



Leap for Technical Services

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Michelle Ralston

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Years of Experience: 19

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Settings That Affect Technical Services

Settings SAVE REFRESH CLOSE

[Print Options](#) [Special Loan](#) [Workform User Defaults](#)

Label Options

Cataloging Label Options
Label Type: SL4 Sheets
Print Method: Batch

Serials Label Options
Label Type: Serial Sheets
Print Method: Batch

Label Default
✓ Cataloging Options
Serials Options

SAVE REFRESH CLOSE

[Print Options](#) [Special Loan](#) [Workform User Defaults](#)

Workforms: Default view
Check in: Bulk
Item record: Circulation
Bibliographic record: Preview
Background processing: **MARC Import**

Request manager: Default status
Holds: Active
ILL: Inactive
INN-Reach: Active

Workform tracker: Recent records
Patron: 4
Bibliographic: 4
Item: 4

Workforms: New item record
Item Template: Cameron Circulating Item (Cameron University Library)

Workforms: Item bulk change
Item Bulk Change Template: (None)

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

(None)

Cataloging Functions in Leap

- Authority Records
 - View
 - Editing
 - Deletion
- Bibliographic Records
 - Creation
 - Importing
 - Editing
 - Deletion
 - Merging
- Item Records
 - Creation
 - Editing
 - Deletion
- Spine Label Printing
- Bulk Change
 - Bibliographic Records
 - Item Records
- Bulk Delete (from a record set)
 - Authority Records
 - Bibliographic Records
 - Item Records

Cataloging – Authority Records

Authority Record i

ACTIONS ▾
REFRESH
RESULTS
CLOSE

King, Stephen, 1947-

Control number: 47114	Kind of record: Established heading	Main or added entry use: Appropriate
Record status: Final	Descriptive cataloging rules: AACR 2	Subject use: Appropriate
Linked bib count: 405	Subject heading system: Library of Congress Subject Headings	Series use: Not appropriate

MARC
Bibliographic Records
See Also
See Also From
Record Sets

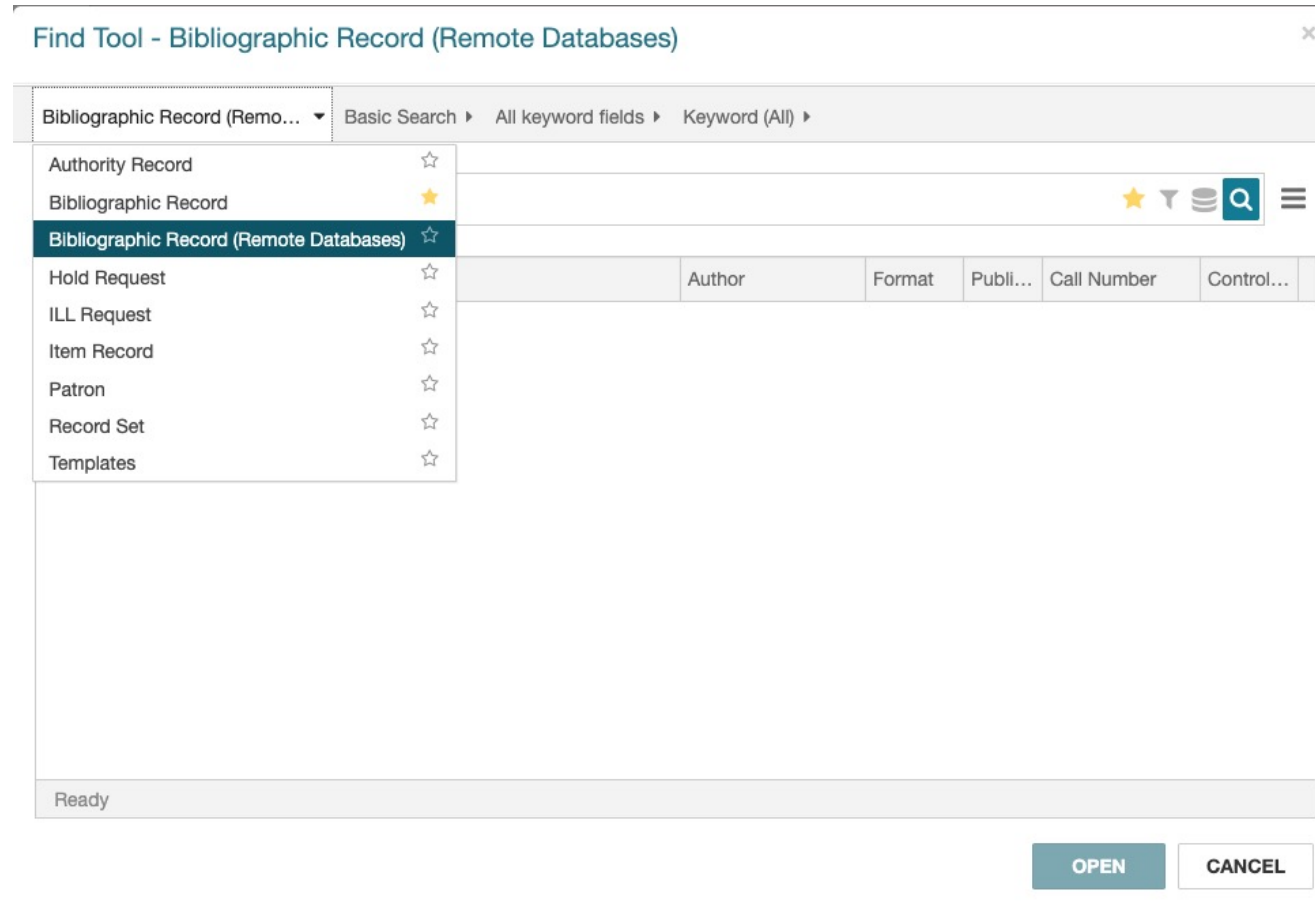
```

LDR      | | | | | nznza22 | | | | | n4500
001     47114
003     DLC
005     20200901180407.0
008     080521n| acannaabn |a aaa | | |
010     $an 79063767 $zn 87125504
035     $a47326
035     $an 79063767
035     $a(OCOLC)oca00296711
040     $aDLC $beng $cDLC $dDLC $dOCL $dDLC $dOCoLC $dOCL $dDLC $dOCoL
053     0 $aPS3561.I483
100     1 $aKing, Stephen, $d1947-
400     1 $aKing, Stiven, $d1947-
400     1 $aKing, Stivn, $d1947-
500     1 $wnnc $aDruse, Eleanor
500     1 $wnnc $aBachman, Richard
663     $aFor works of this author written under other names, search a
    
```

MARC
Bibliographic Records
See Also
See Also From
Record Sets

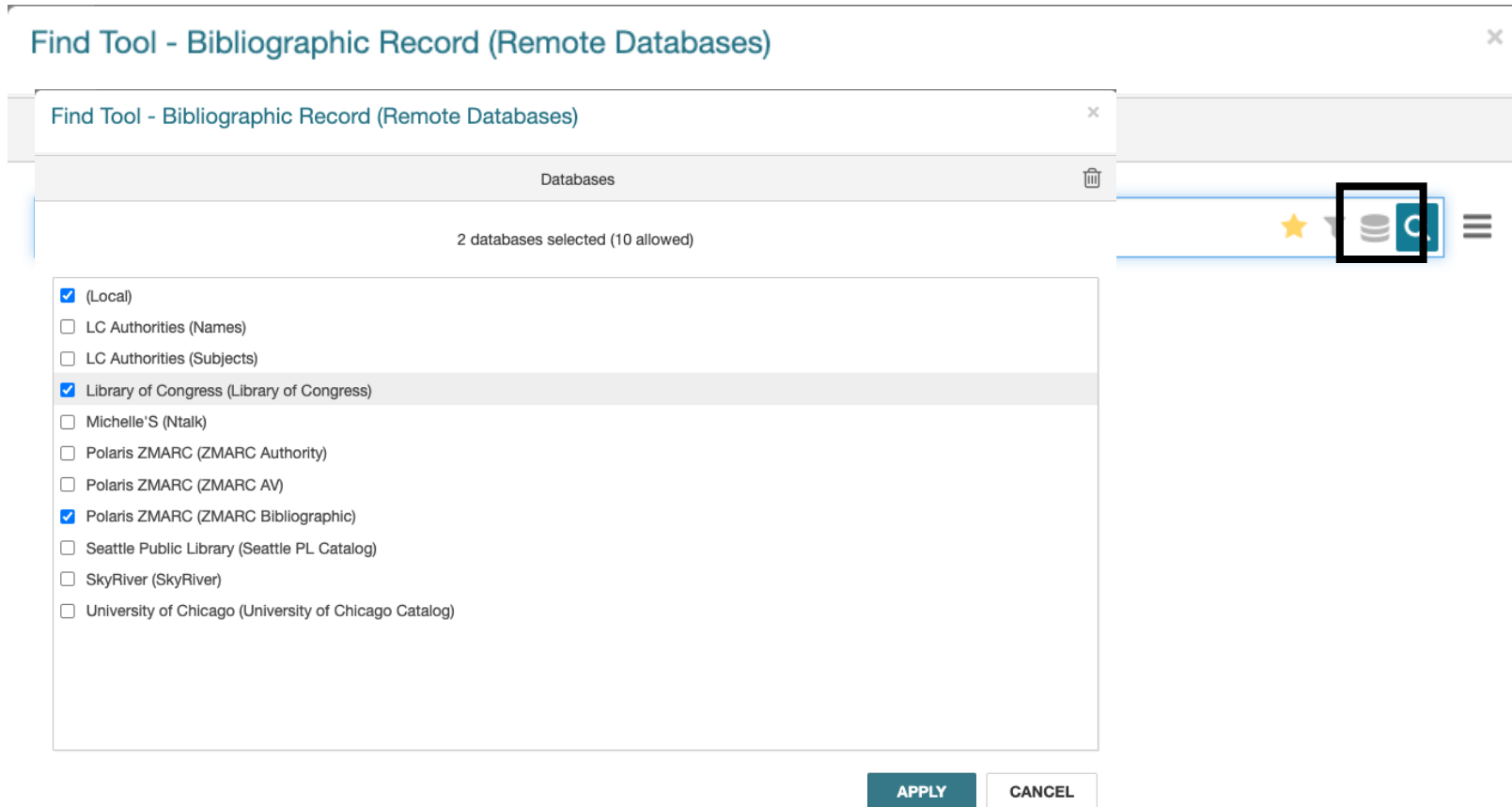
TITLE	AUTHOR	FORMAT	RECORD STATUS	LINKED ITEMS	HOLDS	PUB DATE	CALL NO.	CONTROL NUMBER
11/22/63	King, Stephen, 1947-	Audio Book on CD	Final	2	0	2011		462828
11/22/63	King, Stephen, 1947-	Audio Book on CD	Final	10	0	2011	813/.54	462441
11/22/63	King, Stephen, 1947-	Large Print	Final	9	0	2011	813/.54	462681
11/22/63 a novel	King, Stephen, 1947-	Audio Book on CD	Final	1	0	2011	813/.54	463849
11/22/63 a novel	King, Stephen, 1947-	Audio Books	Final	1	0	2011	813/.54	463853
11/22/63 : a novel	King, Stephen, 1947-	Book	Final	18	0	2011	813/.54	461684
American vampire. [1]	Snyder, Scott.	Book	Final	2	0	2010	741.5973	437307
Apt pupil		DVD	Final	1	0	2006		419331
Apt pupil	King, Stephen, 1947-	Eaudiobook	Final	0	0	2009	813/.54	415173
Apt pupil from Different seasons	King, Stephen, 1947-	Audio Book on Cassette	Final	1	0	1984	AB CASS	41794

Cataloging – Importing Records from Remote Databases



- From the Find Tool, choose Bibliographic Record (Remote Databases)

Cataloging – Importing Records from Remote Databases



- Click on the "Database" icon in the top rock and select the database(s).

Cataloging – Importing Records from Remote Databases

Find Tool - Bibliographic Record (Remote Databases) ×

Bibliographic Record (Remo... ▶ Basic Search ▶ ISBN ▶ Exact (*) ▶

9781891830853 × ☆ ▼ 📄 🔍 ☰

* Database	Title	Author	Format	Publi...	Call Number	Control...
<input checked="" type="checkbox"/> Polaris ZMA...	American Elf : the collected sketchbook diaries of ...	Kochalka, James,...	01	2004	741.5/973 B	220167...
Library of Co...	American Elf : the collected sketchbook diaries of ...	Kochalka, James,...	01	2004	741.5/973 B	189251...

All retrieved results have been added. 2 result(s)


[SEARCH STATUS >](#) [OPEN](#) [CANCEL](#)

- Search (usually by ISBN)

Cataloging – Importing Records from Remote Databases

New Bibliographic Record

SAVE **RESULTS** **CLOSE**



American Elf : the collected sketchbook diaries of James Kochalka.
By Kochalka, James, author, illustrator.

