

Checking for Duplicate Bibliographic Records without Saving

Leap performs duplicate checking when you save a bibliographic record. As of version 7.7, you can also check for duplicate bibliographic records at any time, without changing or saving the bibliographic record.

To check for duplicate bibliographic records without saving

1. Find the bibliographic record you want to edit, and open it in the Bibliographic Record workflow.
2. Select **Actions > Duplicate Check**.

Leap performs the duplicate check and displays results on the Bibliographic Record Duplicate Detection Results dialog.

Note:

Leap displays the Bibliographic Record Duplicate Detection Results dialog regardless of whether the system finds potential duplicate records using your library's duplicate detection rules. If the duplicate check finds no potential duplicates, you can still manually add duplicate records as described below.

Bibliographic Record Duplicate Detection Results

Record to Retain

CONTROL#	TITLE	AUTHOR	FORMAT	ITEMS	STATUS
1433765	Ocean	MacQuitty, Miranda.	Book	1	Final

Record(s) to Replace

<input type="checkbox"/>	CONTROL#	TITLE	AUTHOR	FORMAT	ITEMS	STATUS	REASON
<input type="checkbox"/>	546559	Ocean	MacQuitty, Miranda.	Book	5	Final	ISBN;Author/Title;Just Title and;Title/260 \$c;publisher and title
<input type="checkbox"/>	1426718	Ocean	MacQuitty, Miranda.	Book	1	Final	ISBN;Author/Title;Just Title and;Title/260 \$c;publisher and title

ADD TITLES

REPLACE

CANCEL

3. On the Bibliographic Record Duplicate Detection Results dialog, do one of the following:
 - Replace one or more duplicate records with the record you are saving. To do this:
 - a. (Optional) To manually add a duplicate record that does not already appear in the **Record(s) to Replace** list, do the following:
 - i. Select **ADD TITLES**.
 - ii. Use the Find Tool to search for a bibliographic record and select it.
 - iii. Select **OPEN**.

The record appears in the **Record(s) to Replace** list.
 - b. Select one or more records in the **Record(s) to Replace** list.
 - c. Select **REPLACE**.

Leap deletes the selected records, moves their linked items and holds to the bibliographic record that will be retained, and saves the record that will be retained.

- Select **CANCEL** to return to the bibliographic record without making any changes.

Comparing Bibliographic Records in Leap

In previous versions, you could only view or edit a single bibliographic record at a time in Leap. As of version 7.7, you can now compare and edit up to 20 bibliographic records at the same time on the Compare Records workflow.

To access the Compare Records workflow, you must have the **Bibliographic records: Modify** permission enabled in Polaris Administration. For more information about cataloging permissions, search for "Cataloging Permissions" in the Polaris staff client help.

This section covers the following topics:

- [Comparing and Editing Bibliographic Records](#)
- [Using Keyboard Shortcuts on the Compare Records Workflow](#)

Comparing and Editing Bibliographic Records

To compare and edit bibliographic records

1. Find the bibliographic record you want to compare to one or more other records, and open it in the Bibliographic Record workflow.

Note:

We refer to this record as the *current record* in the workflow below.

2. Select **Actions > Compare**.

The bibliographic record Find Tool appears.

3. Search for the bibliographic record or records you want to compare to the current record.
4. From the list of search results, select one or more records. You can select up to 19 records.

Note:

We refer to these records as the *compare records* in the workflow below.

5. Select **Open**.

Leap displays the records in the Compare Records workflow. The current record appears on the left side of the screen and the compare record or records appear on the right side of the screen.

