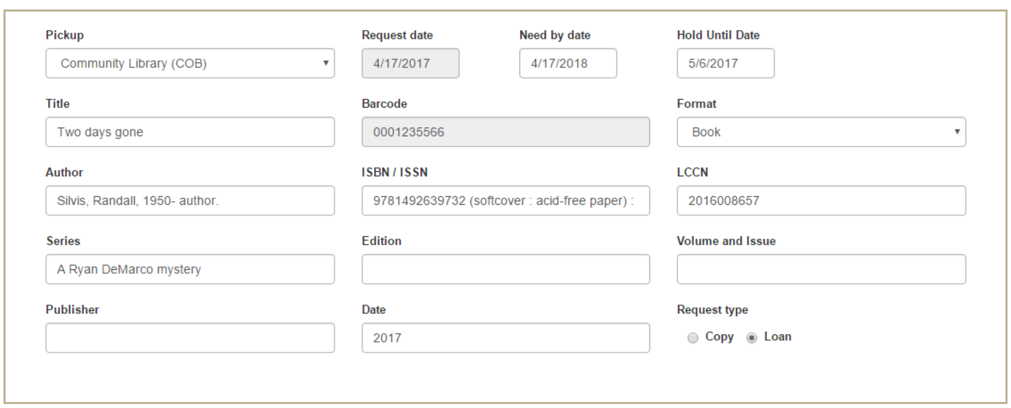
ILL Workform - Details View

On the details view of the ILL request, the following elements are editable:

- **Pickup location** - Editable for statuses Active, Inactive, Shipped, Recd-Held and Recd-Transferred.
- **Need by date** - Editable for statuses Active, Inactive.
- **Hold until date** - Editable for status ID Recd-Held.
- **Return uncirculated** - Editable for status of Shipped.

The following bibliographic elements can be edited only for ILL requests with an Inactive status:

- Title
- Author
- Format
- Publisher
- Publication Year
- ISBN/ISSN
- LCCN
- Volume and Issue
- Series
- Edition
- Request type



> **Note:**
> The **Return uncirculated** check box appears only when the ILL request is linked to an INN-Reach request.

ILL Workform - Notes View

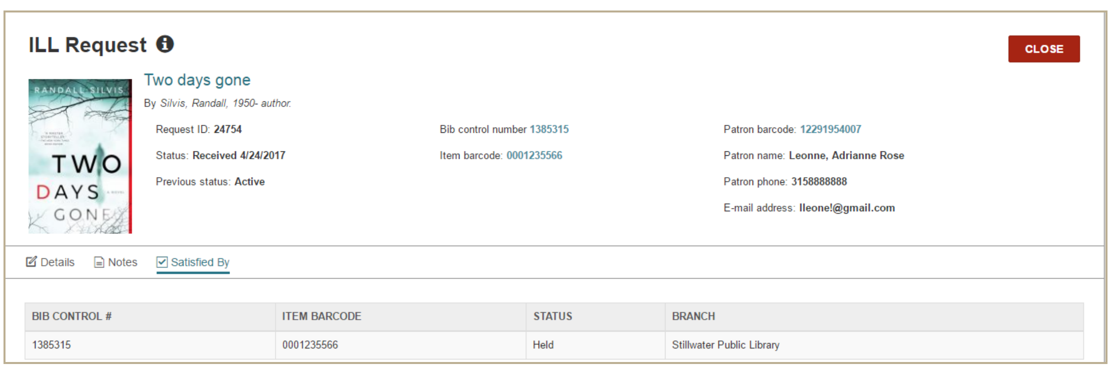
This view includes staff notes and PAC display notes.

You can edit the following fields on the Notes view:

- Staff Notes 1
- Staff Notes 2

ILL Workform - Satisfied By View

This view displays the item that fills the hold request and is bound to it. This is the item that is received during the ILL process.



You can click the row to open the Item Record workform.

Leap - ILL Requests Locked When Being Modified

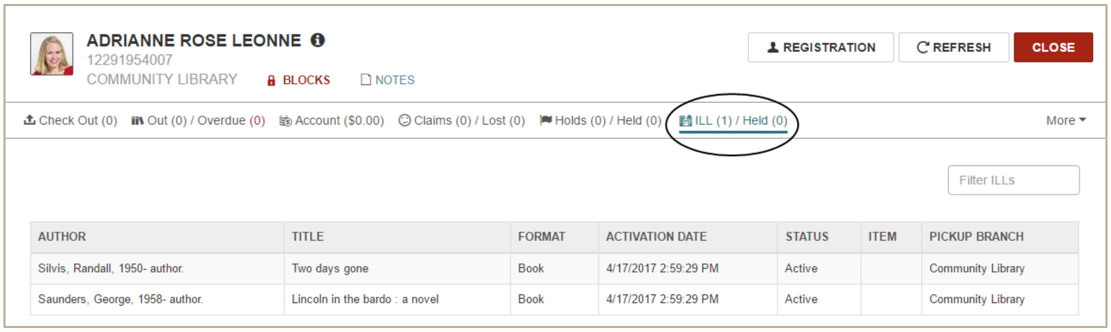
When one Leap user has an ILL request open, and another user tries to open the same ILL request, the following message appears: **The record is being modified by [username]**.

The ILL Request workform opens in read-only mode with a locked icon indicating its object lock.

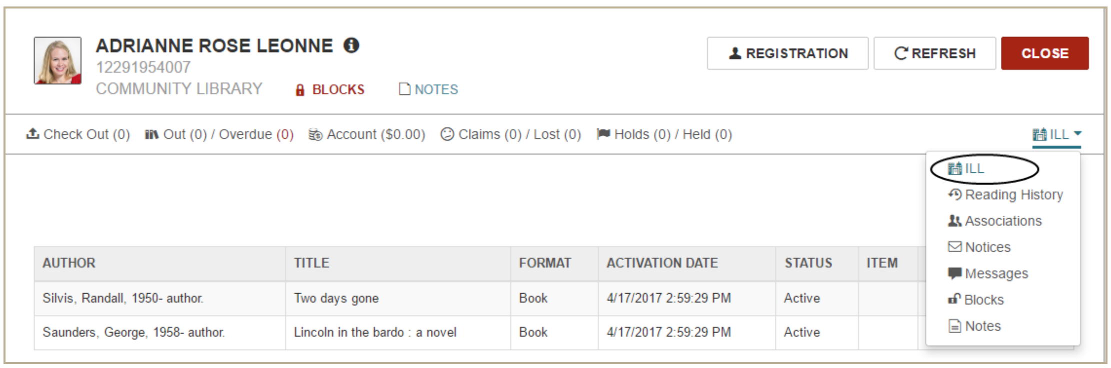
When you click on the locked icon, the username displays for the staff member who has the record open.

