



# Polaris Leap User Guide

POLARIS LEAP 1.0

INNOVATIVE INTERFACES, INC.

# About Leap Documentation

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# Contents

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<b>Polaris Leap Overview .....</b>	<b>1</b>
Requirements .....	2
Operating Systems / Web Browsers .....	2
Polaris ILS Version .....	2
Camera .....	2
Staff User Permissions in Leap .....	4
Signing in to Polaris Leap .....	5
Browser and Ipad® Issues .....	7
Patron Password Validation in Internet Explorer 11 .....	7
iPad® Display .....	7
Leap User Interface .....	9
Leap Header .....	9
Workforms Menu .....	10
Help Menu .....	10
User Options .....	11
Options Menus .....	12
Navigation Menus .....	13
View Bars .....	13
Button Toolbars .....	14
Required Fields .....	14
Check Boxes .....	14
Command Buttons .....	14
Plus Buttons .....	15
Drop-Down List Boxes .....	15
Date Fields .....	15
Message Boxes .....	16
Summary Bars .....	16
List Views .....	17
Filters .....	17
Search for Records in Leap .....	18

---

Receipt Printing from Leap .....	19
Set user print options in Leap .....	20
Receipt Printer Configuration .....	21
Configure a receipt printer for IE10 or IE 11 on Windows 7 or 8.1 .....	22
Create a custom receipt size for printing from IE on Windows 7 or 8.1 .....	24
Set up the receipt page in IE10 or IE11 .....	25
Configure a receipt printer for Chrome on Windows 7 or 8.1 .....	26
Create a receipt size for printing from Chrome on Windows 7 or 8.1 .....	29
Set up the receipt page in Chrome on Windows 7 or 8.1 .....	30
Configure a receipt printer for Chrome and Safari on Mac OS X .....	31
Create a receipt size for printing from Safari/Chrome on Mac OS X .....	32
<b>The Leap Find Tool .....</b>	<b>34</b>
Count Only Option .....	34
Search Results List .....	34
Find Tool Tabs .....	34
Find Tool System Administration .....	34
Do a basic search for a patron, item, or bibliographic record .....	36
Do a power search .....	39
Save a power search .....	40
Set up and save an SQL search .....	41
Rename a saved search .....	42
Delete a saved search .....	43
Apply a filter to a Find Tool search .....	44
Specify columns for search results .....	46
Save a set of Find Tool search options as your user default .....	48
Sort Find Tool search results list .....	51
<b>Open a Patron, Item, or Bibliographic Record in Leap .....</b>	<b>52</b>
Patron Record .....	53
Patron Record - Library Account view .....	53
Patron Record - Registration View .....	54
Item Record .....	55

---

Item Record - Circulation view .....	55
Item Record - Controls view .....	56
Item Blocks and Notes view .....	57
Item History view .....	58
Bibliographic Record .....	59
Bibliographic Record - Items View .....	60
Bibliographic MARC view .....	61
Bibliographic Record - Statistics view .....	61
Bibliographic Resources view .....	61
Bibliographic Preview view .....	62
Go to the Title in the PAC .....	62
<b>Patron Record - Registration .....</b>	<b>64</b>
Do a quick search for an existing patron .....	65
Use the Find Tool to search for a patron .....	67
View, edit, or renew an existing patron's registration .....	69
Register a new patron .....	71
<b>Patron Record - Library Account .....</b>	<b>76</b>
Items Out List .....	77
Renew items from the items out list .....	79
Reset the due date from the items out list .....	80
Set a special renew date or loan period from the items out list .....	81
Estimate fines from the items out list .....	82
Claim an item from the items out list .....	83
Declare an item lost from the items out view .....	84
View the item record from the items out list .....	85
Patron's Financial Account .....	86
Pay patron charges .....	87
Waive charges .....	88
Add a charge to a patron's account .....	90
Add a credit to a patron's account .....	92
View a patron's collection summary .....	94

---

Remove a patron account from collections .....	95
View a patron's transaction summary .....	96
Claimed and Lost Items .....	97
View estimated fines for claimed and lost items .....	98
View notices for claimed or lost items .....	99
Reset the claim count .....	100
Hold Requests .....	101
Messages or blocks when placing holds .....	102
Place a single hold request for a patron .....	103
Place a hold request from the bibliographic record .....	105
Place a hold request from the item record .....	107
Place multiple holds for the same patron .....	109
Fill a hold now .....	111
Modify a hold .....	112
Reactivate a hold .....	114
Cancel a hold .....	115
Deny a hold .....	116
Group multiple holds .....	117
Set a hold request to Ask me later .....	119
Delete a hold .....	120
View a hold's details and history .....	121
Patron Blocks .....	123
Add a patron block .....	124
Delete patron blocks .....	125
Patron Notes .....	126
Add a patron note .....	127
Delete a patron note .....	128
Reading History .....	129
Remove an item from a patron's reading history .....	130
Patron's Interlibrary Loans .....	131
Notices .....	132

---

View an item's notification history .....	133
Open the item record associated with a notice .....	135
Patron Messages .....	137
Add a patron message .....	138
Delete a patron message .....	139
Patron Associations .....	140
Add a new associated patron .....	141
Edit a patron association .....	143
Delete a patron association .....	145
<b>Checking In Items and Managing Fines .....</b>	<b>146</b>
Check in items .....	147
Manage fines during check in .....	148
Resolve billed items during check in .....	151
<b>Check Out/Renew Items .....</b>	<b>153</b>
Messages and blocks when checking out/renewing .....	154
Check out items .....	155
Set a special due date/loan period during check out .....	156
Reset a special due date/loan period .....	158
<b>Holds Picklist .....</b>	<b>159</b>
Changing pending hold requests from the holds picklist .....	160
Sort and filter the picklist .....	162
Mark a hold request with Ask Me Later .....	163
Indicate an item was located .....	164
Return a located item to the Pending list .....	165
View hold details from the picklist .....	166
Deny hold requests in the picklist .....	168
Cancel hold requests in the picklist .....	169
<b>Index .....</b>	<b>170</b>





## Polaris Leap Overview

The Polaris Leap web application is used to perform the most common library functions, such as registering new patrons, checking out materials, or placing items on hold. Leap is optimized for a desktop computer, but it can be used on a tablet device that can access a modern Web browser, such as an iPad® or Surface™ tablet. Leap is not designed for mobile phones.

Currently Leap's function is not to replace the Polaris ILS, but to complement it. Because Leap uses the existing database and business objects, changes made in Leap appear in the Polaris ILS Staff Client and vice versa.

In addition, the circulation functions available in Leap are controlled by the same Polaris Administration settings as the corresponding functions in the Polaris ILS Staff Client. This includes staff permissions, which control tasks in Leap in the same way as in the staff client, with a few exceptions that are noted in the following section: "Staff User Permissions in Leap" on page 4.

With Leap running on a mobile device, librarians can interact with their patrons without the limits and barriers inherent in a purely desktop system. Instead of patrons standing in line to check out or pay a fine, librarians can get out from behind the desk and serve patrons wherever they are in the library or out in the community. As a Polaris ILS customer, all you need is Leap and an internet connection to extend library services in unique ways.

See also:

- "Requirements" on page 2
- "Browser and Ipad® Issues" on page 7
- "Staff User Permissions in Leap" on page 4
- "Signing in to Polaris Leap" on page 5
- "Leap User Interface" on page 9
- "Search for Records in Leap" on page 18
- "Open a Patron, Item, or Bibliographic Record in Leap" on page 52
- "Receipt Printing from Leap" on page 19

## Requirements

Polaris Leap runs on desktops, notebooks, and tablets with the requirements listed below. Leap is not designed to operate on cell phones.

### Operating Systems / Web Browsers

- The web browser must support HTML 5.
- Windows 7/8/8.1 (includes Surface tablets)
- Microsoft Internet Explorer 10/11
- Google Chrome v36+
- OS X (recommend Mavericks 10.9 / Mountain Lion 10.8)
- Safari 7+
- Google Chrome v36+
- iOS v7+ (iPad 3rd gen+, not phones)
- Safari 6+
- Chrome v36+

### Polaris ILS Version

Polaris Integrated Library System version 5.0.

**Important:**

Recently implemented circulation functionality in Polaris may not be available for this version of Leap.

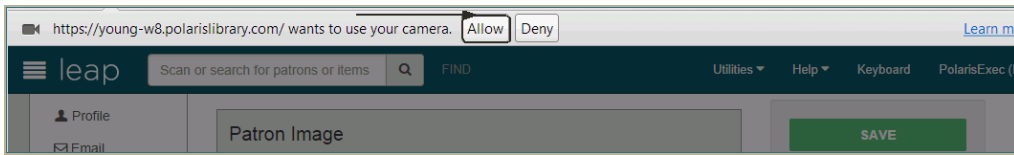
### Camera

The camera is available to take patron photographs for the following:

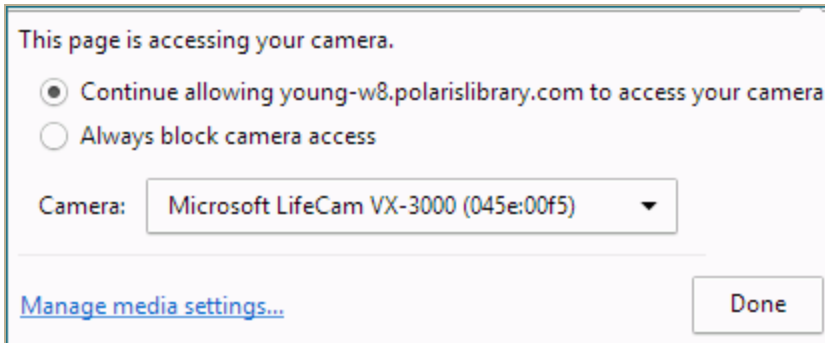
- Windows 7/8/8.1 (desktop and Surface Pro only)
- Google Chrome v36+
- OS X
- iOS v7+
- Safari 6+

**Note:**

When using Chrome, you must select the **Allow** button in the address bar to permit Leap to use the camera.



You can select the camera icon in the address bar to view additional options, such as selecting the camera.



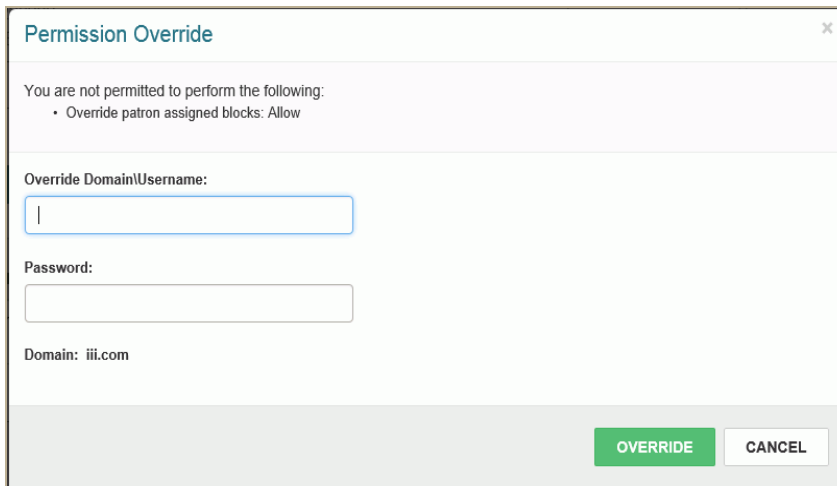
While in Chrome, go to *chrome://settings/contentExceptions#media-stream* to manage media settings.

## Staff User Permissions in Leap

User permissions are checked according to settings in Polaris Administration. For example, if a user has the permission to register patrons in the Polaris staff client, she will be able to register patrons in Leap.

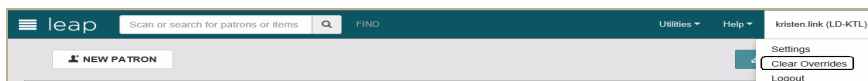
In general, when users perform a task in Leap, permissions are checked in the same way as they are for the equivalent task in the Polaris ILS. However, for the following tasks, permissions checking is different in Leap:

- **Modify patron accounts** - In the Polaris ILS, if a staff member does not have permission to modify patron accounts, no override is available. In Leap, authorized users can override the permission block if a staff member does not have permission to modify patron accounts.
- **Access the patron workform** - In Leap, the patron workform contains both registration and status information, so the user must have at least Patron status: Access or Patron Registration: Access permissions to access the patron workform.
- **Find Tool patron search** - When a staff member scans a patron's barcode or searches for a patron record, and the staff member does not have permission to access that patron's record, a message indicates that the barcode was found, but that the record cannot be opened because the staff member does not have the required permissions. The patron record can be opened for checkouts only.
- **Override permission blocks** - When a staff member has insufficient permissions to do a task in Leap, an Override box lists all the permissions the staff member lacks. A staff member with the Override permission can enter their credentials to override the permissions checking and allow the user to continue with the task. The override will continue in effect for the user's logged in session unless the override is cleared.



The image shows a 'Permission Override' dialog box. At the top, it says 'You are not permitted to perform the following:' followed by a bullet point: 'Override patron assigned blocks: Allow'. Below this, there are input fields for 'Override Domain\Username:', 'Password:', and 'Domain: iii.com'. At the bottom right, there are two buttons: 'OVERRIDE' (green) and 'CANCEL' (white).

- **Clear Overrides** - If you have overridden blocks, but you do not want to keep them in the cache for the logged in session, select your user ID in the upper right corner of the Leap title bar, and select Clear Overrides.



## Signing in to Polaris Leap

When you sign in to Leap the first time, you enter your domain, user name, and password. Another dialog box opens where you select your branch and workstation. After signing in the first time, you only need to enter your domain, username and password; your branch and workstation are selected automatically.

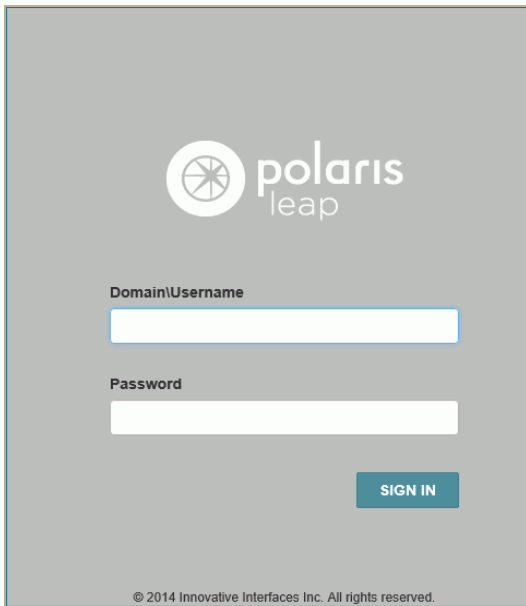
**Important:**

Your username cannot contain spaces.

To sign in to Polaris Leap:

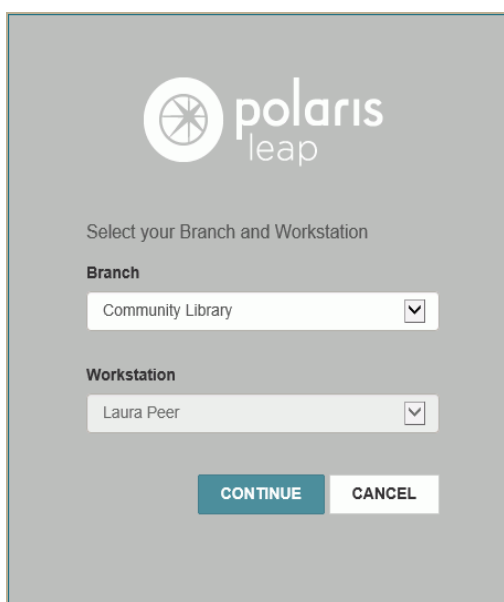
1. Select the Leap icon or shortcut.

The sign in page opens.

The image shows the Polaris Leap sign-in page. At the top center is the Polaris Leap logo, which consists of a circular icon with a stylized 'L' inside, followed by the text 'polaris leap'. Below the logo are two input fields. The first field is labeled 'Domain\Username' and the second is labeled 'Password'. Both fields are empty. Below the password field is a blue button with the text 'SIGN IN' in white. At the bottom of the page, there is a small copyright notice: '© 2014 Innovative Interfaces Inc. All rights reserved.'

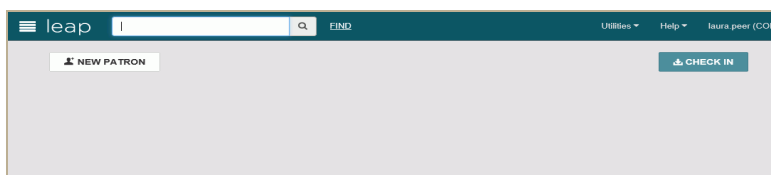
2. Enter your domain and user name in the **Domain\Username** box.
3. Enter your password in the **Password** box.
4. Select **SIGN IN**.

Another page opens where you select your branch and workstation.

The image shows a login screen for Polaris Leap. At the top is the Polaris Leap logo, which consists of a stylized circular icon with a cross-like pattern inside, followed by the text "polaris leap". Below the logo, the text "Select your Branch and Workstation" is displayed. There are two dropdown menus: the first is labeled "Branch" and has "Community Library" selected; the second is labeled "Workstation" and has "Laura Peer" selected. At the bottom of the form are two buttons: "CONTINUE" in a teal box and "CANCEL" in a white box with a grey border.

5. Select your branch in the **Branch** drop-down list box.
6. Select your workstation in the **Workstation** drop-down list box.
7. Select **CONTINUE**.

The Circulation page opens.



The cursor is in the quick search box.

8. Do one of the following:
  - Select **CHECK IN** to go to the Check In page and scan item barcodes to check the items in.
  - Scan a patron barcode in the quick search box.
  - Scan an item barcode in the quick search box.
  - Start entering search criteria to see automatic suggestions for patron and bibliographic records
  - Select **Find** to use the Find Tool.

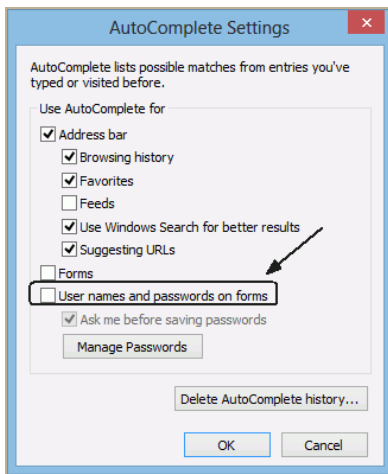
## Browser and Ipad® Issues

You may encounter the following browser and iPad display issues when using Leap.

### Patron Password Validation in Internet Explorer 11

When you access a patron record in Internet Explorer 11 (IE11) that has a patron password entered, the second password field (password validation) is blank. When you attempt to save the record, an alert displays: The patron record was not saved. The passwords do not match.

To prevent this from happening when using Leap in Internet Explorer 11, disable the Autocomplete feature for Usernames and Passwords. This setting is under Tools, Internet Options, Content tab, AutoComplete options, Settings. On the AutoComplete Settings dialog box, clear the User name and passwords on forms check box so that this option is disabled.



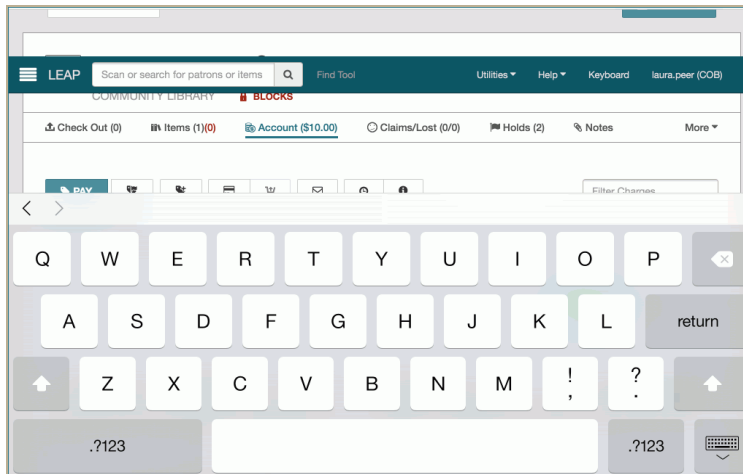
For more information on this issue, which Microsoft has identified as a known bug in IE 11, see:

<http://connect.microsoft.com/IE/feedback/details/811458/ie-11-second-password-input-not-showing-as-being-populated-for-ssl-page-with-autocomplete-for-passwords-enabled>

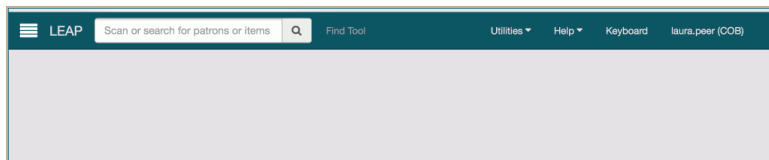
### iPad® Display

Leap is designed to be displayed in landscape (horizontal) view on an iPad.

When you waive a charge, and start to enter a free text block or note, the iPad touch keyboard opens. If you swipe downward, the Leap header is not at the top of the page. Upon closing the iPad's touch keyboard, the Leap header goes back to the top of the page.



You may also find that buttons are obscured by the Leap header. For example, if you open the Find Tool when you first log in, but then cancel the search, the Check In and New Patron buttons may be hidden. To re-display the buttons, swipe downward.





## Leap User Interface

This section describes the general user interface elements that are available throughout the Leap application.

### Leap Header

The Leap header is displayed when you log into Leap.

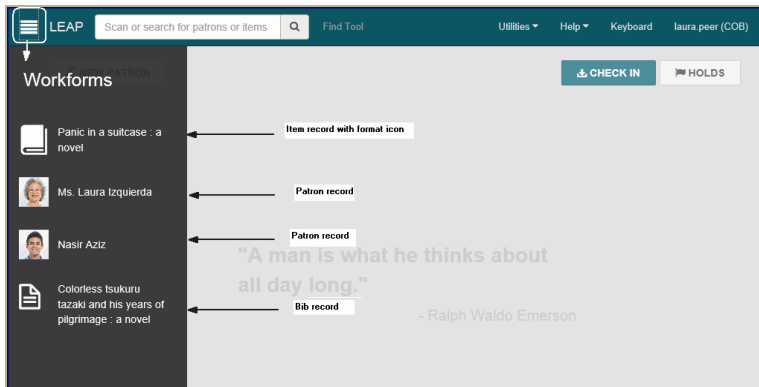


The Leap header contains the following elements:

Element	Description
	Select the slide-out button to access a menu. When you click-/tap this button in the Leap header, the Workforms menu opens.  See "Workforms Menu" on page 10.
	Enter search criteria to find patrons or titles (bibliographic records).  See "Search for Records in Leap" on page 18.
	Opens the Find Tool to search for patron, bibliographic, and item records.  See "The Leap Find Tool" on page 34
	Select Utilities to access the Holds Picklist.  See "Holds Picklist " on page 159.
	Opens a menu with the options: <ul style="list-style-type: none"> <li>• <b>Leap Topics</b> - Select this option to open the Leap online Help.</li> <li>• <b>Keyboard</b> - Select this option to see the list of keyboard shortcuts.</li> <li>• <b>About</b> - Select this option to see details about the Leap application.</li> </ul> See "Help Menu" on page 10.
	Select your username to access user settings or to log out of Leap.  See "Leap User Interface" on page 9.

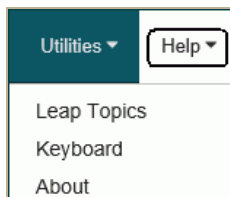
## Workforms Menu

You can use the workforms menu to move among open workforms. Multiple workforms can be open simultaneously.



## Help Menu

Select **Help** in the Leap header to access the Leap online Help, keyboard shortcuts, and information about Leap.



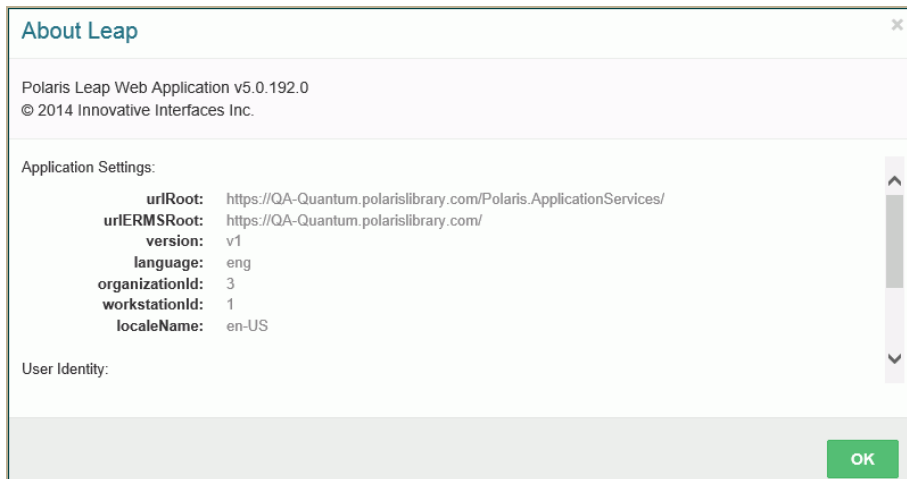
- Select **Leap Topics** to access online Help. If the contents and index tabs are not visible, select the slide-out button in Help to see the tabs. To return to the topic view, click/tap the slide-out button.



- Select **Keyboard** to see a list of keyboard shortcuts. The **Actions** shortcuts are used to create a new patron, check in an item, or position the cursor in the filter box on the current view. The **Patron Views** shortcuts go to a certain view in the patron's record.

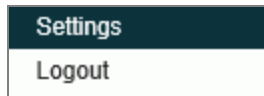
Keyboard Shortcuts	
<i>To execute a keyboard shortcut, press ctrl+shift, followed by the appropriate key:</i>	
<b>Actions</b>	
New Patron	ctrl+shift+y
Check In	ctrl+shift+/
Filter	ctrl+shift+f
<b>Patron Views</b>	
Check Out	ctrl+shift+1
Items	ctrl+shift+2
Account	ctrl+shift+3
Claims/Lost	ctrl+shift+4
Holds	ctrl+shift+5
Notes	ctrl+shift+6
History	ctrl+shift+7
Associations	ctrl+shift+8
Notices	ctrl+shift+9
Registration	ctrl+shift+;

- Select **About** to see details about the Leap application and the logged-in user.



## User Options

When you select your username in the Leap header, the following options are available: Settings and Logout



Select **Settings** to open the Settings page. The Settings page has two views: *Print Options* and *Special Loan*. Use the Print Options page to set the printing options for each workform. For information on using the Print Options view, see "Receipt Printing from Leap" on page 19.