Tag	Ind	Data
LDR	>	cam a22 a 4500
001		1438727
003		PolarisTest
005		20170929160114.0
008	>	061114s2008 ilua j 001 0 eng
010		#a 2006037975
020		#a9781403494306 (hc)
020		#a1403494304 (hc)
020		#a9781403494368 (pb)
020		#a1403494363 (pb)
035		#a(OCoLC)ocn169870136

Tag	Ind	Data
LDR	>	cam 22 a 4500
001		556388
005		20050421123015.0
008	>	040312s2005 flua j 001 0 eng u
010		#a 2004006059
020		#a1595151567 (hardcover)#c\$20.64
035		#aAHB-3941

6. Do one or more of the following:

- [View a different compare record.](#)
- [Add or edit MARC data.](#)
- [Align MARC tags.](#)
- [Copy MARC tags from one record to another.](#)
- [Delete MARC tags.](#)
- [Add a new compare record.](#)
- [Close a compare record.](#)

7. When you're finished comparing and editing records, do one or both of the following:

- Save your changes to one or more of the records on the Compare Records workflow. To do this, select **Save Record**  in the header of the records

you want to save.

Leap performs record validation, duplicate detection, and authority control, and then saves the record. For more information, see [Bibliographic Record Validation, Duplicate Checking, and Authority Control](#).

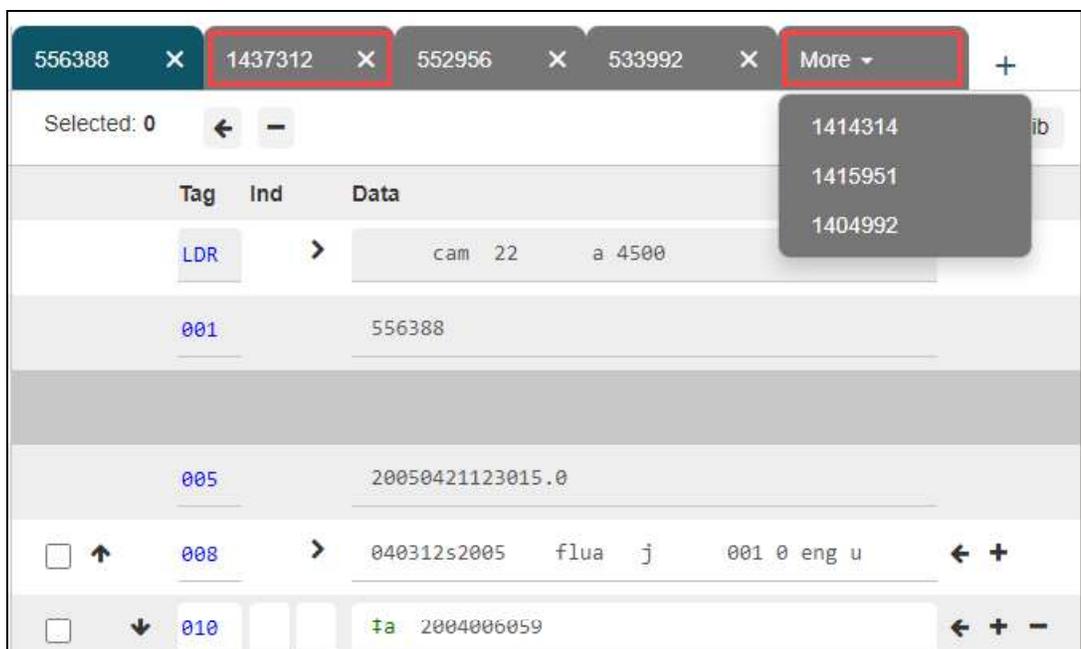
- Select **CLOSE** to close the Compare Records workflow.

Viewing a Different Compare Record

If you selected multiple compare records in step 4, the first record you selected appears by default on the Compare Records workflow. You can switch between compare records.

To view a different compare record

- Do one of the following:
 - Select the tab with the control number of the record you want to view.
 - Select **More**, then select the control number of the record you want to view.



Leap displays the new compare record on the right side of the Compare Records workflow.

Adding or Editing MARC Data

You can add or edit MARC data in one or more of the records displayed in the Compare Records workflow. For details on editing bibliographic records, see [Edit a Bibliographic Record](#).

Aligning MARC Tags

If tags appear in a different order in the records you are comparing, you can align the tags.

Note:

If your library uses automatic MARC tag sorting for bibliographic records, tags displayed on the MARC Compare workflow are aligned by default. However, you may still want to use the align tags feature to reorder tags after editing one or more of the records you are comparing. For more information about automatic tag sorting, search for "Turn Automatic MARC Tag Sorting On or Off" in the Polaris staff client help.