Leap - ILL View of Patron Record

To make the ILL view more accessible on the patron record, the option appears in the view bar on wide screens.



Or, it appears at the top of the **More** menu on narrow screens.



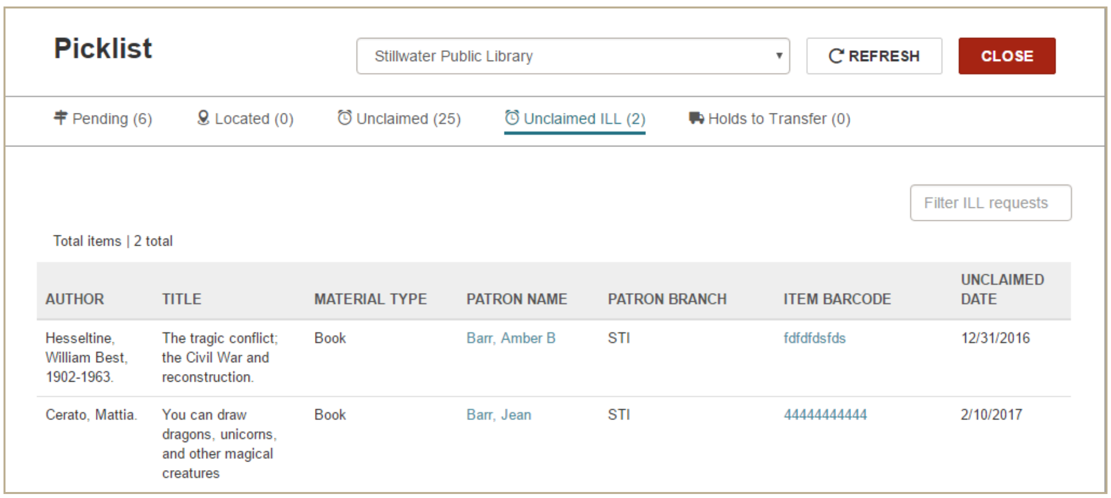
You can click on a row in the ILL view to open the ILL Request workform.

Leap - Unclaimed ILL Requests on the Picklist

The new Unclaimed ILL view was added to the Picklist. This view includes all ILL requests for the selected pickup branch that have a status of received-held and an unclaimed date earlier than the current date.

The following columns appear in this view:

- AUTHOR
- TITLE
- MATERIAL TYPE
- PATRON NAME - You can click on the patron's name to go to the patron record.
- PATRON BRANCH
- ITEM BARCODE - You can click on the item barcode to go to the item record.
- UNCLAIMED DATE- This is the held until date of the ILL request.



AUTHOR	TITLE	MATERIAL TYPE	PATRON NAME	PATRON BRANCH	ITEM BARCODE	UNCLAIMED DATE
Hesseltine, William Best, 1902-1963.	The tragic conflict; the Civil War and reconstruction.	Book	Barr, Amber B	STI	fdfdfdsfds	12/31/2016
Cerato, Mattia.	You can draw dragons, unicorns, and other magical creatures	Book	Barr, Jean	STI	44444444444	2/10/2017

Clicking on a row opens the ILL Request workform.

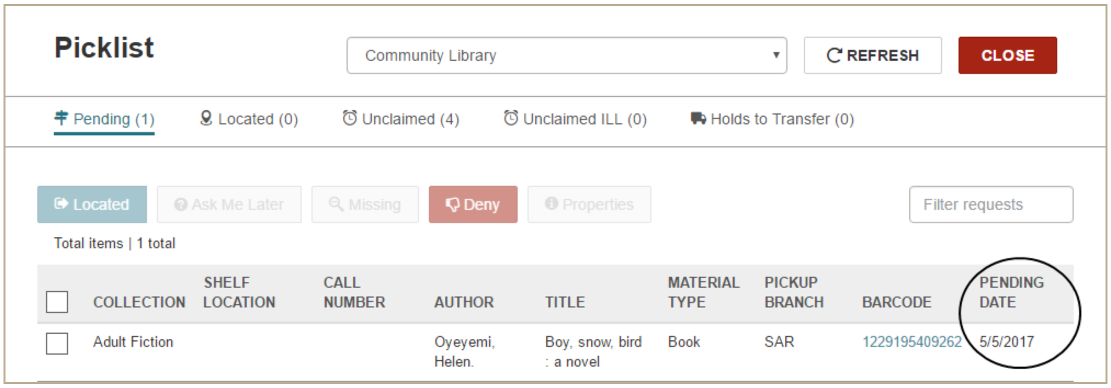
Language Strings Added to Web Admin for the Unclaimed ILL Requests View on the Picklist

Language String	Default
SW_CI_PICKLIST_ILL_FILTER	ILL requests
SW_CI_PICKLIST_ILL_FILTERSW_CI_PICKLIST_VIEW_ILL_UNCLAIMED	Unclaimed ILL