Control number:

Owner:

Record status:

Display in PAC Do not overlay Host ILL

MARC

```
LDR | | | | |cam a22| | | | | a 4500
005 20160511204110.0
008 160104m200499999gaua 6 000 1deng
010 $a 2015506393
015 $GBA694896$2bnb
020 $a9781891830495$q(bk. 1)
020 $a189183049X$q(bk. 1)
020 $a9781891830853$q(bk. 2)
020 $a1891830856$q(bk. 2)
020 $a9781603090162$q(bk. 3)
020 $a1603090169$q(bk. 3)
020 $a9781603092654$q(bk. 4)
020 $a160309265X$q(bk. 4)
035 $a(OCOLC)ocn271445105
035 $a(DLC) 2015506393
035 $a21536678
035 $a22016725
040 $aCUSA$beng$cCUS$dYDXCP$dCDX$dGK8$dOCLCQ$dUKSCO$dBDX$dCGP$dCVM$dSO$dOCLCQ$dUKMGB$dDLC
042 $alccopycat
043 $an-us---
050 00 $aPN6727.K66$b246 2004
082 00 $a741.5/973$aB$223
100 1 $aKochalka, James,$eauthor,$eillustrator.
245 10 $aAmerican Elf :$bthe collected sketchbook diaries of James Kochalka.
260 $aMarietta, Georgia :$bTop Shelf Productions,$c2004-
300 $avolumes :$bchiefly illustrations (some color) ;$c23 cm
505 00 $t[Bk. 1.] October 26, 1998 to December 31, 2003 --$tbk. 2. January 1, 2004 to December 31, 2005 --$tbk. 3. January 1, 2006 to December 31, 2007 --$tbk. 4. January 1, 2008 to December 31, 2011.
520 $aCollects the semi-autobiographical online comic strip diary American Elf in which the author depicts himself as an elf.
600 10 $aKochalka, James$vDiaries.
600 10 $aKochalka, James$vComic books, strips, etc.
650 0 $aCartoonists$vUnited States$vDiaries.
650 0 $aCartoonists$vUnited States$vComic books, strips, etc.
655 0 $aGraphic novels.
336 $atext$btxt$2rdacontent
336 $astill image$2rdacontent
337 $aunmediated$bn$2rdamedia
338 $avolume$bnc$2rdacarrier
```

- View the record
- Click “Save” to add it to the database
- Click “Results” to go back to the list

Cataloging – Importing Records from a MARC File

New ▾ Utilities ▾

- Holds Queue
- Outreach Services
- Picklist Processing
- Request Manager
- Serials Check In

Print Notices

Cataloging Processing

- Create Unlinked Bibliographic Record Set
- Create Unlinked Authority Record Set
- Label Manager
- MARC Import**

MARC Import Setup

IMPORT CLOSE

[Profile Setup](#) [Bibliographic Records](#) [Item Records](#) [Authority Records](#) [Record Sets](#)

Import Profile: Schlomit test Filter

PROFILE NAME	DESCRIPTION	CREATOR
Sample_Selector_B&I_order	For print Bib records from vendor selection tools containing 970s and ISBNs (eg Baker and Taylor)	Pinsley
Sample_Selector_Midwest_order	For Non-Print Bib records from vendor selection tools containing 970s and ISBN, UPCs, 037 Catalog Numbers, Publisher Numbers (eg Midwest Tape)	Pinsley
Sample_Vendor_Brief_Order_Nonprint	For Non-Print Bib records from vendor selection tools containing 970s and ISBN, UPCs, 037 Catalog Numbers, Publisher Numbers (eg Midwest Tape)	Pinsley
Sample_Vendor_Brief_Order_Print	For print Bib records from vendor selection tools containing 970s and ISBNs (eg Baker and Taylor)	Pinsley
Schlomit test	Polaris default import profile copied for training	Schwarzer
Sierra API Test		Boland
Simone_Midwest_order	For Non-Print Bib records from vendor selection tools containing 970s and ISBN, UPCs, 037 Catalog Numbers, Publisher Numbers (eg Midwest Tape)	Pinsley

Import Files: 0 files selected SELECT FILE

Vendor Account
(None) ▾

Cataloging – Importing Records from a MARC File

MARC Import Setup

IMPORT **CLOSE**

[Profile Setup](#) [Bibliographic Records](#) [Item Records](#) [Authority Records](#) [Record Sets](#)

Import Profile: Schlomit test

PROFILE NAME	DESCRIPTION	CREATOR
Sample_Selector_B&T_order	For print Bib records from vendor selection tools containing 970s and ISBNs (eg Baker and Taylor)	Pinsley
Sample_Selector_Midwest_order	For Non-Print Bib records from vendor selection tools containing 970s and ISBN, UPCs, 037 Catalog Numbers, Publisher Numbers (eg Midwest Tape)	Pinsley
Sample_Vendor_Brief_Order_Nonprint	For Non-Print Bib records from vendor selection tools containing 970s and ISBN, UPCs, 037 Catalog Numbers, Publisher Numbers (eg Midwest Tape)	Pinsley
Sample_Vendor_Brief_Order_Print	For print Bib records from vendor selection tools containing 970s and ISBNs (eg Baker and Taylor)	Pinsley
Schlomit test	Polaris default import profile copied for training	Schwarzer
Sierra API Test		Boland
Simone_Midwest_order	For Non-Print Bib records from vendor selection tools containing 970s and ISBN, UPCs, 037 Catalog Numbers, Publisher Numbers (eg Midwest	Pinsley

Import Files: 1 files selected

Vendor Account:

Select File

File List

Select File

File List

- linkeddata.mrc

Cataloging – Importing Records from a MARC File

MARC Import Setup


[IMPORT](#) [CLOSE](#)

[Profile Setup](#) [Bibliographic Records](#) [Item Records](#) [Authority Records](#) [Record Sets](#)

Import Profile: Polaris default Filter

PROFILE NAME	DESCRIPTION	CREATOR
Sample_Bibload to create system-generated AF records	Overlays existing bib records, but creates system generated headings when no matching AF heading is found.	Pinsley
Sample_FullMARC records	Fully edited MARC records; system dedup rules	Pinsley
Sample_OCLC_MARC_Records	Fully edited OCLC MARC records with the 001 of the existing Polaris record copied into the 035 of the OCLC Record prior to export from OCLC.	Pinsley
Sample_Paperback or Lease Book Import profile	Paperback carts or lease book carts from B&T.	Pinsley
Sample_Selector_B&T_order	For print Bib records from vendor selection tools containing 970s and ISBNs (eg Baker and Taylor)	Pinsley
Sample_Selector_Midwest_order	For Non-Print Bib records from vendor selection tools containing 970s and ISBN, UPCs, 037 Catalog Numbers, Publisher Numbers (eg Midwest Tape)	Pinsley
Sample_Vendor_Brief_Order_Nonprint	For Non-Print Bib records from vendor selection tools containing 970s and ISBN, UPCs, 037 Catalog Numbers, Publisher Numbers (eg Midwest Tape)	Pinsley
Sample_Vendor_Brief_Order_Print	For print Bib records from vendor selection tools containing 970s and ISBNs (eg Baker and Taylor)	Pinsley

Import Files: 1 files selected SELECT FILE

 MARC7.mrc

Cataloging – Importing Records from a MARC File

New ▾ Utilities ▾

- Holds Queue
- Outreach Services
- Picklist Processing
- Request Manager
- Serials Check In

Print Notices

- Background Processing**
- Create Unlinked Bibliographic Record Set
- Create Unlinked Authority Record Set
- Label Manager
- MARC Import

Cataloging Processing

- Create Unlinked Bibliographic Record Set
- Create Unlinked Authority Record Set
- Label Manager
- MARC Import

Background Processing

REFRESH CLOSE

Bibliographic Bulk Change [MARC Import](#) Patron Bulk Change

Stop Delete Filter

<input type="checkbox"/>	FILE	ORGANIZATION	USER	TYPE	STATUS	RECORDS READ	RECORDS CREATED	POSTED
<input type="checkbox"/>	Cart7.mrc	Pottersville Public Library	michelle.ralston	Bibliographic	Completed	5	5	4/11/2023 3:07:29 PM
<input type="checkbox"/>	OCLC14.mrc	Pottersville Public Library	michelle.ralston	Bibliographic	Completed	5	10	4/11/2023 2:52:02 PM
<input type="checkbox"/>	eContent automatic import 4/10/2023 12:13:06 AM for vendor account: Overdrive LEAD.	Polaris Training Server	PolarisExec	Bibliographic	Completed	89	178	4/10/2023 12:13:06 AM
<input type="checkbox"/>	MARC3.mrc	Red Rock Public Library	nazee.depp	Bibliographic	Completed	5	10	3/31/2023 5:21:09 PM
<input type="checkbox"/>	OCLC12.mrc	Pottersville Public Library	michelle.ralston	Bibliographic	Completed	5	13	3/23/2023 4:53:35 PM
<input type="checkbox"/>	eContent automatic import 3/23/2023 12:33:11 AM for vendor account: Overdrive LEAD.	Polaris Training Server	PolarisExec	Bibliographic	Completed	1	2	3/23/2023 12:33:11 AM
<input type="checkbox"/>	eContent automatic import 3/17/2023 12:24:41 AM for vendor account: Overdrive LEAD.	Polaris Training Server	PolarisExec	Bibliographic	Completed	78	156	3/17/2023 12:24:41 AM

Microsoft PowerPoint

Cataloging – Editing Bib Records – Edit Current Tag

EDIT TAG

- LDR
- 001 3829
- 005 2021
- 008 0711
- 010 #a 2
- 020 #a97
- 020 #a04
- 035 #a(P
- 035 #a(O
- 037 #bJu:
- 040 #aDL
- 042 #alc
- 050 00 #aPZ
- 082 00 #a[F
- 100 1 #aCo
- 245 14 #aTh
- 250 #als
- 260 #aNe
- 300 #a37
- 490 1 #aHu
- 500 #aIs
- 500 #aFi
- 500 #aMi
- 520 #aIn

Bibliographic Record

SAVE ACTIONS - LINKS - REFRESH RESULTS CLOSE

The hunger games
By Collins, S

Control number: 382966

Record status: Final

Preview Items MARC

082 - DEWEY DECIMAL CLASSIFICATION NUMBER

Tag	Data
082	#a[Fic]#222

Indicator One: [dropdown]

Indicator Two: [dropdown]

CTRL+Q - Insert subfield delimiter (#)

OK CANCEL

EDIT TAG **INSERT**

- LDR cam 22
- 001 382966
- 005 20210615101151.0
- 008 071102s2008 nyr
- 010 #a 2007039987
- 020 #a9780439023481 (hardcover : alk. paper) :#c\$17.99
- 020 #a0439023483 (hardcover : alk. paper) :#c\$17.99
- 035 #a(Pol)574818
- 035 #a(OCOLC)ocn181516677
- 037 #bJunior Library Guild#nhttp://www.juniorlibraryguild.com
- 040 #aDLC+cDLC+dBTCTA+dBAKER+dTEF
- 042 #alcac
- 050 00 #aPZ7.C6837#bHun 2008
- 082 00 #a[Fic]#222
- 100 1 #aCollins, Suzanne.
- 245 14 #aThe hunger games /#cSuzanne Collins.
- 250 #a1st ed.
- 260 #aNew York :#bScholastic Press,#cc2008.
- 300 #a374 p. :#n22 cm

#IUG2023

Cataloging – Editing Bib Records – Insert New Tag

Bibliographic Record

THE HUNGER GAMES
By Collins, Suzanne.

Control number: 382966
Record status: Final

Owner: Polaris Library Training System (sys)

Display in PAC Do not over

Insert Data Field - General Note

Tag: 500

Indicator One: - Undefined

Indicator Two: - Undefined

Data: ‡Michelle is awesome

CTRL+Q - Insert subfield delimiter (‡)

(‡a) General note / (‡3) Materials specified / (‡5) Institution to which field applies / (‡6) Linkage / (‡8) Field link and sequence number

OK CANCEL

EDIT TAG **INSERT** **MOVE TAG UP** **MOVE TAG DOWN**

- LDR
- 001 382966
- 005 2021
- 008 0711
- 010 ‡a 20
- 020 ‡a 977
- 020 ‡a 04
- 035 ‡a (P
- 035 ‡a (O
- 037 ‡b Ju
- 040 ‡a DL
- 042 ‡a l
- 050 00 ‡a P
- 082 00 ‡a [Pic]#222
- 100 1 ‡a Collins, Suzanne.
- 245 14 ‡a The hunger games / ‡c Suzanne Collins.
- 250 ‡a 1st ed.
- 260 ‡a New York : ‡b Scholastic Press, ‡c 2008.
- 300 ‡a 374 p. : ‡c 22 cm

Cataloging – Editing Bib Records – Insert Fixed Field Tag

The screenshot displays a library cataloging interface for editing a bibliographic record. The main record is for "The hunger games" by Suzanne Collins, with control number 382966. The interface includes buttons for "CHECK IN", "NEW PATRON", "PRINT", "SAVE", "ACTIONS", "LINKS", "REFRESH", "RESULTS", and "CLOSE".

A "Bibliographic Fixed Field Selection" dialog box is open, prompting the user to specify a valid category of material (007/00). The list of categories includes: a - Map, c - Electronic resource, d - Globe, f - Tactile material, g - Projected graphic, h - Microform, k - Nonprojected graphic, **m - Motion picture** (highlighted), o - Kit, q - Notated music, r - Remote-sensing image, s - Sound recording, t - Text, v - Videorecording, and z - Unspecified.

The "007--MOTION PICTURE" dialog box is also open, showing various fields for the motion picture record. The "Category of material (00)" field is set to "m - Motion picture". Other fields include "Specific mat'l design (01)", "Color (03)", "Motion pic press form (04)", "Sound on med/sep (05)", "Medium for sound (06)", "Dimensions (07)", "Config of plybk chan (08)", "Production elements (09)", "Positive/neg aspect (10)", "Generation (11)", "Base of film (12)", "Refined color cat (13)", "Kind of col stk/print (14)", "Deterioration stage (15)", "Completeness (16)", and "Film inspect date (17-22)".


The MARC tag list on the left shows the following tags:

- 001 382966
- 005 20210711
- 008 0711
- 010 #a
- 020 #a9780439023483 (hardcover : alk. paper) :#c\$17.99
- 020 #a0439023483 (hardcover : alk. paper) :#c\$17.99
- 035 #a(Pol)574818
- 035 #a(OCOLC)ocn181516677
- 037 #bJunior Library Guild#nhttp://www.juniorlibraryguild.com
- 040 #aDLC#cDLC#dBTCTA#dBAKER#dTEF
- 042 #alcac
- 050 00 #aP27.C6837#bHun 2008
- 082 00 #a[Fic]+222
- 100 1 #aCollins, Suzanne.