To align MARC tags

- In the header of the compare record, select **Align Tags** .

Leap sorts the tags in the records that appear on screen according to the order specified in the **MARC validation: Bibliographic** profile in Polaris Administration (staff client). For more information, search for "Change the Sort Order of MARC Tags" in the Polaris staff client help.

Note:

The changes to the tag order are temporary unless you save the record or records.

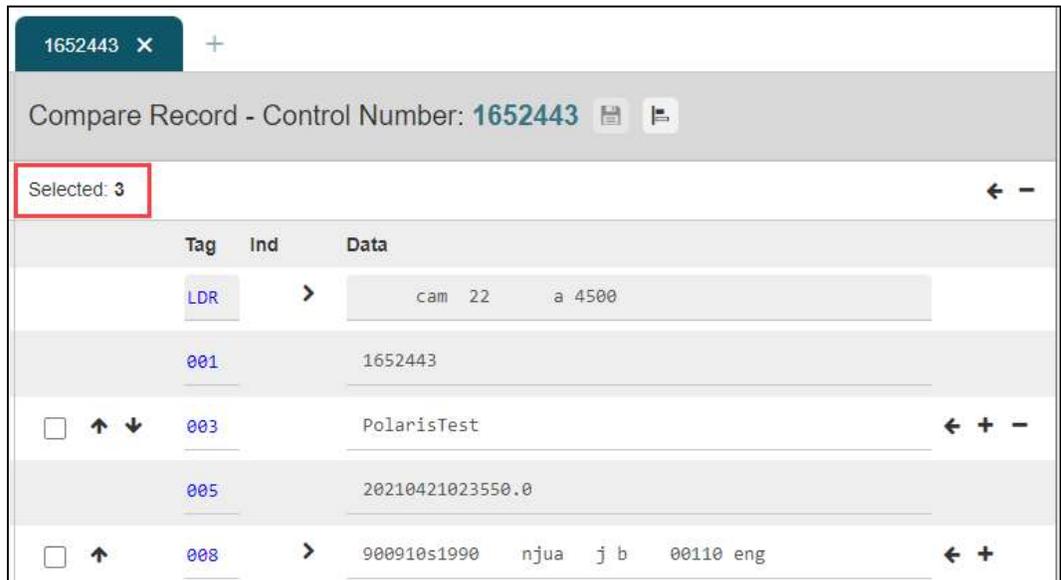
Copying MARC Tags from One Record to Another

You can copy tags between the two records that currently appear on the Compare Records workflow.

You can't copy the Leader, the 001 tag, or the 005 tag.