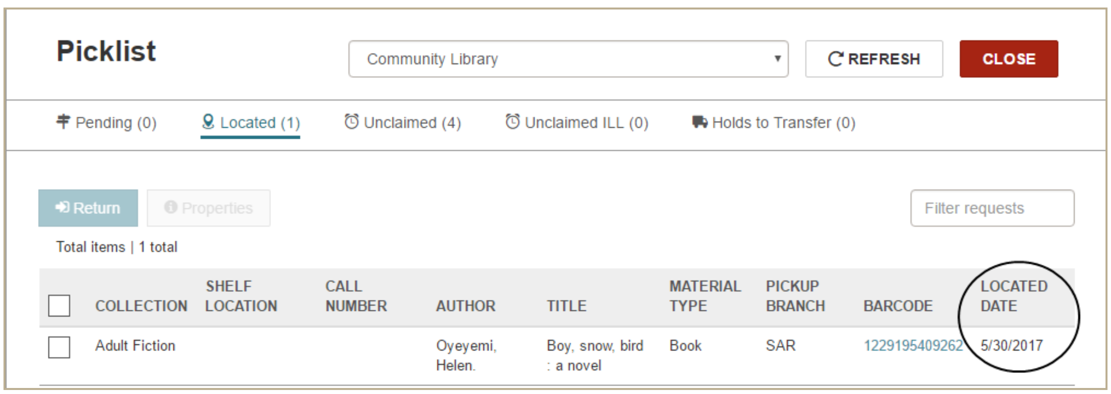
Leap - Pending/Located Date on the Picklist

The following updates were made to the Picklist:

- The **Pending Date** column appears on the Pending tab.

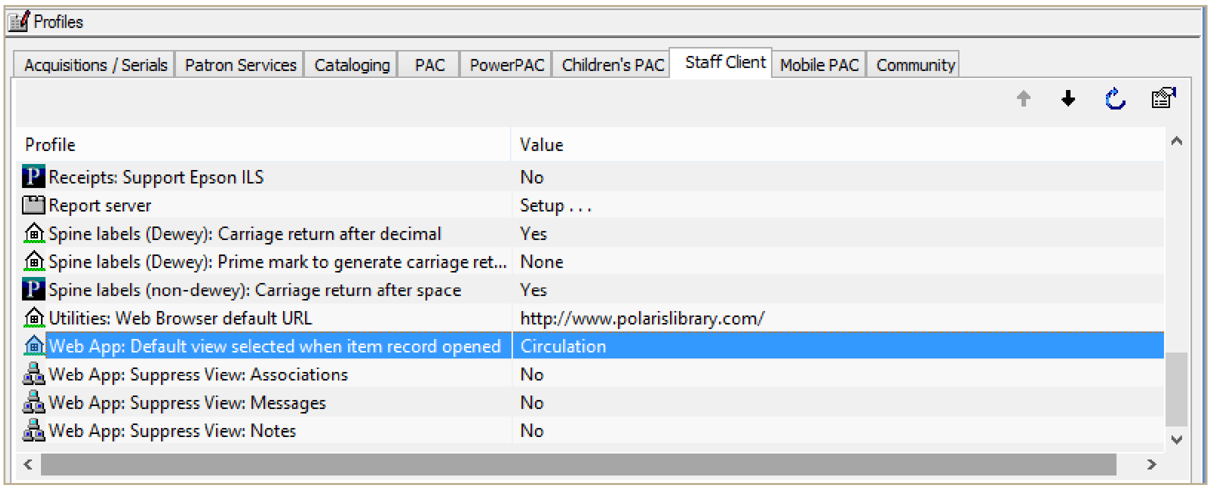


- The **Located Date** column appears on the Located tab.



Leap - Default Opening View for Item Record Workform

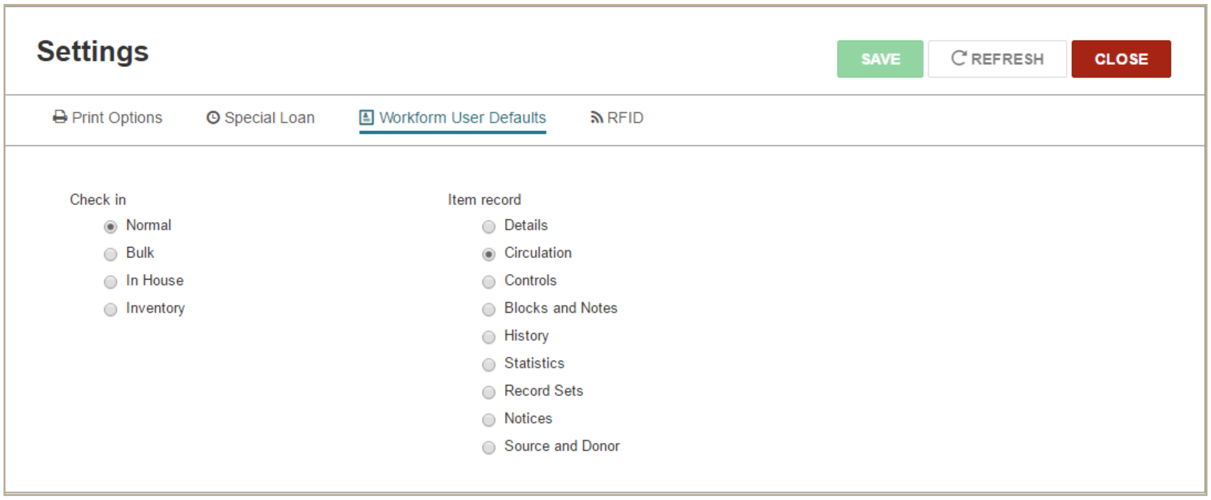
The new Polaris Administration Staff Client profile, **Web App: Default view selected when item record opened**, controls the opening view of the Item Record workform in Leap. You can set the profile at the System, Library, Branch, Workstation, or Staff level. If you do not specify an opening view for the Item Record workform, it opens to the Circulation view.