 The "Settings" page with the "Print Options" tab selected. It contains three columns of settings:
 

- Check in:** ☐ Fine receipt, ☐ In-transit slip, ☐ Hold slip, ☐ Hold call slip, ☐ Hold pickup slip.
- Check out:** ☐ Check out receipt, ☐ Fine receipt, ☐ only if no eReceipt, ☒ In-transit slip, ☐ Holds only, ☐ Hold slip, ☐ Hold call slip, ☐ Hold pickup slip.
- Patron status:** ☐ Check out receipt, ☐ Fine receipt, ☐ In-transit slip, ☐ Hold slip, ☐ Hold call slip, ☐ Hold pickup slip.
- Hold requests:** ☐ In-transit slip, ☐ Hold slip, ☐ Hold call slip, ☐ Hold pickup slip.
- Item record:** ☐ Fine receipt, ☐ In-transit slip, ☐ Hold slip, ☐ Hold call slip, ☐ Hold pickup slip.
- ILL requests:** ☐ In-transit slip, ☐ Print ILL Slip, ☐ Print ILL Pickup Slip.

 At the top right are "SAVE" and "CLOSE" buttons.

Use the Special Loan page to set a special loan period that remains in effect while you are logged in. To set a special loan period to apply to all check-outs, select the Apply to all check-outs check box, and select a date in the calendar or type a number, and select Days, Hours, or Minutes in the drop-down list box. For more information, see "Set a special due date/loan period during check out" on page 156.

 The "Settings" page with the "Special Loan" tab selected. It features:
 

- An "Apply to all check-outs" checkbox.
- A date selection interface showing a calendar for December 2014 with the 11th selected.
- A "Loan period:" input field containing the number "110".
- A dropdown menu currently set to "Days".
- "SAVE" and "CLOSE" buttons at the top right.

Select **Logout** to close Leap.

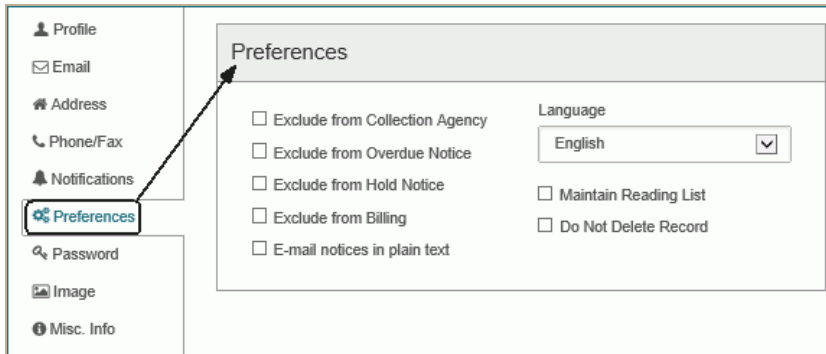
## Options Menus

Options menus provide selections for additional functions, such as the column and filter options for the Find Tool.



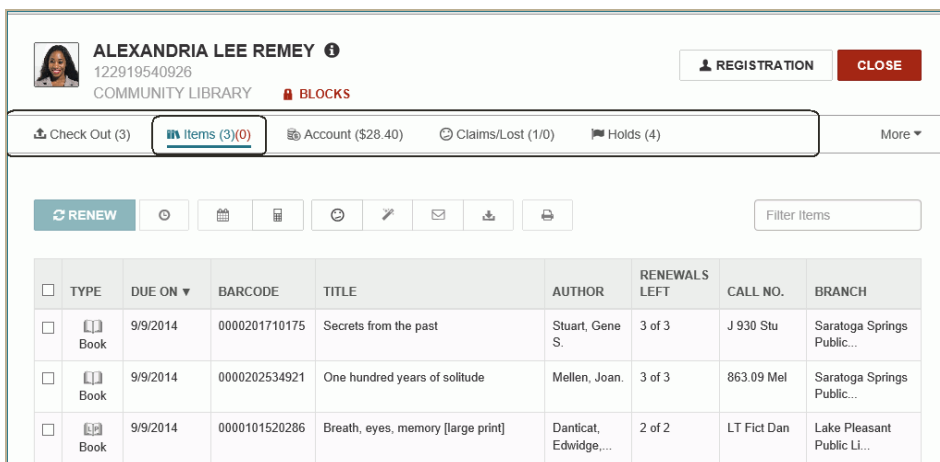
## Navigation Menus

You can move through a patron record in Leap by selecting an option in the left navigation menu.



## View Bars

View bars provide links to views and display information such as the number of items checked out to the patron in the current session; the total number of items out and overdue items; the patron's financial balance; the number of items claimed or lost; and the number of holds. To go to a view, select one of the links. For example, when you select a patron record, you can select **Items** to go to the list of items the patron has checked out. The selected summary bar option is blue.



## Button Toolbars

Button toolbars are displayed at the top of lists, such as the list of items out, and contain buttons for performing actions items in the list.



## Required Fields

Fields marked with an asterisk are required.

Barcode*
<input type="text"/>

## Check Boxes

Some check boxes are used to apply an option, such as maintaining a reading list for a patron.

Preferences	
<input type="checkbox"/> Exclude from Collection Agency	Language English
<input type="checkbox"/> Exclude from Overdue Notice	<input checked="" type="checkbox"/> Maintain Reading List
<input type="checkbox"/> Exclude from Hold Notice	<input type="checkbox"/> Do Not Delete Record
<input type="checkbox"/> Exclude from Billing	
<input type="checkbox"/> E-mail notices in plain text	

Other check boxes are used to select a line or lines in a list view and then apply the same function to the selected lines. If the function can be applied to multiple line items, you can select the check box in the list view header to select all the lines.

For example, select the check box next to a charge, and select the **Pay** button to pay the charge. When you select the line item, the command button becomes brighter, which indicates the function is available.

## Command Buttons

Buttons, such as **CHECK IN**, are used to perform an action.



## Plus Buttons

Buttons labeled with a plus sign, such as **ADDRESS**, expand the area on the page so you can enter information.



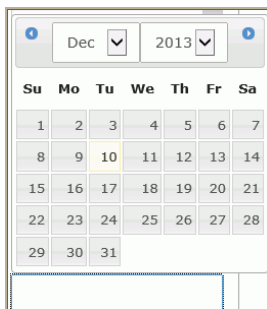
Address Type <input type="text" value="Home"/>	City <input type="text"/>
Postal Code <input type="text"/>	State <input type="text"/>
Street Address <input type="text"/>	County <input type="text"/>
Street Address Line 2 <input type="text"/>	Country <input type="text" value="USA"/>

## Drop-Down List Boxes

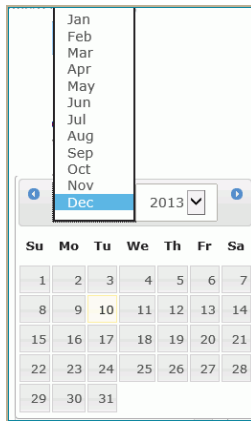
Select an entry in a drop-down list box.

## Date Fields

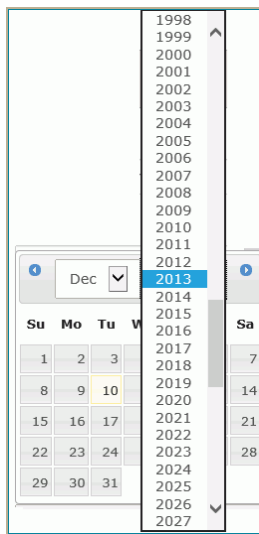
When you click or tap inside a date field, a calendar control appears. To locate and select a date, do the following:



- Select the date in the current month.
- Select the left arrow to go to the previous month.
- Select the right arrow to go to the next month.
- Select the month at the top of the calendar to open the month list, and select the month.



- Select the year at the top of the calendar to open the year list, and select the year.



## Message Boxes

Green message boxes appear when an action was successful, and red message boxes appear when there is a problem with an action or a blocking condition prevents the action from occurring. In most cases, messages in Leap appear according to the same conditions under which messages appear in the Polaris ILS.

ACTION	TITLE	FORMAT	NUMBER	DATE	STATUS	UNARCH	SELOS	ORNL	GROUP
<input type="checkbox"/>	Daley, Robert.	Prince of the the true stor	Hold request(s) have been created.				Community	1	

## Summary Bars

A summary bar displays at the top of list views, such as the Charges view and the Claims view.





## Search for Records in Leap

You can search for records in Leap in the following ways, depending on the type of record:

- Scan an item or patron barcode to locate a specific item or patron record.



- Start typing in a search box, and automatic suggestions appear, if available.

×
Q

— Patron Suggestions —

40 fredericks road, notown, ny, 00000

49 fredericks rd, notown, ny, 00000

72 fredericks road, boca raton, fl, 33432

lake geo elem, fredericksbrg, va, 22401

glens falls hospital, fredericksbrg, va, 22401

54 charlton rd, fredericksbrg, va, 22401

14 frederick st, winter haven, fl, 33880

frederick w killeen, esq, alexandria, va, 22310

— Bibliographic Suggestions —

chopin, Frédéric, 1810-1849

chopin, frederic, 1810-1849

douglass, frederick, 1818-1895

forsyth, frederick, 1938

delderfield, r.f ronald frederick 1912-1972

remington, frederic, 1861-1909

delius, frederick, 1862-1934

benson, e.f edward frederic 1867-1940

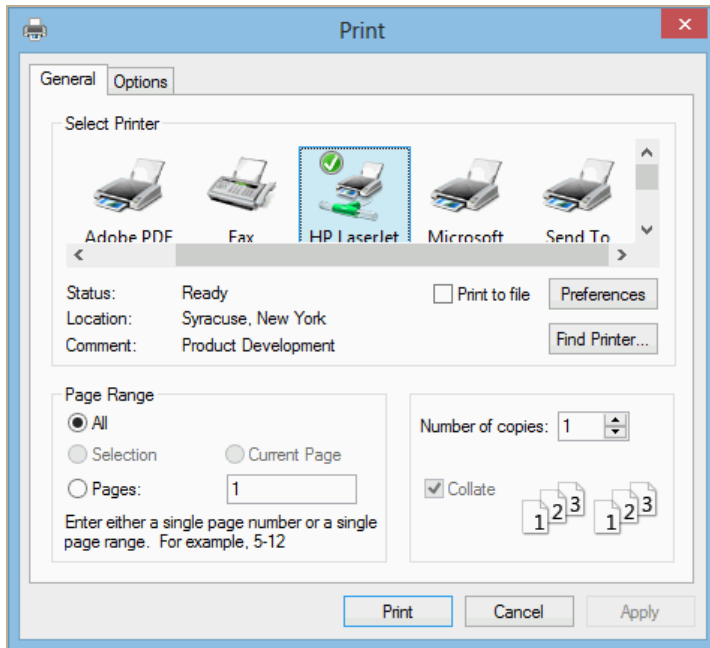
### Note:

Automatic suggestions are updated nightly. If you make a change to a patron's record, the changes will not be reflected in the automatic suggestions until the next day.

- Use the Find Tool, which is available by selecting **FIND** on the first page when you log in and in various pages throughout the application. See "The Leap Find Tool" on page 34

## Receipt Printing from Leap

Printing receipts from Leap depends on the options set for your library organization in Polaris Administration, the workform settings in the Polaris ILS and in Leap, and the receipt printer configuration. When the receipt printer has been configured, and the workform print options are set to print a receipt for an action, the print dialog box opens automatically when the user performs the action.



### Polaris ILS Workform Print Options

Receipts and slips are printed from Leap according to the settings in Polaris Administration and the workform print options, which can be set in the Polaris staff client or in Leap. For information on setting workform print options in the Polaris ILS staff client, see the Polaris online Help.

- The Check-In workform Print Options are used when the request is filled from the Check In view.
- The Patron Status workform Print Options are used when the request is filled from the Items Out view.
- The Hold Request workform Print Options are used when the request is filled from the Hold view or the Holds List view.

See also:

- "Set user print options in Leap" on page 20
- "Receipt Printer Configuration" on page 21

## Set user print options in Leap

To set the print options in Leap:

1. Select your user ID in the upper right corner of the page.
2. Select **Settings**.

The Settings page opens with the Print Options view displayed.

The screenshot shows the Leap application interface. At the top, there is a navigation bar with the Leap logo, a search bar, and user information. A dropdown menu is open, showing 'Settings' and 'Logout'. The 'Settings' page is displayed, with 'Print Options' selected. The page contains several sections for configuring print options:

- Check in:**
  - ☒ Fine receipt
  - ☐ only if no eReceipt
  - ☐ In-transit slip
  - ☐ Holds only
  - ☒ Hold slip
  - ☐ Hold call slip
  - ☐ Hold pickup slip
- Check out:**
  - ☒ Check out receipt
  - ☒ Fine receipt
  - ☐ only if no eReceipt
  - ☐ In-transit slip
  - ☐ Holds only
  - ☐ Hold slip
  - ☐ Hold call slip
  - ☒ Hold pickup slip
- Patron status:**
  - ☒ Check out receipt
  - ☒ Fine receipt
  - ☐ only if no eReceipt
  - ☐ In-transit slip
  - ☐ Holds only
  - ☒ Hold slip
  - ☐ Hold call slip
  - ☐ Hold pickup slip
- ILL requests:**
  - ☐ In-transit slip
  - ☐ Print ILL Slip
  - ☐ Print ILL Pickup Slip
- Hold requests:**
  - ☐ In-transit slip
  - ☒ Hold slip
  - ☐ Hold call slip
  - ☐ Hold pickup slip
- Item record:**
  - ☒ Fine receipt
  - ☐ only if no eReceipt
  - ☐ In-transit slip
  - ☐ Holds only
  - ☒ Hold slip
  - ☐ Hold call slip
  - ☐ Hold pickup slip

Buttons for 'SAVE' and 'CLOSE' are located at the top right of the settings area.

3. Select the receipts and/or slips that you want to be printed.

### Important:

The receipt printers must be configured to print receipts and slips from Leap. See "Receipt Printer Configuration" on page 21.

## Receipt Printer Configuration

Before you can print receipts from Polaris Leap, the receipt printer must be configured correctly. To set up receipt printing, configure the receipt printer, verify that the page size is available, create a custom paper size if the page size is not available, and set up the page in the browser. The table below shows the receipt printers that were tested with Leap using the operating systems, drivers, and browsers indicated.

Receipt Printer	Windows 7	Windows 8.1	Mac OS Xv10
<b>Star TSP600</b>	Driver: Star TSP600 Cutter (TSP643) Chrome, IE10, IE11		Star 3.0 Driver for Mac  Chrome, Safari
<b>Epson TM-T88IV</b>	Chrome, IE10, IE11	EPSON TM-T88IV ReceiptE4 Chrome, IE11	
<b>Star TSP700</b>		Star TSP700 (TSP743) Chrome, IE11	

See also:

- "Configure a receipt printer for IE10 or IE 11 on Windows 7 or 8.1" on page 22
- "Create a custom receipt size for printing from IE on Windows 7 or 8.1" on page 24
- "Set up the receipt page in IE10 or IE11 " on page 25
- "Configure a receipt printer for Chrome on Windows 7 or 8.1" on page 26
- "Create a receipt size for printing from Chrome on Windows 7 or 8.1" on page 29
- "Set up the receipt page in Chrome on Windows 7 or 8.1" on page 30
- "Configure a receipt printer for Chrome and Safari on Mac OS X" on page 31
- "Create a receipt size for printing from Safari/Chrome on Mac OS X" on page 32

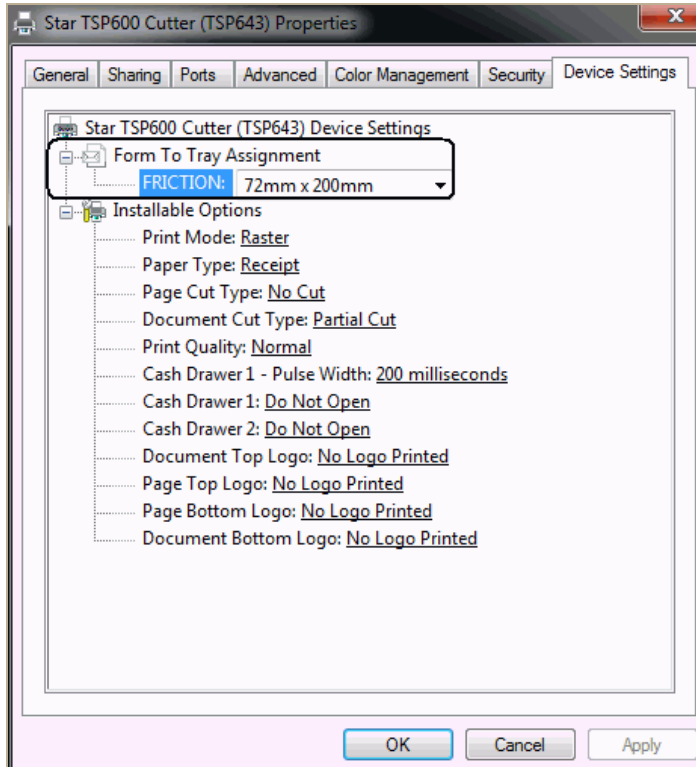
## Configure a receipt printer for IE10 or IE 11 on Windows 7 or 8.1

To configure the receipt printer for IE10, IE11 on Windows 7 and 8.1:

1. In the Control Panel, open the Devices and Printers window.
2. Right-click on the printer and select Printer Properties.

The Properties window opens.

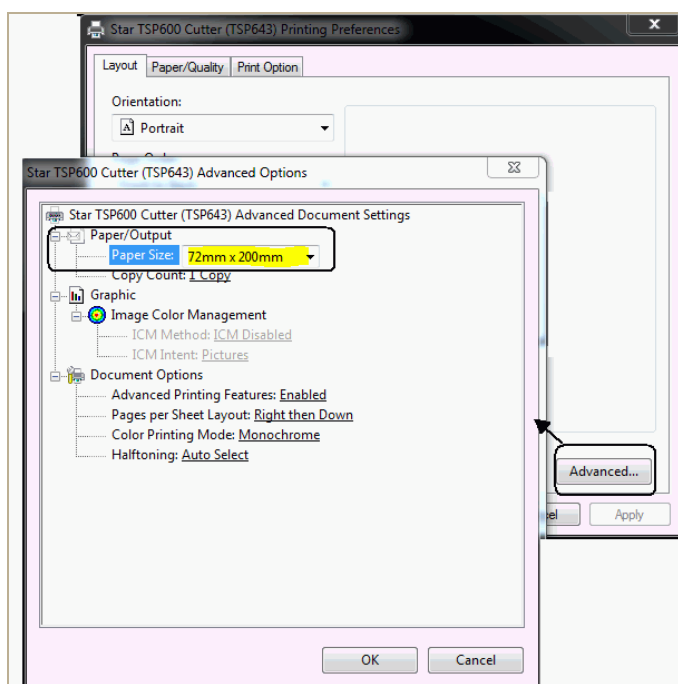
3. Select the Device Settings tab.
4. The Device Settings tabbed page is displayed.
5. Select **Form To Tray Assignment**, and select **FRICTION: 72mm x 200 mm**.



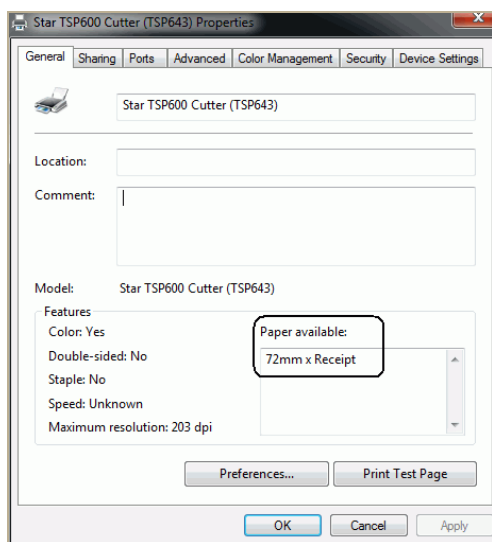
6. Click **OK**.
7. On the Devices and Printers window, right-click the printer, and select **Printing Preferences**.
8. Click **Advanced**.

The Advanced Options window is displayed.

9. Select **Paper/Output**, and select **Paper Size: 72mm x 200mm**.



10. Click **OK**.
11. Check the Printer Properties window to see that the correct paper size is listed under **Paper available**.



**Note:**

If the printer driver does not list the expected page size, create a custom form page and select that form page instead. (This was necessary for the Epson printer on Windows 8.1.) See "Create a custom receipt size for printing from IE on Windows 7 or 8.1" on page 24.

## Create a custom receipt size for printing from IE on Windows 7 or 8.1

To create a custom paper size for IE:

1. Open the Devices and Printers window, right-click the printer, and select Printing Preferences.

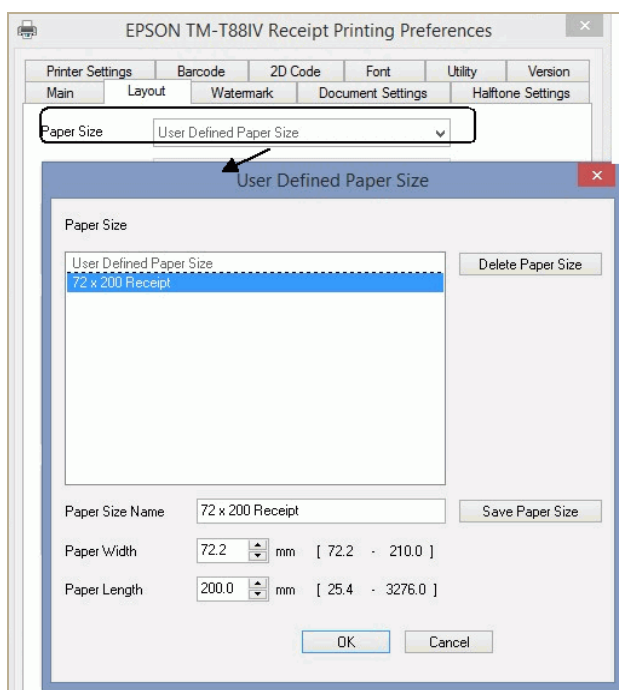
The Printing Preferences window opens.

2. Click the Layout tab.

The Layout tabbed page is displayed.

3. In the Paper Size box, select User Defined Paper Size

The User Defined Paper Size dialog box opens.



4. Define the paper size and select **Save Paper Size**.



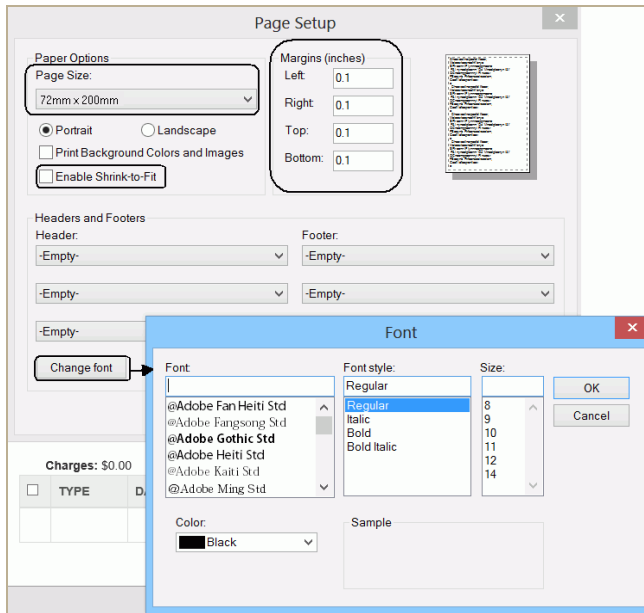
## Set up the receipt page in IE10 or IE11

To set up the page in Internet Explorer 10 or IE11:

1. In the browser window, select **File, Page Setup**.

The Page Setup dialog box opens.

2. Make sure these options are set correctly:
  - **Page Size - 72mm x 200mm**
  - **Margins - 0.1** (for all)
  - **Enable Shrink-to-fit** - This box should not be checked.
  - **Headers and Footers** - Empty



3. Select **OK**.

## Configure a receipt printer for Chrome on Windows 7 or 8.1

To configure the receipt printer for Chrome on Windows 7 and 8.1:

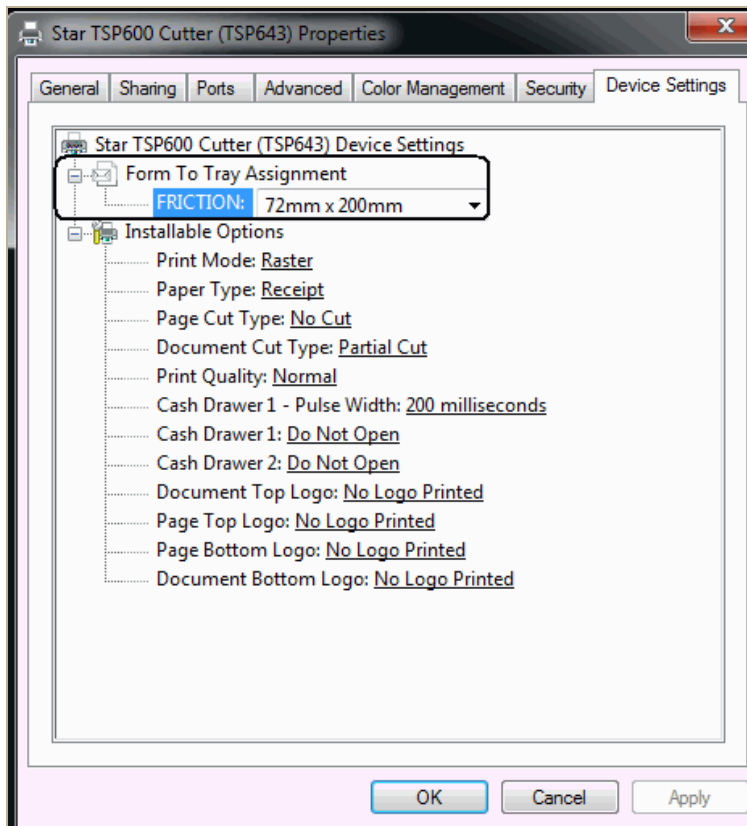
1. In the Control Panel, open the Devices and Printers window.
2. Right-click on the printer and select **Printer Properties**.

The Properties window opens.

3. Select the **Device Settings** tab.

The Device Settings tabbed page is displayed.