Cataloging – Editing Bib Records – Deleting A Tag

Bibliographic Record ⓘ

SAVE **ACTIONS** ▾ **LINKS** ▾ **REFRESH** **RESULTS** **CLOSE**

 **The hunger games**
By Collins, Suzanne.

Control number: 382966 **Owner:** Polaris Library Training System (sys) ▾

Record status: Final Display in PAC Do not overlay Host ILL

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

EDIT TAG **INSERT** **DELETE TAG** **MOVE TAG UP** **MOVE TAG DOWN**

- LDR cam 22 a 4500
- 001 382966
- 005 20210615101151.0
- 008 071102s2008 nyu d 000 f eng
- 010 #a 2007039987
- 020 #a9780439023481 (hardcover : alk. paper) :+c\$17.99
- 020 #a0439023483 (hardcover : alk. paper) :+c\$17.99
- 035 #a(Pol)574818
- 035 #a(OCOLC)ocn181516677
- 037 #bJunior Library Guild#nhttp://www.juniorlibraryguild.com
- 040 #aDLC+cDLC+dBTCTA+dBAKER+dTEF
- 042 #alcac
- 050 00 #aP27.C6837#bHun 2008
- 082 00 #a[Fic]+222
- 100 1 #aCollins, Suzanne.
- 245 14 #aThe hunger games /+cSuzanne Collins.
- 250 #a1st ed.
- 260 #aNew York :+bScholastic Press,+cc2008.
- 300 #a374 p. :+tc22 cm

Cataloging – New Bib Record

The screenshot displays a library cataloging interface. The main window is titled "Bibliographic Record" and shows the record for "The hunger games" by Suzanne Collins. The control number is 382966, and the owner is Polaris Library Training System (sys). The record status is Final, and the "Display in PAC" checkbox is checked. An "ACTIONS" menu is open, showing options like "Place Hold", "Create Item", "Copy", "Delete", and "Undelete".

A "New Bibliographic Record" dialog box is open, showing a list of "Bib Template" options. The selected option is "Book + CD TOM (Polaris Library Training System)". A smaller "New Bibliographic Record" dialog box is also open, showing the selected template "Blu-ray TOM (Polaris Library Training System)".

The "Bibliographic Record" form includes the following fields:

- Control number:** 382966
- Owner:** Polaris Library Training System (sys)
- Record status:** Final
- Display in PAC
- Do not overlay

The "New Bibliographic Record" dialog box shows the following "Bib Template" options:

- (None)
- Blu-Ray (Polaris Library Training System)
- Audie Ebook TOM (Polaris Library Training System)
- Audiobook TOM (Polaris Library Training System)
- AZ History Book (Polaris Library Training System)
- Blu-ray TOM (Polaris Library Training System)
- Book + CD TOM (Polaris Library Training System)**
- Book Fiction (Polaris Library Training System)
- Braille Bib (Polaris Library Training System)
- Default - Book (Fiction) (Polaris Library Training System)
- Default - Book (NonFiction) (Polaris Library Training System)
- Default - Book (S)
- Default - Comput
- Default - Realia (
- Default - Serial (
- Default - Sound
- Default - Video R
- DVD 2 (Polaris Li
- DVD TOM (Polar
- Ebook TOM (Pola
- Fusion - 1 black
- Fusion - 1 color p
- Local Authors (W
- MacBookPro (Polaris Library Training System)
- Michelle DVD (Polaris Library Training System)
- Michelle's Map (Polaris Library Training System)
- Music CD TOM (Polaris Library Training System)
- ND-DVD (Cocoa Avenue Library)
- on order Audio Book (Polaris Library Training System)

Cataloging – Saving a Bib Record

Check Headings Assistant

The bibliographic headings with no exact authority matches are listed below.

HEADING	SOLUTION
130 0 \$aBionanotechnology (2013)	Leave heading unlinked
650 22 \$aNanotechnology\$xmmethods.	Leave heading unlinked
650 7 \$aBiotechnology.\$2fast#0(OCOLC)fst00832729	Leave heading unlinked
650 7 \$aNanotechnology.\$2fast#0(OCOLC)fst01032639	Leave heading unlinked

CONTINUE **CANCEL**

MARC Validation Results

The following validation errors were found. To ignore these errors, click continue.

Tag 906 is not defined
Tag 925 is not defined
Tag 955 is not defined
Tag 955 is not defined

CONTINUE **CANCEL**

Bibliographic Record Duplicate Detection Results

Record to Retain

CONTROL#	TITLE	AUTHOR	FORMAT	ITEMS	STATUS
	Bionanotechnology : biological self-assembly and its applications /			0	Final

Record(s) to Replace

<input checked="" type="checkbox"/>	CONTROL#	TITLE	AUTHOR	FORMAT	ITEMS	STATUS	REASON
<input checked="" type="checkbox"/>	894903	Bionanotechnology : biological self-assembly and its applications		Book	0	Final	LCCN;ISBN;Author/Title;035 and 245a Match

Maintain Control # **ADD TITLES**

REPLACE **CONTINUE** **CANCEL**

- Headings
- MARC Validation
- Dup Detection

Cataloging – Merging Bib Records

The screenshot shows a library cataloging interface. On the left, a 'Bibliographic Record' for 'The Hunger Games' by Suzanne Collins is displayed. The record number is 836035 and the status is 'Final'. A modal window titled 'Bibliographic Record Duplicate Detection Results' is open, showing a table of records. The table has two sections: 'Record to Retain' and 'Record(s) to Replace'. The 'Record to Retain' section shows a single record with control number 836035, title 'The Hunger Games', author 'Collins, Suzanne.', format 'Book', 5 items, and status 'Final'. The 'Record(s) to Replace' section shows a single record with control number 894890, title 'The Hunger Games', author 'Collins, Suzanne.', format 'Book', 0 items, status 'Final', and reason 'LCCN;ISBN;Author/Title;Title/260\$c'. Below the table is an 'ADD TITLES' button. At the bottom of the modal are three buttons: 'REPLACE', 'CONTINUE', and 'CANCEL'.

Bibliographic Record Duplicate Detection Results

Record to Retain					
CONTROL#	TITLE	AUTHOR	FORMAT	ITEMS	STATUS
836035	The Hunger Games	Collins, Suzanne.	Book	5	Final

Record(s) to Replace							
<input checked="" type="checkbox"/>	CONTROL#	TITLE	AUTHOR	FORMAT	ITEMS	STATUS	REASON
<input checked="" type="checkbox"/>	894890	The Hunger Games	Collins, Suzanne.	Book	0	Final	LCCN;ISBN;Author/Title;Title/260\$c

ADD TITLES

REPLACE **CONTINUE** **CANCEL**

- Upon Saving record, duplicates will show.
- Click the title to view the record before deciding.


Cataloging – Creating An Item Record

The screenshot displays a library cataloging interface. At the top left, the title "Bibliographic Record" is followed by an information icon. Below this, a small image of a person in a landscape is shown next to the title "American Elf : the collected sketchbook diaries of James Kochalka." and the author "By Kochalka, James, author, illustrator." The form includes fields for "Control number" (543694) and "Owner" (Polaris Library Training System (sys)). The "Record status" is set to "Final", and there are checkboxes for "Display in PAC" (checked) and "Do not overlay" (unchecked). A navigation bar at the bottom of the form contains links for "Preview", "Items", "MARC", "Headings", "Statistics", "Record Sets", "Resources", and "Outreach Patrons". On the right side, there are buttons for "SAVE", "ACTIONS", "LINKS", "REFRESH", and "CLOSE". The "ACTIONS" menu is open, showing options: "Place Hold", "Create Item" (highlighted), "Delete", "Undelete", "Add to New Record Set", and "Add to Existing Record Set". Below the form, there are tabs for "Brief", "Full", and "Availability", a language dropdown set to "English", and a library dropdown set to "Cambridge Library". The main content area shows a preview of the record with the title, author, publisher information (Marietta, Georgia : Top Shelf Productions, 2004-), description (volumes : chiefly illustrations (some color) ; 23 cm), and availability (Cambridge Libraries: 0 (of 0), System Availability: 0 (of 0)). A small book icon and the year "2004" are also visible.

- Starting from the bib record, use the "Actions" button to create an item

Cataloging – Creating An Item Record From A Template

New Item Record

 **American Elf : the collected sketchbook diaries of James Kochalka.**
By Kochalka, James, author, illustrator.

Barcode

Call Number Scheme *
Dewey Decimal

Prefix

Classification
741.5/973 B

Cutter

Assigned Branch *
Nocentro College Library (NCL)

Collection
DVD/Blueray (DVD)

Shelf Location
(None)

Suffix

Volume

Copy

Display in PAC

Material Type *
DVD

Loan Period *
7 Day

Fine Code *
0.10/5.00/0

Owning Branch *
Nocentro College Library (br)


Item Template

- AB / NCLAW (Lauren County Free Library)
- CPPL/CNF (Cabrillo Point Public Library)
- DVD / NCL (Lauren County Free Library)**
- DVD / NCLAW (Lauren County Free Library)
- GENCOLL / NCL (Lauren County Free Library)
- GOVDOC / NCL (Lauren County Free Library)
- GOVDOC / NCLAW (Lauren County Free Library)
- MCD / NCL (Lauren County Free Library)
- REF / NCL (Lauren County Free Library)
- REF / NCLAW (Lauren County Free Library)
- AB / BPL (Washburn Public Library)
- AB / BRPL (Washburn Public Library)
- AB / CL (Central Library)
- AB / EL (East Library)
- AB / FVPL (Washburn Public Library)
- AB / HPL (Lauren County Free Library)
- AB / NL (North Library)
- AB / WPL (Washburn Public Library)
- ART / BPL (Washburn Public Library)
- ART / BRPL (Washburn Public Library)
- ART / FVPL (Washburn Public Library)
- ART / HPL (Lauren County Free Library)
- ART / WPL (Washburn Public Library)

CREATE ITEM **CANCEL**

Cataloging – Creating An Item Record

New Item Record

 **American Elf : the collected sketchbook diaries of James Kochalka.**
By Kochalka, James, author, illustrator.

Barcode:

Item Template:

Call Number Scheme * **Suffix**

Use template values instead of these (if available)

Prefix **Volume** **Price** **Renewal Limit**

Classification **Copy**

Circulation Status *

Cutter Display in PAC Holdable Non-circulating

Assigned Branch *

Material Type *

Statistical Code

Collection

Loan Period *

Owning Branch *

Shelf Location

Fine Code *

Cataloging – Copying An Item Record

Item Record ⓘ

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

ACTIONS ▾

- Check In
- Place Hold
- Copy**
- Delete
- Undelete
- Add to New Record Set
- Add to Existing Record Set

American Elf : the collected sketchbook diaries of James Kochalka.
By Kochalka, James, author, illustrator.

Barcode: **LEAPCAT** ILL Non-circulating eContent Display in PAC

Call number: **DVD 741.5/973 B** Record status: **Final** Issue:

Collection: **DVD/Blueray** Bib control number: **543694** Issue control number:

Shelf location: **None** Parent item: Price: **\$12.99**

Owning branch: **NCL** Assigned branch: **NCL** Circulation status: **In-Process** || 1/25/2

[Details](#) [Circulation](#) [Controls](#) [Blocks and Notes](#) [History](#) [Statistics](#) [Record Sets](#) [Notices](#) [Source and Donor](#)

Barcode **Owning Branch*** **Bib Control Number*** **FIND**

Collection **Assigned Branch*** **Parent Item**

Shelf Location **Price** **Non-circulating**

Temporary Location **Circulation Status** **Display in PAC**

Cataloging – Editing An Item Record

Item Record ?

American Elf : the collected sketchbook diaries of James Kochalka.
By Kochalka, James

Barcode: **MR30003765** ILL Non-circulating eContent Display in PAC

Call number: **Koch TX950.7 .S36 2013** Record status: **Final** Issue:

Collection: **Circulating Collection** Bib control number: **894904** Issue control number:

Shelf location: **None** Parent item: Price:

Owning branch: **Cameron University Library** Assigned branch: **Cameron University Library** Circulation status: **In ||**

[Details](#) [Circulation](#) [Blocks and Notes](#) [History](#) [Statistics](#) [Record Sets](#) [Notices](#) [Source and Donor](#)

Barcode: Owning Branch*: Bib Control Number*:

Collection: Assigned Branch*: Parent Item:

Shelf Location: Price:

Temporary Location: Circulation Status:

Material Type*: Loan Period*:

Statistical Code: Fine Code*:

[Details](#) [Circulation](#) [Blocks and Notes](#) [History](#) [Statistics](#) [Record Sets](#) [Notices](#) [Source and Donor](#)

Library Assigned Block:

Free Text Block:

System Block:

Public Note:

Non-Public Note:

Physical Condition:

Special Item Check-In:

Microsoft PowerPoint

Cataloging – Spine Label Printing

The screenshot displays a library cataloging interface. On the left is a navigation menu with options like 'Holds Queue', 'Outreach Services', 'Picklist Processing', 'Request Manager', 'Serials', 'Print No', 'Catalog', 'Create L', 'Create L', 'Label M', and 'MARC I'. The main area is divided into two panels. The top panel, 'Label Manager', has a 'Label' dropdown set to 'Spine Sheets' and buttons for 'SAVE', 'ACTIONS', 'REFRESH', and 'CLOSE'. The 'ACTIONS' dropdown is open, showing 'Clear Labels' and 'Print Labels'. The bottom panel, 'Item Record', shows details for the book 'Hi, clouds' by Greene, Carol. It includes a barcode (31111000575573), call number (E-Z GRE C. 1), collection (Children's Easy Readers), and owning branch (GCPL). The 'ACTIONS' dropdown is also open here, showing options like 'Check In', 'Place Hold', 'Copy', 'Delete', 'Undelete', 'Print Label', 'Add to New Record Set', and 'Add to Existing Record Set'. The 'Print Label' option is highlighted.

- From an item record, use the “Actions” drop down and choose “Print Label” to send the label to the Label manager.

Cataloging – Spine Label Printing

The screenshot shows the 'Label Manager' interface. On the left is a navigation menu under 'Utilities' with options: Holds Queue, Outreach Services, Picklist Processing, Request Manager, Serials Check In, Print Notices, Cataloging Processing, Create Unlinked Bibliographic Record Set, Create Unlinked Authority Record Set, **Label Manager**, and MARC Import. The main area is titled 'Label Manager' and has a 'Label' dropdown set to 'Spine Sheets'. At the top right are buttons for 'SAVE', 'ACTIONS', 'REFRESH', and 'CLOSE'. The 'ACTIONS' dropdown is open, showing 'Clear Labels' and 'Print Labels'. Below is a table with 5 columns and 6 rows. The first cell of the first row contains the text: 'J 394.2 kel Kelley, Emily.'

J 394.2 kel Kelley, Emily.				