You can set the opening view of the Item Record in Leap to one of the following:

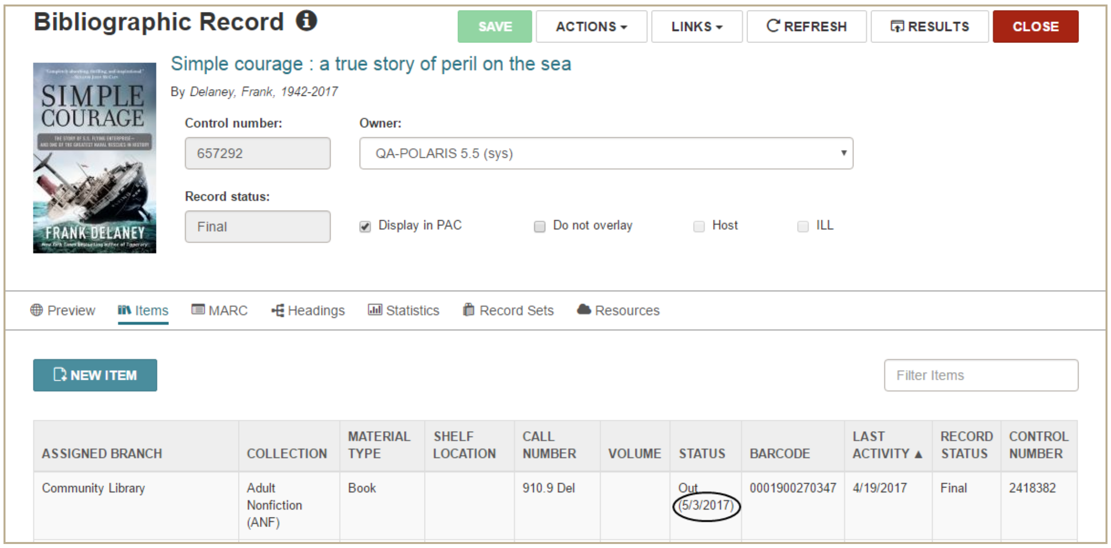
- Blocks and Notes
- Circulation
- Controls
- Details
- History
- Notices
- Record Sets
- Source and Donor
- Statistics

Individual staff members can also set their own default opening view for the Item Record workform in user **Settings | Workform User Defaults**.


Settings
SAVE
REFRESH
CLOSE
Print Options
Special Loan
Workform User Defaults
RFID
Check in
Normal
Bulk
In House
Inventory
Item record
Details
Circulation
Controls
Blocks and Notes
History
Statistics
Record Sets
Notices
Source and Donor

Leap - Due Date Appears on Items View of Bibliographic Record Workform

On the Items view of the Bibliographic Record workform, the due date now appears in parenthesis in the **Status** column for items with a status of Out or Out-ILL. If the due date is for an hourly loan, the time due also appears.



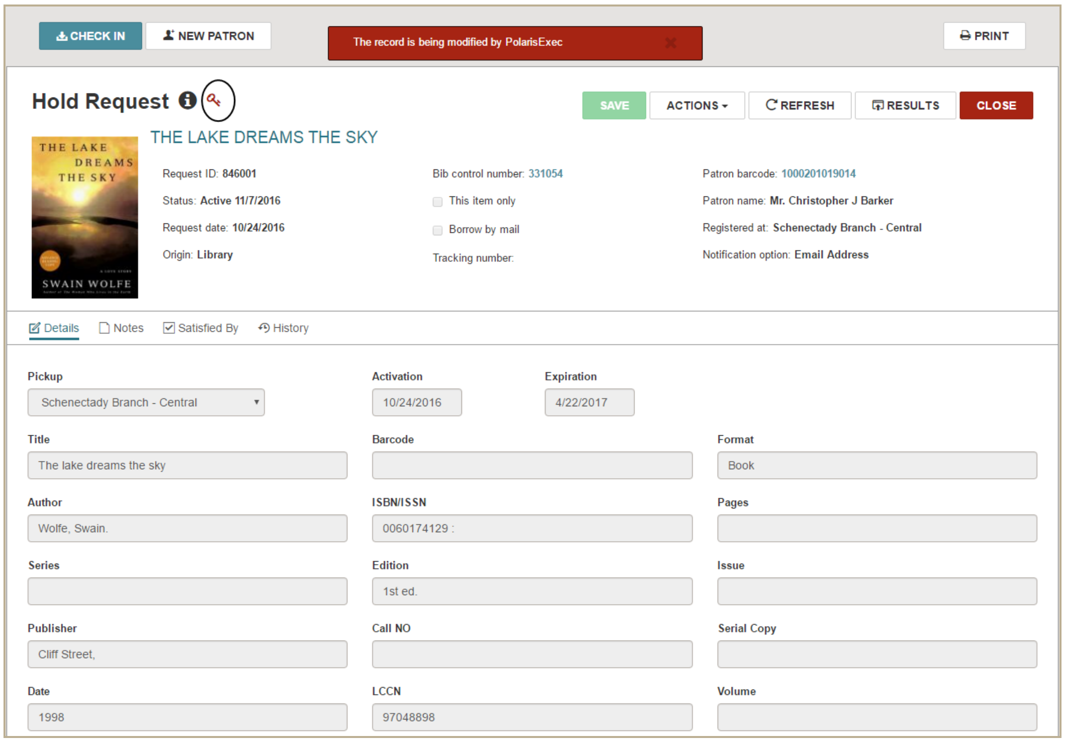
Leap - Bibliographic Record PAC Preview Updated

The Brief, Full, and Availability PAC Previews were updated to reflect the new responsive PAC. The metadata appears according to the **Title Display: Configuration** profile settings for the organization selected in the organizations drop-down list, and using the classic default style sheet in responsive tablet width.

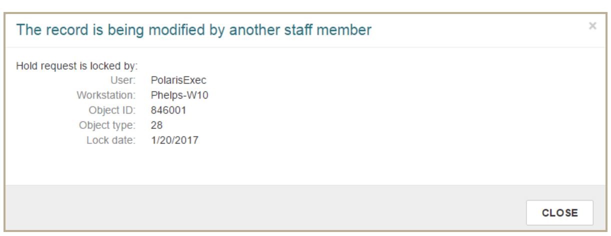
See also: "Polaris PowerPAC Responsive Design" on page 4.

Leap - Locked Hold Displayed in Hold Request Workform

When a staff member opens a hold request in the Polaris staff client or in Leap, an object lock is applied so that another user cannot modify the same hold request. If another staff member opens the same hold request in Leap, the following message appears above the Hold Request workform: **The record is being modified by [username].** In addition, a red key icon indicates the record is locked. You cannot make any modifications to a locked hold request, but you can still click a link to go to another record.