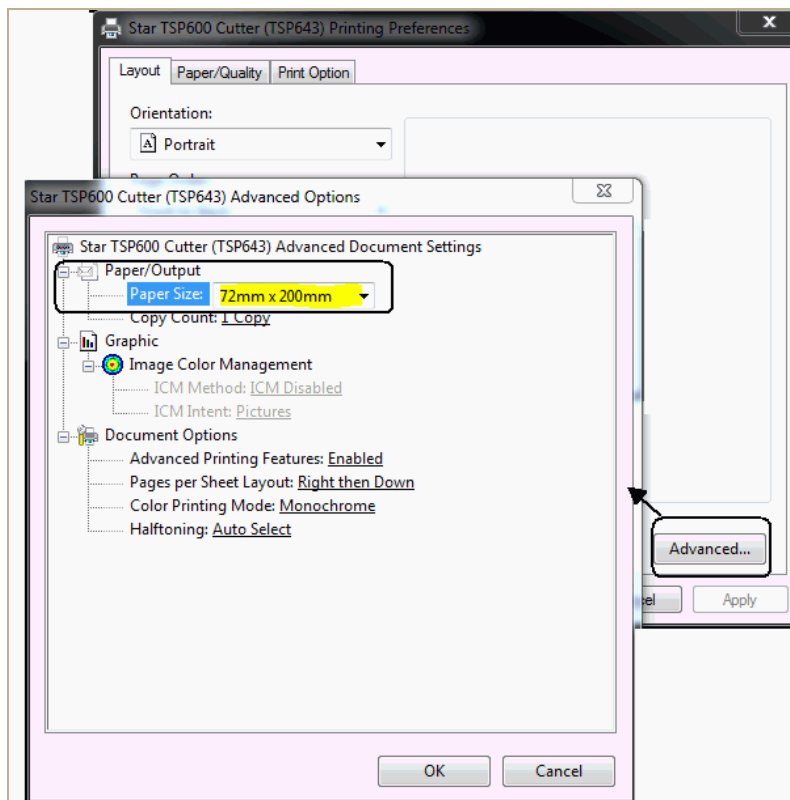
4. Select **Form To Tray Assignment**, and select **FRICITION:72mm x Receipt**.



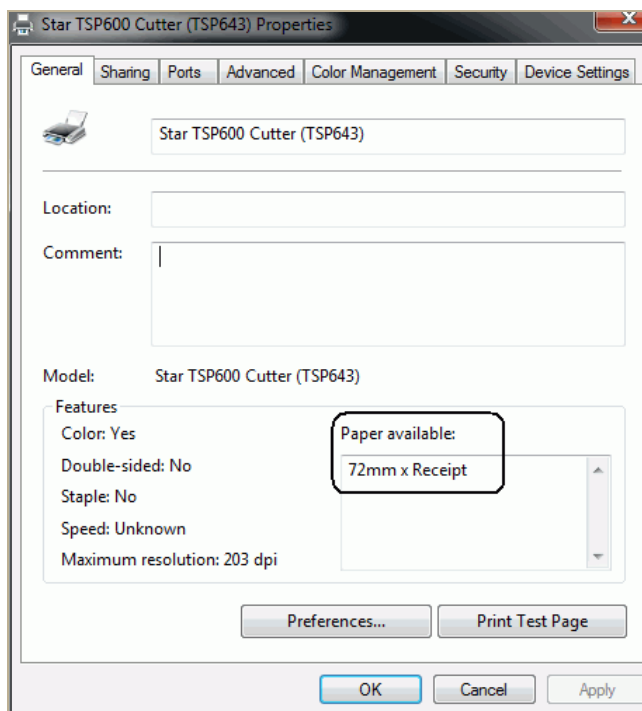
5. Click **OK**.
6. On the Devices and Printers window, right-click the printer, and select **Printing Preferences**.
7. Select **Advanced**.

The Advanced Options window is displayed.

8. Select **Paper/Output**, and select **Paper Size: 72mm x 200mm**.



9. Select **OK**.
10. Check the Printer Properties window to see that the correct paper size is listed under **Paper available**.



**Note:**

If the printer driver does not list the expected page size, create a custom form page and select that form page instead. See "Create a receipt size for printing from Chrome on Windows 7 or 8.1" on page 29 (This was necessary for the Epson printer on Windows 8.1.)

## Create a receipt size for printing from Chrome on Windows 7 or 8.1

To create a custom paper size:

1. Open the Devices and Printers window, right-click the printer, and select **Printing Preferences**.

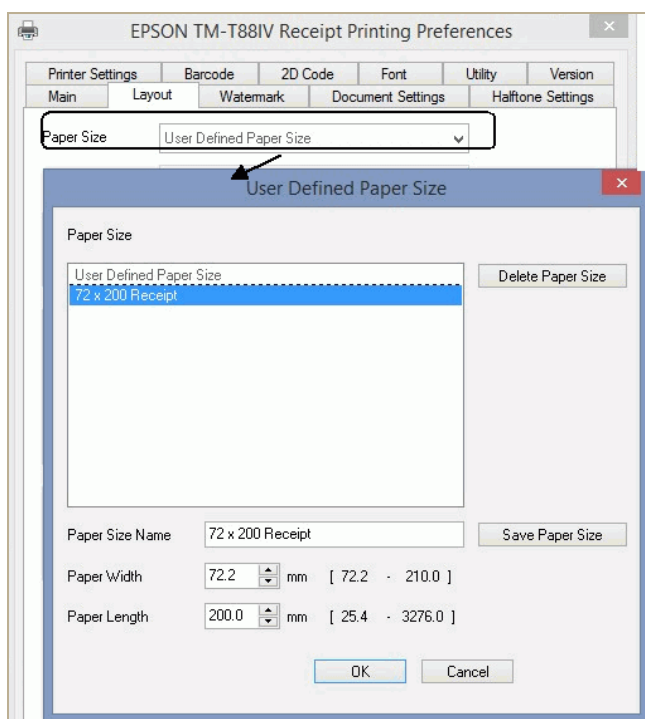
The Printing Preferences window opens.

2. Click the Layout tab.

The Layout tabbed page is displayed.

3. In the Paper Size box, select **User Defined Paper Size**.

The User Defined Paper Size dialog box opens.



4. Define the paper size and select **Save Paper Size**.

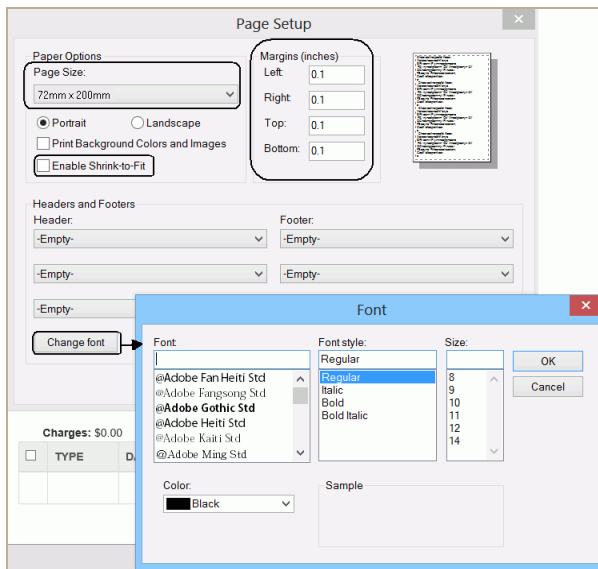
## Set up the receipt page in Chrome on Windows 7 or 8.1

To set up the page in Chrome:

1. In the browser window, select **File, Page Setup**.

The Page Setup dialog box opens.

2. Make sure these options are set correctly:
  - **Page Size - 72mm x 200mm**
  - **Margins - 0.1** (for all)
  - **Enable Shrink-to-fit** - This box should not be checked.
  - **Headers and Footers - Empty**



3. Select **OK**.

## **Configure a receipt printer for Chrome and Safari on Mac OS X**

To configure the receipt printer for Chrome and Safari on Mac OS X:

1. Open the Printer and Device dialog box.
2. Select the correct paper size for the printer.
3. If the printer driver does not list the paper size for the printer, create a custom paper size.

See "Create a receipt size for printing from Safari/Chrome on Mac OS X" on page 32.

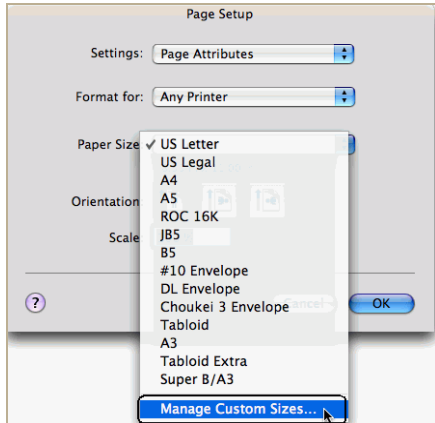
## Create a receipt size for printing from Safari/Chrome on Mac OS X

To create a custom page size for printing receipts from Chrome or Safari on Mac OS X:

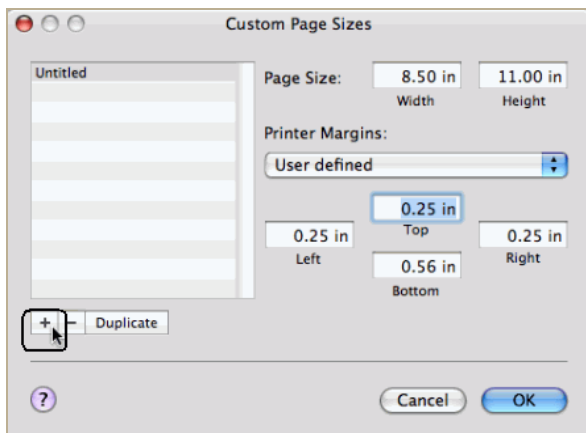
1. Press the **Command** and **P** keys or select **File | Page Setup**, or **File | Print** to open the Page Setup dialog box.



2. Open the drop-down list in the Paper Size box, and select **Manage Custom Sizes**.



The Custom Page Sizes dialog box opens.



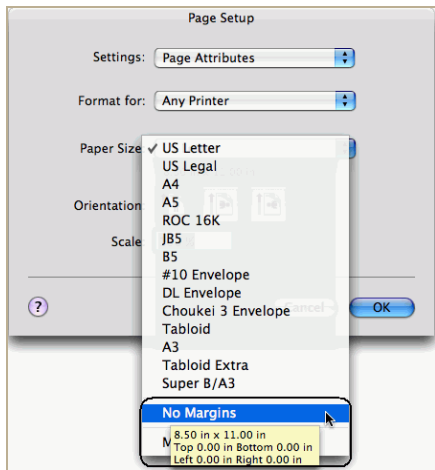
3. Select the plus sign button in the bottom left corner of the dialog box.
4. Double-click the default name **Untitled**, and type a new more descriptive name, such as **No Margins**, and click **OK**.



5. Press **Command** and **P** to go to the Page Setup dialog box.



6. Click in the Paper Size box to open the drop-down list.
7. Select the custom paper size name, for example **No Margins**.



8. Select **OK**.

## The Leap Find Tool

The Leap Find Tool has many of the same search features as the Find Tool in the Polaris ILS staff client. However, for Leap 1.0, records listed in search results cannot be placed in record sets, bulk changed, deleted, or otherwise modified.

Find Tool permissions, such as those for setting up and saving SQL searches, are checked in the Leap Find Tool. In Leap 1.0, some functionality that exists in the Polaris ILS staff client Find Tool is not currently available, such as creating record sets. Other options, such as saving search results columns as part of a user's default, are available in Leap and not in the Polaris ILS staff client.

These are some of the differences between the Find Tool in the Polaris ILS and in Leap:

---

### Count Only Option

The count only option does not apply to Leap because the search results are returned in a virtual results set with a set maximum of 10,000 records that cannot be changed. The search results are displayed AND the count appears in the status bar. You do not need to select Ctrl+Alt+A to load all the search results.

#### Remote Database Searches

Currently, you cannot search external Z39.50 targets from the Polaris Find Tool.

---

### Search Results List

In Leap, there are no right-click menu options. Currently, you cannot select multiple entries in the search results and perform tasks, such as bulk changing records. You cannot link to other records from the Leap Find Tool or use the Preview feature to see circulation statistics for linked items from a bibliographic record listed in the Find Tool results list.

---

### Find Tool Tabs

In Leap 1.0, the only types of records you can search for are patron records, bibliographic records, and item records, and the tabs remain the same for all types of searches.

---

### Find Tool System Administration

Find Tool permissions are applied to the Leap Find Tool and the Polaris ILS staff client Find Tool. Other Administration settings that apply to the Polaris ILS staff client Find Tool do not apply to Leap. The following Find Tool Administration settings do not apply to Leap:

- Find tool/record set-to record set creation: Record set size warning threshold.
- Find Tool: Default number of records to return in a result set.
- Find Tool: Filter search results by permission.
- Find Tool: Use initial article table.
- Find Tool: Use language scoping display

The Polaris ILS performance issues that may be encountered with large search results sets do not apply to Leap. In Leap, the results are returned in a virtual result set with 10,000 as the set maximum. The results are filtered by permission by default without regarding the Administration setting.

Initial articles are not stripped out when exact match searches are done, and Leap does not use the initial article table. Currently, searches cannot be limited by language, and the language scoping display is not used. In addition, Leap has its own automatic suggestions and does not use the Cataloging parameter Auto suggest.

See also:

- "Do a basic search for a patron, item, or bibliographic record" on page 36
- "Do a power search" on page 39
- Save a power search
- "Set up and save an SQL search" on page 41
- Rename a saved search
- "Delete a saved search" on page 43
- "Apply a filter to a Find Tool search" on page 44
- "Specify columns for search results" on page 46
- "Save a set of Find Tool search options as your user default" on page 48
- "Sort Find Tool search results list" on page 51

## Do a basic search for a patron, item, or bibliographic record

To search for patron, item, or bibliographic records:

1. Open the Find Tool.
2. Select the record type if it is not already selected.

The screenshot shows the 'Find Tool - Patron' window. A dropdown menu is open for the 'Patron' tab, listing 'Bibliographic Record', 'Item Record', 'Patron' (which is highlighted), and 'Barcode'. The main search area has fields for 'Name (Last, First Middle)' and 'Keyword (All)', along with a search icon. At the bottom, there's a 'Ready' status bar and 'OPEN' and 'CANCEL' buttons.

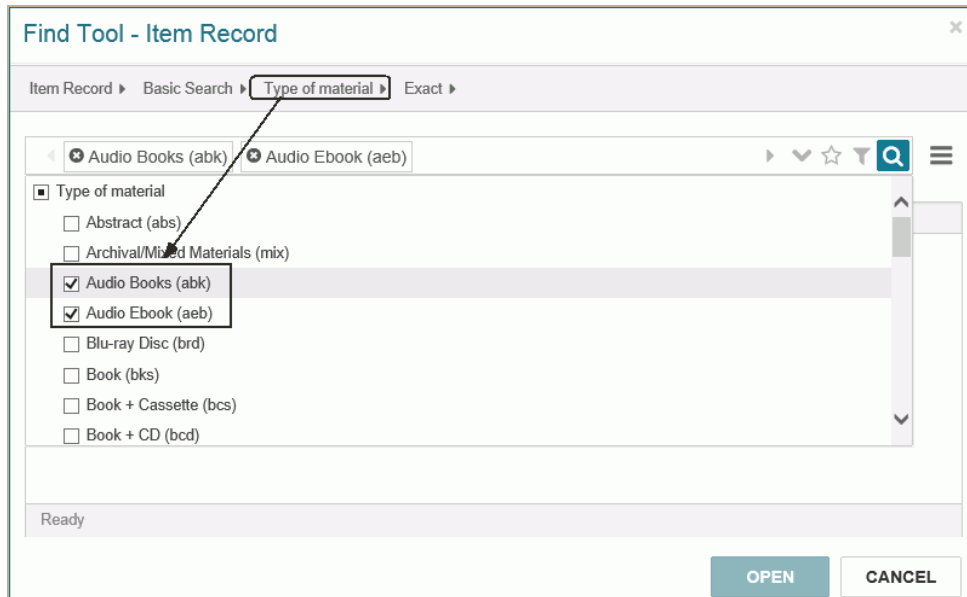
3. Select **Basic Search**.
4. Select the search by access point or qualifier.

The screenshot shows the 'Find Tool - Item Record' window. A dropdown menu is open for the 'All keyword fields' tab, listing various search criteria: 'All keyword fields', 'Assigned branch', 'Author', 'Barcode', 'Bibliographic control', 'Call number', 'Check-in location', 'Check-out date', and 'Circ status date'. The main search area has fields for 'Title' and 'Assigned branch', along with a search icon. At the bottom, there's a 'Ready' status bar and 'OPEN' and 'CANCEL' buttons.

5. Select the relation option. The options depend on the selected search by access point or qualifier.

For example, if **All keyword fields** is selected as the access point, the selections are **Keyword (All)**, **Keyword (Any)**, and **Phrase**. If **Assigned Branch** is selected for an item search, the only option is **Exact**.

6. Enter or select the search term by doing one of the following:
  - If a list is displayed, select the appropriate check boxes. When multiple check boxes are selected, an OR is implied between the selections. In the example below, the search will return items that have a material type of Audio Books (abk) or Audio Ebook (aeb).



- If the search access point does not have an associated list, type the search term. For example, if you search by Author, type the author's name.
7. Select the search button to start the search.



The search results list is displayed.

**Find Tool - Item Record**

Item Record ▶ Basic Search ▶ Type of material ▶ Exact ▶

☐ Audio Books (abk)
 ☒ Audio Ebook (aeb)

#	Title	Assig...	Coll...	Mat...	Shel...	Call...	Status	Barcode	Last Activ...
<input checked="" type="checkbox"/>	Fresh aire [comp...	Sarat...	Adul...	Music		CD...	In	0000201935...	2007-12-0...
	Fresh aire [comp...	Rich...	Audi...	Music		CD	In	0001500141...	2006-11-1...
	North country Chr...	Sarat...	Chil...	Music	Stor...	CD J...	In	0000201730...	2007-12-2...
	North country Chr...	Red...	Audi...	Music		HOL...	In	0000503633...	
	North country Chr...	Burnt...	Audi...	Music		CD...	In	0000700589...	2007-12-3...
	The chocolate wa...	Burnt...	Chil...	Audi...		J RC...	In	0000700942...	2007-09-1...
	The chocolate wa...	Roun...	Chil...	Audi...		RC J...	In	0001400214...	2006-08-2...
	The chocolate wa...	Ches...	Chil...	Audi...		J RC...	In	0002900096...	2006-08-0...
	The chocolate wa...	Pem...	Audi...	Audi...		RC J...	In	0003200190...	2007-06-0...

Ready 10,000 Result(s)

**OPEN** **CANCEL**

8. Select the record in the list, and select **OPEN**.

The record opens.

9. If you want to return to the Find Tool results, select **RESULTS**.

**Item Record**

☐ **Fresh aire [compact audio disc]**  
 By Mannheim Steamroller (Musical group)

Barcode: 0000201935541	Material type: Music	<input type="checkbox"/> ILL
Call number: CD EA DAVI FA D55	Shelf location: None	<input type="checkbox"/> eContent
Collection: Adult Music	Issue:	<input type="checkbox"/> Non-circulating
Temp location:	Price: \$15.00	<input checked="" type="checkbox"/> Display in PAC

## Do a power search

To do a power search:

**Note:**

For details about setting up power searches and a list of search access points, see the Polaris ILS online Help.

1. Open the Find Tool.
2. Select the type of record to find (if it is not already selected).
3. Select **Power Search**.
4. Enter the power search in the search box. For a list of search access points, see the Polaris ILS online Help.
5. Select the search button to start the search or press **Enter/Go**.



The search results are listed.

Find Tool - Bibliographic Record

Bibliographic Record ▶ Power Search ▶ (unsaved) ▶

SU=Bosnia AND PD>2000 AND GENRE=fiction

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#	Title	Author	Format	Li...	H...	Pub...	Call Number	Contr...
<input checked="" type="checkbox"/>	The book of Q : a novel	Rabb, Jonathan.	Book	13	0	2001	Fict Rab	452029
	Nowhere man : the Pronek fantasies	Hemon, Aleksa...	Book	7	0	2002	Fict Hem	492588
	Homecoming : a novel	Radojčić, Nata...	Book	2	0	2002	Fict Rad	496956
	The small boat of great sorrows : a novel	Fesperman, Da...	Book	7	0	2003	Fict Fes Mys...	516014
	Under the sun	Dorros, Arthur.	Book	2	0	2004	Fict Dor YA	548309
	Pretty birds : a novel	Simon, Scott.	Book	8	0	2005	Fict Sim	559164
	Drop zone / [large print]	Salazar, Michael.	Large...	1	0	2001	LT Fict Sal	583683
	Pretty birds [compact audio disc]	Simon, Scott.	Nonm...	5	0	2005	CD Fict Sim	619521
	The blood price	Evans, Jon, 19...	Book	6	0	2005	Fict Eva	630652

Ready

14 Result(s)

OPEN

CANCEL

6. Select a record and select **OPEN**.

## Save a power search

### Note:

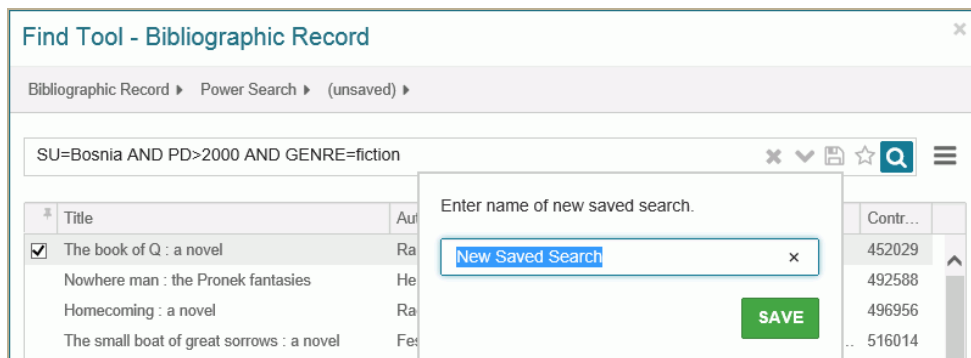
No additional permissions are required to save a power search. Each user sees only their own saved power searches.

To save a power search:

1. Enter the search terms for the power search. See "Do a power search" on page 39.
2. Select the save button.

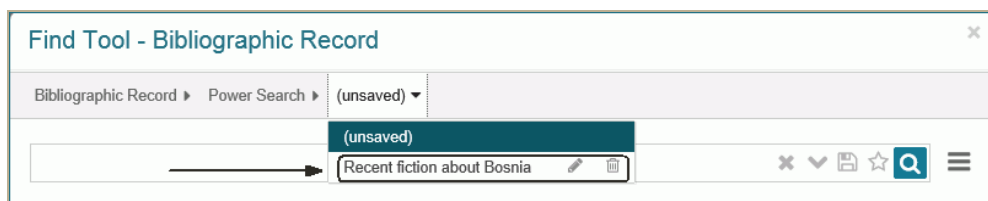


A dialog box opens where you enter the name of the saved search.



3. Type the name of the saved search, and select **SAVE**.

The power search is saved, and it is available in the drop-down list.



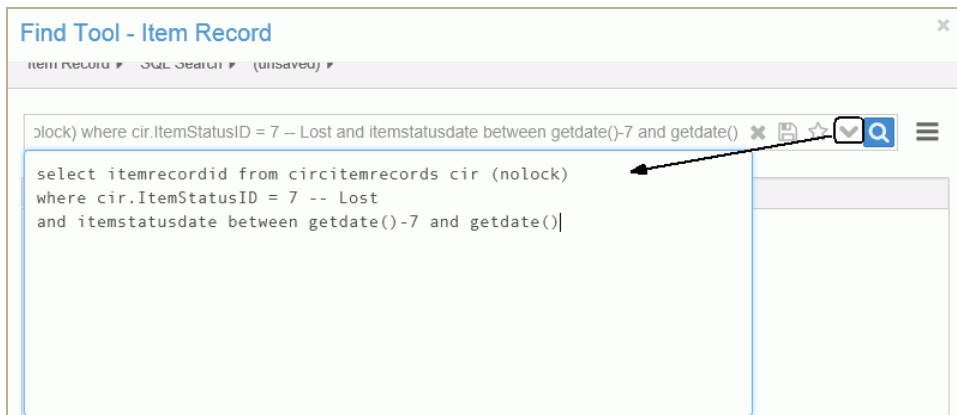


## Set up and save an SQL search

SQL searches saved in Leap are available to authorized users in Leap and in the Polaris ILS.

To set up and save an SQL search:

1. Open the Find Tool.
2. Select the type of record to find (if it is not already selected).
3. Select SQL Search.
4. Enter the search query in the search box.
5. If the query has multiple lines, select the button to expand the box, and type the rest of the query.

**Tip:**

You can save an SQL search as your user default.

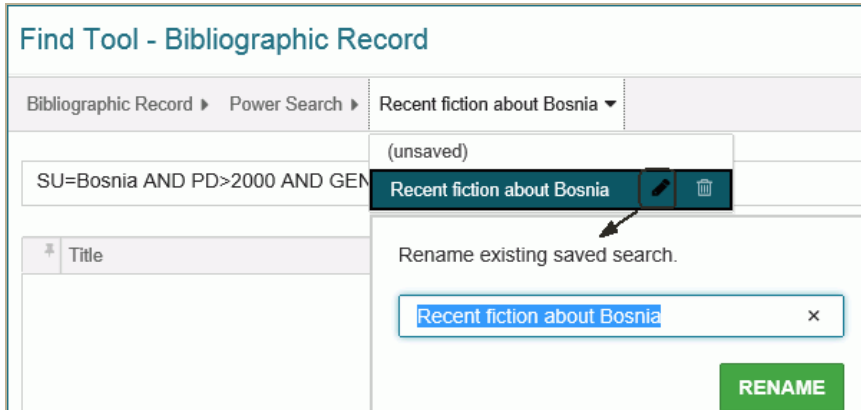
6. If you have the permission to save SQL searches, and you want this search query to be saved, select the **Save** button.

The SQL search is saved and available in the drop-down list.

## Rename a saved search

To rename a saved search:

1. Select the saved search, and select the pencil icon.  
A dialog box opens.
2. Type another name for the saved search in the name box.
3. Select **RENAME**.

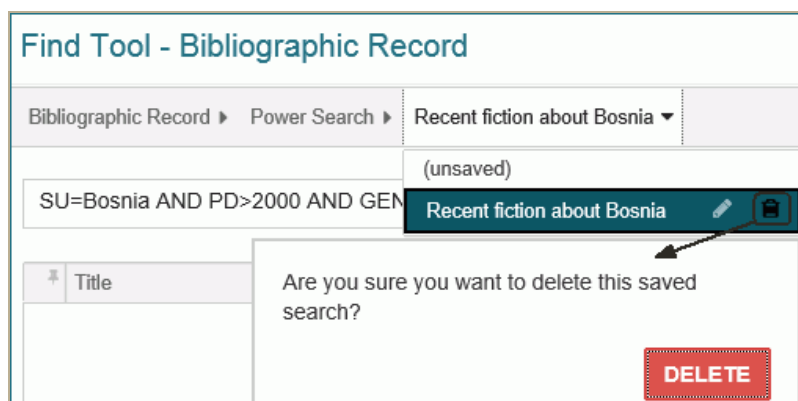


The saved search is listed with the new name.

## Delete a saved search

To delete a saved search:

1. Select the saved search in the list, and select the trashcan icon.  
A message asks if you are sure you want to delete this saved search.
2. Select **DELETE**.



The saved power search is deleted from the list.

## Apply a filter to a Find Tool search

To apply a filter to limit search results:

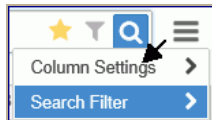
**Note:**

You can apply filters and save them in your user defaults. See "Save a set of Find Tool search options as your user default" on page 48.