- The label manager can be found under “Utilities”
- Printing is done under the “Actions”

Cataloging – Deleting An Item Record

The screenshot displays a library cataloging interface with three overlapping windows:

- Item Record Window:** Shows details for "American Elf : the collected sketchbook diaries of James Kochalka." by James Kochalka. It includes a barcode (LEAPCAT2), call number (DVD 741.5/973 B), and record status (Final). An "ACTIONS" dropdown menu is open, with "Delete" highlighted. Other options include Check In, Place Hold, Copy, Undelete, Add to New Record Set, and Add to Existing Record Set.
- Delete item record Window:** A modal dialog asking "The item record will be marked for deletion. Do you want to continue?" with "CONTINUE" and "CANCEL" buttons.
- Last copy options Window:** A modal dialog titled "Last copy options" showing "Bibliographic Record 543694 - American Elf : the collected sketchbook diaries of James Kochalka." with buttons for "DELETE", "SUPPRESS FROM PAC", and "RETAIN".

Background interface elements include a "SAVE" button, "LINKS" dropdown, "REFRESH" button, and "CLOSE" button. A search bar at the bottom right shows "Bib Control Number*" with the value "543694" and a "FIND" button.

Cataloging – Deleting A Single Bib Record

The screenshot displays a library cataloging interface for a bibliographic record. The record is titled "Berlin '65, Paris '67" by Ellington, Duke, 1899-1974. The control number is 401650, and the owner is Polaris Library Training System (sys). The record status is "Delete bibliographic record". A confirmation dialog box is open, asking "The bibliographic record will be marked for deletion. Do you want to continue?". The dialog has "CONTINUE" and "CANCEL" buttons. Below the dialog, the record details are visible, including the title, publisher, date, and description. A "Bibliographic Record Links (Breakable)" section shows that the record is linked to 8 record set(s). The interface includes a top navigation bar with "SAVE", "ACTIONS", "LINKS", "REFRESH", "RESULTS", and "CLOSE" buttons. The "ACTIONS" menu is open, showing options like "Place Hold", "Create Item", "Delete", "Undelete", "Add to New Record Set", and "Add to Existing Record Set".

Bibliographic Record ⓘ

Berlin '65, Paris '67
By Ellington, Duke, 1899-1974.

Control number: 401650

Owner: Polaris Library Training System (sys)

Record status: Delete bibliographic record

The bibliographic record will be marked for deletion. Do you want to continue?

Berlin '65, Paris '67
by Ellington, Duke, 1899-1974.

Title [sound recording]

Publisher, Date: Berkeley, CA : Pablo, p1997.

Description: 1 sound disc : digital ; 4 3/4 in.

Cambridge Libraries: 0 (of 0)
System Availability: 0 (of 0)

Bibliographic Record Links (Breakable)

The following links will be broken if you continue deleting bibliographic record [401650]:

This bibliographic record is linked to 8 record set(s).

CONTINUE DELETING CANCEL

Cataloging - Record Sets – Creation

New ▾

- Authority Record
- Bibliographic Record
- Fiscal Year
- Invoice
- Patron Record
- Purchase Order
- Record Set**
- Serial Holdings Record
- Supplier

New Item Record Set 1 ⓘ

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

Name

Owner

Record Set ID

Note

Record Status

Record Count

FIND TOOL **ACTIONS ▾**

<input type="checkbox"/>	TITLE	ASSIGNED BRANCH	COLLECTION	MATERIAL TYPE	SHELF LOCATION	CALL NO.	VOL.	STATUS	BARCODE	LAST ACTIVITY DATE	RECORD STATUS	CONTROL NUMBER
0 of 0 record(s) retrieved												

Cataloging - Record Sets – Creation

The image shows a screenshot of a library cataloging interface with three overlapping windows:

- Find Tool - Bibliographic Record (Top Left):** Shows search filters: Bibliographic Record > Basic Search > Display in PAC > Exact. The search bar contains "No".
- Find Tool - Bibliographic Record (Middle Left):** Shows a list of search results with "Prime rip" selected. Below the list is a "Record Set Options" dialog box with the following fields:
 - Send Results to a New Record Set
 - Name:** Display In PAC unchecked
 - Owner:** Ralston Library System (lib)
 - Warning Size Threshold:** 1000
- Item Record Set (Right):** A form for creating a new record set with the following fields:
 - Name:** MRItemExample
 - Owner:** Pottersville Public Library (br)
 - Record Set ID:** 33873
 - Note:** (empty)
 - Record Status:** Final
 - Record Count:** 0Below the form is a search bar with "43242342343243" and a "FIND TOOL" button. At the bottom are "APPLY" and "CANCEL" buttons.

At the bottom of the Item Record Set window, there is a table header and a status message:

TITLE	ASSIGNED BRANCH	COLLECTION	MATERIAL TYPE	SHELF LOCATION	CALL NO.	VOL.	STATUS	BARCODE	LAST ACTIVITY DATE	RECORD STATUS	CONTROL NUMBER
-------	-----------------	------------	---------------	----------------	----------	------	--------	---------	--------------------	---------------	----------------

0 of 0 record(s) retrieved

Cataloging - Record Sets – Bulk Changing Bib Records

Bibliographic Record Set SAVE ACTIONS - REFRESH RESULTS CLOSE

Name: MR Depew Nonaudio SR
Owner: Depew Public Library (br)
Note:
Record Status: Final

Scan or enter barcode FIND TOOL ACTIONS - Filter Records

Bibliographic Record Bulk Change

MR Depew Nonaudio SR
Depew Public Library

Non-MARC Data Fields Leader 008 Tag

Operation

- (No change)
- Insert a new tag
- Insert new subfield(s) into an existing tag
- Insert new subfield(s) into an existing tag (before a specific subfield)
- Insert new subfield(s) into an existing tag (after a specific subfield)
- Delete an existing tag (first instance only)
- Delete an existing tag (last instance only)
- Delete an existing tag (all instances)
- Delete a subfield (any data) from an existing tag
- Delete a subfield (with specific data) from an existing tag
- Delete a subfield (any data) from an existing tag (last instance only)
- Change a tag's number only (subfields and data stay the same)
- Change a specific tag's subfield code only (data stays the same)
- Replace a tag's subfield (with specific data)
- Correct non-filing indicator values (initial articles 'a', 'an' or 'the')
- Change a tag's indicator only (subfields and data stay the same)

Non-MARC Data Fields Leader 008 Tag

Operation
Insert a new tag

Tag Number
500

Indicator One
.

Indicator Two
.

Subfields
\$ a Michelle is awesome

ADD TO CHANGE QUEUE

Change Queue

↓ ↑ [Tag Insert] Tag 500 (**) \$a Michelle is awesome

Cataloging - Record Sets – Bulk Changing Bib Records

Summary of Changes

This bulk change process will attempt to change 20 bibliographic record(s).

Record Set Name: MR Depew Nonaudio SR
Record Set Owner: Depew Public Library

Data Field Changes:
[Tag Insert] Tag 500 (**) \$a Michelle is awesome

Fixed Field Changes:
008 Books: Change position 34 from ' ' to 'a'

Once made, these changes cannot be automatically undone.

CONTINUE **CANCEL**

Cataloging - Record Sets – Bulk Changing Item Records

Item Record Set ⓘ

Name
Withdrawn to delete

Note

Owner
Ralston Library System (lib)

Record Status
Final

ACTIONS **SAVE** **REFRESH** **RESULTS** **CLOSE**

- Bulk Change
- Create Bibliographic Record Set
- Export
- Delete
- Undelete

Scan or enter barcode **FIND TOOL** **ACTIONS** Filter Records

<input type="checkbox"/>	TITLE	ASSIGNED BRANCH	COLLECTION	MATERIAL TYPE	SHELF LOCATION	CALL NO.	VOL.	STATUS	BARCODE	LAST ACTIVITY DATE	RECORD STATUS	CONTROL NUMBER
<input type="checkbox"/>	The math entertainer	Cambridge Library	Fiction (FIC)	Book		QA 95 .H37		Withdrawn	31111500064321		Final	553562
<input type="checkbox"/>	Math without fear	Cambridge Library	Fiction (FIC)	Book		QA 39.2 .C72		Withdrawn	31111500064065		Final	554728
<input type="checkbox"/>	The pleasures of math	Cambridge Library	Fiction (FIC)	Book		QA 93 .G6		Withdrawn	31111500064291		Final	553708

3 of 3 record(s) retrieved

Cataloging - Record Sets – Bulk Changing Item Records

Item Record Bulk Change

Withdrawn to delete
Ralston Library System

Bulk Change Report
ItemBulkChangeReport_20210127091151.txt

Template
(None)

Owner

Error Record Set
 Name

Location | Circulation | Call Number | Blocks and Notes | Miscellaneous

Owning Branch (No change)	Shelf Location (No change)
Assigned Branch (No change)	Home Branch (No change)
Collection (No change)	Temporary Location

Circulation Status
(No change)

Material Type
(No change)

Loan Period
(No change)

Holdable
(No change)

Limit To

Pickup At **Patrons from this branch only**
(No change)

Patrons from this library and branches
(No change)

Preferred borrowers
(No change)

Non-circulating
(No change)

Loanable outside system
(No change)

Fine Code
(No change)

Statistical Code
(No change)

Renewal Limit

Do not float
(No change)

Do not mail to patron
(No change)

UPDATE ITEMS **SAVE AS TEMPLATE** **CANCEL**

Cataloging - Record Sets – Bulk Changing Item Records

Item Record Bulk Change

UPDATE ITEMS

SAVE AS TEMPLATE

CANCEL

Withdrawn to delete

Ralston Library System

Bulk Change Report

ItemBulkChangeReport_20210127091151.txt

Error Record Set

Name

Location Circulation Call Number Blocks and Notes

Template

✓ (None)

No Longer New (Cambridge Library)

Summary of Changes

This bulk change process will attempt to change 3 item record(s).

Record set name: Withdrawn to delete
Record set owner: Ralston Library System
Bulk change report: ItemBulkChangeReport_20210127091850.txt
Error record set name:
Error record set owner:

Assigned collection: Fiction (FIC)

Material type: Book

Loan period code: 28 Day

Fine code: No Fine

Renewal limit: 2

Once made, these changes cannot automatically be undone.

CONTINUE

CANCEL

Cataloging - Record Sets – Bulk Changing Item Records

Item Record Bulk Change

UPDATE ITEMS SAVE AS TEMPLATE CANCEL

Withdrawn to delete

Ralston Library System

Bulk Change Report

ItemBulkChangeReport_20210127091151.txt

Template

✓ (None)
No Longer New (Cambridge Library)

Error Record Set

Name

Location Circulation Call Number Blocks and Notes

Summary of Changes

This bulk change process will attempt to change 3 item record(s).

Record set name:	Withdrawn to delete
Record set owner:	Ralston Library System
Bulk change report:	ItemBulkChangeReport_20210127091850.txt
Error record set name:	
Error record set owner:	

Assigned collection: Fiction (FIC)

Material type: Book

Loan period code: 28 Day

Fine code: No Fine

Renewal limit: 2

Once made, these changes cannot automatically be undone.

CONTINUE **CANCEL**

Cataloging – Bulk Deleting Records (From a Record Set)

Item Record Set ⓘ

SAVE **ACTIONS -** **REFRESH** **RESULTS** **CLOSE**

Name
Withdrawn to delete

Owner
Ralston Library System (lib)

Record Set ID
1500

Note

Record Status
Final

Record Count
3

Scan or enter barcode **FIND TOOL**

	TITLE	ASSIGNED BRANCH	COLLECTION	MATERIAL TYPE	SHELF LOCATION	CALL NO.	VOL.	STATUS	BARCODE	LAST ACTIVITY DATE	RECORD SET ID	MEMBER
<input checked="" type="checkbox"/>	The math entertainer	Cambridge Library	Fiction (FIC)	Book		QA 95 .H37		Withdrawn	31111500064321		Final	
<input checked="" type="checkbox"/>	Math without fear	Cambridge Library	Fiction (FIC)	Book		QA 39.2 .C72		Withdrawn	31111500064065		Final	
<input checked="" type="checkbox"/>	The pleasures of math	Cambridge Library	Fiction (FIC)	Book		QA 93 .G6		Withdrawn	31111500064291		Final	

ACTIONS - Filter Records

- Ad Hoc Bulk Change
- Add from File
- Add to New Record Set
- Add to Existing Record Set
- Check in
- Remove Selected Records
- Delete Selected Records**

3 of 3 record(s) retrieved

Delete item records

Are you sure you want to delete 3 selected Item record(s)?

Warn me about:

- breakable links
- unbreakable links and other stopping conditions

CONTINUE **CANCEL**

Item Record Links (Breakable)

The following links will be broken if you continue deleting item record [553708]:

This item record is linked to 1 other record set(s).

CONTINUE DELETING **CANCEL**

Cataloging – Bulk Deleting Records (From A Record Set)

Last copy options

Record Set weeded0003 (CAL) has been created.