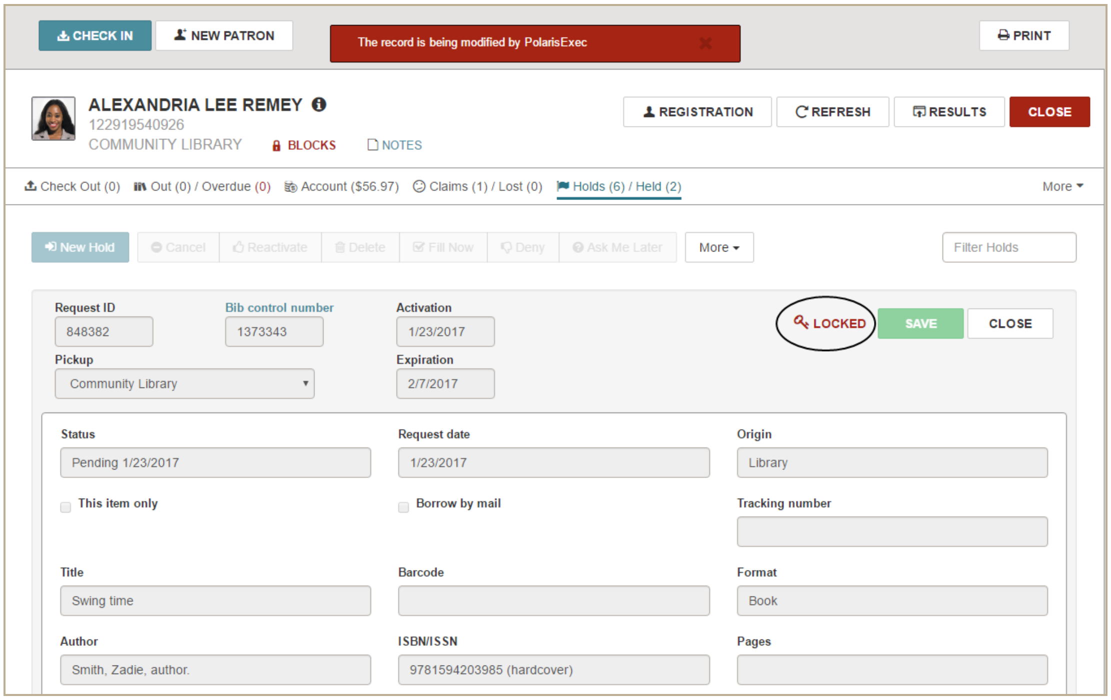
Clicking on the key icon reveals the locked information.



When the user modifying the hold request closes it, the object lock is removed.

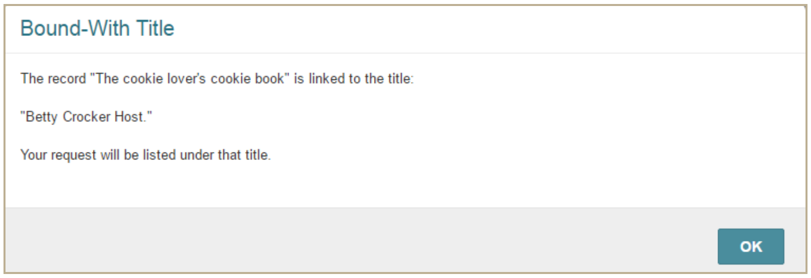
Leap - Locked Hold Request Displayed in Patron Record

When you access a locked hold request from a patron record, a message indicates the record is being modified by another user. You can click the LOCKED indicator with the red key icon to display the locked information.

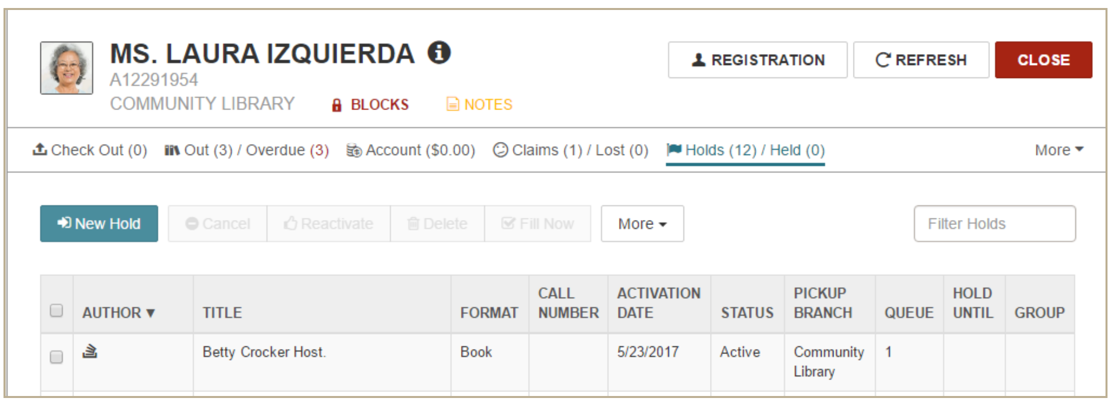


Leap - Alert When Hold Placed on Bound-With Title

When you place a hold request on a title that is a constituent of a bound-with title, the Bound-With Title message informs you that the constituent title is linked to the host title and that the request will be listed under the host title.



When you click **OK**, the hold is placed, and the host title appears in the patron's holds list.