1. Set up the search criteria. See "Do a basic search for a patron, item, or bibliographic record" on page 36.
2. Select the filter icon.



3. Or, select the slide-out button and select **Search Filter**.

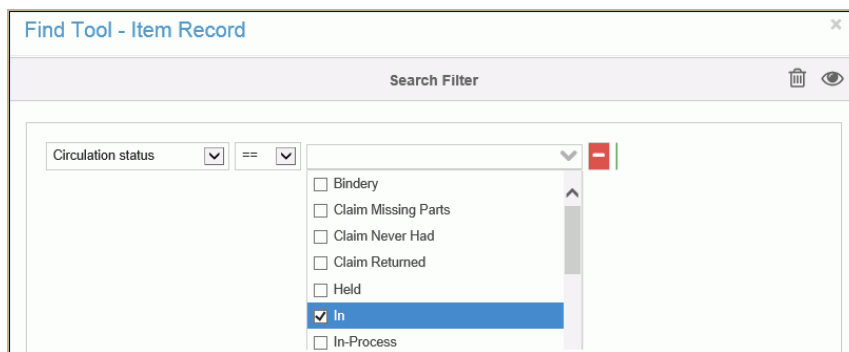


The Filter page opens.

4. Select **ADD CONDITION**.



5. Select the access point.
6. Select the qualifier.



7. Add more conditions, as necessary.
8. Select **APPLY**.

The Search Filter view closes.

9. Select the search button.



The search starts.

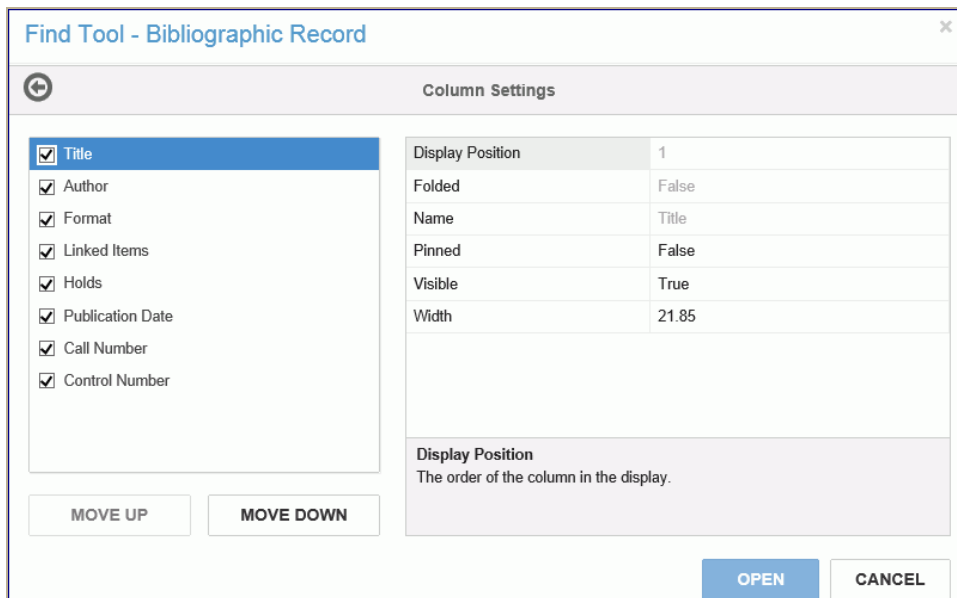
## Specify columns for search results

To specify the columns to display in search results:

1. Open the Find Tool.
2. Go to the options menu.
3. Select **Column Settings**.



4. The Column Settings dialog box opens.



When you select a column heading, you can view the column settings: Display Position, Folded, Name, Pinned, Visible, and Width. Column settings that display in black type can be modified; those that display in gray type cannot be modified.

### Note:

When you select a column setting, the definition is displayed in the shaded box.

The column settings are as follows:

- **Display Position:** The order in which the columns display from left to right, with 1 being the first column on the left. To change the display position, select the MOVE UP

or MOVE DOWN button.

- **Folded:** Indicates whether a column will be “folded” to a secondary line. When set to True, the column is folded; False is not folded.
- **Pinned:** Indicates whether a column will move when scrolling the results list horizontally. When set to True, the column is pinned; False is not pinned.
- **Visible:** Indicates whether a column will be visible. When set to True, the column is visible; False is not visible.
- **Width:** The width of the column in characters. The minimum setting is 2, and the maximum setting is 255.

5. Select the check boxes for the columns to display in the Find Tool search results.
6. Select the **MOVE UP** or **MOVE DOWN** button to change the position of the column from left to right.
7. Select **OPEN** when you have finished defining the columns for search results.

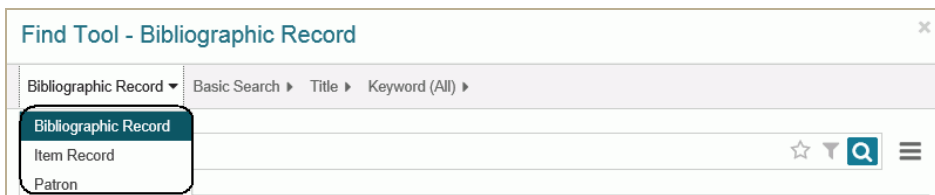
## Save a set of Find Tool search options as your user default

You set up a search and then save the following search criteria as your user default:

- Database (record type) - Patron, Item, or Bibliographic
- Mode - Basic, Power, SQL
- Qualifier - Name, Title, Author etc.
- Columns in search results display
- Order of the columns in search results display.

To save a set of search criteria and search results columns:

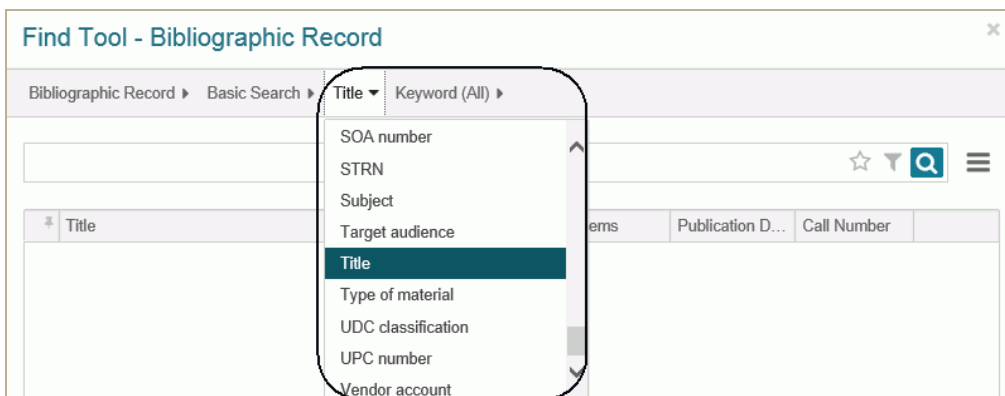
1. Open the Find Tool.
2. Select the record type: **Bibliographic Record**, **Item Record**, **Patron**.



3. Select the search mode: **Basic Search**, **Power Search**, **SQL Search**.

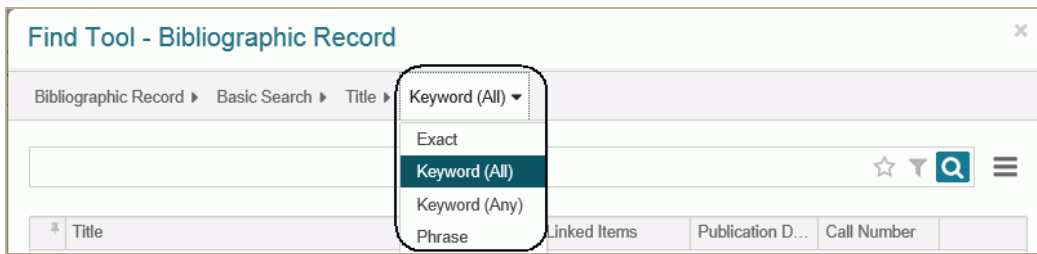


4. Select the search qualifier (access point or search by) option: **Title**, **Author**, **Type of material** etc.





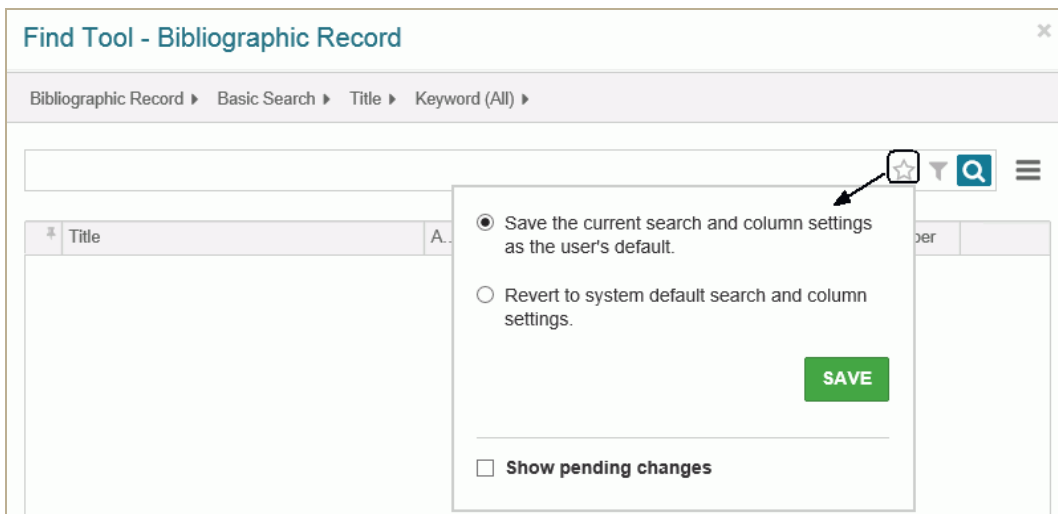
5. Select the search relation - **Exact**, **Keyword (All)**, **Keyword (Any)**, **Phrase** etc.



6. To include specific columns for search results in your user default, set up the columns. See "Specify columns for search results" on page 46.

7. Select the star icon.

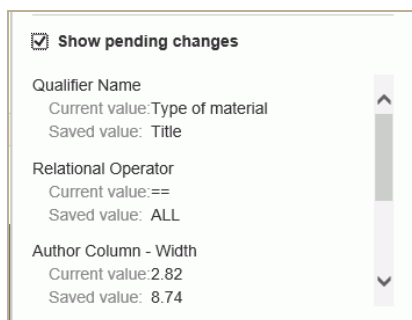
A dialog box opens.



8. Select **Save the current search and column settings as the user's default**.

**Note:**

To see the changes that will be made when you save the current search and column settings, select **Show pending changes**.



9. Select **SAVE**.

The dialog box closes and the star icon is displayed in yellow, indicating your user defaults are saved.

**Note:**

To return to the system defaults, select the star icon again and select **Revert to system default search and column settings**.

## Sort Find Tool search results list

To sort search results in the Leap Find Tool, select a column heading. For example, select the **Status** column heading in item search results to sort the list by the circulation status.

The screenshot shows the 'Find Tool - Item Record' window. The search path is 'Item Record > Basic Search > Title > Keyword (All)'. The search term 'harry potter' is entered in the search bar. The search results are displayed in a table with columns: Title, Assig..., Coll..., Mat..., Shel..., Call..., Status, Barcode, and Last Activ... The 'Status' column is highlighted with a red box, indicating it is selected for sorting. The table shows several rows of search results for 'Harry Potter Year...' with various circulation statuses. The status 'In' is visible for several items. The bottom of the window shows 'Ready' and '2,222 Result(s)'. There are 'OPEN' and 'CANCEL' buttons at the bottom right.

Title	Assig...	Coll...	Mat...	Shel...	Call...	Status	Barcode	Last Activ...
Harry Potter Year...	Test...	Adul...	Book			In	BulkCreate0...	
Harry Potter Year...	Test...	Adul...	Book			In	BulkCreate0...	
Harry Potter Year...	Test...	Adul...	Book			In	BulkCreate0...	
Harry Potter Year...	Test...	Adul...	Book			In	BulkCreate0...	
Harry Potter Year...	Test...	Adul...	Book			In	BulkCreate0...	
Harry Potter Year...	Test...	Adul...	Book			In	BulkCreate0...	
Harry Potter Year...	Test...	Adul...	Book			In	BulkCreate0...	
Harry Potter Year...	Test...	Adul...	Book			In	BulkCreate0...	

## Open a Patron, Item, or Bibliographic Record in Leap

When you first log into Leap, the cursor is in a search box where you can enter (scan or type) a patron barcode to open a patron record or an item barcode to open an item record. If you enter search terms, the automatic suggestions may include patron and bibliographic records. See "Search for Records in Leap" on page 18.

You can also open the Find Tool and use various options to search for records. See "The Leap Find Tool" on page 34.

When you find the record, select it, and select **OPEN**, the record is displayed. Only patron records can be modified in Leap 1.0; item and bibliographic records are read-only.

You can also view item records by selecting the item in the following lists: checkout, check in, items out, claims, reading history, notices, account and transaction history.

See also:

- "Patron Record " on page 53
- "Item Record" on page 55
- "Bibliographic Record" on page 59

## Patron Record

In Leap, patron information includes data elements from the Patron Registration and the Patron Status workforms in the Polaris ILS. When you search for and select an existing patron, the first view includes a summary of the patron's library account: the number of items out; the account balance; the number of lost and/or claimed items; and notes. The cursor is in the **Check out an item box**, where you can scan an item barcode.

### Patron Record - Library Account view

**ANAR KAMAT** ⓘ  
1001900146413  
COMMUNITY LIBRARY

REGISTRATION REFRESH CLOSE

Check Out (0) Items (2)(2) Account (\$0.00) Claims/Lost (0/0) Holds (0) More ▾

SEARCH BAR: [ ] FIND TOOL [ ] RESET [ ] SPECIAL...

BARCODE	CALL NUMBER	TITLE	DUE DATE	ACTION	SHELF LOCATION	ASSIGNED BRANCH	MATERIAL TYPE
---------	-------------	-------	----------	--------	----------------	-----------------	---------------

To quickly see the patron's address, phone number, e-mail, and registration expiration date, select the information button.



**ANAR KAMAT** ⓘ

1001900146413

PATRON INFO

Check Out

PATRON CODE: REGULAR

HOME ADDRESS:  
2304 BARCELONA ROAD  
SYRACUSE, NY 13210

PHONE NUMBER: 315-634-1234

EMAIL ADDRESS:


EXPIRATION DATE: 11/6/2019

NOTIFICATION OPTION: MAILING ADDRESS

## Patron Record - Registration View

When you select **NEW PATRON** to register a new patron or **REGISTRATION** to see an existing patron's information, the patron registration view opens.



**ANAR KAMAT** ⓘ  
1001900146413  
COMMUNITY LIBRARY

REGISTRATIONREFRESHCLOSE

Check Out (0)Items (2)(2)Account (\$0.00)Claims/Lost (0/0)Holds (0)More ▾

Profile

Email

Address

Phone/Fax

Notifications

Preferences

Password

Image

Misc. Info

Profile

Barcode \*  
1001900146413 X

Former Barcode

Last Name \*  
Kamat

First Name \*  
Anar

Middle Name

Title  
(None) ▾

Registered At \*  
Community Library ▾

Patron Code \*  
Regular ▾

Date of Registration  
11/6/2013

Expiration Date \*  
11/6/2019

Birth Date  
4/27/1987

Suffix

Gender \*  
☐ Male ☒ Female ☐ N/A

SAVE

RENEW

## Item Record

The settings that apply to item records in the staff client (such as the loan period, item home branch, and hold limited to) are also applied to item records displayed in Leap. If a book jacket image is associated with the item record, the image is displayed in the Item view in Leap.

The top part of the page displays the item's header information, and the bottom part of the page changes depending on the selected view: Circulation, Controls, Blocks and Notes, or History.

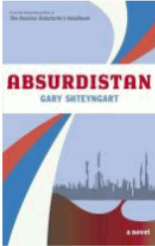
### Note:

If you use the Find Tool to access a record in Leap, a **RESULTS** button is displayed in the record header. Select **RESULTS** to return to the Find Tool results. This button does not display if you opened the record from a quick search or from a list view.

## Item Record - Circulation view

### Item Record

PLACE HOLD
REFRESH
RESULTS
CLOSE



#### Absurdistan : a novel

By Shteyngart, Gary, 1972-

Barcode: 0000602756975  
Call number: Fict Sht  
Collection: None  
Temp location:  
Assigned branch: Clifton Park

Material type: Book  
Shelf location: None  
Issue:  
Price: \$24.95  
Circulation status: In-Transit || 8/14/2014 10:13:26 AM

☐ ILL  
☐ eContent  
☐ Non-circulating  
☒ Display in PAC  
Bib control number: 656943

Circulation
Controls
Blocks and Notes
History

Due date:  
Renewals taken: 0  
Renewals limit: 2  
Renewal date:  
Last location  
Check-in at:  
Ck-in date:  
Wkstn/user:

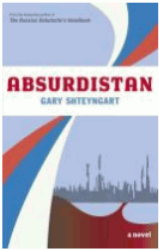
Current borrower:  
Loaning branch:  
Held for:  
Held at:  
Last use  
Borrower: 1229195408668  
Loaning branch: Community Library  
Circ date: 8/4/2014 10:28:06 AM

Check-out date:  
Original due date:  
In-transit/Transferred  
From: Community Library  
Sent: 8/14/2014 10:13:26 AM  
To: Clifton Park  
Received:

## Item Record - Controls view

### Item Record

[PLACE HOLD](#) [REFRESH](#) [RESULTS](#) [CLOSE](#)



**Absurdistan : a novel**  
By Shteyngart, Gary, 1972-  
Barcode: 0000602756975  
Call number: Fict Sht  
Collection: None  
Temp location:  
Assigned branch: Clifton Park

**Material type: Book**  
Shelf location: None  
Issue:  
Price: \$24.95  
Circulation status: In-Transit ||  
8/14/2014 10:13:26 AM

☐ ILL  
☐ eContent  
☐ Non-circulating  
☒ Display in PAC  
Bib control number: [656943](#)

☐ Circulation ☒ **Controls** ☐ Blocks and Notes ☐ History

Loan period: Standard  
Fine code: Book  
Statistical code: Adult/YA Fiction  
Home branch: Clifton Park

☒ Holdable  
☒ Loanable outside system  
☐ Do not float


Hold limited to:  
☐ Patrons from this library and branches  
☐ Patrons from this branch only  
☐ Preferred borrowers  
☐ Pickup at Clifton Park



## Item Blocks and Notes view

### Item Record

[PLACE HOLD](#) [REFRESH](#) [RESULTS](#) [CLOSE](#)



**Absurdistan : a novel**  
By Shteyngart, Gary, 1972-

Barcode: 0000602756975      Material type: Book      ☐ ILL

Call number: Fict Sht      Shelf location: None      ☐ eContent

Collection: None      Issue:      ☐ Non-circulating

Temp location:      Price: \$24.95      ☒ Display in PAC

Assigned branch: Clifton Park      Circulation status: In-Transit || 8/14/2014 10:13:26 AM      Bib control number: 656943

[Circulation](#) [Controls](#) [Blocks and Notes](#) [History](#)

Library Assigned Block:

Free Text Block:

System Block:

Public Note:

Non-Public Note:


Physical Condition:

Special Item Check-In:

## Item History view

### Item Record

[PLACE HOLD](#) [REFRESH](#) [RESULTS](#) [CLOSE](#)



**Absurdistan : a novel**  
By Shteyngart, Gary, 1972-

Barcode: 0000602756975  
Call number: Fict Sht  
Collection: None  
Temp location:  
Assigned branch: Clifton Park

Material type: Book  
Shelf location: None  
Issue:  
Price: \$24.95  
Circulation status: In-Transit || 8/14/2014 10:13:26 AM

☐ ILL  
☐ eContent  
☐ Non-circulating  
☒ Display in PAC  
Bib control number: 656943

[Circulation](#) [Controls](#) [Blocks and Notes](#) [History](#)


DATE	ASSIGNED BRANCH	STATUS	ACTION	LOCATION	USER/WKS	PATRONID
8/14/2014 10:13:26 AM	Clifton Park-Halfmoon Public Library	Out -> In-Transit	Checked in	Community Library	laura.peer/Peer-W8	370460
8/4/2014 10:28:07 AM	Clifton Park-Halfmoon Public Library	In -> Out	Checked out	Community Library	laura.peer/Peer-W8	370460

## Bibliographic Record

The top part of the bibliographic record displays the header information that identifies the bibliographic record, and the bottom of the page displays a different view depending on the selection in the toolbar. When the Bibliographic Record page opens, Preview is selected. This is a preview of the Brief display in the PAC. You can select **Full** or **Availability** to change the PAC view.

### Bibliographic Record

PLACE HOLD
PAC
REFRESH
CLOSE



#### The swan gondola

By Schaffert, Timothy.

Control number: 990175    ☒ Display in PAC    ☐ ILL

Owner: QA-Quantum 5.0 (sys)    ☐ Do not overlay    ☐ Host


Record status: Final

Preview
Items
MARC
Statistics
Resources


Brief
Full
Availability

English
Community Library

1. The swan gondola  
by Schaffert, Timothy.


2014

Publisher, Date: New York : Riverhead Books, a member of Penguin Group (USA) 2014.

Web Site:  - [Cover image](#)


Description: 458 pages ; 24 cm

## Bibliographic Record - Items View

The items view displays information about the item records linked to the bibliographic record. Select an item in the list to go to the item record.

### Bibliographic Record

PLACE HOLD
PAC
REFRESH
CLOSE



**The swan gondola**  
By Schaffert, Timothy.

Control number: 990175    ☒ Display in PAC    ☐ ILL

Owner: QA-Quantum 5.0 (sys)    ☐ Do not overlay    ☐ Host

Record status: Final

Preview
**Items**
MARC
Statistics
Resources

Filter Items


ASSIGNED BRANCH	COLLECTION	MATERIAL TYPE	SHELF LOCATION	CALL NUMBER	VOLUME	STATUS	BARCODE	LAST ACTIVITY	RECORD STATUS	CONTROL NUMBER
Bolton Free Library		New / Popular Book	New and Popular	Fict F		In-Process			Final	9976671
Canajoharie Library		Book		F		In			Final	9976670
Chester Public Library, Town of	Adult Video (AVID)	Video		DVD FICT		In			Final	9976672

## Bibliographic MARC view

The MARC view displays the MARC tags and fields. The MARC view cannot be modified in Leap.

### Bibliographic Record

PLACE HOLD
PAC
REFRESH
CLOSE



#### The swan gondola

By Schaffert, Timothy.

Control number: 990175    ☒ Display in PAC    ☐ ILL

Owner: QA-Quantum 5.0 (sys)    ☐ Do not overlay    ☐ Host

Record status: Final

Preview
Items
**MARC**
Statistics
Resources

```


1DR  ||||pam a22|||| i 4500
001  990175
005  20140804110745.0
008  130827s2014 nyu 000 1 eng
003  PolarisTest
010  $a 2013030317
020  $a9781594486098 (hbk.) : $c$27.95
020  $a1594486093 (hbk.) : $c$27.95
035  $a1911836
035  $a(DLC) 2013030317
035  $a1911836
035  $a1969567
040  $aDLC $beng $cDLC $erda $dTnLvILS
042  $apcc
043  $an-us-nb
050  00 $aPS3619.C325 $bS93 2014
082  00 $a813/.6 $223
084  $aFIC014000 $aFIC019000 $aFIC000000 $2bisacsh

```

## Bibliographic Record - Statistics view

### Bibliographic Record

PLACE HOLD
PAC
REFRESH
CLOSE



#### The swan gondola

By Schaffert, Timothy.

Control number: 990175    ☒ Display in PAC    ☐ ILL

Owner: QA-Quantum 5.0 (sys)    ☐ Do not overlay    ☐ Host

Record status: Final

Preview
Items
MARC
**Statistics**
Resources

Number of items: 3	Year-to-date circulation: 0	Year-to-date in-house use: 0
Number of holds: 0	Previous year-to-date circulation: 0	Previous year-to-date in-house use: 0
First available date: 8/4/2014	Lifetime circulation: 0	Lifetime in-house use: 0

## Bibliographic Resources view

The Resources view displays resource entity information only if the bib record is for integrated eContent.

## Bibliographic Record

PLACE HOLD
PAC
REFRESH
RESULTS
CLOSE

**The Science of Breath [electronic resource]**

By Ramacharaka, Yogi

Control number: 990293    ☒ Display in PAC    ☐ ILL

Owner: QA-Quantum 5.0 (sys)    ☐ Do not overlay    ☐ Host

Record status: Final

Preview
Items
MARC
Statistics
Resources

OverDrive QA1

Account Name: OverDrive QA1

Active: Yes

Resource Group: Overdrive

Imported MARC Data: 856 40 \$3Click for more information: [http://integration.api.overdrive.com/v1/collections/v1L1BBQ0AAA2/\\_products/1b0a0f39-72a8-49f7-b6f9-207c23ca8d43?x:4425](http://integration.api.overdrive.com/v1/collections/v1L1BBQ0AAA2/_products/1b0a0f39-72a8-49f7-b6f9-207c23ca8d43?x:4425)

Object Identifier: 1B0A0F39-72A8-49F7-B6F9-207C23CA8D43

URL: [http://integration.api.overdrive.com/v1/collections/v1L1BBQ0AAA2/\\_products/1b0a0f39-72a8-49f7-b6f9-207c23ca8d43](http://integration.api.overdrive.com/v1/collections/v1L1BBQ0AAA2/_products/1b0a0f39-72a8-49f7-b6f9-207c23ca8d43)

Link Text: Click for more information

Cover Image URL: <http://images.contentreserve.com/ImageType-200/2389-1/{1B0A0F39-72A8-49F7-B6F9-207C23CA8D43}img200.jpg>

Public Note:

Non-Public Note:

Creator: PolarisExec


Creation Date: 9/19/2014 12:09:09 AM

Modifier:

Modification Date:

## Bibliographic Preview view

The PAC view displays the bibliographic information as it appears in the PAC.



**The swan gondola**

By Schaffert, Timothy.

Control number: 990175    ☒ Display in PAC    ☐ ILL

Owner: QA-Quantum 5.0 (sys)    ☐ Do not overlay    ☐ Host


Record status: Final

PAC
REFRESH
CLOSE

Statistics
Items
MARC
Resources
PAC

Language: English

Organization: Community Library



1. **The swan gondola**  
by Schaffert, Timothy.

Publisher, Date: New York : Riverhead Books, a member of Penguin Group (USA) 2014.

Web Site: [Cover image](#)

Description: 458 pages : 24 cm

see reviews/add a review, 10 reviews (★★★★½)

Availability

Full Display

2014

## Go to the Title in the PAC

From the bibliographic record, you can select **PAC** to go to the title in Polaris PowerPAC.



[LANGUAGE](#) [LARGE TEXT](#) [KID'S CATALOG](#) Switch to another branch...