The following record options are available:

Bibliographic Record 204523 - The pleasures of math
Bibliographic Record 226603 - Math without fear
Bibliographic Record 204534 - The math entertainer

DELETE SUPPRESS FROM PAC RETAIN OPEN RECORD SET

Item Record Set ⓘ

SAVE **ACTIONS -** **REFRESH** **RESULTS** **CLOSE**

Name
Withdrawn to delete

Owner
Ralston Library System (lib)

Record Set ID
1500

Note

Record Status
Final

Record Count
0

Scan or enter barcode **FIND TOOL** **ACTIONS -** Filter Records

<input type="checkbox"/>	TITLE	ASSIGNED BRANCH	COLLECTION	MATERIAL TYPE	SHELF LOCATION	CALL NO.	VOL.	STATUS	BARCODE	LAST ACTIVITY DATE	RECORD STATUS	CONTROL NUMBER
0 of 0 record(s) retrieved												

Acquisitions Functions in Leap

- Fiscal Year
 - Create
 - View
 - Edit
- Funds (no hierarchy)
 - Create
 - Edit
 - Actions
 - Delete
- Suppliers
 - Create
 - View
 - Edit
 - Delete
- Purchase Orders
 - Bulk Add to PO
 - View
 - Edit
 - View/Edit POLI information
 - Release/Send
 - Delete
- Purchase Order Line Items (POLI) 7.4
 - Receiving
 - Copy to Invoice
- Invoices
 - View
 - Edit
 - Edit/Delete invoice line items
 - Adding Charges
 - Pay
 - Unpay
 - Delete

Acquisitions – Creating And Editing A Fiscal Year

New Fiscal Year - 1

SAVE **CLOSE**

Name: MR NEW FY2022 Status: Open Status Date: 2/25/2022

[Details](#)

Owner: Cambridge Library (CACL)

Note:

Fiscal Year ⓘ

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

Name: MR NEW FY2022 Status: Open Status Date: 2/25/2022

[Details](#) [Funds](#)

+ NEW FUND Filter

NAME	ALTERNATE NAME	TYPE	STATUS	TOTAL ALLOCATED	ENCUMBERED	EXPENDED	EBF BALANCE
MR Adult Print	MRADP	Regular					

New Fund - 3

SAVE **CLOSE**

Fiscal year: MR NEW FY2022

[Details](#) Balances Donor

Name: MR Adult Books Non Fiction Alternative Name: MRADBNF External Name:

Type: Regular Owner: Cambridge Library (CACL) Funding Source:

Transfers Display

Note:

Acquisitions – Creating A Supplier

New Supplier - 1 SAVE CLOSE

Name: Michelle's Awesome Books Alternative Name: MAB Currency: USD

SAN: 22222222 Account Number: Owner: Cambridge Library (CACL)

Details Orders Payments Claims

Contact Information

Postal Code: Zip+4: City: Street Address: State: Street Address Line 2: County: Street Address Line 3: Country: USA

Contact: Email: username@domain.com

Phone Number: Fax Number:

Financial

Discount (%): 0 External Financial System ID:

Claim Setup

Max Claims:

Cancel Notice:

Auto Cancel Waiting Period:

Claim Notice:

Claim Waiting Period

Days After Release/Expected Arrival

Days After 1st Claim

Days After 2nd Claim

Days After 3rd Claim

Days After 4th Claim

New ▾

- Authority Record
- Bibliographic Record
- Fiscal Year
- Invoice
- Patron Record
- Purchase Order
- Record Set
- Serial Holdings Record
- Supplier**

Acquisitions – Creating A Manual PO

New ▾

- Authority Record
- Bibliographic Record
- Fiscal Year
- Invoice
- Patron Record
- Purchase Order**
- Record Set
- Serial Holdings Record
- Supplier

New Purchase Order - 1

SAVE **CLOSE**

Number
MRPOExample

Suffix
[]

Lines
[]

Type
Firm Order

Status
Pending

Status Date
4/12/2023

Prepaid

Total
[]

Method
Purchase

Details

Account Identifiers

Owner
Pottersville Public Library (PPL)

Supplier
Mike's Books and Tapes **FIND**

SAN
[] 1ZZ-ZZZY : []

Plan
[]

Account
1123121

Order Details

Authorization
[]

Rental Return Date
[]

Details Line Items Charges Instructions to Supplier Claims Bibliographic Records Items Invoices Funds

Account Identifiers

Owner
Pottersville Public Library (PPL)

Supplier
Mike's Books and Tapes **FIND**

SAN
[] 1ZZ-ZZZY : []

Plan
[]

Account
1123121

Order Details

Authorization
Microsoft Remote Desktop

EDI File Name
[]

Acquisitions – Creating A Manual PO

Purchase Order ?

SAVE **ACTIONS -** **REFRESH** **CLOSE**

Number: MRPOExample Suffix: Lines: 0 Type: Firm Order

Status: Pending Status Date: 4/12/2023 Prepaid Total: \$0.00 Method: Purchase

[Details](#) [Line Items](#) [Charges](#) [Instructions to Supplier](#) [Claims](#) [Bibliographic Records](#) [Items](#) [Invoices](#) [Funds](#)

NEW LINE ITEM **RECEIVE** **UNDO**

LINE	TITLE
------	-------

New Purchase Order Line Item - 2

SAVE **ACTIONS -** **CLOSE**

Purchase order number: MRPOExample Status: Pending Line no.: 1

Suffix: Status date: 4/12/2023 Bib control number:

ISBN/ISSN: 0593593804 Other no.: Material type:

[Details](#) [Segments](#)

Title Details

ISBN/ISSN: 0593593804 **FIND** Bib Control Number: 894542 Bib Template: (None)

Title: Spare Author: Harry, Prince, Duke of Sussex, 1984-

Publisher: Random House, Date: 2023 Edition: First US e Alert Display in PAC

Other No.: LCCN: BL2022036973 Material Type:

Price

Unit Price: \$25.00 Discount Rate: 10 Discount Price: \$22.50

Acquisitions – Creating A Manual PO

[CHECK IN](#) [NEW PATRON](#) [PRINT](#)

New Purchase Order Line Item - 2

[SAVE](#) [ACTIONS -](#) [CLOSE](#)

Purchase order number: [MRPOExample](#) Status: **Pending** Line no.: 1
 Suffix: Status date: **4/12/2023** Bib control number:
 ISBN/ISSN: **0593593804** Other no.: Material type:

[Details](#) [Segments](#)

Total Order Quantity: 0

[+ NEW SEGMENT](#) [EDIT](#) [DELETE](#) [RECEIVE](#) [SPLIT RECEIVE](#)

SEGMENT	QUANTITY	DESTINATION
<input type="checkbox"/>		

Add Segment

Quantity: Destination:

Collection:

Fund:

[SAVE](#) [ACTIONS -](#) [REFRESH](#) [RESULTS](#) [CLOSE](#)

Type: [Release](#) [Send](#) [Delete](#)

Method:

ID	STATUS
Books	Pending
Books	Pending
Books	Pending
Books	Pending

Total Order Quantity: 1

[+ NEW SEGMENT](#) [EDIT](#) [DELETE](#) [RECEIVE](#) [SPLIT RECEIVE](#) [UNDO RECEIPT](#) [COPY TO -](#)

View: Orders [CANCEL](#)

SEGMENT	QUANTITY	DESTINATION	COLLECTION	FUND	FISCAL YEAR	STATUS	PAYMENT STATUS
<input type="checkbox"/>							
<input type="checkbox"/>	1	Pottersville Public Library	Bestsellers	Adult Fiction (Montana 2021)	Montana 2021	Pending	Open

Acquisitions – Importing Records from a Vendor MARC File

New ▾ Utilities ▾

- Hold Queue
- Outreach Services
- Picklist Processing
- Request Manager
- Serials Check In

Print Notices

Background Processing

Create Unlinked Bibliographic Record Set

Create Unlinked Authority Record Set

Label Manager

MARC Import

MARC Import Setup

IMPORT CLOSE

[Profile Setup](#) [Bibliographic Records](#) [Item Records](#) [Authority Records](#) [Record Sets](#)

Import Profile: Schlomit test

PROFILE NAME	DESCRIPTION	CREATOR
Sample_Selector_B&I_order	For print bib records from vendor selection tools containing 970s and ISBNs (eg Baker and Taylor)	Pinsley
Sample_Selector_Midwest order	For Non-Print Bib records from vendor selection tools containing 970s and ISBN, UPCs, 037 Catalog Numbers, Publisher Numbers (eg Midwest Tape)	Pinsley
Sample_Vendor_Brief_Order_Nonprint	For Non-Print Bib records from vendor selection tools containing 970s and ISBN, UPCs, 037 Catalog Numbers, Publisher Numbers (eg Midwest Tape)	Pinsley
Sample_Vendor_Brief_Order_Print	For print Bib records from vendor selection tools containing 970s and ISBNs (eg Baker and Taylor)	Pinsley
Schlomit test	Polaris default import profile copied for training	Schwarzer
Sierra API Test		Boland
Simone_Midwest order	For Non-Print Bib records from vendor selection tools containing 970s and ISBN, UPCs, 037 Catalog Numbers, Publisher Numbers (eg Midwest Tape)	Pinsley

Import Files: 0 files selected

Vendor Account

Acquisitions – Importing Records from a Vendor MARC File

New ▾ Utilities ▾

- Holds Queue
- Outreach Services
- Picklist Processing
- Request Manager
- Serials Check In

Print Notices

Background Processing

- Create Unlinked Bibliographic Record Set
- Create Unlinked Authority Record Set
- Label Manager
- MARC Import

Background Processing REFRESH CLOSE

Bibliographic Bulk Change [MARC Import](#) Patron Bulk Change

Stop Delete Filter

<input type="checkbox"/>	FILE	ORGANIZATION	USER	TYPE	STATUS	RECORDS READ	RECORDS CREATED	POSTED
<input type="checkbox"/>	Cart7.mrc	Pottersville Public Library	michelle.ralston	Bibliographic	Completed	5	5	4/11/2023 3:07:29 PM
<input type="checkbox"/>	OCLC14.mrc	Pottersville Public Library	michelle.ralston	Bibliographic	Completed	5	10	4/11/2023 2:52:02 PM
<input type="checkbox"/>	eContent automatic import 4/10/2023 12:13:06 AM for vendor account: Overdrive LEAD.	Polaris Training Server	PolarisExec	Bibliographic	Completed	89	178	4/10/2023 12:13:06 AM
<input type="checkbox"/>	MARC3.mrc	Red Rock Public Library	nazee.depp	Bibliographic	Completed	5	10	3/31/2023 5:21:09 PM
<input type="checkbox"/>	OCLC12.mrc	Pottersville Public Library	michelle.ralston	Bibliographic	Completed	5	13	3/23/2023 4:53:35 PM
<input type="checkbox"/>	eContent automatic import 3/23/2023 12:33:11 AM for vendor account: Overdrive LEAD.	Polaris Training Server	PolarisExec	Bibliographic	Completed	1	2	3/23/2023 12:33:11 AM
<input type="checkbox"/>	eContent automatic import 3/17/2023 12:24:41 AM for vendor account: Overdrive LEAD.	Polaris Training Server	PolarisExec	Bibliographic	Completed	78	156	3/17/2023 12:24:41 AM

Microsoft PowerPoint

Acquisitions – Creating a PO (from a Record Set)

Import option to reject forced the incoming record to be ignored. Record number 4 from file was rejected.

Warning(s)
Bibliographic record 542495 was detected as a duplicate and retained.

Unsaved record: **Bibliographic Record**
Begin time: 2/25/2022 9:01:06 AM **End time:** 2/25/2022 9:01:06 AM

Error(s)
Import option to reject forced the incoming record to be ignored. Record number 5 from file was rejected.

Warning(s)
Bibliographic record 542496 was detected as a duplicate and retained.

Bibliographic final record set:
Name (owner): SXS B&TBibsFinal_20220225090107 (Central Library)
Number of records added: 4
New or existing: New

Bibliographic provisional record set:
Name (owner): SXS B&TBibsProv_20220225090107 (Central Library)
Number of records added: 1
New or existing: New

Find Tool - Record Set

Record Set ▶ Basic Search ▶ Name ▶ Exact (*) ▶

SXS B&TBibsFinal_2022022509010

Name	Record Type	Owner	Total Records	Creation Date	Note
<input checked="" type="checkbox"/> SXS B&TBibsFinal_20220...	Bibliographic R...	Central Library	4	2/25/2022	

Ready 1 result(s)

Count Only

OPEN **CANCEL**

Acquisitions – Creating a PO (from a Record Set)

Bibliographic Record Set ⓘ

Name: SXS B&TBibsFinal_20220225090107

Owner: Central Library (br)

Note:

Record Status: Final

Actions: Bulk Change, Create Item Record Set, Create Authority Record Set, Export, Delete, Undelete, **Bulk Add to New PO**, Bulk Add to Existing PO

SAVE **ACTIONS** **REFRESH** **RESULTS** **CLOSE**

Set ID: _____
Count: _____

Filter Records

	PUB DATE	CALL NO.	CONTROL NUMBER	STATUS
<input type="checkbox"/>	2013	979.1/3	542496	Final
<input type="checkbox"/>		978	542495	Final
<input type="checkbox"/>		978	542494	Final
<input type="checkbox"/>	2013	[Fic]	542492	Final

4 of 4 record(s) retrieved

Scan or enter barcode **FIND TOOL**

Add to New Purchase Order

Header

PO number: MRPO73

Owner: Cambridge Library (CACL)

Type: Firm Order

Method: Purchase

Supplier: **FIND**

Line Default Data

Material type: (None) **Quantity:** 1

Destination: Cambridge Library (CACL) **List price:** \$0.00

Collection: (None) **Discount (%):** 0

Fund: Adult Audiobooks Fund

CONTINUE **CANCEL**

TITLE

- The Colorado River
- Highlandlake and Mead
- Northglenn
- The shadow girl

Acquisitions – Releasing/Sending POs

Purchase Order i

SAVE
ACTIONS ▾
REFRESH
RESULTS
CLOSE

Number

Suffix

Lines

Type

Status

Status Date

Prepaid

Total

Method

Details
Line Items
Charges
Instructions to Supplier
Claims

Filter

DELETE

	LINE	!	TITLE	AUTHOR	ISBN/ISSN	AMOUNT	ORDERED	RECEIVED	INVOICED	FUND	STATUS
<input type="checkbox"/>	1	!	The shadow girl	Archer, Jennifer, 1957-	0061834602 : PAP	\$59.94	6	0	0	Adult Books	Pending
<input type="checkbox"/>	2	!	Northglenn	Candelario, Elizabeth Moreland	0738596752 : PAP	\$131.94	6	0	0	Adult Books	Pending
<input type="checkbox"/>	3	!	Highlandlake and Mead	Smith, Pauli Driver	0738596019 : PAP	\$131.94	6	0	0	Adult Books	Pending
<input type="checkbox"/>	4	!	The Colorado River	Marsico, Katie, 1980-	1624310389 : PAP	\$85.26	6	0	0	Adult Books	Pending

Acquisitions – Receiving POLIs (7.4)

The screenshot displays the 'Purchase Order Line Item' details for 'Medical Robotics Handbook' by Dogramadzi, Sanja/ Vaidyanathan, Ravi. The item is on order with a quantity of 1. The 'RECEIVE' button is highlighted with an orange box. A confirmation dialog titled 'Receive Segment(s)' is open, asking 'Are you sure you want to receive 1 segment(s)?' with 'CONTINUE' and 'CANCEL' options. A green notification banner at the bottom states 'The purchase order line item segment(s) were received successfully'.