Language String Added to Web Admin for Holds on Bound-With Titles

Language String	Default
SW_CI_CONVW_BOUNDWITHTITLE	Bound-With Title

Leap - Patron Code Description in Find Tool Results

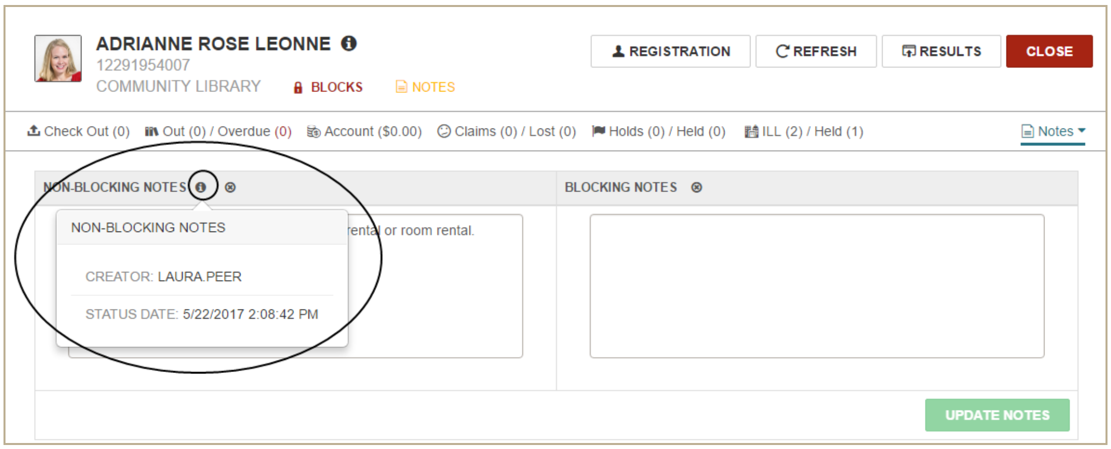
The Patron Code description column was added to Find Tool search results for patron records. This enables staff to search for a patron and quickly determine the library resources available to that patron.

Leap - Updates to Patron Record

The following updates were made to the Patron Record:

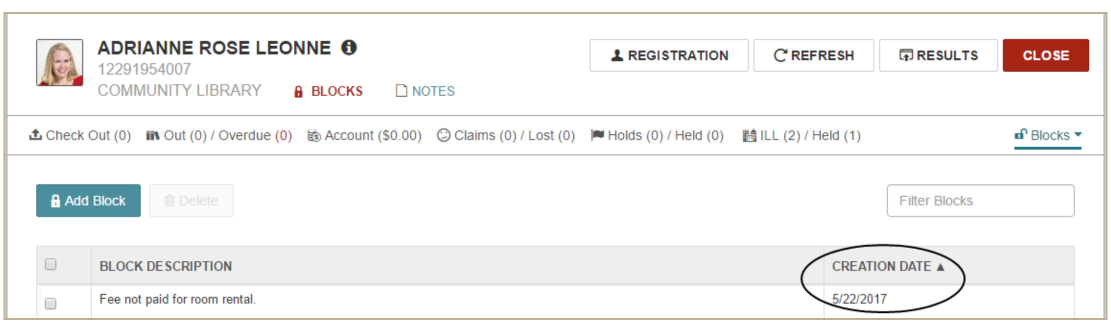
Information Icon and Properties Window Added to the Notes View

You can see information regarding the note creator and creation date for notes in a patron's record by clicking on the information icon on the Patron Record | Notes view.



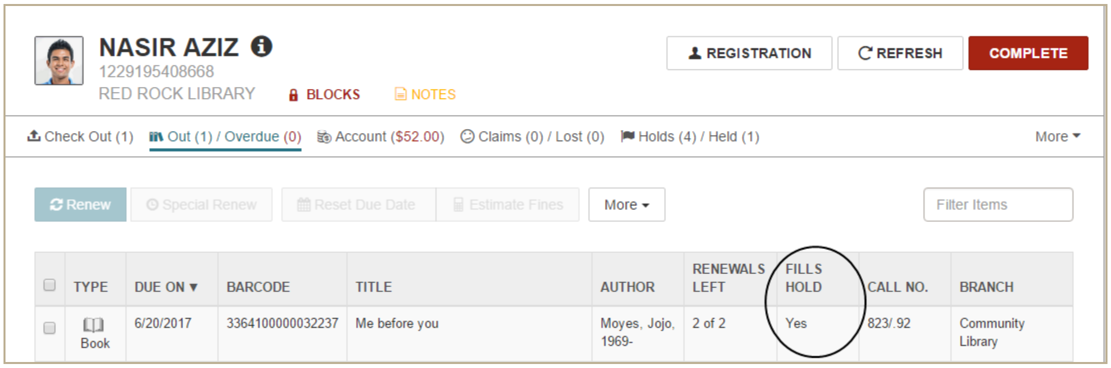
Creation Date Column Added to the Blocks View

The Creation Date now displays for library-assigned and free-text blocks on the Patron Record | Blocks view.



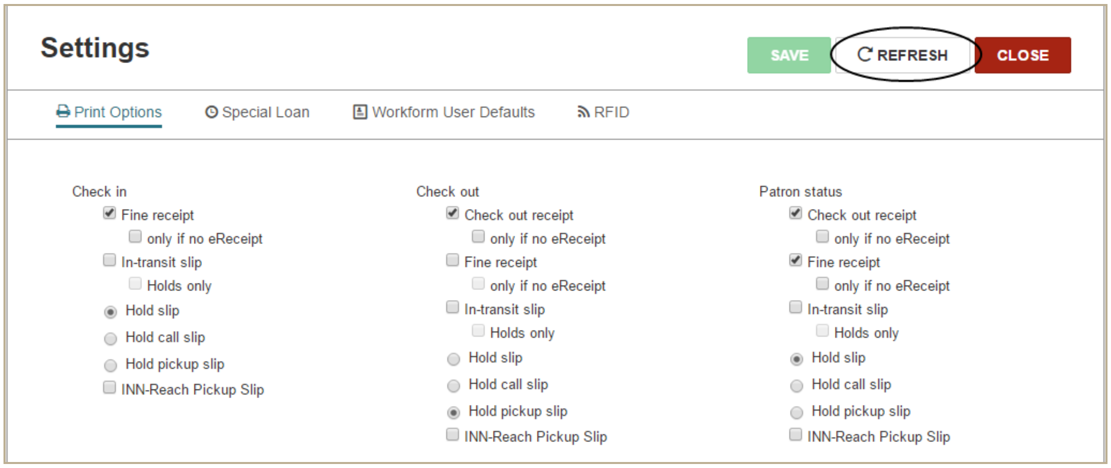
Fills Hold Request Column Added to the Items Out View

The **Fills Hold** column was added to the Items Out view so that staff members can see if an item out has a hold request that the item can fill. If the value is **Yes**, when a staff member attempts to renew the item, the Item Fills Request dialog will open.