Community Library

[LIBRARY INFO](#) [SEARCH](#) [COMMUNITY](#) [MY ACCOUNT](#) [HELP](#)

[Save Search](#)

**Keyword search for:**

**Search by:**  **Using:**

**Limit by:**  [Select Databases](#)

[More Search Options](#) ☐ Course reserve items only

**1 - 1 of 1** Page: [1]

see reviews/add a review: 10 reviews (★★★★½)

1. **The swan gondola**  
by Schaffert, Timothy.

Publisher, Date: New York : Riverhead Books, a member of Penguin Group (USA) 2014.

Web Site: - Cover image

Description: 458 pages ; 24 cm

[Availability](#)  
[Full Display](#)  
[Place Request](#)

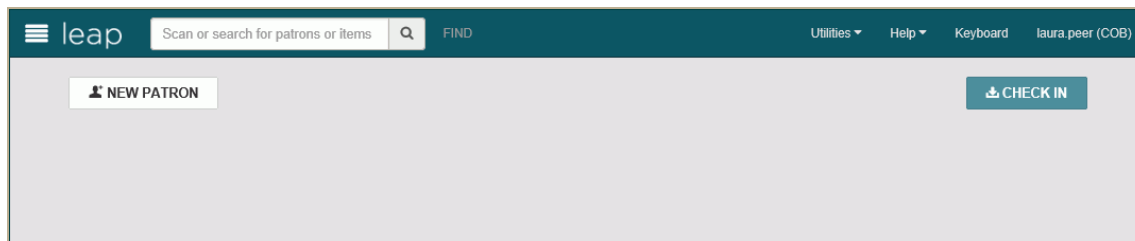
2014

[Add to My List](#)

To return to the bibliographic record displayed in Leap, close the browser tab that displays PowerPAC.

## Patron Record - Registration

When you first sign in to Leap, the Circulation page opens.



From this page, you can access an existing patron record by scanning the patron's barcode or by searching for the patron. Or, you can register a new patron by selecting **NEW PATRON**.

**Note:**

Leap and the Polaris staff client share the same patron registration settings and required fields as defined in Patron Services Administration parameters and profiles for the patron's registered branch.

See also:

- "Do a quick search for an existing patron" on page 65
- "Use the Find Tool to search for a patron" on page 67
- "View, edit, or renew an existing patron's registration" on page 69
- "Register a new patron" on page 71



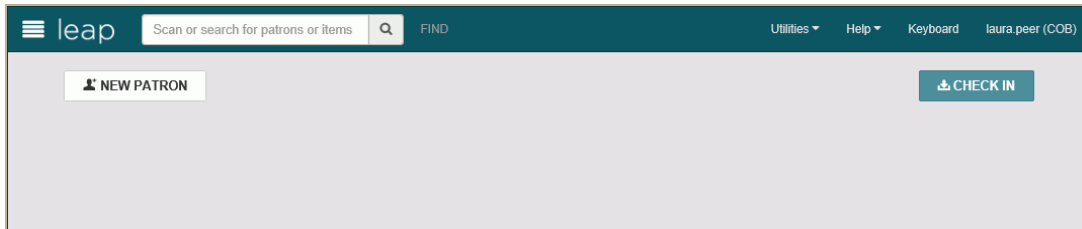
## Do a quick search for an existing patron

You can do a quick search by scanning a patron barcode or entering search criteria in the search box. For additional search options, select **Find Tool**. See "Use the Find Tool to search for a patron" on page 67.

To do a quick search for an existing patron's record:

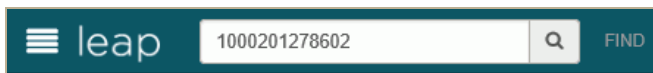
1. Sign in to Polaris Leap.

The Circulation page opens with the cursor in the search box.

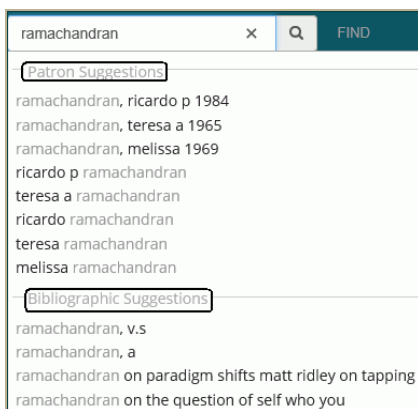


2. Open the patron's record by one of these methods:

- Scan the patron's barcode on the patron's library card.



- Start entering search criteria in the box. As you type, automatic suggestions are displayed that may include both patron and bibliographic records. If only one patron record matches the entry, it opens immediately. You can select a patron from the list of automatic suggestions or press **Enter** or tap **Go**.



- If you press **Enter** or tap **Go**, and the search criteria matches keywords in both patron and bibliographic records, a total count is displayed for each type of record. Select **Patron Keywords** to open the Find Tool. Select a patron in the Find Tool results list.

Please choose one of the following to narrow your search for "ramachandran"


Bibliographic Keywords (6)

Patron Keywords (3)

The patron's record opens to the patron's library account view. Select **REGISTRATION** to go to the existing patron's registration view. See "View, edit, or renew an existing patron's registration" on page 69.

**Note:**

If the patron record requires updates, a message appears.



**MS. LAURA IZQUIERDA** ⓘ  
A12291954  
COMMUNITY LIBRARY

BLOCKS
NOTES

[Check Out \(1\)](#)
Out (3) / Overdue (0)
Account (\$0.00)
Claims (1) / Lost (0)
Holds (5)
More ▼

<input type="checkbox"/>	BARCODE	CALL NUMBER	TITLE	DUE DATE	ACTION	SHELF LOCATION	ASSIGNED BRANCH	MATERIAL TYPE
<input type="checkbox"/>	122919546777		Gravity [videorecording]	11/21/2014	Check Out		Saratoga Springs Public Library	Video

## Use the Find Tool to search for a patron

To search for a patron using the Find Tool:

1. Sign in to Polaris Leap.

The Circulation page opens.

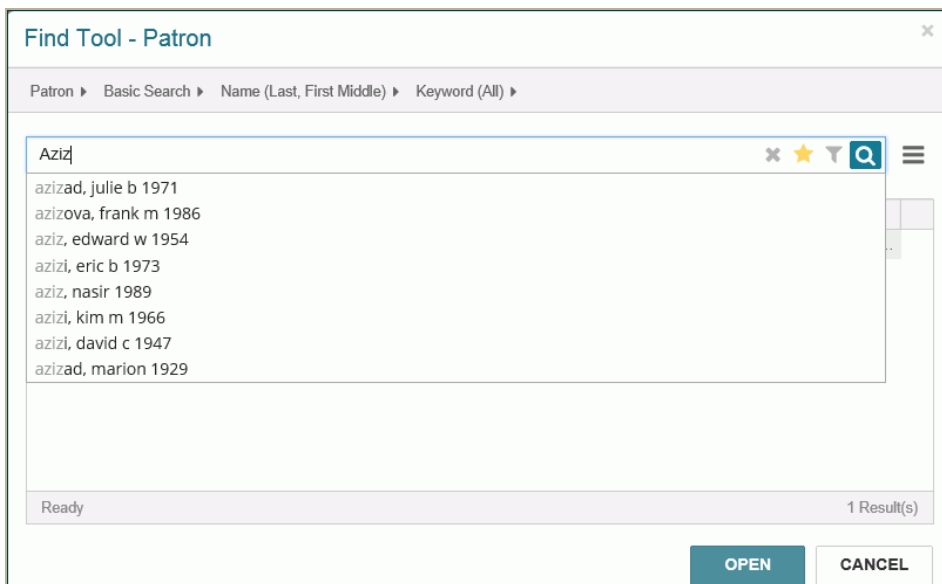
2. Select **FIND**.



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

3. Enter the search criteria.

As you type, automatic suggestions are displayed.



4. Open the patron record:

- If the patron is listed in the automatic suggestions list, select the patron in the list, and select **OPEN**.
- Select the search button to go to the Find Tool search results list, select the patron in the list, and select **OPEN**.

The patron's record opens.

Find Tool - Patron

Patron ▶ Basic Search ▶ Name (Last, First Middle) ▶ Keyword (All) ▶

aziz, nasir 1989

✕ ★ 🔍 ☰

<input type="checkbox"/>	Barcode	Name	Street	City	S...	Zip	Birth D...	Library
<input checked="" type="checkbox"/>	1229195408668	Aziz, Nasir	856 Oak Drive	SYRACUSE	NY	13...	2/14/19...	Commu...

Ready1 Result(s)

OPENCANCEL

For more information, see "The Leap Find Tool" on page 34.

## View, edit, or renew an existing patron's registration

To view or edit an existing patron's registration information or renew the patron's registration:

1. Scan a patron's barcode or search for the patron.

The patron's name, picture (if available), registered branch, and account information are displayed at the top of the page.

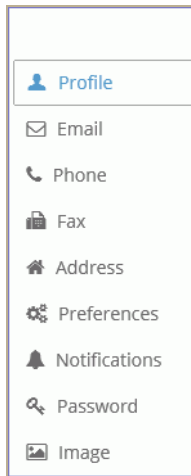
The screenshot shows the top section of the patron profile page for ALEXANDRIA LEE REMEY. At the top left is a small profile picture and the name 'ALEXANDRIA LEE REMEY' with an information icon. Below the name is the barcode '122919540926' and the library name 'COMMUNITY LIBRARY'. To the right are buttons for 'REGISTRATION', 'REFRESH', and 'CLOSE'. Below this is a row of account statistics: 'Check Out (0)', 'Items (3)(3)', 'Account (\$3.40)', 'Claims/Lost (1/0)', and 'Holds (5)', with a 'More' dropdown. Below the statistics is a search bar with a 'FIND TOOL' button and a 'RESET' button. To the right of the search bar is a 'SPECIAL...' button. At the bottom is a table with columns: BARCODE, CALL NUMBER, TITLE, DUE DATE, ACTION, SHELF LOCATION, ASSIGNED BRANCH, and MATERIAL TYPE.

2. Select **REGISTRATION**.

The page displays the patron's registration information.

The screenshot shows the 'Profile' section of the patron profile page. On the left is a navigation menu with links: Profile, Email, Address, Phone/Fax, Notifications, Preferences, Password, Image, and Misc. Info. The main content area is titled 'Profile' and contains a form with the following fields: 'Barcode \*' (122919540926), 'Registered At \*' (Community Library), 'Former Barcode', 'Patron Code \*' (Regular), 'Last Name \*' (Remey), 'Date of Registration' (11/12/2013), 'First Name \*' (Alexandria), 'Expiration Date \*' (11/12/2016), 'Middle Name' (Lee), and 'Birth Date' (4/16/1988). To the right of the form are two buttons: 'SAVE' and 'RENEW'.

3. To go to different sections of the patron record, select an item from the left navigation menu.



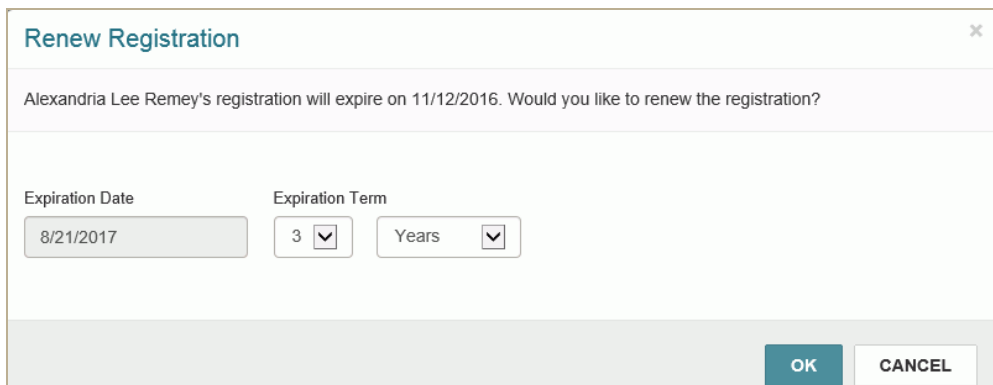
- Profile
- Email
- Phone
- Fax
- Address
- Preferences
- Notifications
- Password
- Image

4. To edit the patron's registration information, type the text or select options, and select **SAVE**.

SAVE

See "Register a new patron" on page 71 for information on the registration fields.

5. To renew the patron's registration, select **RENEW** to open the Renew Registration box, and type the date in the **Expiration Date** box, or select a number and select **Months** or **Years** from the drop-down list, and select **OK**.



**Renew Registration**

Alexandria Lee Remey's registration will expire on 11/12/2016. Would you like to renew the registration?

Expiration Date: 8/21/2017

Expiration Term: 3 Years

OK CANCEL

**Note:**

When you have a patron record open, you can continue to open other patron, item, or bibliographic records. You can select the record to view from the Workforms menu.

## Register a new patron

To register a new patron:

1. Select **NEW PATRON**.



The Patron Registration page opens to the Profile section of the record.

**Note:**

Required fields are marked with an asterisk.

A screenshot of the "Patron Registration" web form. The form has a title bar "Patron Registration" and a left-hand navigation menu with links: Profile (selected), Email, Address, Phone/Fax, Notifications, Preferences, Password, and Image. The main content area is titled "Profile" and contains several input fields: "Barcode \*" (text box), "Former Barcode" (text box), "Last Name \*" (text box), "First Name \*" (text box), "Middle Name" (text box), "Title" (dropdown menu with "(None)" selected), "Suffix" (text box), "Registered At \*" (dropdown menu with "Community Library" selected), "Patron Code \*" (dropdown menu with "Regular" selected), "Date of Registration" (text box with "8/21/2014"), "Expiration Date \*" (text box with "8/21/2017"), "Birth Date" (text box), and "Gender \*" (radio buttons for "Male", "Female", and "N/A", with "N/A" selected). On the right side of the form are two buttons: "SAVE" (green) and "CANCEL" (white with a grey border).

2. Scan the patron's barcode from the new library card in the **Barcode** box, or type the barcode.

**Note:**

If the patron was registered previously and had a library card with a barcode, enter the old barcode number in the **Former barcode** box.

3. Enter the patron's name as follows:

- Type the patron's last name (at least one character) in the **Last name** box.

**Tip:**

Do not use spaces when typing compound last names. For example, type MacDonald (instead of Mac Donald).

- Type the first name in the **First Name** box.

4. To enter optional name information, follow these steps:

- Type the middle name in the Middle Name box.
- Select the patron's title in the Title box.
- Type the patron's suffix (such as Sr., Jr., II, or Ph.D.) in the Suffix box.

5. Select the patron's registration location in the Registered At box.
6. Select the patron's code in the Patron Code box.

**Tip:**

You can also type dates (mm/dd/yyyy) in date boxes.

7. Click/tap in the **Expiration Date** box to open a calendar, and select the date that the patron's registration will expire.

Expiration Date\*

9/13/2016

4 Sep 2016 1

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

8. Click/tap in the Birth Date box to open a calendar, and select the patron's birth date.

4 Sep 1961 1

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

09/01/1961 X

9. Select **Male**, **Female**, or **N/A** under Gender.
10. Select a statistical class for the patron
11. If applicable, enter additional information in the user-defined fields that your library has set up.
12. In the Email section, type the patron's email address and the alternate email address (if applicable).
13. In the Addresses section, select the ADDRESS button to add a patron's address.

The Address section expands.



**Addresses**

Address Type: Home ☐

City: COBLESKILL

Postal Code: 12043

State: NY

Street Address:

County: SCHOHARIE

Street Address Line 2:

Country: USA ☐

Address Check Date: 8/22/2015

Term: 1 ☐ Years ☐

14. Enter the following information in the expanded Address section:

- Select an address type in the **Address Type** box.
- Enter the postal code in the **Postal Code** box.
- The **City**, **State**, and **County** boxes are filled in based on the postal code you entered. If these boxes are not automatically filled, you can type the city, state, and county.
- Type the patron's street address in the **Street Address** and, if necessary, the **Street Address Line 2** boxes.
- Click/tap in the **Address Check Date** box, and select a date when the patron's address should be checked. Or, under **Term** select a number and select **Years** or **Months**. The address check date changes when you select a term.

Address Check Date:

09/08/2016

Sep 2016

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

15. In the **Phone/Fax** section, enter at least one and up to three phone numbers, and a fax number (if applicable).

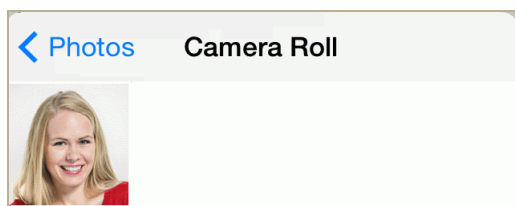
16. In the **Notification Settings** section, select the following options for notices:
  - Select the address type to which notices will be sent. The addresses must be entered in the Addresses section to appear in this list. For example, if you specified a home address, it is listed as **Home**.
  - Select the electronic receipt option in the **eReceipt Option** box.
  - Select the notification option to use in the **Notification Option** box.
  - If an additional text notice will be sent to the patron's cell phone, select the following options:
    - Select the **Additional TXT Notice** box
    - Select the phone (1, 2, or 3) to which text messages will be sent in the **Text Messaging Phone** box.
    - Select the wireless carrier in the **Wireless Carrier** box.
17. In the Preferences section, select the check box next to the applicable options:
  - **Exclude from Collection Agency**
  - **Exclude from Overdue Notice**
  - **Exclude from Hold Notice**
  - **Exclude from Billing**
  - **E-mail notices in plain text**
  - If the patron's primary language is other than English, select it in the **Language** box.
  - **Maintain Reading List**
  - **Do Not Delete Record**
18. In the **Password** section, enter the patron's password and re-enter it to confirm it in the **Password (Confirm)** box.

If the passwords do not match, the Password (Confirm) box has a red border.
19. To save a patron's picture in the record, go to the Patron Image section, and do the following steps:

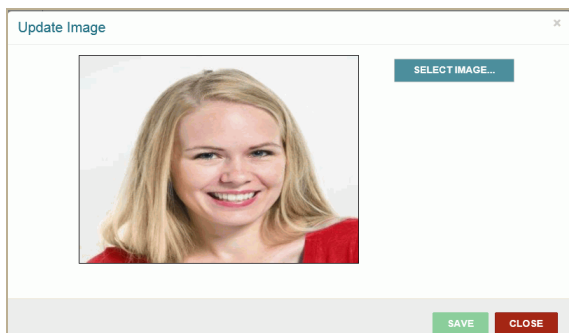
**Note:**

To take a new patron photograph from a workstation, a webcam must be installed. If you are running Leap on an iPad, you can use the iPad camera.

- a. Select **UPDATE IMAGE**.
- b. Click/tap **SELECT IMAGE** and select one of the following options:
  - **TAKE PHOTO** - The camera opens. Take the patron's photo and select Use Photo to use the image as it was captured. You can select Retake to take a new photograph.
  - **CHOOSE EXISTING** - Browse and select the existing patron photo. On an iPad, you can select the picture from the Camera Roll.



The picture is displayed in the Update Image view.



- c. Select **SAVE** to save the patron's picture.
  - d. Select **CLOSE** to close the Update Image box and return to the patron's record.
20. Select **SAVE** to save the new patron record.

If no similar patron records are found, the new patron record is saved.

If potential duplicate patron records are found in the database, a Record Not Saved dialog box opens listing the potential duplicates.

**Note:**

You can update the photo by replacing it, or if you want to delete the photo, select it and select **DELETE**.

## Patron Record - Library Account

When you access an existing patron's record in Leap, **Check Out** is selected and the cursor is in the barcode box. To check out an item to the patron, scan the barcode. You can also search for an item and check it out. See "Check Out/Renew Items" on page 153.

In addition to the **Check Out** option, the summary bar displays the number of items out and overdue; the account balance; the number of claimed and lost items; and the number of holds. To view details, or to enter or modify data, select the appropriate option in the summary bar.

From the **More** menu, you can access the patron's notes, reading history, associations, notices, interlibrary loans (ILLs), and messages.

**ANAR KAMAT** ⓘ  
1001900146413  
COMMUNITY LIBRARY

REGISTRATION REFRESH CLOSE

BLOCKS NOTES

Check Out (0) Items (2)(2) Account (\$0.00) Claims/Lost (0/0) Holds (0) More ▾

SEARCH [ ] FIND TOOL [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]

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

See also:

- "Items Out List" on page 77
- "Patron's Financial Account " on page 86
- "Claimed and Lost Items" on page 97
- "Hold Requests " on page 101
- "Patron Blocks" on page 123
- "Patron Notes" on page 126
- "Notices" on page 132
- "Patron Messages" on page 137
- "Reading History" on page 129
- "Patron's Interlibrary Loans" on page 131
- "Patron Associations" on page 140

## Items Out List


The patron's items out list is displayed when you select the **Items** button. The button indicates the number of items out to the patron (in blue) and the number of overdue items (in red).

**Note:**

Some screen captures show the updated button without the word **Items**

Out (4) / Overdue (0)

The **Due On** column displays the due date with an exclamation point if the item is overdue. From patron's items out view, you can reset the due date, renew, make a claim, estimate fines for overdue items, or check in items. You can also select **More** to go to the History, Associations, Notices, ILL, and Messages pages.



**MS. LAURA IZQUIERDA** ⓘ  
 A12291954  
 COMMUNITY LIBRARY

REGISTRATION
 REFRESH
 CLOSE

BLOCKS
 NOTES

Check Out (3)
 **Items (3)(0)**
 Account (\$0.00)
 Claims/Lost (1/0)
 Holds (3)
 More ▼

RENEW
 [Clock] [Calendar] [Calculator] [Smiley] [Pencil] [Envelope] [Download] [Print]
 Filter Items

<input type="checkbox"/>	TYPE	DUE ON ▼	BARCODE	TITLE	AUTHOR	RENEWALS LEFT	CALL NO.	BRANCH
<input type="checkbox"/>	Music	11/12/2014	0000202317905	Leaving the land : [compact audio disc] a collection of songs, Scottish and Western.	Redpath, Jean.	1 of 1	CD Q BRIT REDP R 31	Saratoga Springs Public...
<input type="checkbox"/>	Book	11/12/2014	0000406847319	The autumn of the patriarch	García Márquez, ...	1 of 1	Fict	Schenectady Branch - Ce...
<input type="checkbox"/>	Book	11/12/2014	2223334445552	The narrow road to the deep north	Flanagan, Richard...	0 of 0		Community Library

You can select an item or items in the patron's items out list and select a button from the task toolbar to do the following: renew an item; set a special renew period; reset the due date; estimate fines; make a claim; declare the item lost; view the item's notification history; check in the item; or print a list of the selected items.

RENEW
 [Clock] [Calendar] [Calculator] [Smiley] [Pencil] [Envelope] [Download] [Print]

Special Renew
 Reset Due Date
 Estimate Fines
 Make a Claim
 Declare Lost
 Notification History
 Check In
 Print List


See also:

- "Renew items from the items out list" on page 79
- "Reset the due date from the items out list" on page 80
- "Set a special renew date or loan period from the items out list" on page 81
- "Estimate fines from the items out list" on page 82
- "Claim an item from the items out list" on page 83
- "Declare an item lost from the items out view" on page 84
- "View the item record from the items out list" on page 85

## Renew items from the items out list

To renew one or multiple items from the items out list:

1. Open the patron's items out list.
2. Select the item or items in the list and select **RENEW**.


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A12291954  
COMMUNITY LIBRARY

REGISTRATION
REFRESH
CLOSE

BLOCKS
NOTES

Check Out (1)
Out (4) / Overdue (0)
Account (\$0.00)
Claims (1) / Lost (0)
Holds (5)
More ▼

RENEW
Filter Items

<input type="checkbox"/>	TYPE	DUE ON ▼	BARCODE	TITLE	AUTHOR	RENEWALS LEFT	CALL NO.	BRANCH
<input type="checkbox"/>	Video	11/26/2014	122919546777	Gravity [videorecording]		0 of 0		Saratoga Springs Public...
<input type="checkbox"/>	Book	11/26/2014	2223334445552	The narrow road to the deep north	Flanagan, Richard,...	0 of 0		Community Library
<input type="checkbox"/>	Music	11/26/2014	0000202317905	Leaving the land : [compact audio disc] a collection of songs, Scottish and Western.	Redpath, Jean.	0 of 1	CD Q BRIT REDP R 31	Saratoga Springs Public...
<input checked="" type="checkbox"/>	Book	11/26/2014	0000406345801	Star of Peace : a novel of the sea	De Hartog, Jan, 19...	0 of 1	Fict	Schenectady Branch - Ce...

If the item is overdue, the Overdue Fine dialog box opens.

From this dialog box, you can pay, waive, charge account, or cancel. See "Patron's Financial Account " on page 86.


If your library prints receipts for renewals, the print dialog box opens. See "Receipt Printing from Leap" on page 19.

When the items are renewed successfully, the new due date is displayed in the **DUE ON** column.

## Reset the due date from the items out list

To set a different due date from the items out list:

1. Open the patron's record and go to the items view.
2. Select an item or items in the list of items out, and select the **Reset Due Date** button.



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REGISTRATION  
 REFRESH  
 CLOSE

BLOCKS  
 NOTES

Check Out (1)   Out (4) / Overdue (0)   Account (\$0.00)   Claims (1) / Lost (0)   Holds (5)   More ▾

RENEW

Filter Items

Reset Due Date

<input type="checkbox"/>	TYPE	DUE ON ▼	BARCODE	TITLE	AUTHOR	RENEWALS LEFT	CALL NO.	BRANCH
<input type="checkbox"/>	Video	11/26/2014	122919546777	Gravity [videorecording]		0 of 0		Saratoga Springs Public...
<input type="checkbox"/>	Book	11/26/2014	2223334445552	The narrow road to the deep north	Flanagan, Richard,...	0 of 0		Community Library
<input type="checkbox"/>	Music	11/26/2014	0000202317905	Leaving the land : [compact audio disc] a collection of songs, Scottish and Western.	Redpath, Jean.	0 of 1	CD Q BRIT REDP R 31	Saratoga Springs Public...
<input checked="" type="checkbox"/>	Book	11/26/2014	0000406345801	Star of Peace : a novel of the sea	De Hartog, Jan, 19...	0 of 1	Fict	Schenectady Branch - Ce...

A calendar control is displayed.

3. Select the new due date from the calendar.

The new due date is displayed in the **DUE ON** column.





## Estimate fines from the items out list

To estimate fines for items in the items out view:

1. Open the patron's record.
2. Select **Items** to go to the items out view.
3. Select the item or items in the items out list, and select the estimate fines button.



The estimated fines are displayed.