Purchase Order Line Item Medical Robotics Handbook

By Dogramadzi, Sanja/ Vaidyanathan, Ravi

Purchase order number: mr1806 Status: **On Order** Line no.: 4

Suffix: Status date: 4/11/2023 Bib control number: 894900

ISBN/ISSN: 9781439881439 : HRD Other no.: Material type: Blu-Ray

Ready

Count Only

Details Segments Notes Instructions To Supplier Claims Invoices Funds

Total Order Quantity: 1

+ NEW SEGMENT EDIT DELETE RECEIVE SPLIT RECEIVE UNDO

SEGMENT	QUANTITY	DESTINATION	COLLECTION
1	1	Pottersville Public Library	Adult Non-Ficti

View: Orders

Filter

PAYMENT STATUS: Open

Receive Segment(s)

Are you sure you want to receive 1 segment(s)?

CONTINUE CANCEL

The purchase order line item segment(s) were received successfully

Acquisitions – Split Receiving POLIs (7.4)

Purchase Order Line Item ⓘ

Michelle Is Awesome
By *Ralston, Michelle*

Purchase order number: MRPOExample Status: **On Order**
 Suffix: Status date: 4/17/2023
 ISBN/ISSN: 1123233445566 Other no.:

Details Segments Notes Instructions To Supplier Claims Invoices Funds

Total Order Quantity: 4

+ NEW SEGMENT EDIT DELETE RECEIVE **SPLIT RECEIVE** UNDO RECEIPT

✓	SEGMENT	QUANTITY	DESTINATION	COLLECTION
✓	1	4	Pottersville Public Library	Adult Non-Fiction

Line Item Segment Receiving

You have chosen to receive the selected segments. The status of the segments will now become 'Received'. Copies not received will remain 'On-Order'.

Quantity ordered

Enter the number of copies received

Quantity received

OK CANCEL

The purchase order line item segment(s) were received successfully

Details Segments Notes Instructions To Supplier Claims Invoices Funds

Total Order Quantity: 4 View: Orders ▾

+ NEW SEGMENT EDIT DELETE RECEIVE SPLIT RECEIVE UNDO RECEIPT COPY TO ▾ Filter

☐	SEGMENT	QUANTITY	DESTINATION	COLLECTION	FUND	FISCAL YEAR	STATUS	PAYMENT STATUS
☐	1	2	Pottersville Public Library	Adult Non-Fiction	Adult Media (AMed)	Carnegie 2021-22	Received	Open
☐	2	2	Pottersville Public Library	Adult Non-Fiction	Adult Media (AMed)	Carnegie 2021-22	On Order	Open

Acquisitions – Receiving POLIs (7.3)

Find Tool - Purchase Order Line Item

Purchase Order Line Item ▶ Basic Search ▶ ISBN/ISSN ▶ Exact ▶

9781934781111

Title	Author	ISBN/ISSN	Ord...	Rec...	Inv...	Fund	Status	PO No. & Suffix
The Weirding Field : The ...	Watson, Esther ...	9781934781111...	1	0	0	Adult Books	On Order	mr1806

Purchase Order Line Item ⓘ

The Weirding Field : The North Texas Spacecraft of Gen Watson, Father and Visionary

By Watson, Esther Pearl

Purchase order number: **mr1806**

Suffix:

ISBN/ISSN: 9781934781111 : HRD

Status: On Order Line no.: 2

SAVE ACTIONS - REFRESH CLOSE

Details Segments Notes Instructions To Supplier

Total Order Quantity: 1

+ NEW SEGMENT EDIT DELETE

SEGMENT	QUANTITY
1	1

NEW LINE ITEM RECEIVE UNDO RECEIPT COPY TO - CANCEL DELETE

Purchase Order ⓘ

Number: mr1806 Suffix:

Status: Partly Received Status Date: 4/17/2023 Prepaid:

SAVE ACTIONS - REFRESH RESULTS CLOSE

Details Line Items Charges Instructions to Supplier Claims Bibliographic Records Items Invoice

LINE	TITLE	AUTHOR	ISBN/ISSN	PRICE	ORD	REC	INV	FUND	STATUS
1	Gas in Glass	Eliens, Titus M.						Adult Books	On Order
<input checked="" type="checkbox"/>	The Weirding Field : The North Texas Spacecraft of Gen Watson, Father and Visionary	Watson, Esther Pearl	9781934781111 : HRD	\$139.50	1	0	0	Adult Books	On Order
3	Renewable Energy Resources	Twidell, John/ Weir, Tony	9780415584371 : HRD	\$139.50	1	0	0	Adult Books	On Order
4	Medical Robotics Handbook	Dogramadzi, Sanja/ Vaidyanathan, Ravi	9781439881439 : HRD	\$161.96	1	1	0	Adult Books	Received
5	Electric Safety : Practice and Standards	El-Sharkawi, Mohamed	9781466571495 : HRD	\$116.96	1	0	0	Adult Books	On Order

Receive Purchase Order Line Item(s)

Are you sure you want to receive 1 purchase order line item(s)?

CONTINUE CANCEL

Acquisitions – Invoicing POLIs

Purchase Order ⓘ

SAVE ACTIONS - REFRESH RESULTS CLOSE

Number: mr1806 Suffix: Lines: 5 Type: Firm Order

Status: Partly Received Status Date: 4/17/2023 Total: \$469.27 Method: Purchase

Details Line Items Charges Instructions to Supplier Claims Bibliographic Records Items Invoices Funds

NEW LINE ITEM RECEIVE UNDO RECEIPT COPY TO - CANCEL DELETE Filter

LINE	TITLE	AUTHOR	ISBN/ISSN	AMOUNT	ORDERED	RECEIVED	INVOICED	FUND	STATUS
1	Gas in Glass	Eliens, Titus M.	9789078964377 : HRD	\$33.75	1	0	0	Adult Books	On Order
2	The Weiriding Field : The North Texas Spacecraft of Gen Watson, Father and Visionary	Watson, Esther Pearl	9781934781111 : HRD	\$17.10	1	1	0	Adult Books	Received

Purchase Order Line Item ⓘ

SAVE ACTIONS - REFRESH RESULTS CLOSE

Medical Robotics Handbook
By Dogramadzi, Sanjal Vaidyanathan, Ravi

Purchase order number: mr1806 Status: Received Line no.: 4
Suffix: Status date: 4/17/2023 Bib control number: 894900
ISBN/ISSN: 9781439881439 : HRD Other no.: Material type: Blu-Ray

Details Segments Notes Instructions To Supplier Claims Invoices Funds

Total Order Quantity: 1 View: Orders

+ NEW SEGMENT EDIT DELETE RECEIVE SPLIT RECEIVE UNDO RECEIPT COPY TO - Filter

SEGMENT	QUANTITY	DESTINATION	COLLECTION	FISCAL YEAR	STATUS	PAYMENT STATUS
1	1	Pottersville Public Library	Adult Non-Fiction	Fox 2022	Received	Open

Acquisitions – Creating an Invoice

New Invoice - 1 SAVE CLOSE

Number: MRINVEXMPI Suffix: Lines: Type: Regular

Invoice Date: 4/14/2023 Status: Open Status Date: 4/14/2023 Total: Method: Purchase

[Details](#)

Account Identifiers

Owner: Pottersville Public Library (PPL) Supplier: Mike's Books and Tapes FIND

SAN: SAN: 123-2112

Plan: Account: 1123121

Invoice Details

Transmission Method: (None) EDI File Name:

Closing Alert Date: Payment Due Date: Receipt Date: Shipped Date:

New ▾

- Authority Record
- Bibliographic Record
- Fiscal Year
- Invoice**
- Patron Record
- Purchase Order
- Record Set
- Serial Holdings Record
- Supplier

Acquisitions – Creating an Invoice

New Invoice Line Item - 2

Invoice number: MRINVEXMPI
Suffix:
ISBN/ISSN:

Details Segments

Line Item Total Quantity:

+ NEW SEGMENT EDIT DELETE

SEGMENT	QUANTITY

Add Segment

Quantity: 0 Destination: Pottersville Public Library (PPL)

Collection: Adult Fiction

Fund: Adult Books (Fox 2022)

OK CANCEL

Invoice

SAVE ACTIONS REFRESH RESULTS CLOSE

Number: MRINVEXMPI Suffix: Lines: 1 Type: Regular

Invoice Date: 4/14/2023 Status: Open Status Date: 4/14/2023 Total: \$5.00 Method: Purchase

Details Line Items Charges Payment History Bibliographic Records Items Purchase Orders Funds

NEW LINE ITEM RECEIVE CREDIT DELETE Filter

LINE	TITLE	AUTHOR	ISBN/ISSN	AMOUNT	RECEIVED	PAID	PO NO.	FUND	STATUS
1	Hunger; man's struggle to feed himself.	Scott, John, 1912-		\$0.00	0	0		Adult Books	Open

Acquisitions – Editing Invoices

Invoice i

SAVE
ACTIONS ▾
REFRESH
RESULTS
CLOSE

Number

Suffix

Lines

Type

Invoice Date

Status

Status Date

Total

Method

Details | Line Items | Charges | Payment History

DELETE

Invoice Line Item i

SAVE
REFRESH
CLOSE

Raining cat sitters and dogs : a Dixie Hemingway mystery
By *Clement, Blaize.*

Invoice number: MR1223334444

Suffix: mr

ISBN/ISSN: 9781410425645 (alk. paper)

Status: Open

Status date: 1/23/2020

Other no.:

Line no.: 2

Bib control number: 543081

Purchase order number: MR11112222

Details | Segments

Title Details

ISBN/ISSN

Bib Control Number

Bib Template

Title

Author

Publisher

Date

Edition

Other No.

LCCN

Material Type

Shipped Date

Alert Note

Price

Unit Price

Discount Rate

Discount Price

Acquisitions – Adding Charges to Invoices

Invoice ⓘ

SAVE ACTIONS - REFRESH RESULTS CLOSE

Number: MRINVEXMPI Suffix: Lines: 1 Type: Regular

Invoice Date: 4/14/2023 Status: Open Status Date: 4/14/2023 Total: \$0.00 Method: Purchase

Details Line Items **Charges** Payment History Bibliographic Records Items Purchase Orders Funds

Payment Details

Line Item Subtotals

Materials

Charges and credits

Header Charge Subtotals

Charges and credits

Rate (%)

Discount applied

Sales tax

ADD CHARGE DELETE

CHARGE TYPE

Add Header Charge

Type: Shipping Amount: \$5.00

Fund: Adult Books (Fox 2022)

OK CANCEL

Header Charges

ADD CHARGE DELETE

	CHARGE TYPE	AMOUNT	FUND	FISCAL YEAR
<input type="checkbox"/>	Shipping	\$5.00	Adult Books	Fox 2022

Acquisitions – Paying/Unpaying Invoices

Invoice ?

SAVE **ACTIONS** **REFRESH** **RESULTS** **CLOSE**

Number MR1223334444 **Suffix** mr **Lines** 3 **Type** Regular **Method** Purchase

Invoice Date 4/11/2017 **Status** Open **Status Date** 11/5/2019 **Total** \$34.05

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

DELETE

<input type="checkbox"/>	LINE	TITLE	AUTHOR	ISBN/ISSN	AMOUNT	RECEIVED	PAID	PO NO.	FUND	STATUS
<input type="checkbox"/>	2	Raining cat sitters and dogs : a Dixie Hemingway mystery	Clement, Blaize.	9781410425645 (alk. paper)	\$12.32	1	0	MR11112222 mr	Adult Books	Open
<input type="checkbox"/>	3	Raining fire	Khanna, Rajan, 1974- author.	9781633882737 (paperback)	\$13.38	1	0	MR11112222 mr	Adult Books	Open
<input type="checkbox"/>	4	Raining like hell		9383838333	\$2.35	1	0	MR11112222 mr	Adult Media	Open

Serials Functions in Leap

- Serial Holding Records
 - Creating
 - Copying (7.4)
 - Editing
 - Deleting
- Publication Patterns
 - Creating (7.4)
 - Closing
- Serial Check In
 - Check in part/issue
 - Undo Check in
 - Add an issue
 - Combining issues
 - Predict next group of serials
 - Delete issues/parts
- Serial Labels (7.4)

Serials – Creating the SHR

New Serial Holdings Record - 1

[Sports illustrated. Sports almanac.](#)

Status: Destination: Bib control number: 894905
Serial holdings record ID: Collection: Order Type:
Copy no.: 1 Material type: ISSN/ISBN: 1056-7887

[Details](#) [Notes](#) [Orders](#) [Claims](#)

Status (None) **Destination** Pottersville Public Library (PPL) **Copy no.** 1 **Bib control number*** 894905 **FIND**

Order Type Subscription **Collection** (None) **Material type** (None)

Holdings Display

Call Number Scheme Dewey Decimal **Prefix** **Classification** **Cutter** Display in PAC

Completeness Code (None) **Retention Designator** (None)

Publication Patterns

[+ NEW PATTERN](#) [x CLOSE PATTERN](#) [↶ REOPEN PATTERN](#) [🗑 DELETE](#)

<input type="checkbox"/>	CATEGORY	FREQUENCY	START DESIGNATION	REGULARITY PATTERN	CALENDAR CHANGE	STATUS
--------------------------	----------	-----------	-------------------	--------------------	-----------------	--------

- New ▾
- Authority Record
- Bibliographic Record
- Fiscal Year
- Invoice
- Patron Record
- Purchase Order
- Record Set
- Serial Holdings Record**
- Supplier

Serials – Creating the SHR

New Serial Holdings Record - 1

SAVE
CLOSE

Sports illustrated. Sports almanac.

Status:

Serial holdings record ID:

Copy no.: 1

Destination:

Collection:

Bib control number: 894905

Order Type:

Details

Notes

Orders

Claims

Electronic Access Notes

Shared Public Notes

Non-Public Notes

Non-Public/Warning Notes

New Serial Holdings Record - 1

SAVE
CLOSE

Sports illustrated. Sports almanac.