Leap - Refresh Settings

The **REFRESH** button was added to the Settings page. You can click **REFRESH** to update the settings on the Print Options, Workform User Defaults, or RFID tab so that you can see any recent changes to these preferences.

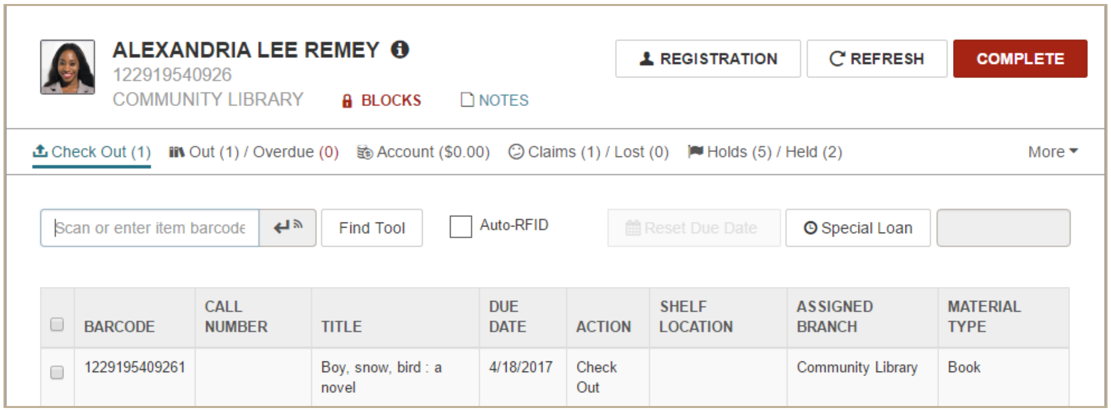


Leap - Auto-Pin the Workform Tracker

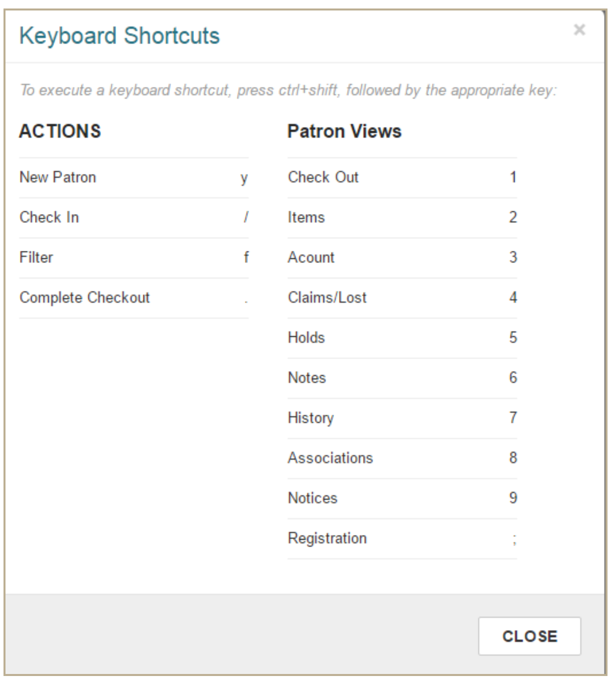
The workform tracker will now stay in the last known position (pinned or un-pinned) even after you log off. While logged in, if you minimize the browser window, the workform tracker will be unpinned until you increase your browser to a size that accommodates the pinned tracker.

Leap - Check Out Shortcut

As an alternative to clicking the **COMPLETE** button, you can now press **Ctrl+Shift+.** to complete the checkout process from the Check Out view of the patron record.



The shortcut was added to the Keyboard Shortcuts list that appears when you select **Help | Keyboard**.



API and Client-Side JavaScript Versions on the About Leap Dialog Box

When you click **Help | About**, the About Leap dialog box now includes both the client-side JavaScript version number and the Polaris.ApplicationServices (API) version number. This information can aid in troubleshooting.

INN-Reach Integration

In response to library feedback, several improvements have been made to the Polaris integration with INN-Reach, Innovative's user-initiated direct consortial borrowing system.

Prompt for Shipping or Check In

Previously, it was not possible to check in an item at the lending library in these situations:

- The lending library sent a shipped message (API 201), but then decided not to ship the item after all. The lending library could not check the item in to put it back into circulation.
- The lending library sent a shipped message (API 201), and shipped the item. However, the borrowing library did not process the item and simply sent it back. The lending library could not check the item in to put it back into circulation.

In these situations, the system displayed a blocking error message: **This INN-Reach item has already been checked in.**

A new workflow for the above situations allows correct processing at the lending library. The system now prompts **This INN-Reach item has already been checked in and declared shipped. Do you still want to ship this item?**

- Select **Yes** to leave the request and item in a shipped status and reprint the pick-up slip.
- Select **No** to check in the item with normal Polaris INN-Reach check-in processing. The system sends a Final Item Check In (API 300) message to the borrowing library.

The new workflow applies to both the Polaris staff client and Polaris Leap.

Design Changes for Workflows Outside Normal Sequence

Prior to Polaris 5.5, when workflows outside the normal processing sequence for INN-Reach transactions occurred, the item/request status may not have reflected actual events. Polaris 5.5 code updates now allow better troubleshooting and correction in these cases. The following situations are examples:

- The Polaris borrowing library receives a Final Item Check In (API 300) message from a non-Polaris lending library, even though the borrowing library has not received the item. (The lending library may have checked out the item to "off site," that is shipped, but then inadvertently checked the item in.) The borrowing library patron never receives the item; even though the request status is Shipped. The system now cancels the hold request, sends a cancellation notice, and logs a warning exception that includes the tracking ID.