Estimated Fines				
Estimated Fines of \$0.70 based on return date of 8/27/2014 <span>SELECT DATE</span>				
TITLE	AUTHOR	ITEM STATUS	DUE DATE	FINE
The Australian outback	Moffitt, Ian	Out	8/26/2014	\$0.10
The theatre of Tennessee Williams	Williams, Tennessee, 1911-1983.	Out	8/26/2014	\$0.10
Zen art for meditation	Holmes, Stewart Walker.	Out	8/26/2014	\$0.10
The question of Bruno	Hemon, Aleksandar, 1964-	Out	8/26/2014	\$0.10
White teeth : a novel	Smith, Zadie.	Out	8/26/2014	\$0.10
Remembrance of things past	Proust, Marcel, 1871-1922.	Out	8/26/2014	\$0.10
Panic in a suitcase : a novel	Akhitorskaya, Yelena.	Out	8/26/2014	\$0.10
Estimated Fine Total:				<b>\$0.70</b>
<span>CLOSE</span>				

4. To change the due date, click/tap **SELECT DATE**, and select a different date from the calendar.
5. Select **CLOSE** to close the dialog box and return to the items out list.

### Note:

If your library has opted to include lost/and or claimed items in the estimated fines calculation, you can also estimate fines from the **Claims/Lost** view.

## Claim an item from the items out list

When an item is listed as checked out to the patron, but the patron claims she never checked out the item or has already returned it, you can assign a claim status to the item.

To assign a claimed status to an item in the patron's item list:

1. Open the patron's record and select Items.

The patron's items out list view opens.

2. Select the check box in the column to the left of the item that you want to claim, and select the **Make a Claim** button.

	TYPE	DUE ON ▼	BARCODE	TITLE	AUTHOR	RENEWALS LEFT	CALL NO.	BRANCH
<input checked="" type="checkbox"/>	Book	8/29/2014	0000601199680	The giver.	Hall, Lynn.	2 of 2	Fict Hal YA	Clifton Park-Halfmoon P...
<input type="checkbox"/>	Book	9/9/2014	0001100333564	Ortho's all about azaleas, camellias & rhododendrons	Reiley, H. Edward.	0 of 1	635.933 Rei	Mechanicville District ...
<input type="checkbox"/>	Book	9/9/2014	0000402103121	The portrait of a lady	James, Henry, 1843...	0 of 1	Fict	Schenectady Branch - Ce...

The area below the button expands.

Choose a claim status: Claim Returned ▼

CLAIM CANCEL

3. Select the claim status, and select **CLAIM**.

The item is claimed.

## Declare an item lost from the items out view

To select an item from the list of items out and declare the item lost:

1. Access the patron's items out list. See "Items Out List" on page 77
2. Select the check box in the column to the left of the item that you want to declare lost, and select the declare lost button.



The Declare Lost dialog box opens.

Declare lost item

Item Barcode: 0001900161173
Title: All about African violets : the complete guide to success with Saintpaulias

Due Date: 2/18/2014
Billed Date: N/A
☐ Billed

Patron Name: Remey, Alexandria Lee
Patron Barcode: 122919540926

	Replacement:	Processing:	Overdue:
Charge:	\$22.00	\$0.00	\$0.00
Paid:	\$0.00	\$0.00	\$0.00
Waived:	\$0.00	\$0.00	\$0.00
Amount due:	\$22.00	\$0.00	\$0.00
Amount:	<input type="text" value="\$22.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>
Actions:	<input type="button" value="Pay"/> ▼	<input type="button" value="Leave as is"/> ▼	<input type="button" value="Leave as is"/> ▼
Payment method:	<input type="button" value="Cash"/> ▼		

Total Fine: \$22.00

3. Enter the amount to pay, waive, or charge in the **Amount** box.
4. Select **Pay**, **Waive**, or **Charge** in the **Actions** box.
5. Select **Check** or **Cash** in the **Payment method** box.

### Note:

Integrated credit card payments are not available in this version of Leap.

6. Select **OK**.

## View the item record from the items out list


To view the item details from the items out list:

1. Open the patron's items out list. See "Items Out List" on page 77.
2. Select an item in the list.

The item record's details are displayed.

### Item Record

PLACE HOLD
REFRESH
CLOSE



**Breath, eyes, memory [large print]**  
By Danticat, Edwidge, 1969-

Barcode: 0000101520286	Material type: Book	<input type="checkbox"/> ILL
Call number: LT Fict Dan	Shelf location: None	<input type="checkbox"/> eContent
Collection: Large Type	Issue:	<input type="checkbox"/> Non-circulating
Temp location:	Price: \$25.00	<input checked="" type="checkbox"/> Display in PAC
Assigned branch: Lake Pleasant	Circulation status: Out    8/26/2014 2:25:03 PM	Bib control number: 561428


Circulation
Controls
Blocks and Notes
History

Due date: 2/4/2015 11:59:00 PM	Current borrower: 122919540926	Check-out date: 8/26/2014 2:25:03 PM
Renewals taken: 1	Loaning branch: Community Library	Original due date: 9/9/2014 11:59:59 PM

3. Select **CLOSE** to close the item record details box.

## Patron's Financial Account

The patron's financial account view is displayed when you select **Account** in the summary bar. The columns in the Account view display the type of charge, credit, or deposit; the date; the item barcode and title (if applicable); the reason for the charge, credit or deposit; the organization that made the financial transaction; notes (if entered); and the amount.



**HAROLD T SMYTHE** ⓘ  
 12291954022100  
 COMMUNITY LIBRARY

REGISTRATION REFRESH

CLOSE

BLOCKS NOTES

Check Out (4) Items (3)(0) **Account (\$0.50)** Claims/Lost (1/0) Holds (3) More ▾

PAY

Filter Charges

Charges: \$0.50 Deposits: \$0.00 Credits: \$0.00 Balance: \$0.50 View: Account Summary ▾

<input type="checkbox"/>	TYPE	DATE ▲	BARCODE	TITLE	REASON	ORGANIZATION	NOTE	AMOUNT	BALANCE
<input type="checkbox"/>	Charge	8/27/2014	0000400560710	The theatre of Tennessee Williams	Overdue Item	Community Library		\$0.10	\$0.10
<input type="checkbox"/>	Charge	8/27/2014	0000405654906	Zen art for meditation	Overdue Item	Community Library		\$0.10	\$0.10
<input type="checkbox"/>	Charge	8/27/2014	0000409188828	White teeth : a novel	Overdue Item	Community Library		\$0.10	\$0.10
<input type="checkbox"/>	Charge	8/27/2014	0000600056733	Remembrance of things past	Overdue Item	Community Library		\$0.10	\$0.10
<input type="checkbox"/>	Charge	8/27/2014	0000201647757	The Australian outback	Overdue Item	Community Library		\$0.10	\$0.10
									\$0.50

When you select a specific line in the **Account** view, the applicable task buttons are active. For example, when you select a credit, the refund credit button is active.

PAY

Waive Charge Add Charge Create Credit Refund Credit Notification History History Properties

See also:

- "Add a charge to a patron's account" on page 90
- "Pay patron charges" on page 87
- "Waive charges" on page 88
- "Add a credit to a patron's account" on page 92

## Pay patron charges

To select charges and pay them:

1. Open the patron's record.
2. Select **Account** in the summary toolbar.
3. Select the check box next to the charge or charges you want to pay.
4. Select **PAY**.

The area below the button expands.

The screenshot shows a 'PAY' modal window. At the top, there is a toolbar with icons for 'PAY', a heart, a shield, a credit card, a shopping cart, an envelope, a refresh, and an information icon. A 'Filter Charges' button is located on the right. The main form area contains the following fields:

- Balance:** \$10.00
- Amount:** A text input field containing '\$10.00'.
- Method:** A dropdown menu with 'Cash' selected.
- Note:** A large text area for entering a note.

At the bottom right of the form are two buttons: a green 'PAY' button and a white 'CANCEL' button.

5. If the amount paid is different from that displayed in the **Amount** box, type the amount.
6. (Optional) Type a note in the **Note** box.
7. Select **PAY**.

The charges are paid, and the patron's account is updated.

## Waive charges

To waive a charge or charges, and distribute waived amounts:

1. Open the patron's record and select **Account** to go to the account view.

**HAROLD T SMYTHE** 12291954022100  
COMMUNITY LIBRARY

Check Out (4) Items (3)(0) **Account (\$0.50)** Claims/Lost (1/0) Holds (3) More ▾

**PAY** Filter Charges

Charges: \$0.50 Deposits: \$0.00 Credits: \$0.00 Balance: \$0.50 View: **Account Summary** ▾

<input type="checkbox"/>	TYPE	DATE ▲	BARCODE	TITLE	REASON	ORGANIZATION	NOTE	AMOUNT	BALANCE
<input type="checkbox"/>	Charge	8/27/2014	0000400560710	The theatre of Tennessee Williams	Overdue Item	Community Library		\$0.10	\$0.10
<input type="checkbox"/>	Charge	8/27/2014	0000405654906	Zen art for meditation	Overdue Item	Community Library		\$0.10	\$0.10
<input type="checkbox"/>	Charge	8/27/2014	0000409188828	White teeth : a novel	Overdue Item	Community Library		\$0.10	\$0.10
<input type="checkbox"/>	Charge	8/27/2014	0000600056733	Remembrance of things past	Overdue Item	Community Library		\$0.10	\$0.10
<input type="checkbox"/>	Charge	8/27/2014	0000201647757	The Australian outback	Overdue Item	Community Library		\$0.10	\$0.10
									\$0.50

The Account view displays the account summary at the top of the list with totals for Charges, Deposits, Credits, and the total balance on the account.

2. Select the check box next to the charge (or charges) you want to waive.
3. Select the **Waive Charge** button.

**PAY** **Waive Charge**

The area below the toolbar buttons expands.

Balance: **\$0.10**

Amount to waive:  ×

Note:

**WAIVE** **CANCEL**



- To enter an amount less than the total amount of the charge, enter it in the Amount to waive box.

**Note:**

The ability to distribute waived amounts among several selected charges is available only if your library has enabled distributed waivers in Polaris Administration. For more information, see Polaris online Help.

- To distribute a waived amount among the selected charges, select **Distributed waive**, and enter an amount in the Amount to waive box.

The screenshot shows a web interface for managing charges. At the top, there is a navigation bar with icons for 'PAY', a shield, a heart, a credit card, a shopping cart, an envelope, a refresh, and an information icon. A 'Filter Charges' button is on the right. Below the navigation bar, a dialog box is open. Inside the dialog, the 'Balance' is \$10.00. The 'Amount to waive' is set to \$10.00. The 'Distributed waive' checkbox is checked. There is a 'Note' text area. At the bottom right of the dialog are two buttons: 'WAIVE' (green) and 'CANCEL' (white).

- To enter an optional note, type it in the **Note** box.
- Select **WAIVE** at the bottom of the dialog box to waive the charge or charges, or select **CANCEL** if you choose not to waive the charge.

A message indicates the charge was waived successfully.

## Add a charge to a patron's account

To add a charge to a patron's account:

1. Open the patron's record and select **Account** to go to the account view.

**HAROLD T SMYTHE** 12291954022100  
COMMUNITY LIBRARY

REGISTRATION REFRESH CLOSE

Check Out (4) Items (3)(0) **Account (\$0.50)** Claims/Lost (1/0) Holds (3) More ▾

PAY Filter Charges

Charges: \$0.50 Deposits: \$0.00 Credits: \$0.00 Balance: \$0.50 View: Account Summary ▾

<input type="checkbox"/>	TYPE	DATE ▲	BARCODE	TITLE	REASON	ORGANIZATION	NOTE	AMOUNT	BALANCE
<input type="checkbox"/>	Charge	8/27/2014	0000400560710	The theatre of Tennessee Williams	Overdue Item	Community Library		\$0.10	\$0.10
<input type="checkbox"/>	Charge	8/27/2014	0000405654906	Zen art for meditation	Overdue Item	Community Library		\$0.10	\$0.10
<input type="checkbox"/>	Charge	8/27/2014	0000409188828	White teeth : a novel	Overdue Item	Community Library		\$0.10	\$0.10
<input type="checkbox"/>	Charge	8/27/2014	0000600056733	Remembrance of things past	Overdue Item	Community Library		\$0.10	\$0.10
<input type="checkbox"/>	Charge	8/27/2014	0000201647757	The Australian outback	Overdue Item	Community Library		\$0.10	\$0.10
									\$0.50

The Account view displays the account summary at the top of the list with totals for Charges, Deposits, Credits, and the total balance on the account.

2. Select **Add Charge**.

PAY Add Charge

The Add Charge dialog box opens.

**Add Charge** [X]

**Amount:**  
Charge Amount

**Fee Reason:**  
Select one [v]

**Item Barcode:**  
Scan or enter item barcode [FIND TOOL]

**Notes:**  
[Text Area]

[ADD CHARGE] [CANCEL]

3. Type the amount of the charge in the **Amount** box.
4. Select the reason for the charge in the **Fee Reason** box.
5. If the charge is related to an item, scan or type the barcode in the box. Or, if the item is not in hand, select **FIND TOOL** to open the Find Tool, and search for the item.
6. To enter notes regarding this charge, type them in the **Notes** box.
7. Select **ADD CHARGE** at the bottom of the dialog box to add the charge or select **CANCEL** if you decide not to add the charge.
8. The charge is added to the patron's account, and the dialog box closes.

## Add a credit to a patron's account

To add a credit to a patron's account:

1. Open the patron's record and select **Account** to go to the account view.

**HAROLD T SMYTHE** 12291954022100  
COMMUNITY LIBRARY

REGISTRATION REFRESH CLOSE

Check Out (4) Items (3)(0) **Account (\$0.50)** Claims/Lost (1/0) Holds (3) More ▾

PAY Filter Charges

Charges: \$0.50 Deposits: \$0.00 Credits: \$0.00 Balance: \$0.50 View: Account Summary ▾

<input type="checkbox"/>	TYPE	DATE ▲	BARCODE	TITLE	REASON	ORGANIZATION	NOTE	AMOUNT	BALANCE
<input type="checkbox"/>	Charge	8/27/2014	0000400560710	The theatre of Tennessee Williams	Overdue Item	Community Library		\$0.10	\$0.10
<input type="checkbox"/>	Charge	8/27/2014	0000405654906	Zen art for meditation	Overdue Item	Community Library		\$0.10	\$0.10
<input type="checkbox"/>	Charge	8/27/2014	0000409188828	White teeth : a novel	Overdue Item	Community Library		\$0.10	\$0.10
<input type="checkbox"/>	Charge	8/27/2014	0000600056733	Remembrance of things past	Overdue Item	Community Library		\$0.10	\$0.10
<input type="checkbox"/>	Charge	8/27/2014	0000201647757	The Australian outback	Overdue Item	Community Library		\$0.10	\$0.10
									\$0.50

The Account view displays the account summary at the top of the list with totals for Charges, Deposits, Credits, and the total balance on the account.

2. Select the **Create Credit** button to add a credit.

PAY Create Credit

The area below the button toolbar expands.

Credit to add: \$0.00 ×

Method: Cash ▾

Note:

ADD CANCEL

3. Enter the amount in the **Credit to add** box.

**Note:**

Integrated credit card payments are not available in this Leap version.

4. To enter an optional note, type it in the **Note** box.
5. Click to add the credit amount to the patron's account.

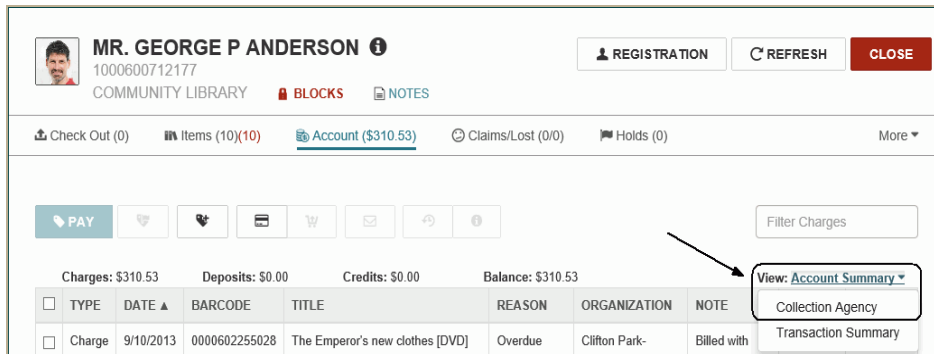
## View a patron's collection summary

To view a patron's collection summary and history:

1. Select **Account** in the patron's summary toolbar.

The Account view displays the account summary at the top of the list with totals for Charges, Deposits, Credits, and the total balance on the account.

2. Select **View |Collection Agency**.



MR. GEORGE P ANDERSON ⓘ  
1000600712177  
COMMUNITY LIBRARY

REGISTRATION REFRESH CLOSE

Check Out (0) Items (10)(10) **Account (\$310.53)** Claims/Lost (0/0) Holds (0) More ▾

PAY

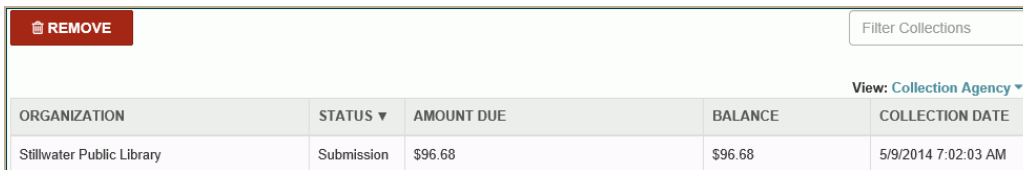
Charges: \$310.53 Deposits: \$0.00 Credits: \$0.00 Balance: \$310.53

TYPE	DATE ▲	BARCODE	TITLE	REASON	ORGANIZATION	NOTE
Charge	9/10/2013	0000602255028	The Emperor's new clothes [DVD]	Overdue	Clifton Park-	Billed with

Filter Charges

View: **Account Summary** ▾  
Collection Agency  
Transaction Summary

The Collection Agency view is displayed.



REMOVE

Filter Collections

View: **Collection Agency** ▾

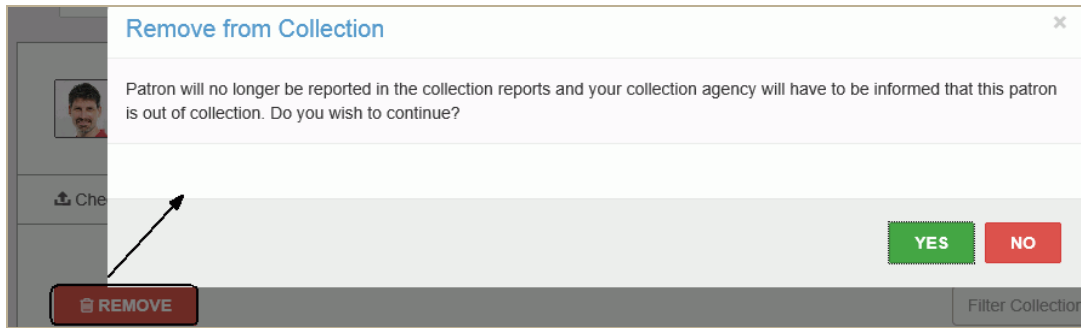
ORGANIZATION	STATUS ▾	AMOUNT DUE	BALANCE	COLLECTION DATE
Stillwater Public Library	Submission	\$96.68	\$96.68	5/9/2014 7:02:03 AM

## Remove a patron account from collections

To remove a patron account from collections:

1. Go to the Collection Agency view in the patron record. See "View a patron's collection summary " on page 94
2. Select the line for the amount in collection.
3. Select **Remove**.

A message informs you that the patron's account is in collection.



4. Select **YES** to remove the account from collections.

## View a patron's transaction summary

To view the patron's account transaction summary:

1. Open the patron record.
2. Select **Account**.

The Account view displays the account summary at the top of the list with totals for Charges, Deposits, Credits, and the total balance on the account.

3. Select **View | Transaction Summary**.

MR. GEORGE P ANDERSON ⓘ  
1000600712177  
COMMUNITY LIBRARY

REGISTRATION REFRESH CLOSE

Check Out (0) Out (10) / Overdue (10) Account ((\$19.46)) Claims (0) / Lost (0) Holds (0) More ▾

PAY

Charges: \$280.54 Deposits: \$0.00 Credits: \$300.00 Balance: (\$19.46)

TYPE	DATE ▲	BARCODE	TITLE	REASON	ORGANIZATION	NOTE
Credit	10/31/2014				Community	

Filter Charges

View: Account Summary ▾  
Collection Agency  
Transaction Summary

The Transaction Summary view opens.

HISTORY

Filter Transactions

View: Transaction Summary ▾

DATE ▲	TYPE	REASON	TITLE	BARCODE	AMOUNT	NOTE
8/16/2013 8:50:16 AM	Waive	Check Out Charge	The Emperor's new clothes [DVD]	0000602255028	\$5.00	
8/16/2013 8:50:16 AM	Charge	Check Out Charge	The Emperor's new clothes [DVD]	0000602255028	\$5.00	
8/16/2013 8:50:13 AM	Waive	Overdue Item	The Emperor's new clothes [DVD]	0000602255028	\$5.00	Billed and checked in
8/16/2013 8:50:13 AM	Waive	Replacement Cost	The Emperor's new clothes [DVD]	0000602255028	\$29.99	Billed and checked in
8/8/2013 3:14:56 PM	Waive	Overdue Item	Your executor duties	0000601071962	\$5.00	Billed and checked in

The patron's transaction history is displayed.

### Note:


You can select an item in the list to display the item details view.



## Claimed and Lost Items

If the patron has claimed items or declared items lost, the items are listed in the patron's record when you select **Claims/Lost**. The first number indicates the number of claimed items and the second number indicates the number of items that were declared lost.

From the **Claims/Lost** view, you can: reset the patron's total claim count; estimate fines (if your library has opted to include claimed items in estimated fines); and view the notification history for a claim.



**HAROLD T SMYTHE** ⓘ  
 12291954022100  
 COMMUNITY LIBRARY

REGISTRATION
 REFRESH
 CLOSE

BLOCKS
 NOTES

Check Out (4)
 Items (3)(0)
 Account (\$0.50)
 Claims/Lost (1/0)
 Holds (3)
 More ▼

RESET CLAIM COUNT
 Filter Claims

Total Claims: 1
 Current Claims: 1
 Lost: 0

<input type="checkbox"/>	BARCODE	TITLE	CLAIM DATE	DESCRIPTION	DUE DATE
<input type="checkbox"/>	0000400560710	The theatre of Tennessee Williams	9/17/2014	Claim Never Had/Accruing	8/26/2014

See also:

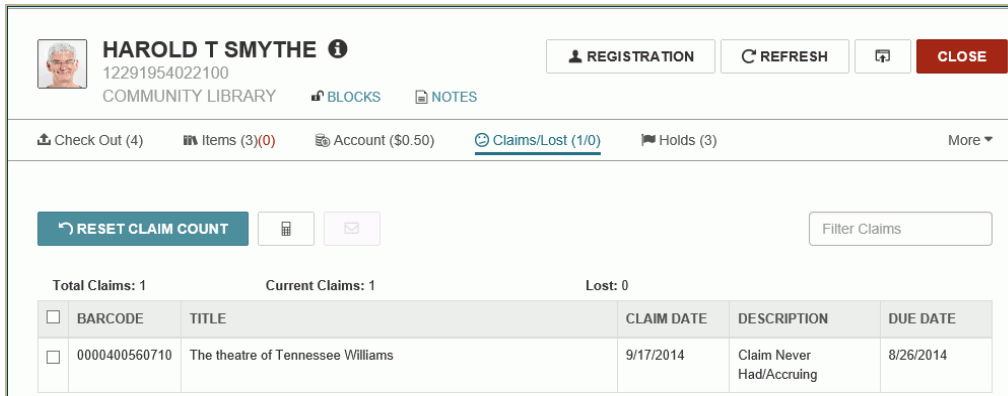
- "View estimated fines for claimed and lost items" on page 98
- "View notices for claimed or lost items" on page 99
- "Reset the claim count" on page 100

## View estimated fines for claimed and lost items

To view the items that were claimed or declared lost for a patron:

1. Open the patron's record.
2. Select **Claims/Lost** in the patron record's summary bar.

The items that were claimed or declared lost for the patron are listed.



**HAROLD T SMYTHE** ⓘ  
12291954022100  
COMMUNITY LIBRARY

REGISTRATION REFRESH

Check Out (4) Items (3)(0) Account (\$0.50) **Claims/Lost (1/0)** Holds (3) More ▾

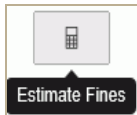
RESET CLAIM COUNT

Filter Claims

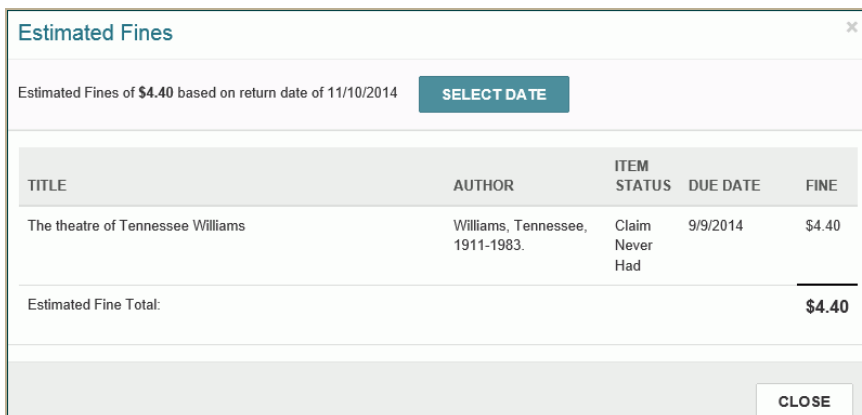
Total Claims: 1 Current Claims: 1 Lost: 0

BARCODE	TITLE	CLAIM DATE	DESCRIPTION	DUE DATE
<input type="checkbox"/> 0000400560710	The theatre of Tennessee Williams	9/17/2014	Claim Never Had/Accruing	8/26/2014

3. Select the item or items for which you want to estimate fines.
4. Select the estimate fines button.



The Estimate Fines dialog box opens.



**Estimated Fines** ✕

Estimated Fines of **\$4.40** based on return date of 11/10/2014 **SELECT DATE**

TITLE	AUTHOR	ITEM STATUS	DUE DATE	FINE
The theatre of Tennessee Williams	Williams, Tennessee, 1911-1983.	Claim Never Had	9/9/2014	\$4.40
Estimated Fine Total:				<b>\$4.40</b>

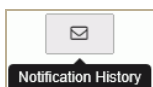
**CLOSE**

5. To see fines based on a different return date click/tap the **SELECT DATE** button and select another date. The estimated fine amount changes.

## View notices for claimed or lost items

To view the notification history for a claimed or lost item:

1. Open the patron's record.
2. Select **Claims/Lost** to open the list of claimed or lost items.
3. Select the check box next to the item, and select the notification history button.



The notification history for the claimed or lost item is displayed.

Notification History					
Title: The theatre of Tennessee Williams Material Type: Book					
NOTICE	METHOD	DATE	FROM	AMOUNT	STATUS
1st Overdue	Email	8/29/2014	COB		Email Completed
				ITEM RECORD	CLOSE

4. To see the claimed or lost item record, select **ITEM RECORD**.

The item record is displayed.