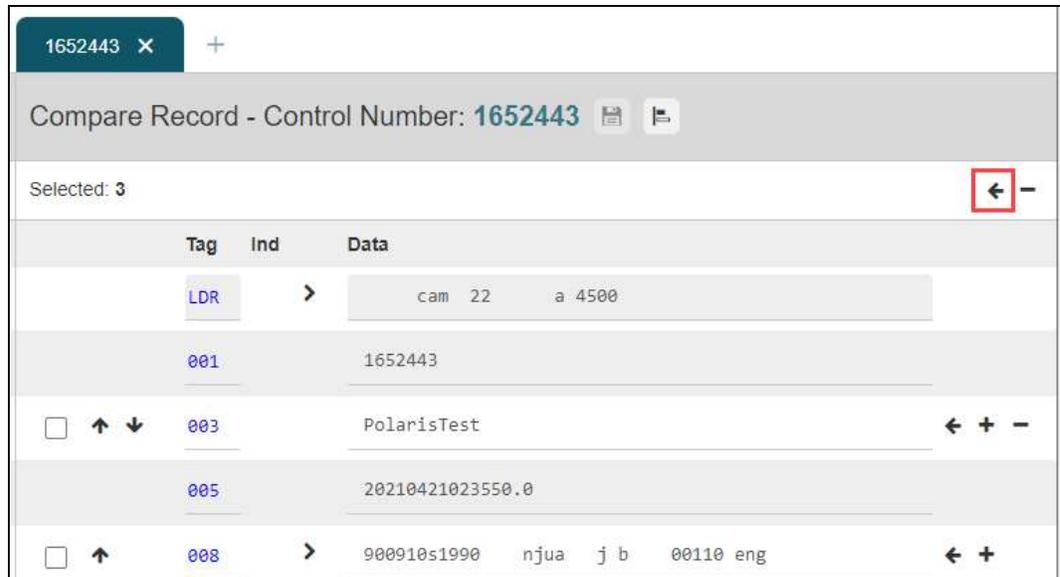
To copy tags from one record to another

- Do one of the following:
 - To copy a single tag, select the right arrow  or the left arrow  next to the tag.
Leap copies the tag from one record to the other.
 - To copy multiple tags:
 1. Select the tags you want to copy.
Leap displays the number of tags you selected.



2. Select the **Copy Selected Rows** icon at the top of the record. The icon is a right arrow  or a left arrow , depending on whether you are

copying tags from the current record or from the compare record.



Deleting MARC Tags

You can delete tags from any record in the Compare Records workflow.

You can't delete the 001 tag, the 005 tag, or any tag that your library has defined as a required bibliographic record tag. For more information about required tags, search for "Administering MARC Validation and Display" in the Polaris staff client help.

To delete tags

1. Select the tags you want to delete.

Leap displays the number of tags you selected.

1652443 X +

Compare Record - Control Number: 1652443 [Print] [List]

Selected: 3 ← -

	Tag	Ind	Data	
	LDR	>	cam 22 a 4500	
	001		1652443	
<input type="checkbox"/>	↑ ↓	003	PolarisTest	← + -
	005		20210421023550.0	
<input type="checkbox"/>	↑	008	> 900910s1990 njua j b 00110 eng	← +

2. At the top of the record, select the delete rows icon .

1652443 X +

Compare Record - Control Number: 1652443 [Print] [List]

Selected: 3 ← -

	Tag	Ind	Data	
	LDR	>	cam 22 a 4500	
	001		1652443	
<input type="checkbox"/>	↑ ↓	003	PolarisTest	← + -
	005		20210421023550.0	
<input type="checkbox"/>	↑	008	> 900910s1990 njua j b 00110 eng	← +

Adding a New Compare Record

You can add a new compare record to the Compare Records workflow.

To add a new compare record

1. In the header of the compare record, select the plus sign.



Leap displays the bibliographic record Find Tool.

2. Search for the record or records you want to compare to the current record.
3. From the list of search results, select one or more records. The Compare Records workflow can display up to 19 compare records.
4. Select **Open**.

The new compare record or records appear on the Compare Records workflow.

Closing a Compare Record

You can close a compare record to remove it from the Compare Records workflow.

To close a compare record

- In the header of the compare record you want to delete, select the close button.



Leap removes the compare record from the Compare Records workflow.

Using Keyboard Shortcuts on the Compare Records Workflow

Version 7.7 includes the following new keyboard shortcuts, which you can use when editing records on the Compare Records workflow. You can also use other cataloging keyboard shortcuts on the Compare Records workflow. See [Keyboard Shortcuts](#) for a list of all available shortcuts.

Action	Keyboard Shortcut
Copy the current tag from one record to the other.	Ctrl + M
Move your cursor from the compare record to the same location in the current record.	Ctrl + Left arrow
Move your cursor from the current record to the same location in the compare record.	Ctrl + Right arrow

Support for Loading All Records in a Record Set

In version 7.7, Leap loads all records when you view a record set. For sets over 250 records, use the **LOAD ALL** option at the top or bottom of the table.