Status:

Serial holdings record ID:

Copy no.: 1

Destination:

Collection:

Material type:

Bib control number: 894905

Order Type:

ISSN/ISBN: 1056-7887

Details

Notes

Orders

Claims

Purchase Order

Owner

Pottersville Public Library (PPL) ▼

Supplier

Michelle's Magazines FIND

SAN

_____ : _____

Plan

Plan Description

SAN

_____ : _____

PO Number

_____ LINK

PO Line Number **Segment Number**

_____ _____

Subscription Details

Start Number	Start Date	Expiration Date	Intent to Cancel Date

New Serial Holdings Record - 1

SAVE
CLOSE

Sports illustrated. Sports almanac.

Status:

Serial holdings record ID:

Copy no.: 1

Destination:

Collection:

Material type:

Bib control number: 894905

Order Type:

ISSN/ISBN: 1056-7887

Details

Notes


Orders

Claims

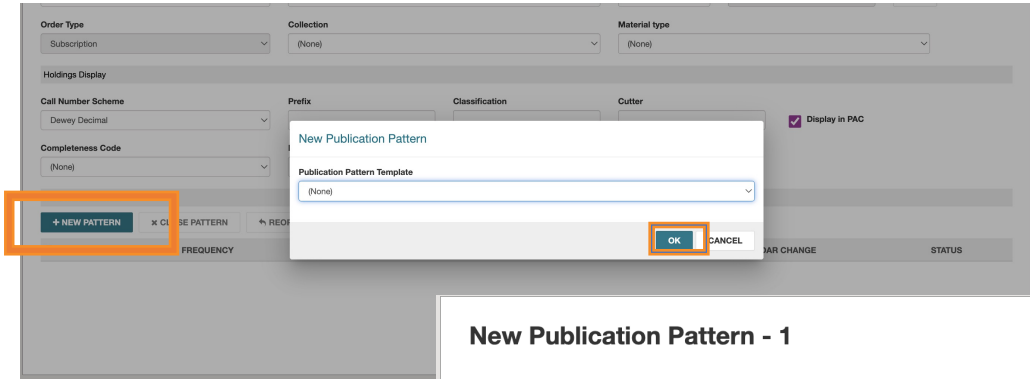
Subscription ID

<input type="checkbox"/>	CATEGORY	CLAIM NUMBER	CLAIM WAITING PERIOD
<input type="checkbox"/>	Basic Bibliographic Unit	1	14 day(s)
<input type="checkbox"/>	Basic Bibliographic Unit	2	30 day(s)

#IUG2023



Serials – Creating Publication Patterns



New Publication Pattern - 1

[SAVE](#) [CLOSE](#)

Category
Basic Bibliographic Unit

[Details](#) [Designation](#) [Regularity Pattern](#)

Options

Arrival Pattern
1 Days After Publication

Issues to Predict
25

Unit Price
\$5.00

Generate Items at Check In Prompt for Barcode

Notes

Type of Supplement or Index

Textual Holdings Note

Textual Holdings Public Note

Serials – Creating Publication Patterns

The screenshot shows the 'Add Chronology Level' dialog box with 'Caption' set to 'Year' and 'Format' set to 'Numeric'. An orange arrow points from the 'Frequency' dropdown menu to the 'Annual' selection in the background interface.

Frequency

- ✓ Annual
- Biennial
- Bimonthly
- Biweekly
- Completely irregular
- Continuously updated
- Daily
- Monthly
- Quarterly
- Semiannual
- Semimonthly
- Semiweekly
- Three times a month
- Three times a week
- Three times a year

Starting Designation

VOL. 54 (Apr. 2023)

The screenshot shows the 'Add Enumeration Level' dialog box with 'Caption' set to 'VOL.', 'Format' set to 'Number', and 'Start Value' set to '54'. The background interface shows the 'Starting Designation' field with the value '(Apr. 2023)'.

Add Enumeration Level

Caption: VOL. Format: Number

Start Value: 54 Units: Continuity:

Alternate Enumeration

Serials – Creating Publication Patterns

Details Designation **Regularity Pattern**

Regularity Pattern

+ ADD PATTERN DELETE

PUBLICATION DETAILS
<input type="checkbox"/> pm 01
<input type="checkbox"/> pm 02
<input type="checkbox"/> pm 03
<input type="checkbox"/> pm 04
<input type="checkbox"/> pm 05
<input type="checkbox"/> pm 06
<input type="checkbox"/> pm 07
<input type="checkbox"/> pm 08
<input type="checkbox"/> pm 09
<input type="checkbox"/> pm 10
<input type="checkbox"/> pm 11

Add Regularity Pattern

Valid From and To values include: Year (1753 - 9999), Month (1-12), Season (21-24), Week of month (09, 98, 97, 00, 01, 02, 03, 04, 05), Week of year (1-53), Day of month (1-31), Day of week (su, mo, tu, we, th, fr, sa).

Publication Code: **Combined** (selected), Omitted, Published

Calendar Unit:

From: To:

OK CANCEL

Predict Issues/Parts

The following issues/parts will be created:

DESIGNATION	PUBLICATION DATE	EXPECTED ARRIVAL DATE
VOL. 54 (Apr. 2023)	4/12/2023	4/13/2023
VOL. 55 (May 2023)	5/12/2023	5/13/2023
VOL. 56 (June 2023)	6/12/2023	6/13/2023
VOL. 57 (July 2023)	7/12/2023	7/13/2023
VOL. 58 (Aug. 2023)	8/12/2023	8/13/2023
VOL. 59 (Sep. 2023)	9/12/2023	9/13/2023
VOL. 60 (Oct. 2023)	10/12/2023	10/13/2023
VOL. 61 (Nov. 2023)	11/12/2023	11/13/2023
VOL. 62 (Dec. 2023)	12/12/2023	12/13/2023

PREDICT SKIP

Publication Patterns

+ NEW PATTERN x CLOSE PATTERN REOPEN PATTERN DELETE

CATEGORY	FREQUENCY	START DESIGNATION	REGULARITY PATTERN	CALENDAR CHANGE	STATUS
<input type="checkbox"/> Basic Bib / 1	Monthly	VOL. 54 (Apr. 2023)	pm 01,02,03,04,05,06,07,08,09,10,11,12		Open

Serials – Closing Publication Patterns

Holdings Display

Call Number Scheme: Dewey Decimal

Prefix: []

Completeness Code: (None)

Retention Designation: (None)

Publication Patterns

+ NEW PATTERN **x CLOSE PATTERN** ← REOPEN PATTERN 🗑️ DELETE

Display in PAC

Close Publication Pattern

Start Date: 4/12/2023 End Date: 4/12/2023

CONTINUE CANCEL

CATEGORY	FREQUENCY	START DESIGNATION	REGULARITY PATTERN	CALENDAR CHANGE	STATUS
Basic Bib / 1	Monthly	VOL. 54 (Apr. 2023)	pm 01,02,03,04,05,06,07,08,09,10,11,12		Open

Serials – Copying the SHR

Serial Holdings Record ⓘ

Sports illustrated. Sports almanac.

Status: Serial holdings record ID: 1432 Copy no.: 1

Destination: **Pottersville Public Library (PPL)** Collection: **(None)** Material type:

Bib control number: 894905 Order Type: **Subscription** ISSN/ISBN: 1056-7887

SAVE ACTIONS - LINKS - REFRESH CLOSE

Copy Delete

[Details](#) [Notes](#) [Orders](#) [Claims](#)

Status: (None) Destination: Pottersville Public Library (PPL) Copy no.: 1 Bib control number*: 894905 FIND

New Serial Holdings Record - 2

Sports illustrated. Sports almanac.

Status: Serial holdings record ID: 2 Copy no.:

[Details](#) [Notes](#) [Orders](#) [Claims](#)

Status: (None) Order Type: Subscription

- Galway City Library (TAFT)
- Goshen Branch Library (FRANK)
- Harding Public Library (HARD)
- Harper Campus Library (HARP)
- Harris Campus Library (HARRIS)
- Hayes Public Library (HAYES)
- Jefferson Public Library (JEFF)
- Johnson Public Library (JPL)
- Martin Luther College Library (VINE)
- Metropolitan Branch (METRO)
- Montana Avenue Branch (MAB)
- North Branch (NORTH)**
- Outreach Services (OUTREACH)
- Pierce Public Library (PIERCE)
- ✓ Pottersville Public Library (PPL)
- Quaker Street Branch (QUA)
- Red Rock Public Library (RRPL)
- Repository Used Reference (RUR)
- South Main Library (SOUTH)
- Thompson Falls High School (MORC)

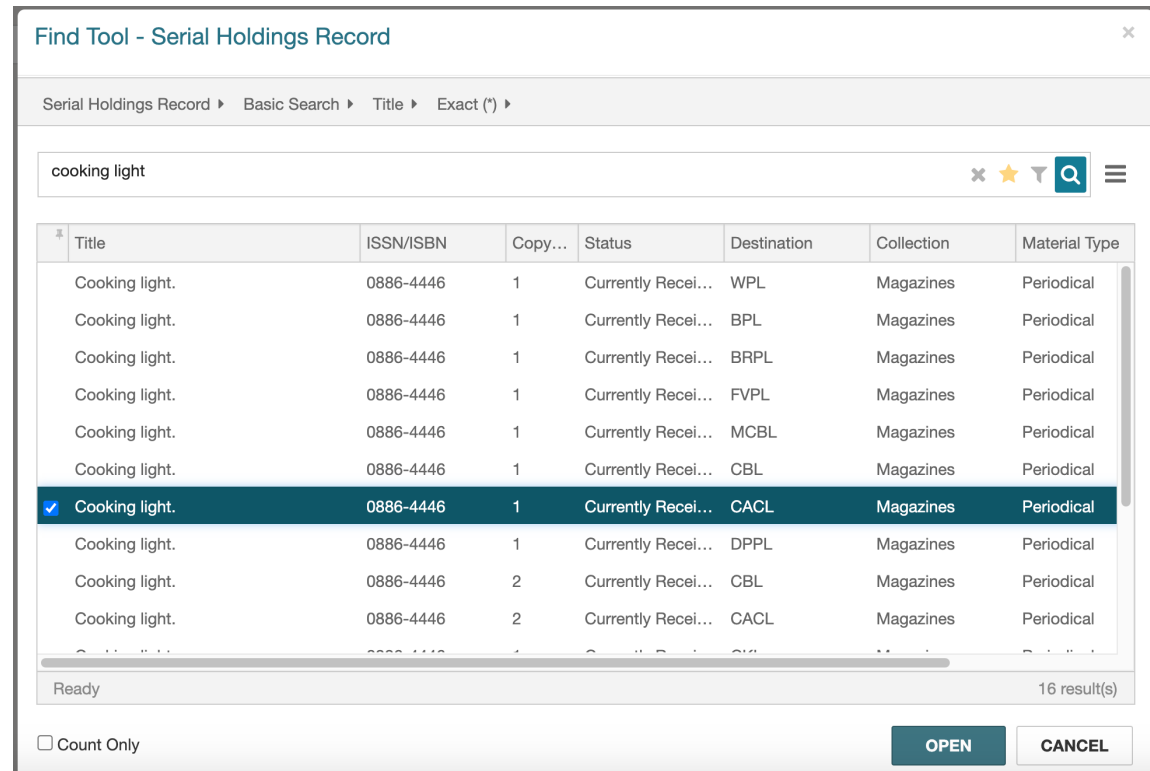
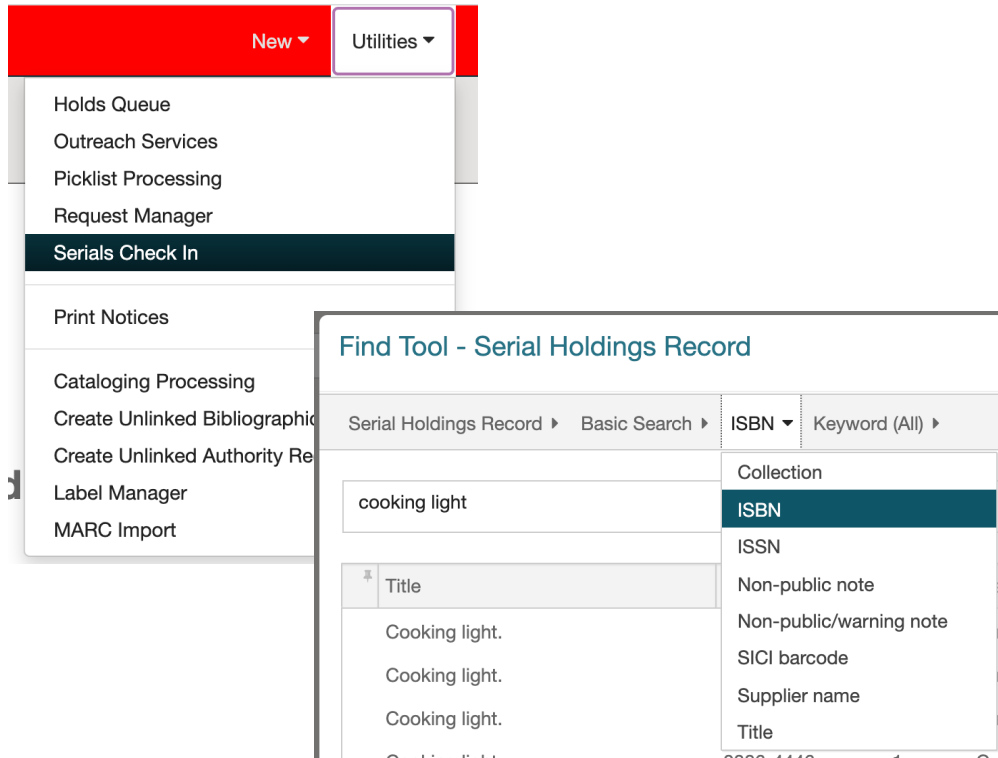
Bib control number: 894905 Order Type: **Subscription** ISSN/ISBN: 1056-7887

SAVE CLOSE

Copy no. Bib control number*: 894905 FIND

Material type: (None)

Serials – Serials Check In



- Click on “Utilities and select “Serials Check In”
- This will open the Find Tool and allow you to search Serials Holding Records

Serials – Check In

- Click the box by the issue to be checked in and then click the “Check In” Button

Serials Check In **SAVE** **ACTIONS** **REFRESH** **RESULTS** **CLOSE**

Cooking light.