## Reset the claim count

Resetting a patron's claim count to zero prevents the patron from being blocked for exceeding the total claim limit when claims have actually been resolved.

To reset the count of claimed items for a patron:


1. Open the patron's record.
2. Go to the **Claims/Lost** view. See "Claimed and Lost Items" on page 97.
3. Select **RESET CLAIM COUNT**.

The patron's total claim count is reset to zero.

## Hold Requests

You start from the patron record and place holds by finding the title. Or, you can start from an item or bibliographic record, and place holds by finding the patron.

When you open a patron record in Leap, you can click on the Holds button to see a list of the patron's current holds. From the list view, you can select a single hold to open it in another view where you can edit it, view the hold history, cancel the hold, delete the hold, or deny the hold request.


**ALEXANDRIA LEE REMEY** ⓘ  
 122919540926  
 COMMUNITY LIBRARY

REGISTRATION
 REFRESH
 CLOSE

BLOCKS
 NOTES

Check Out (0)
 Out (1) / Overdue (0)
 Account (\$0.00)
 Claims (1) / Lost (0)
 **Holds (6)**
 More ▼

NEW HOLD
 Filter Holds

<input type="checkbox"/>	AUTHOR	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS	PICKUP BRANCH	QUEUE	HOLD UNTIL	GROUP
<input type="checkbox"/>	Milne, A. A. (Alan Alexander), 1882-1956.	When we were very young	Book	J 821 Mil	10/28/2014	Pending	Community Library	1		
<input type="checkbox"/>	Howard, John Tasker, 1890-1964.	A program of early and mid-nineteenth century American songs [musical score] [musical score]	Printed Music	S 784.8 H84	10/28/2014	Pending	Community Library	1		

Depending on the status of the hold and whether one or multiple holds are selected, one or more of the following buttons may be active:

NEW HOLD

Deny Hold
 Ask Me Later
 Cancel Hold
 Reactivate
 Delete
 Return
 Fill Now
 Add to Group
 Remove from Group
 Multiple Holds

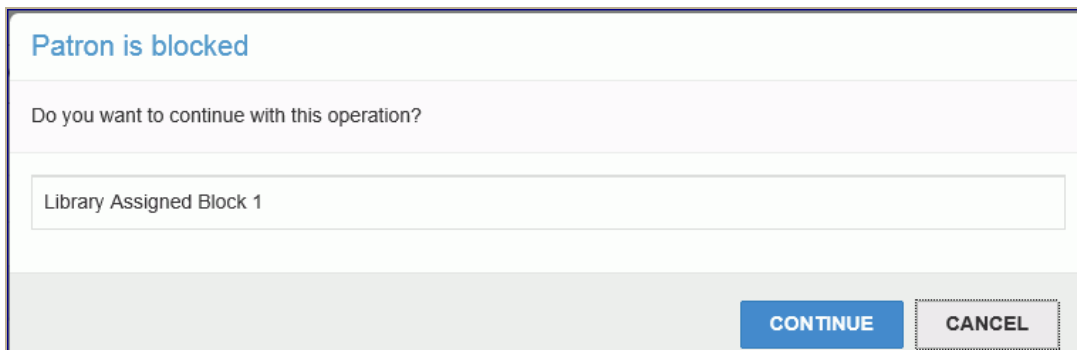
See also:

- "Messages or blocks when placing holds " on page 102
- "Place a single hold request for a patron" on page 103
- "Place a hold request from the bibliographic record" on page 105
- "Place a hold request from the item record" on page 107
- "Place multiple holds for the same patron" on page 109
- "Fill a hold now" on page 111
- "Modify a hold " on page 112

- "Reactivate a hold" on page 114
- "Cancel a hold " on page 115
- "Group multiple holds" on page 117
- "Deny a hold " on page 116
- "Mark a hold request with Ask Me Later" on page 163
- "Delete a hold " on page 120
- "View a hold's details and history " on page 121

## Messages or blocks when placing holds

As you create holds in Leap, messages and blocks may appear due to the status of the item or the patron. For example, there may be a library-assigned block on the patron's account. If a message or block appears in Leap, you can select **CONTINUE** or **CANCEL**.



The screenshot shows a modal dialog box with a light green header bar containing the text "Patron is blocked" in blue. Below the header is a light purple bar with the question "Do you want to continue with this operation?". Underneath is a white rectangular box containing the text "Library Assigned Block 1". At the bottom right of the dialog are two buttons: a solid blue button labeled "CONTINUE" and a dashed gray button labeled "CANCEL".

These messages and blocks appear in Leap according to the same criteria as they appear in the Polaris staff client. For more information on the types of messages and blocks that may appear when creating hold requests in Leap, see the topic *Hold Request Messages and Blocks* in the Polaris ILS online Help.

## Place a single hold request for a patron

When you search for a title to place a hold for a patron, the Find Tool opens with Bibliographic record selected. If your library allows item-specific holds, you can also place holds on specific items.

To place a hold from a patron record:

1. Open the patron's record.
2. Select **Holds**.

The patron's holds are displayed.

3. Select **NEW HOLD**.

The area below the button expands.

4. Click/ tap inside the **Title** box and start typing the title. Then, press **Enter** or select the return button to see the results in the Find Tool. Or, select the Find Tool button to open the Find Tool and search for the bibliographic record.

**Find Tool - Bibliographic Record**

Bibliographic Record ▶ Basic Search ▶ Title ▶ Keyword (All) ▶

When we were ✕ ★ 🔍 ☰

☑	Title	Author	Format	Li...	H...	Pub...	Call Number	Contr...
	When we were young : an album of stars.	Fortunato, Pat.	Book	1	0	1979	920 For	5800
	When we were very young	Milne, A. A. (Al...	Book	14	0	1924	J 821 Mil	13400

### Note:

When you search for a title, the Find Tool opens with **Bibliographic Record** selected. If the

patron wants a hold placed on a specific item, and your library allows item-specific holds, you can select **Item Record** in the Find Tool and select an item record on which to place the hold.

5. Select the title to place a hold.
6. To change the duration of the hold request, select the **Activation** and **Expiration** boxes to open the calendar control and select new dates. Select **PLACE HOLD**.

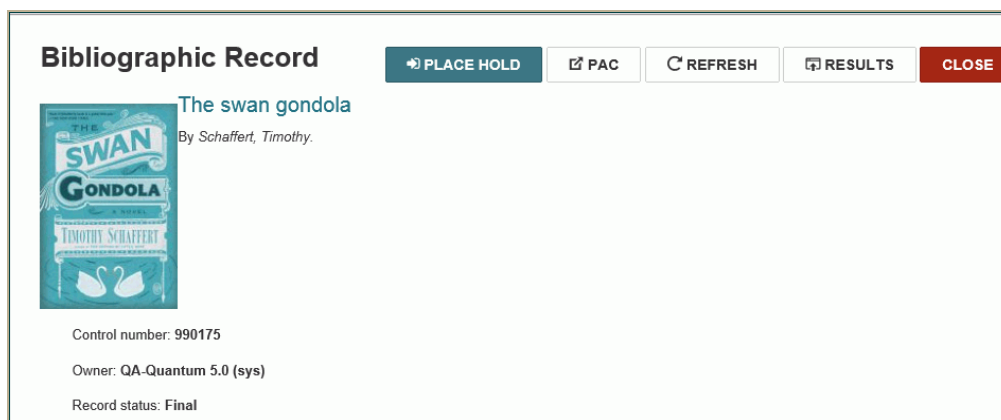
If there are no blocking conditions, a message indicates the hold request was created, and the pending hold request appears at the top of the patron's holds list.



## Place a hold request from the bibliographic record

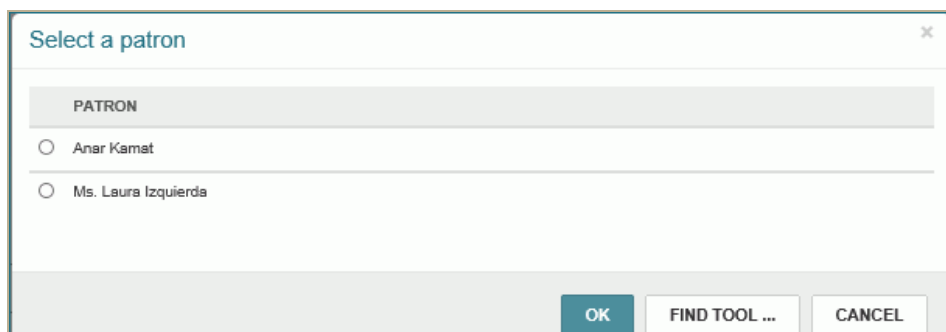
To place a hold request on a single title from the bibliographic record:

1. Open the bibliographic record.




2. Select **PLACE HOLD**.

If patron records are open, the **Select a patron** box opens, and you can select the patron.



If no patron record is open, select **FIND TOOL...** and search for the patron.

The patron's record opens to the Holds view with the title selected.

**ANAR KAMAT** ⓘ  
1001900146413  
COMMUNITY LIBRARY [BLOCKS](#)

REGISTRATION CLOSE

Check Out (0) Items (2)(0) Account (\$0.00) Claims/Lost (0/0) Holds (0) More ▾

NEW HOLD

Filter Holds

Activation  
08/25/2014

Expiration  
9/4/2014

Pickup  
Community Library ▾

PLACE HOLD

CANCEL

Title  
The swan gondola

FIND TOOL

Author  
Schaffert, Timothy.

Edition

Pages

Series

Call NO

Issue

Publisher

LCCN  
2013030317

Serial Copy

ISBN/ISSN  
9781594486098 (hbk.) :

Format  
Book

Tracking Number

3. Review the information and select **PLACE HOLD**. For more details, see "Place a single hold request for a patron" on page 103

## Place a hold request from the item record

To place a hold request from the item record:

1. Open the item record.

**DROWN** *Drown*  
By Diaz, Junot, 1968-

Barcode: 0000410237689      Material type: Book      ☐ ILL  
Call number: Fict Dia YA      Shelf location: None      ☐ eContent  
Collection: Young Adult Paperbacks      Issue:      ☐ Non-circulating  
Temp location:      Price: \$12.00      ☒ Display in PAC  
Assigned branch: Niskayuna      Circulation status: In || 11/13/2007 5:53:28 PM      Bib control number: 304723

**PLACE HOLD** **REFRESH** **CLOSE**

**Circulation** **Controls** **Blocks and Notes** **History**

Due date:      Current borrower:      Check-out date:  
Renewals taken: 0      Loaning branch:      Original due date:  
Renewals limit: 1      Held for:        
Renewal date:      Held at:        
Last location      Last use      In-transit/Transferred  
Check-in at: Niskayuna      Borrower: 1000402202567      From:  
Ck-in date: 11/13/2007 5:53:28 PM      Loaning branch: Niskayuna      Sent:  
Wkstn/user: NIS Staff/sgarrett      Circ date: 11/2/2007 4:44:53 PM      To:  
Received:

2. Select **PLACE HOLD**.

If patron records are open, the Select a patron box appears, and you can select the patron and select **OK**. Or, if you are placing the hold for another patron select **FIND TOOL** and search for the patron.

**Select a patron**

**PATRON**


☐ Anar Kamat

☐ Ms. Laura Izquierda

**OK** **FIND TOOL ...** **CANCEL**

If no patron records are open, the Find Tool opens. Search for and select the patron record.

3. Select **Holds** to open the Holds view .



**ANAR KAMAT** ⓘ  
1001900146413  
COMMUNITY LIBRARY

REGISTRATION

CLOSE

Check Out (0)

Items (2)(0)

Account (\$0.00)

Claims/Lost (0/0)

Holds (2)

More ▾

NEW HOLD

Filter Holds

Activation

Expiration

Pickup

PLACE HOLD

CANCEL

Title

Drown

FIND TOOL

Author

Díaz, Junot, 1968-

Edition

Pages

Series

Call NO

Issue

Publisher

Riverhead Books,

LCCN

96018362

Serial Copy

ISBN/ISSN

1573220418 (hc) :

Format

Book

Tracking Number

Barcode

0000410237689

Date

1996

4. Select **PLACE HOLD** to place the hold on the item.

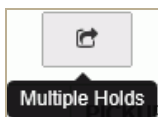
## Place multiple holds for the same patron

To place multiple holds at once for the same patron:

1. Open the patron's record.
2. Select **HOLDS**.

The patron's holds list is displayed.

3. Select the multiple holds button.



The area below the multiple holds button expands.

A screenshot of the "Multiple Holds" interface. At the top, there is a "NEW HOLD" button and a toolbar with various icons. A callout box points to a "Multiple Holds" icon in the toolbar. Below the toolbar, there are input fields for "Activation:" (08/19/2014), "Expiration:" (8/29/2014), and "Pickup:" (Community Library). To the right of these fields are "PLACE HOLD" and "CANCEL" buttons. Below the input fields is a table with columns: "AUTHOR", "TITLE", "FORMAT", "ASSIGNED BRANCH", "CALL NUMBER", and "ITEM BARCODE". There is a checkbox in the first column. Below the table is an "ADD TITLES" button and a trash icon. At the bottom, there is a "Notes" section with a plus icon.

4. Select **ADD TITLES** to open the Find Tool.
5. Search for the titles that the patron wants to request.  
The search results are displayed.
6. Select the check boxes next to the titles to hold for the patron.

**Find Tool - Bibliographic Record**

Bibliographic Record ▶ Basic Search ▶ Author ▶ Keyword (All) ▶

gladwell, malcolm, 1963

	Title	Author	Format	Li...	H...	Pub...	Call Number	Contr...
<input checked="" type="checkbox"/>	The tipping point : how little things can make...	Gladwell, Malc...	Book	19	2	2000	302 Gla	429422
	The tipping point : [sound recording] how littl...	Gladwell, Malc...	Nonm...	2	0	2000	RC 302 Gla	481005
	Blink : the power of thinking without thinking	Gladwell, Malc...	Book	54	0	2005	153.4 Gla	546032
<input checked="" type="checkbox"/>	Blink : [sound recording] the power of thinkin...	Gladwell, Malc...	Nonm...	3	0	2005	RC 153.4 Gla	553995
	Blink : [compact audio disc] the power of thin...	Gladwell, Malc...	Nonm...	10	0	2005	CD 153.4 Gla	615127
	The tipping point : [compact audio disc (abrid...	Gladwell, Malc...	Nonm...	3	0	2005	CD 302 Gla	631096
	The tipping point : how little things can make...	Gladwell, Malc...	Book	9	4	2002	302 Gla	632600
	Blink : the power of thinking without thinking	Gladwell, Malc...	Book	6	0	2007	153.4 Gla	719856
<input checked="" type="checkbox"/>	What the dog saw and other adventure stories	Gladwell, Malc...	Book	11	0	2009	814/.6	913136

Ready 10 Result(s)

**OPEN** **CANCEL**

7. Select **OPEN**.


The titles are displayed in a list, but the holds are not placed until you select **PLACE HOLD**.

8. To add more titles on which to place hold requests, select **ADD TITLES**, and search for and select the additional titles.
9. When all requested titles are displayed in the list, select the check boxes next to the titles.

Activation: 08/19/2014 Expiration: 8/29/2014 Pickup: Community Library ☒

**PLACE HOLD** **CANCEL**

<input type="checkbox"/>	AUTHOR	TITLE	FORMAT	ASSIGNED BRANCH	CALL NUMBER	ITEM BARCODE
<input type="checkbox"/>	Gladwell, Malcolm, 1963-	What the dog saw and other adventure stories	Book			
<input type="checkbox"/>	Gladwell, Malcolm, 1963-	Blink : [sound recording] the power of thinking without thinking	Nonmusical Sound Recording			
<input type="checkbox"/>	Gladwell, Malcolm, 1963-	The tipping point : how little things can make a big difference	Book			

**ADD TITLES** 

10. Select **PLACE HOLD**.

The hold requests are placed on all the selected titles.

## Fill a hold now

To fill a hold now:

1. Open the patron's record.
2. Select **Holds**.

The patron's holds list is displayed.

3. Select the check box next to the hold you are filling, and select the **Fill Now** button.

**ALEXANDRIA LEE REMEY** ⓘ  
122919540926  
COMMUNITY LIBRARY

REGISTRATION REFRESH CLOSE

Check Out (0) Out (2) / Overdue (0) Account (\$0.00) Claims (1) / Lost (0) **Holds (11)** More ▾

NEW HOLD [Icons] Filter Holds

	AUTHOR	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS	PICKUP BRANCH	QUEUE	HOLD UNTIL	GROUP
<input type="checkbox"/>		Treme. The complete fourth season [videorecording (Blu-ray)].	Blu-ray Disc		11/7/2014	Active	Community Library	1		A
<input checked="" type="checkbox"/>	Haddix, Margaret Peterson.	Double Identity	Book	YA Fict Had	11/11/2014	Pending	Community Library	1		
<input type="checkbox"/>	Akhierskaya, Yelena.	Panic in a suitcase : a novel	Book	F	8/14/2014	Unclaimed	Community Library		8/22/2014	

The area below the button bar expands.

NEW HOLD [Icons] Filter Holds

Scan/enter item barcode to fill now:

OK CANCEL

4. Scan the item barcode, and select **OK**.

The hold request is filled, and the pending hold request is updated to Held in the patron's holds list.

## Modify a hold

To modify a patron's hold request:

1. Open the patron's record.
2. Select **Holds**.

The patron's holds list is displayed.

3. Select a hold in the list to open it.

The hold details are displayed.

The screenshot shows the 'Modify a hold' form in the Polaris Leap 1.0 interface. The form is organized into several sections:

- Top Bar:** Includes a 'NEW HOLD' button, a set of icons for various actions (like search, edit, delete), and a 'Filter Holds' button.
- Form Fields:**
  - Request ID:** 839073
  - Activation:** 10/29/2014
  - Expiration:** 11/8/2014
  - Pickup:** Community Library (dropdown menu)
  - Status:** Pending 10/29/2014
  - Request Date:** 9/2/2014
  - Origin:** Library
  - Title:** By night in Chile
  - Barcode:**
  - Format:** Book
  - Author:** Bolano, Robert.
  - ISBN/ISSN:** 0811215474 (pbk.)
  - Pages:**
  - Series:** NDPaperbook ; 975
  - Edition:**
  - Issue:**
  - Publisher:** New Directions,
  - Call NO:**
  - Serial Copy:**
  - Date:** 2003
  - LCCN:** 2003013223
  - Volume:**
  - Constituent Title/Author:**
- Buttons:** 'SAVE' and 'CLOSE' buttons are located in the top right corner of the form.
- Checkboxes:** There are checkboxes for 'This item only' and 'Borrow By Mail'.

4. Modify the hold as follows:

- To change the date range for which the hold is active, click/tap inside the **Activation** box and select the beginning date from the calendar. Then click/tap inside the **Expiration** box and select the ending date from the calendar.
- To change the branch where the patron will pick up the item, select a branch in the **Pickup** drop-down list box.
- To change the notes that display with the hold request, select the arrow next to **Notes** to expand the Notes area, and enter or edit the notes.



- To change the date range for which the hold is active, click/tap inside the **Activation** box and select the beginning date from the calendar. Then click/tap inside the **Expiration** box and select the ending date from the calendar.
  - To change the branch where the patron will pick up the item, select a branch in the **Pickup** drop-down list box.
  - To change the notes that display with the hold request, select the arrow next to **Notes** to expand the Notes area, and enter or edit the notes.
5. When you are finished editing the hold request, select **SAVE**.

The hold request is modified.


## Reactivate a hold

You can reactivate Canceled, Expired, and Not-supplied hold requests to permit items to fill them. When you reactivate a hold request, the request becomes active with a new expiration date.

To reactivate a hold:

1. Open the patron's record.
2. Select **Holds**.

The patron's holds list is displayed.



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REGISTRATION REFRESH CLOSE

BLOCKS NOTES

Check Out (0) Out (2) / Overdue (0) Account (\$0.00) Claims (1) / Lost (0) **Holds (10)** More ▼

NEW HOLD
 

Reactivate

<input type="checkbox"/>	AUTHOR	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS	PICKUP BRANCH	QUEUE	HOLD UNTIL	GROUP
<input type="checkbox"/>		Treme. The complete fourth season [videorecording (Blu-ray)].	Blu-ray Disc		11/7/2014	Active	Community Library	1		A
<input checked="" type="checkbox"/>		Poets & Writers	Book		11/10/2014	Cancelled	Community Library			
<input type="checkbox"/>	Milne, A. A. (Alan Alexander), 1882-1956.	When we were very young	Book		10/28/2014	Expired	Community Library			

3. Select the check box next to the canceled, expired, or not-supplied hold request to be reactivated.
4. Select the reactivate button to reactivate the hold.

The hold request is reactivated.

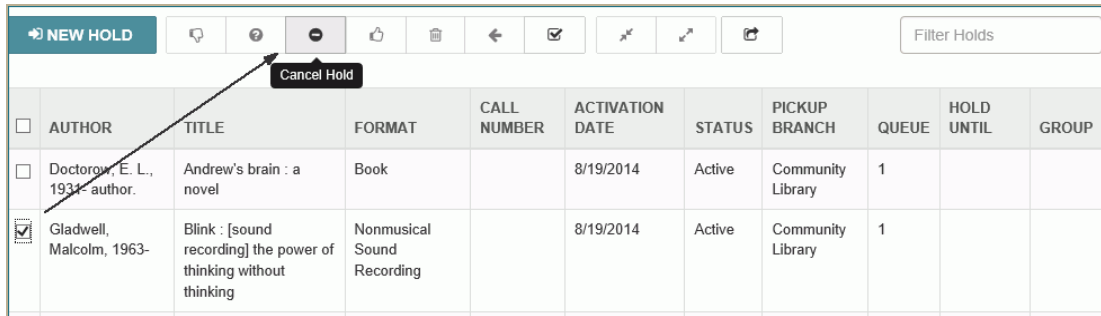
## Cancel a hold











To cancel a hold:

1. Open the patron's record.
2. Select **Holds**.

The patron's hold list is displayed.

3. Select the check box next to the hold you want to cancel, and select the cancel hold button.



<div>NEW HOLD</div> <div></div> <div>Filter Holds</div>										
<input type="checkbox"/>	AUTHOR	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS	PICKUP BRANCH	QUEUE	HOLD UNTIL	GROUP
<input type="checkbox"/>	Doctorow, E. L., 1931- author.	Andrew's brain : a novel	Book		8/19/2014	Active	Community Library	1		
<input checked="" type="checkbox"/>	Gladwell, Malcolm, 1963-	Blink : [sound recording] the power of thinking without thinking	Nonmusical Sound Recording		8/19/2014	Active	Community Library	1		

The hold is canceled and the status is updated in the holds list.


## Deny a hold

To deny a hold:

1. Open the patron's record.
2. Select **Holds**.

The patron's hold list is displayed.

3. Select the check box next to the pending hold request that you want to deny.
4. Select **Deny** to deny the hold.


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REGISTRATION REFRESH CLOSE

Check Out (0) Out (2) / Overdue (0) Account (\$0.00) Claims (1) / Lost (0) **Holds (11)** More ▾

NEW HOLD

Deny Hold

<input type="checkbox"/>	AUTHOR	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS ▲	PICKUP BRANCH	QUEUE	HOLD UNTIL	GROUP
<input type="checkbox"/>	Gladwell, Malcolm, 1963-	The tipping point : how little things can make a big difference	Book	302 Gla	8/19/2014	Unclaimed	Community Library		8/22/2014	
<input type="checkbox"/>	Akhtiorskaya, Yelena.	Panic in a suitcase : a novel	Book	F	8/14/2014	Unclaimed	Community Library		8/22/2014	
<input checked="" type="checkbox"/>	Haddix, Margaret Peterson.	Double Identity	Book	YA Fict Had	11/11/2014	Pending	Community Library	1		

The area below the button bar expands.

NEW HOLD

Deny Hold

Denying an item for a hold request will prevent the pending item from ever satisfying the hold request. Do you want to continue?

Deny reason: Not available ▾

☐ Deny all available items at this branch

DENY HOLD CANCEL

Select the reason for denying the hold in the **Deny reason** box.

(Optional) If you want to deny holds for all items at this branch, select **Deny all available items at this branch**.

Select **DENY HOLD**.

## Group multiple holds

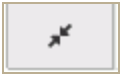
You can group several titles if any one of the titles will satisfy a hold request. When one of grouped requests is filled, the other requests in the group are deleted. The group is counted as a single request against the patron's total request limit.

To group multiple holds:

1. Open the patron's record.
2. Select **Holds**.

The patron's hold list is displayed.

3. Select multiple holds in the list, and select the arrow button.



The holds are grouped, and the letter **A** displays in the Group column.

### Note:

To remove titles from the grouped holds, select the check box next to the title and select arrow button.

<div> <span>NEW HOLD</span> <span>🔍</span> <span>🔍</span> <span>🔍</span> <span>🔍</span> <span>🔍</span> <span>🔍</span> <span>🔍</span> <span>🔍</span> <span>🔍</span> <span>🔍</span> </div> <div>Filter Holds</div>										
<input type="checkbox"/>	AUTHOR	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS	PICKUP BRANCH	QUEUE	HOLD UNTIL	GROUP ▲
<input type="checkbox"/>	Gladwell, Malcolm, 1963-	Blink : [sound recording] the power of thinking without thinking	Nonmusical Sound Recording		8/19/2014	Active	Community Library	1		A
<input type="checkbox"/>	Gladwell, Malcolm, 1963-	What the dog saw and other adventure stories	Book		8/19/2014	Active	Community Library	1		A
<input type="checkbox"/>	Gladwell, Malcolm, 1963-	The tipping point : how little things can make a big difference	Book	302 Gla	8/19/2014	Pending	Community Library	3		A

4. Scan the item that fills the hold request for any of the titles in the group.

The hold is placed on the selected title, and the other titles in the group no longer display in the holds list.

NEW HOLD

Filter Holds

<input type="checkbox"/>	AUTHOR	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS	PICKUP BRANCH	QUEUE	HOLD UNTIL	GROUP
<input type="checkbox"/>	Doctorow, E. L., 1931- author.	Andrew's brain : a novel	Book		8/19/2014	Active	Community Library	1		
<input type="checkbox"/>	Moore, Lorrie.	Bark : stories	Book		8/19/2014	Pending	Community Library	1		
<input type="checkbox"/>	Akhtiorskaya, Yelena.	Panic in a suitcase : a novel	Book	F	8/14/2014	Held	Community Library		8/22/2014	
<input type="checkbox"/>	Gladwell, Malcolm, 1963-	The tipping point : how little things can make a big difference	Book	302 Gla	8/19/2014	Held	Community Library		8/22/2014	

## Set a hold request to *Ask me later*

From a patron's hold requests list, you can set a hold request to "Ask me later" if you cannot locate the item immediately. When this option is selected, the item moves to the next step in Request to Fill (RTF) processing, but it remains eligible to fill the request.

To set a hold request to *Ask me later*:

1. Open the patron's record.
2. Select **HOLDS**.



The patron's holds list is displayed.