- A borrowing patron returns an item directly to the lending library instead of the patron's own (borrowing) library. Or a borrowing library receives the item from the lending library, but it does not circulate to the patron (Unclaimed) and is pulled from hold shelf, or is simply sent back via courier, without doing an ILL return in Polaris. The item is placed in the courier bag and returned to the lender, who checks in the item. A 300 (Final Item Check In) message is sent to the borrowing library but the item remains in its Held status. If no 113 (Item In-Transit) or 301 (Item Returned Uncirculated) has been previously sent, and the item is Out to the patron indicated in the 300 message, the system now checks the item in, deletes the borrowing library's virtual item, virtual bib ,and ILL request, and logs an exception that includes the tracking ID.
- An INN-Reach item circulates to the patron and the borrowing library sends it back to the lending library without sending a 113 (Item In-Transit) or 301 (Item Returned Uncirculated) message. The request status has changed from Shipped to Out to Patron. The system now sends the 300 message when the item is checked in at the lending library, even though no 113/301 has been sent.
- A Polaris lending library fills an item request and ships the item to a non-Polaris borrowing library. The borrowing library or patron cancels the request and a 106 message (Cancel Item Hold) is sent to the lending library, but the request is still in a Shipped state. Or the borrowing library actually receives the item and sends a 203 message (Item Received), but the borrowing library or patron then cancels the request and a 106 message is sent. Previously, when Polaris processed the cancel request message, it deleted the request and the virtual patron, removing the trail to the item. If the item was received at the borrowing library, the item was checked in when it returned to the lending library but an error occurred because the item status remained Out. Now, if the request is in a shipped state, the system reports an API diagnostic message exception (Cannot cancel INN-Reach item request while it is being shipped to borrowing library) and the request is not cancelled. If the item was actually received at the borrowing library, when the lending library receives the 106 message, the lending library checks to see if the item is in a received state at the borrowing library (that is, the item was checked out at the lending library, the request status is Out to Patron, and the item status is Out); if so, the request remains Out to Patron and the virtual patron is retained until one of the following events occurs:
    - The lending library receives a 113 (Item In-Transit) or 301 (Item Returned Uncirculated) message for the requested item.
    - The item is checked in at the lending library.

INN-Reach Lending In-Transit Too Long Report

This new report for the Polaris lending library identifies materials that have been returned in-transit from the borrowing library a specified number of days ago or more, but have not yet been checked back into the lending library. The report is available in the Polaris staff client on the Utilities menu (**Reports and Notices**, **Circulation**, **INN-Reach**). You can set the following parameters:

- **Organization** - The organization is the Assigned Branch of the in-transit items. You can select one, more, or all branches.
- **Number of days in-transit** - The least number of days since the item was sent in-transit from the borrowing library and has yet to be checked in at the lending system. For example, if you enter 5 days, the report will include items that were put in-transit 5 days ago or more from the borrowing library and still have not been checked in at the lending system.

Item Location headers identify the assigned branch of lending library's item in this report. The primary sort order is Item Location; the secondary sort order is in-transit date (ascending).

Report column headers include the following:

- **Item Number** - The item record ID from the INN-Reach request
- **Call Number** - The lending library's item call number
- **Item Barcode** - The lending library's item barcode
- **Title** - The lending library's item title
- **Patron Home Library** - The borrowing patron's library. The Patron Agency Code and the Patron Home Library are concatenated in this column. If no Patron Home Library is supplied in the API message, the report indicates **Not Supplied**, for example **q5rrr-Not Supplied**.
- **In-Transit Date** - The date the borrowing library put the item in-transit

Note:
Items from non-local INN-reach requests only are included in this report.

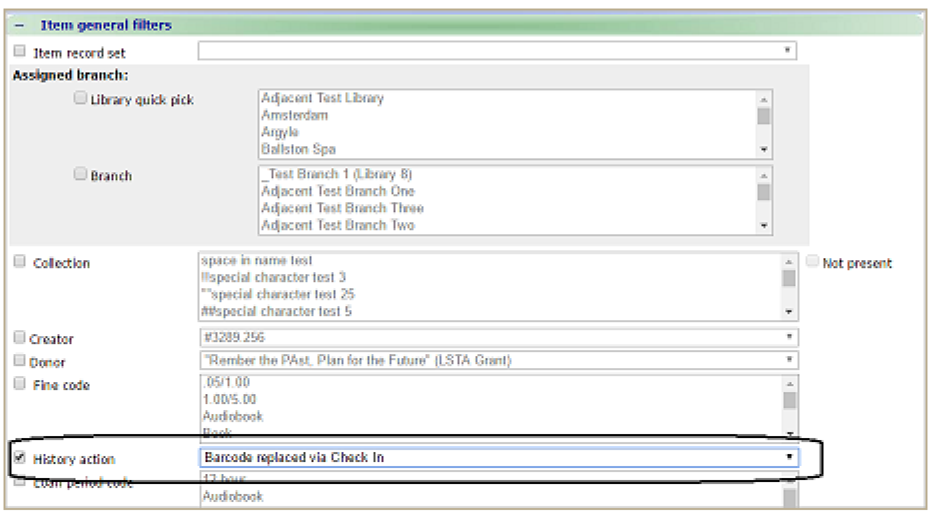
SimplyReports

Editing Saved Authority and Serials List and Count Reports

You can now edit all column and filter settings for saved Authority and Serials List and Count reports, in addition to saved Patron, Patron Account, Bib, Item, and Holds List and Count reports. For more information about editing saved reports, see SimplyReports online help.

Item Record History Action for Orders and Invoices Reports

An item record **History action** filter has been added under **Item general filters** for Orders and Invoices List and Summary Reports, and an **Item record history action** column is now available for these reports. The example shows the **History action** filter for purchase order list reports.



Polaris API Changes - Overview

The following new “paged” methods allow the retrieval of ID lists in smaller packets to prevent timeouts when retrieving long lists of record IDs for deleted/updated records. For these new methods, a date, last record ID, and number of records to return must be specified. When retrieving the first set of records, the "lastid" of 0 forces the process to start at the beginning of the list. Then, when retrieving subsequent records, the "lastid" is used as the starting ID for the next request.

- Synch_GetDeletedAuthsPaged
- Synch_GetDeletedBibsPaged
- Synch_GetDeletedItemsPaged
- Synch_GetDeletedPatronsPaged
- Synch_GetUpdatedAuthsPaged
- Synch_GetUpdatedBibsPaged
- Synch_GetUpdatedItemsPaged

For more information, see the *Polaris API Guide* for 5.5.