Status: **Currently Received** Destination: **Cambridge Library (CACL)** Non-Public Notes Non-Public Warning Notes

Serial holding record ID: **120** Bib control number: **116390**

Copy no.: **1** Collection: **Magazines (MAG)**

Call number: Material type: **Periodical**

Check In **Combine Issues** **More** **Issue/Part Status:** Not Received **Filter by Column** **Filter**

	DESIGNATION	CATEGORY	EXPECTED	STATUS	STATUS DATE	PATTERN
<input checked="" type="checkbox"/>	V. 35 No. 4 (May/June 2021)	Basic Bib / 1	4/16/2021	Pending Claim	6/2/2021	Open
<input type="checkbox"/>	V. 35 No. 6 (July 2021)	Basic Bib / 1	6/17/2021	Expected	10/12/2020	Open
<input type="checkbox"/>	V. 35 No. 7 (August 2021)	Basic Bib / 1	7/18/2021	Expected	10/12/2020	Open
<input type="checkbox"/>	V. 35 No. 8 (September 2021)	Basic Bib / 1	8/18/2021	Expected	10/12/2020	Open
<input type="checkbox"/>	V. 35 No. 9 (October 2021)	Basic Bib / 1	9/17/2021	Expected	10/12/2020	Open
<input type="checkbox"/>	V. 35 No. 10 (November 2021)	Basic Bib / 1	10/18/2021	Expected	10/12/2020	Open

Create Item for Issue/Part

Title: **Cooking light.**

Destination: **Cambridge Library (CACL)**

Designation: **V. 35 No. 4 (May/June 2021)**

Unit Price: **\$ 11.00**

Item Barcode: **MR12344**

CONTINUE **CANCEL**

Label queued successfully.

Serials – Label Printing

Label queued successfully.

The screenshot shows a navigation menu with a red header containing 'New' and 'Utilities' dropdowns. The 'Utilities' dropdown is open, listing several options: 'Holds Queue', 'Outreach Services', 'Picklist Processing', 'Request Manager', 'Serials Check In', 'Print Notices', 'Cataloging Processing', 'Create Unlinked Bibliographic Record Set', 'Create Unlinked Authority Record Set', 'Label Manager' (highlighted in dark blue), and 'MARC Import'. The 'twod' logo is visible at the bottom left of the menu area.

The 'Label Manager' interface features a title bar with 'Label Manager' on the left and 'SAVE', 'ACTIONS', 'REFRESH', and 'CLOSE' buttons on the right. Below the title bar is a 'Label' dropdown menu currently set to 'Serial Sheets'. The main content area displays a table of serials with their corresponding labels. The 'ACTIONS' dropdown is open, showing 'Clear Labels' and 'Print Labels' options.

MAG The American scholar [magazine]. (April 2023)	PER Cooking light. Vol. 12 No. 4 (May 2009)
PER Cooking light. Vol. 12 No. 5 (June 2009)	PER Cooking light. Vol. 12 No. 6 (July/Aug. 2009)
PER Cooking light. Vol. 12 No. 7 (Sep. 2009)	PER Cooking light. Vol. 12 No. 8 (Oct. 2009)
PER Cooking light. Vol. 12 No. 9/10 (Nov./Dec. 2009)	PER Cooking light. Vol. 13 No. 1 (Jan./Feb. 2010)

- The label manager can be found under “Utilities”
- Printing is done under the “Actions”

Serials – Undo Check In

A dropdown menu is open over a table. The menu options are: All, Received (highlighted with a checkmark), Expected, Pending Claim, Claimed, Not Available, Never Published, and Not Received. The table below shows columns for Issue/Part Status, DATE, and another column. The first row has 'EXPECTED' and '6/17/2017'. The second row has '7/18/2017'. The third row has '8/18/2017', 'Received', and '2/21/2020'.

Issue/Part Status:	DATE	
EXPECTED	6/17/2017	
	7/18/2017	
	8/18/2017	Received 2/21/2020

- Change to received status
- Click the check box by the issue to undo
- Click the “more” button and then “undo check in”
- It will move the issue back to expected (and delete the item record)

The screenshot shows the Leap Serials Check In interface. At the top, there's a search bar and navigation links. The main heading is 'Serials Check In' with a help icon. Below it, there are buttons for 'SAVE', 'ACTIONS', 'REFRESH', 'RESULTS', and 'CLOSE'. The title of the record is 'Cooking light.'. Metadata includes: Status: Currently Received, Destination: Cambridge Library (CACL), Serial holding record ID: 120, Copy no.: 1, Call number: (empty), Bib control number: 116390, Collection: Magazines (MAG), and Material type: Periodical. There are two empty text boxes for 'Non-Public Notes' and 'Non-Public Warning Notes'. At the bottom, there's a table with columns: DESIGNATION, CATEGORY, EXPECTED, STATUS, STATUS DATE, PATTERN, and ROUTE STATUS. The first row is selected with a checkbox and has a 'More' dropdown menu open, showing 'Undo Check In' and 'Delete' options. The 'Issue/Part Status' dropdown is set to 'Received'.

DESIGNATION	CATEGORY	EXPECTED	STATUS	STATUS DATE	PATTERN	ROUTE STATUS
<input checked="" type="checkbox"/> V. 31 No. 6 (July 2017)	Basic Bib / 1	6/17/2017	Received	4/14/2017	Open	
<input type="checkbox"/> V. 31 No. 7 (August 2017)	Basic Bib / 1	7/18/2017	Received	2/21/2020	Open	
<input type="checkbox"/> V. 31 No. 8 (September 2017)	Basic Bib / 1	8/18/2017	Received	2/21/2020	Open	
<input type="checkbox"/> V. 31 No. 9 (October 2017)	Basic Bib / 1	9/17/2017	Received	2/21/2020	Open	
<input type="checkbox"/> V. 31 No. 10 (November 2017)	Basic Bib / 1	10/18/2017	Received	8/17/2020	Open	
<input type="checkbox"/> V. 34 No. 8 (September 2020)	Basic Bib / 1	8/18/2020	Received	8/21/2020	Open	

Serials – Combining Issues

- Click the check boxes on the 2 issues to combine and then click “combine issues”
- Complete form and click “continue”

Serials Check In 🔔

SAVE ACTIONS REFRESH RESULTS CLOSE

Cooking light.

Status: **Currently Received** Destination: **Cambridge Library (CACL)** Non-Public Notes Non-Public Warning Notes

Serial holding record ID: **120** Bib control number: **116390**

Copy no.: **1** Collection: **Magazines (MAG)**

Call number: Material type: **Periodical**

Check In Combine Issues More

Issue/Part Status: Expected Filter by Column Filter

DESIGNATION	CATEGORY	EXPECTED	STATUS	STATUS DATE	PATTERN	ROUTE STATUS
<input checked="" type="checkbox"/> V. 31 No. 6 (July 2017)	Basic Bib / 1	6/17/2017	Expected	7/7/2021	Open	
<input checked="" type="checkbox"/> V. 35 No. 6 (July 2021)	Basic Bib / 1	6/17/2021	Expected	10/12/2020	Open	
<input type="checkbox"/> V. 35 No. 7 (August 2021)	Basic Bib / 1	7/18/2021	Expected	10/12/2020	Open	
<input type="checkbox"/> V. 35 No. 8 (September 2021)	Basic Bib / 1	8/18/2021	Expected	10/12/2020	Open	
<input type="checkbox"/> V. 35 No. 9 (October 2021)	Basic Bib / 1	9/17/2021	Expected	10/12/2020	Open	
<input type="checkbox"/> V. 35 No. 10 (November 2021)	Basic Bib / 1					

Combine Issues

Combine: Designation:

Title of:

Public:

Non-public:

Non-public/warning:

Expected arrival date:

CONTINUE CANCEL

DESIGNATION	CATEGORY	EXPECTED	STATUS	STATUS DATE	PATTERN	ROUTE STATUS
<input type="checkbox"/> V. 31/35 No. 6 (July 2017/July 2021)	Basic Bib / 1	6/17/2017	Expected	7/7/2021	Open	

Serials – Adding An Issue

- Click “Actions” and select add issue/part
- Choose the correct pub pattern and click “select”
- Fill out the new issue record and click save

Serials Check In

SAVE ACTIONS REFRESH RESULTS CLOSE

Predict Issues/Parts
Add Issue/Part

Status: **Currently Received** Destination: **Cambridge Library (CACL)**

Serial holding: **120**

Copy no.: 1

Call number:

Publication Patterns

CATEGORY	FREQUENCY	START DESIGNATION	REGULARITY PATTERN	CALENDAR CHANGE
Basic Bib / 1	Monthly	V. 31 No. 4 (May 2017)	cm 01/02 pm 03,04,05,06,07,08,09,10,11,12	
Supplement / 1	Completely Irregular			

SELECT CANCEL

DESIGNATION	CATEGORY	START DATE	STATUS	STATUS DATE	ROUTE STATUS
<input type="checkbox"/> V. 31/35 No. 4					
<input type="checkbox"/> V. 35 No. 7					
<input type="checkbox"/> V. 35 No. 8					
<input type="checkbox"/> V. 35 No. 9					
<input type="checkbox"/> V. 35 No. 10 (November 2021)	Basic Bib / 1	10/18/2021	Expected	10/12/2020	Open
<input type="checkbox"/> V. 35 No. 11 (December 2021)	Basic Bib / 1	11/17/2021	Expected	10/12/2020	Open

New Issue Record

SAVE CLOSE

Cooking light.

Status: **Expected** Serial holding record ID: 120 Bib control number: 116390

Designation: **(April 2021)** Copy no.: 1 Collection: **Magazines (MAG)**

Item record: Destination: **Cambridge Library (CACL)** Material type:

Details Notes

Status: **Expected** Status Date: **7/7/2021** Expected Arrival Date: **7/7/2021** Chronology Date: **4/1/2021**

Title of:

Issue Unit Price:

Enumeration:

[title]

Chronology:

Year: **2021** Month: **April**

	DESIGNATION	CATEGORY	EXPECTED	STATUS	STATUS DATE	PATTERN	ROUTE STATUS
<input type="checkbox"/>	Special Edition (April 2021)	Supplement / 1	7/7/2021	Expected	7/7/2021	Open	

Serials – Predict More Issues

Serials Check In 📄

Cooking light.

Status: **Currently Received** Destination: **Cambridge Library (CACL)**

Serial holding record ID: **120** Bib control number: **116390**

Copy no.: **1** Collection: **Magazines (MAG)**

Call number: Material type: **Periodical**

Non-Public Notes Non-Public Warning Notes

Issue/Part Status: Expected Filter by Column Filter

DESIGNATION	CATEGORY	EXPECTED	STATUS
<input type="checkbox"/> V. 31 No. 6 (July 2017)	Basic Bib / 1	6/17/2017	Expected
<input type="checkbox"/> V. 35 No. 6 (July 2021)	Basic Bib / 1	6/17/2021	Expected
<input type="checkbox"/> V. 35 No. 7 (August 2021)	Basic Bib / 1	7/18/2021	Expected
<input type="checkbox"/> V. 35 No. 8 (September 2021)	Basic Bib / 1	8/18/2021	Expected
<input type="checkbox"/> V. 35 No. 9 (October 2021)	Basic Bib / 1	9/17/2021	Expected
<input type="checkbox"/> V. 35 No. 10 (November 2021)	Basic Bib / 1	10/18/2021	Expected

- Click “Actions” and then “Predict Issues/Parts”
- Choose the correct pub pattern
- Click Continue
- View the predictions and click continue

Predict Issues/Parts

The following issues/parts will be created:

DESIGNATION	PUBLICATION DATE	EXPECTED ARRIVAL DATE
V. 39 No. 6 (July 2025)	7/1/2025	6/17/2025
V. 39 No. 7 (August 2025)	8/1/2025	7/18/2025
V. 39 No. 8 (September 2025)	9/1/2025	8/18/2025
V. 39 No. 9 (October 2025)	10/1/2025	9/17/2025
V. 39 No. 10 (November 2025)	11/1/2025	10/18/2025

CONTINUE CANCEL

Serials – Delete An Issue

- Click the check box of the issue to be deleted
- Click the “delete” button
- Click “yes” to confirm

The screenshot shows the LEAP Serials Check In interface. At the top, there is a red navigation bar with the LEAP logo, a search bar, and a 'FIND' button. Below this, there are buttons for 'CHECK IN' and 'NEW PATRON', and a 'PRINT' button. The main content area is titled 'Serials Check In' and includes a 'SAVE' button, an 'ACTIONS' dropdown, a 'REFRESH' button, a 'RESULTS' button, and a 'CLOSE' button. The interface displays metadata for a serial, including 'Status: Currently Received', 'Destination: Cambridge Library (CACL)', 'Serial holding record ID: 120', 'Bib control number: 116390', 'Copy no.: 1', 'Collection: Magazines (MAG)', and 'Material type: Periodical'. Below this is a table of issues with columns for 'DESIGNATION', 'CATEGORY', 'EXPECTED', 'STATUS', 'STATUS DATE', 'PATTERN', and 'ROUTE STATUS'. The first row is selected, and a 'Delete' button is highlighted. A confirmation dialog titled 'Delete Issue/Part' is open, asking 'Are you sure you want to permanently delete the selected item?' with 'YES' and 'NO' buttons.

DESIGNATION	CATEGORY	EXPECTED	STATUS	STATUS DATE	PATTERN	ROUTE STATUS
<input checked="" type="checkbox"/> Special Edition (April 2021)	Supplement / 1	7/7/2021	Expected	7/7/2021	Open	
<input type="checkbox"/> V. 31/35 No. 6 (July 2017/July 2021)	Basic Bib / 1	6/17/2017	Expected	7/7/2021	Open	
<input type="checkbox"/> V. 35 No. 7 (August 2021)	Basic Bib / 1	7/18/2021	Expected	10/12/2020	Open	
<input type="checkbox"/> V. 35 No. 8 (September 2021)	Basic Bib / 1	8/18/2021	Expected	10/12/2020	Open	
<input type="checkbox"/> V. 35 No. 9 (October 2021)						
<input type="checkbox"/> V. 35 No. 10 (November 2021)						
<input type="checkbox"/> V. 35 No. 11 (December 2021)						
<input type="checkbox"/> V. 36 No. 1 (January/February 2022)						
<input type="checkbox"/> V. 36 No. 2 (March 2022)						



THANK YOU

Questions?