FIND TOOL							LOAD ALL	MORE ▾	Filter
<input type="checkbox"/>	Winter, Nick	172000	1	0	Y	Y	N	Final	
<input type="checkbox"/>	Winterbotham, Ann	149882	2	0	Y	Y	N	Final	
<input type="checkbox"/>	Winterbotham, Ann L.	67507	1	0	Y	Y	N	Final	
<input type="checkbox"/>	Winterbotham, F. W. (Frederick William), 1897-	11520	3	0	Y	Y	N	Final	
<input type="checkbox"/>	Winterbourn, Sally Brice	2166	1	0	Y	Y	N	Final	
<input type="checkbox"/>	Winternitz, Helen	127958	5	0	Y	Y	N	Final	
<input type="checkbox"/>	Winters, Charles D., 1941-	26067	3	0	Y	Y	N	Final	
<input type="checkbox"/>	Winters, Lynn	137425	1	0	Y	Y	N	Final	
250 of 446 record(s) retrieved								LOAD ALL	

Leap loads all the records into the browser.

Additionally, you can now use an RFID pad to scan items into Weeding Record Sets if your workstation supports RFID.

Using New Keyboard Shortcuts in Leap

Leap now includes the following keyboard shortcuts.

Note:

Browser extensions can use the same keyboard shortcuts. If you have a browser extension installed that shares these keyboard shortcuts, you might need to disable the browser extension to use the keyboard shortcuts in Leap.

Action	Keyboard Shortcut
Return to search results.	Ctrl + Shift + K
Open the upper-left hamburger menu.	Ctrl + Shift + D
Print the current workflow.	Ctrl + Shift + [
Open the New menu. Use the arrow keys to move up or down in the menu. Highlight your selection, and select Enter .	Ctrl + Shift + L
Open the Utilities menu. Use the arrow keys to move up or down in the menu. Highlight your selection, and select Enter .	Ctrl + Shift + U
Open the Find Tool.	Ctrl + Shift + '

New Views in Leap Workforms

Now you can navigate between workforms using the added views in several Leap workforms. From the following workforms, you can do the following using new views:

- [Bibliographic Record workform](#) – You can now view and open the following:
 - Purchase order records
 - Invoice records
- [Item Record workform](#) – You can now view and open the following:
 - Purchase order line item records
 - Invoice line item records
- [Invoice Line Item workform](#) – You can now view and open the following:
 - Item records
- [Purchase Order Line Item workform](#) – You can now view and open the following:
 - Item records

New Statistics for Renewal Counts in Leap and SimplyReports

Leap and SimplyReports now include new ways to see statistics about renewals:

- [Renewal Count Statistics in Leap](#)
- [New Filters in SimplyReports](#)
- [New Output Columns in SimplyReports](#)

Renewal Count Statistics in Leap

The Item Record workform and the Bibliographic Record workform now display renewal count statistics. On each workform, the Statistics view now includes the following statistics for the item or bibliographic record:

- Year-to-date renewals
- Previous year-to-date renewals
- Lifetime renewals

Item Record ⓘ

SAVE
ACTIONS ▾
LINKS ▾
C
CLOSE



Out

Rite of passage
By Wright, Richard, 1908-1960.

Barcode: 0000201369899	<input type="checkbox"/> ILL <input type="checkbox"/> Non-circulating	<input type="checkbox"/> eContent <input checked="" type="checkbox"/> Display in PAC
Call number: FICT Wri YA	Record status: Final	Issue:
Collection: Adult Fiction	Bib control number: 262081	Issue control number:
Shelf location: None	Parent item:	Price: \$12.95
Owning branch: Community Library	Assigned branch: Community Library	Circulation status: Out 9/17/2023 3:28:22 PM

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

Year-to-date circulation: 4	Year-to-date in-house use: 0	Year-to-date renewals: 1	Inventory date: 3/4/1994
Previous year-to-date circulation: 0	Previous year-to-date in-house use: 0	Previous year-to-date renewals: 0	
Lifetime circulation: 12	Lifetime in-house use: 0	Lifetime renewals: 3	

Selecting a Range of Records Using Shift + Click

In Leap you can now use the key combination **Shift + click** to select a range of records in the Find Tool and in record set workform tables. You can use **Shift + click** more than once to select multiple ranges of records in one record list. You can use this key combination whenever a keyboard is available, but not on kiosks without a keyboard.