3. Select the check box next to the hold request, and select the ask me later button.



**MS. LAURA IZQUIERDA** ⓘ  
 A12291954  
 COMMUNITY LIBRARY

REGISTRATION REFRESH CLOSE

Check Out (0) Items (2)(0) Account ((\$75.00)) Claims/Lost (0/0) **Holds (5)** More ▾

NEW HOLD
 

?

 Filter Holds

<input type="checkbox"/>	AUTHOR	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS	PICKUP BRANCH	QUEUE	HOLD UNTIL	GROUP
<input type="checkbox"/>	Heller, Joseph.	Catch-22 : [large print] a novel.	Large Print	LT Fict	9/8/2014	Pending	Community Library	1		
<input type="checkbox"/>	Steel, Danielle.	The long road home [large print]	Large Print	LT Fict Ste	9/15/2014	Pending	Community Library	1		
<input type="checkbox"/>	Mann, Thomas, 1875-1955.	The magic mountain.	Book	Fict 77723	9/15/2014	Pending	Community Library	1		
<input checked="" type="checkbox"/>	Bolano, Robert.	By night in Chile	Book	Fict Bol	9/15/2014	Pending	Community Library	1		
<input type="checkbox"/>	Byron, George Gordon Byron, Baron, 1788-1824.	Lord Byron : selected letters and journals in one volume from the unexpurgated twelve volume edition	Book		9/8/2014	Expired	Community Library			

If the hold request cannot be set to *Ask me later*, a message box appears.

If the hold request can be set to *Ask me later*, it moves to the next step in the RTF process, but remains eligible to fill the hold request so that your branch has another chance to fill the hold request.


## Delete a hold

To delete a hold:

1. Open the patron's record.
2. Select **Holds**.

The patron's hold list is displayed.

3. Select the check box next to the hold you want to delete, and select the **Delete** button.



**ALEXANDRIA LEE REMEY** ⓘ  
 122919540926  
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REGISTRATION  
 REFRESH  
 CLOSE

BLOCKS  
 NOTES

Check Out (0)   Out (2) / Overdue (0)   Account (\$0.00)   Claims (1) / Lost (0)   **Holds (11)**   More ▼

NEW HOLD

Filter Holds

<input type="checkbox"/>	AUTHOR	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS ▼	PICKUP BRANCH	QUEUE	HOLD UNTIL	GROUP
<input type="checkbox"/>		Treme: The complete fourth season [videorecording (Blu-ray)].	Blu-ray Disc		11/7/2014	Active	Community Library	1		A
<input checked="" type="checkbox"/>		Poets & Writers	Book		11/10/2014	Cancelled	Community Library			

The hold is deleted and removed from the patron's hold list.



## View a hold's details and history

To view a hold request's details and history:

1. Open the patron's record.
2. Select **Holds**.

The patron's hold list is displayed.

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REGISTRATION REFRESH CLOSE

Check Out (0) Items (0)(0) Account ((\$75.00)) Claims/Lost (1/0) **Holds (3)** More ▾

NEW HOLD

	AUTHOR	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS	PICKUP BRANCH	QUEUE	HOLD UNTIL	GROUP
<input type="checkbox"/>	Mann, Thomas, 1875-1955.	The magic mountain.	Book	Fict 77723	10/29/2014	Pending	Community Library	1		
<input type="checkbox"/>	Bolano, Robert.	By night in Chile	Book	Fict Bol	10/29/2014	Pending	Community Library	1		
<input type="checkbox"/>	Heller, Joseph.	Catch-22 : [large print] a novel.	Large Print	LT Fict	10/29/2014	Pending	Community Library	1		

3. Select a hold in the list to open it.

The held title's details are displayed.

NEW HOLD

Request ID: 839073 Activation: 10/29/2014 Expiration: 11/8/2014 SAVE CLOSE

Pickup: Community Library

Status: Pending 10/29/2014 Request Date: 9/2/2014 Origin: Library

☐ This item only ☐ Borrow By Mail

Tracking Number:

Title: By night in Chile Barcode: Format: Book

Author: Bolano, Robert. ISBN/ISSN: 0811215474 (pbk.): Pages:

Series: NDPaperbook ; 975 Edition: Issue:

Publisher: New Directions, Call NO: Serial Copy:

Date: 2003 LCCN: 2003013223 Volume:

Constituent Title/Author:

4. Select the arrow next to **Notes** to expand the area and view any notes associated with the held title.

▼ Notes

Staff Display Notes:

Non-public Notes:

PAC Display Notes:

Patron Notes:

Below the notes is the **Request Satisfied By** list of items that can fulfill the hold request.

Request Satisfied By				
BIB CONTROL #	ITEM BARCODE	STATUS	BRANCH	NOT SUPPLIED REASON
990192	122919540000	Out	Community Library	
990192	122919540001	Held	Community Library	
990192	122919540002	In	Community Library	
990192	122919540003	In	Community Library	
990192	122919540004	In	Community Library	

5. Select the arrow next to **Request History** to expand the area and view the hold request history.


The area expands to display the hold request history for this title.

▼ Request History					
DATE	STATUS	BARCODE	BRANCH	USER	ACTION
8/19/2014	Held	122919540001	Community Library	laura.peer	An item has trapped and is being held for this request

## Patron Blocks

The **BLOCKS** icon displays in red with a locked icon if the patron has blocks that prevent circulations or in green with an unlocked icon if the patron does not have blocks that prevent circulations.

To view a patron's blocks, open the patron's record and select **BLOCKS**.



**ADRIANNE ROSE LEONNE** ⓘ  
12291954007  
COMMUNITY LIBRARY

REGISTRATION

REFRESH

CLOSE

BLOCKS

NOTES

Check Out (0)

Items (0)(0)

Account (\$20.00)

Claims/Lost (0/0)

Holds (0)

Blocks ▾

ADD BLOCK

Filter Items

<input type="checkbox"/>	BLOCK DESCRIPTION
<input type="checkbox"/>	Patron has notes
<input type="checkbox"/>	Patron owes money. Amount due: \$20.00
<input type="checkbox"/>	Patron has exceeded maximum fees permitted. Amount due: \$20.00
<input type="checkbox"/>	Patron did not pay for equipment rental.

See also:

- "Add a patron block" on page 124
- "Delete patron blocks" on page 125

## Add a patron block

To add a patron block:

1. Scan the patron's library card barcode or search for the patron.
2. Select **BLOCKS**.

The list of blocks (if any) is displayed.

3. Select **ADD BLOCK**.

The area under the button expands to display the blocks options.

4. Add a library-assigned or free text block as follows:

- To add a library assigned block, select **Library Assigned** and select the block description from the list box.

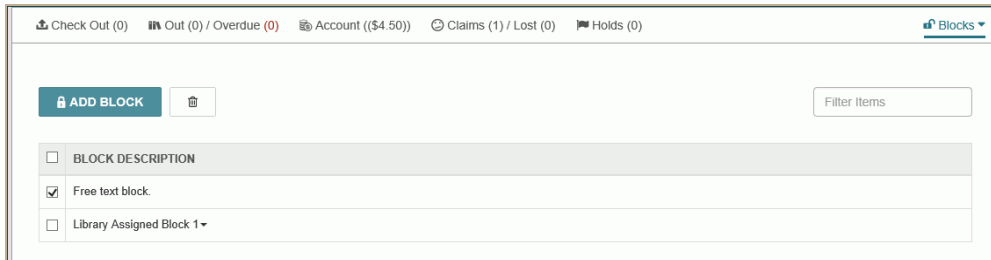
- To add a free text block, select **Free Text**, and type the free text block in the box provided.

## Delete patron blocks

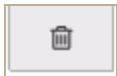
To delete a patron block:

1. Scan the patron's library card barcode or search for the patron.
2. Select **BLOCKS**.

The blocks list is displayed.



3. Select one or more blocks in the list, and select the delete (trashcan) button.



The selected patron blocks are deleted.

## Patron Notes

The patron Notes view displays existing non blocking notes and blocking notes. You can add notes, edit existing notes, and delete notes from this view. To see patron notes, select **Notes**.

The screenshot shows the Patron Notes interface for a user named ALEXANDRIA LEE REMEY. The interface includes a header with the user's name, ID (122919540926), and library name (COMMUNITY LIBRARY). There are buttons for REGISTRATION, REFRESH, and CLOSE. Below the header, there are tabs for BLOCKS and NOTES. The NOTES tab is selected, showing a list of notes. The list is divided into two columns: NON BLOCKING NOTES and BLOCKING NOTES. Each column contains a text area with a placeholder message: "This is a non-blocking note." and "This is a blocking note." respectively. At the bottom right, there is a green button labeled UPDATE NOTES.

ALEXANDRIA LEE REMEY 122919540926 COMMUNITY LIBRARY	
<a href="#">BLOCKS</a> <a href="#">NOTES</a>	
Check Out (0) Out (2) / Overdue (0) Account (\$0.00) Claims (1) / Lost (0) Holds (10) <a href="#">Notes</a>	
<b>NON BLOCKING NOTES</b>	<b>BLOCKING NOTES</b>
<div>This is a non-blocking note.</div>	<div>This is a blocking note.</div>
<a href="#">UPDATE NOTES</a>	

See also:

- "Add a patron note" on page 127
- "Delete a patron note" on page 128

## Add a patron note

To add a patron note:

1. Open the patron's record.
2. Select **NOTES**.

The Notes view opens.

The screenshot shows the 'Notes' view for a patron record. At the top, the patron's name 'ALEXANDRIA LEE REMEY' is displayed with a profile picture, ID '122919540926', and library 'COMMUNITY LIBRARY'. To the right are buttons for 'REGISTRATION', 'REFRESH', and 'CLOSE'. Below this, a navigation bar shows various tabs: 'Check Out (0)', 'Out (2) / Overdue (0)', 'Account (\$0.00)', 'Claims (1) / Lost (0)', 'Holds (10)', and 'Notes' (which is selected). The main area is divided into two columns: 'NON BLOCKING NOTES' and 'BLOCKING NOTES'. Each column contains a text box with placeholder text: 'This is a non-blocking note.' and 'This is a blocking note.' respectively. At the bottom right of the main area is a green button labeled 'UPDATE NOTES'.

3. Type notes in the **NON BLOCKING NOTES** or **BLOCKING NOTES** box.
4. Select **UPDATE NOTES**.

The notes are updated.

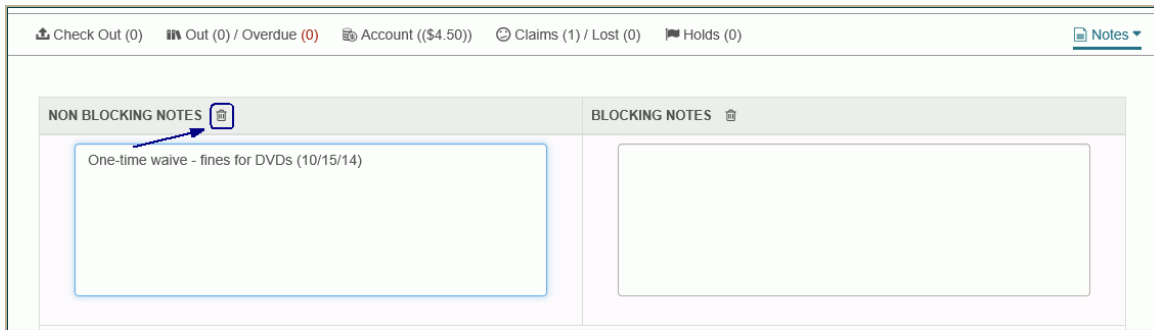
## Delete a patron note

To delete a patron note:

1. Open the patron's record.
2. Select **More | Notes**.

The Notes view opens.

3. Select the note you want to delete, and select the delete (trashcan) button above the note.




The note is deleted.



## Reading History

You can view a patron's reading history if the library maintains reading histories for its patrons and the Maintain Reading List option is selected in the patron's registration preferences.

To view a patron's reading history, open the patron's record and select **More | Reading History**.



**ALEXANDRIA LEE REMEY** ⓘ  
 122919540926  
 COMMUNITY LIBRARY

REGISTRATION
 REFRESH
 CLOSE

BLOCKS
 NOTES

Check Out (0) Out (2) / Overdue (0) Account (\$0.00) Claims (1) / Lost (0) Holds (11)

Reading History

REMOVE

<input type="checkbox"/>	FORMAT	CHECKOUT DATE ▲	TITLE	AUTHOR	LIBRARY
<input type="checkbox"/>	Blu-ray Disc	11/7/2014 1:50:50 PM	Fruitvale Station [videorecording]		Communit
<input type="checkbox"/>	DVD	9/23/2014 2:24:12 PM	Alien quadrilogy [DVD]		Community Library
<input type="checkbox"/>	Musical Sound Recording	9/16/2014 12:28:29 PM	Lives in the balance [compact audio disc]	Browne, Jackson.	Community Library

Blocks  
 Notes  
 Reading History  
 Associations  
 Notices  
 ILL  
 Messages

See also:

- "Remove an item from a patron's reading history" on page 130


## Remove an item from a patron's reading history

To remove an item or items from the patron's reading history:

1. Open the patron's record.
2. Select **More | Reading History**.

The patron's reading history is displayed.

3. Select an item or items in the list, and select **REMOVE**.

**ALEXANDRIA LEE REMEY** ⓘ  
122919540926  
COMMUNITY LIBRARY



[REGISTRATION](#) [REFRESH](#) [CLOSE](#)

[Check Out \(0\)](#) [Out \(2\) / Overdue \(0\)](#) [Account \(\\$0.00\)](#) [Claims \(1\) / Lost \(0\)](#) [Holds \(11\)](#)

[Reading History](#) ▼

[REMOVE](#)

Filter History


<input type="checkbox"/>	FORMAT	CHECKOUT DATE ▲	TITLE	AUTHOR	LIBRARY
<input type="checkbox"/>	 Blu-ray Disc	11/7/2014 1:50:50 PM	Fruitvale Station [videorecording]		Community Library
<input checked="" type="checkbox"/>	 DVD	9/23/2014 2:24:12 PM	Alien quadrilogy [DVD]		Community Library

The selected items are removed from the patron's reading history.



## Notices

The Notices view of the patron record displays the patron's notification history with the following information for each notice: title, type of notice, date, method, and amount. You can filter the notices, view the notification history, and view the associated item record.



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[REGISTRATION](#)
[REFRESH](#)
[CLOSE](#)

[BLOCKS](#)
[NOTES](#)

[Check Out \(0\)](#)
[Items \(3\)\(0\)](#)
[Account \(\\$0.00\)](#)
[Claims/Lost \(1/0\)](#)
[Holds \(9\)](#)
[Notices ▾](#)

TITLE	TYPE	DATE ▲	METHOD	AMOUNT
Secrets from the past	1st Overdue	9/12/2014	Email	
One hundred years of solitude	1st Overdue	9/12/2014	Email	
Breath, eyes, memory [large print]	1st Overdue	9/12/2014	Email	
After the quake : stories	1st Overdue	4/28/2014	Email	
Aunt Julia and the scriptwriter	1st Overdue	4/28/2014	Email	
Dance dance dance : a novel	1st Overdue	4/25/2014	Email	
Making waves	1st Overdue	4/25/2014	Email	

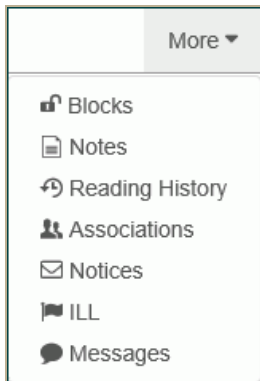
See also:

- "View an item's notification history" on page 133
- "Open the item record associated with a notice" on page 135

## View an item's notification history

To view the notice history for a specific item in the patron's Notices list:

1. Open the patron's record.
2. Select **More** to open the menu.



3. Select **Notices**.

The Notices view is displayed.

TITLE	TYPE	DATE ▲	METHOD	AMOUNT
Secrets from the past	1st Overdue	9/12/2014	Email	
One hundred years of solitude	1st Overdue	9/12/2014	Email	
Breath, eyes, memory [large print]	1st Overdue	9/12/2014	Email	
After the quake : stories	1st Overdue	4/28/2014	Email	
Aunt Julia and the scriptwriter	1st Overdue	4/28/2014	Email	
Dance dance dance : a novel	1st Overdue	4/25/2014	Email	
Making waves	1st Overdue	4/25/2014	Email	

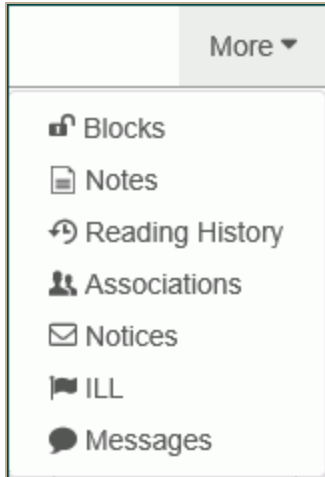
4. Select a notice in the list to see the notification history.

Notification History						×
Title: Breath, eyes, memory [large print] Material Type: Book						
NOTICE	METHOD	DATE	FROM	AMOUNT	STATUS	
Almost overdue/Auto-renew reminder	Email	9/6/2014	COB		Email Completed	
1st Overdue	Email	9/12/2014	COB		Email Completed	
				ITEM RECORD	CLOSE	


## Open the item record associated with a notice

To open the item record associated with a patron notice:

1. Open the patron's record.
2. Select **More | Notices**.



The patron's notification history is displayed.



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REGISTRATION
 REFRESH
 CLOSE

BLOCKS
 NOTES

Check Out (0)
 Items (3)(0)
 Account (\$0.00)
 Claims/Lost (1/0)
 Holds (9)
 Notices ▾

Filter Notices

TITLE	TYPE	DATE ▲	METHOD	AMOUNT
Secrets from the past	1st Overdue	9/12/2014	Email	
One hundred years of solitude	1st Overdue	9/12/2014	Email	
Breath, eyes, memory [large print]	1st Overdue	9/12/2014	Email	
After the quake : stories	1st Overdue	4/28/2014	Email	
Aunt Julia and the scriptwriter	1st Overdue	4/28/2014	Email	
Dance dance dance : a novel	1st Overdue	4/25/2014	Email	
Making waves	1st Overdue	4/25/2014	Email	

3. Select a notice in the list.

The Notification History for the item is displayed.

Notification History					
Title: Breath, eyes, memory [large print] Material Type: Book					
NOTICE	METHOD	DATE	FROM	AMOUNT	STATUS
Almost overdue/Auto-renew reminder	Email	9/6/2014	COB		Email Completed
1st Overdue	Email	9/12/2014	COB		Email Completed
				ITEM RECORD	CLOSE

4. Select **ITEM RECORD**.

The Item record opens.



## Patron Messages

If you have the required permissions set up in Polaris Administration, you can view, post, modify, and delete patron messages in Leap. Patrons can read their messages from the PAC patron account. An alert appears during check-out if a patron has unread messages, but unread messages do not block the patron from checking out items.

To see a patron's messages, select **More | Messages**.



MESSAGES	PATRON HAS READ
<input type="checkbox"/> Renew your items online at <a href="http://qa-orion/polaris">http://qa-orion/polaris</a>	No

To see the message properties, select the message in the list, and select the information button.



See also:

- "Add a patron message " on page 138

## Add a patron message

To add a patron message:

1. Open the patron's record.
2. Select **More** to open the menu.
3. Select **Messages** to open the message list.

The screenshot shows the top navigation bar with links for Check Out (0), Items (3)(0), Account (\$28.40), Claims/Lost (1/0), Holds (4), and Messages. Below the navigation bar, there is a 'NEW MESSAGE' button, a trash icon, and an information icon. To the right is a 'Filter Messages' input field. Below these elements is a table with two columns: 'MESSAGES' and 'PATRON HAS READ'. The table contains one row with a checkbox, the text 'Renew your items online at http://qa-orion/polaris', and the value 'No'.

4. Select **NEW MESSAGE**.

The area below the button expands.

The screenshot shows the expanded 'NEW MESSAGE' form. It includes the 'NEW MESSAGE' button, trash icon, and information icon. Below these is a 'Filter Messages' input field. The main form area has two tabs: 'LIBRARY ASSIGNED' and 'FREE TEXT'. Below the tabs is a dropdown menu labeled 'Select a message description'. To the right of the dropdown are 'ADD' and 'CANCEL' buttons.

5. Select **LIBRARY ASSIGNED** and select a library-assigned message from the drop-down list, or select **FREE TEXT** and type the message text.
6. Select **ADD** to add the message.

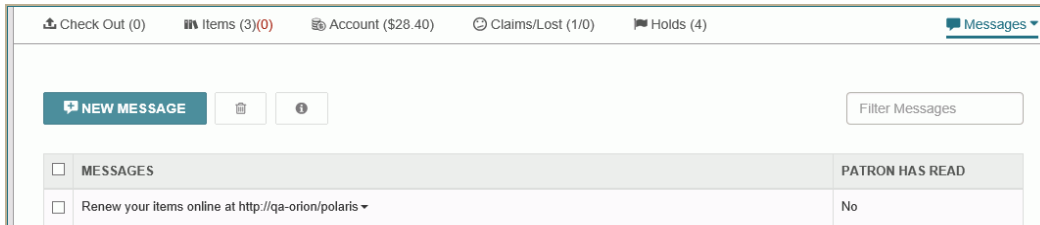
The message is added to the list.

## Delete a patron message

To add a patron message:

1. Open the patron's record.
2. Select **More** to open the menu.
3. Select **Messages**.

The patron's messages are displayed.



4. Select the message you want to delete.
5. Select the delete (trashcan) button.




The patron message is deleted.

## Patron Associations

You can create associations between two or more patron records so that when one record is open, all records associated with that record are conveniently accessible. For example, you might associate all members of a family, so when checking out items to parents, you can quickly renew items or pay fines for their children. Depending on your library's settings in Polaris Administration, associated patron blocking may be implemented.

To see the associated patrons, select **More|Associations**. The Associations view displays a list of associated patrons. From this view, you can: add a new associated patron; go to the associated patron's record; edit a patron association; or delete an association.



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REGISTRATION
 REFRESH
 CLOSE

BLOCKS
 NOTES

Check Out (0)
 Items (1)(1)
 Account (\$5.79)
 Claims/Lost (2/1)
 Holds (2)
 Associations ▼

NEW ASSOCIATION
 Filter Associations

<input type="checkbox"/>	PATRON BARCODE	PATRON NAME	BRANCH	NOTE	BLOCK ME
<input type="checkbox"/>	1001900123289	Genie R Ozolins	Community Library		
<input type="checkbox"/>	1001900122877	Rebekah E Falotico	Community Library		
<input type="checkbox"/>	1001900162725	Brandon S Surento	Community Library		

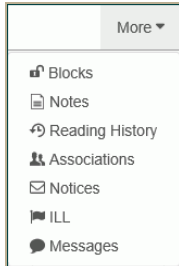
See also:

- "Add a new associated patron" on page 141
- "Edit a patron association" on page 143

## Add a new associated patron

To add a new associated patron to a patron's record:

1. Open the patron record.
2. Select **More | Associations**.



The Associations view opens.

<input type="checkbox"/>	PATRON BARCODE	PATRON NAME	BRANCH	NOTE	BLOCK ME
<input type="checkbox"/>	1001900123289	Genie R Ozolins	Community Library		
<input type="checkbox"/>	1001900122877	Rebekah E Falotico	Community Library		
<input type="checkbox"/>	1001900162725	Brandon S Surento	Community Library		

3. Select **NEW ASSOCIATION**.

The area below the button expands.

4. Scan the patron's barcode, or search for and select the patron.

The patron's barcode and name are displayed in the expanded area.

5. To add an optional note, type a note in the **NOTE** box.
6. If applicable, select additional patrons to associate with the displayed patron record.
7. To block the patron if the associated patron(s) is blocked, select **Block me if these patron records are blocked**.
8. Select **ADD** to add the associated patron(s).

The new associated patron(s) is displayed in the associations list.

## Edit a patron association

To edit a patron association:

1. Open the patron record.
2. Select **More | Associations** in the summary bar.

The Associations view is displayed.

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Check Out (0) Out (0) / Overdue (0) Account (\$9.59) Claims (2) / Lost (1) Holds (1) **Associations**

**NEW ASSOCIATION** Filter Associations

<input type="checkbox"/>	PATRON BARCODE	PATRON NAME	BRANCH	NOTE	BLOCK ME
<input type="checkbox"/>	1001900123289	Genie R Ozolins	Community Library		Yes
<input type="checkbox"/>	1001900122877	Rebekah E Falotico	Community Library		
<input type="checkbox"/>	1001900162725	Brandon S Surento	Community Library		

3. Select the check box next to the associated patron you want to modify and select **MODIFY ASSOCIATION**.

**NEW ASSOCIATION** Filter Associations

Modify an Association

<input type="checkbox"/>	PATRON BARCODE	PATRON NAME	BRANCH	NOTE	BLOCK ME
<input checked="" type="checkbox"/>	1001900123289	Genie R Ozolins	Community Library		Yes
<input type="checkbox"/>	1001900122877	Rebekah E Falotico	Community Library		
<input type="checkbox"/>	1001900162725	Brandon S Surento	Community Library		

The area below the button expands to display the associated patron.

NEW ASSOCIATION

Filter Associations

Associated Patron

1001900123289 : Genie R Ozolins

☒ Block me if this patron record is blocked.

Note

SAVE CANCEL

4. Edit the associated patron's information by adding notes in the Notes box or by selecting or clearing the **Block me if this patron is blocked** check box.
5. Select **SAVE**.

The patron association is modified.



## Delete a patron association

To edit a patron association:

1. Open the patron record.
2. Select **More | Associations** in the summary bar.

The Associations view is displayed.

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Check Out (0) Out (0) / Overdue (0) Account (\$9.59) Claims (2) / Lost (1) Holds (1) **Associations**

**NEW ASSOCIATION** [Icon] [Icon] [Icon] [Icon] Filter Associations

<input type="checkbox"/>	PATRON BARCODE	PATRON NAME	BRANCH	NOTE	BLOCK ME
<input type="checkbox"/>	1001900123289	Genie R Ozolins	Community Library		Yes
<input type="checkbox"/>	1001900122877	Rebekah E Falotico	Community Library		
<input type="checkbox"/>	1001900162725	Brandon S Surento	Community Library		

3. Select the check box next to the associated patron you want to delete and select the delete associations button



## Checking In Items and Managing Fines

When you first log into Polaris Leap, you can select the **CHECK IN** button to open the Check In page where you scan items to check them in. Other processing, such as the application of free days and floating collections, is the same as for items checked in using the Polaris ILS.

Messages may appear for items that are overdue and have a fine; items for which holds have been placed; or items that have other blocks. If you have the appropriate permissions, you can resolve fines and fees from the Check In page.

The screenshot shows the Polaris Leap 'Check In' page. At the top, there's a navigation bar with the 'leap' logo, a search bar with the text 'Scan or search for patrons or items', and a 'FIND' button. To the right of the search bar are links for 'Utilities', 'Help', and the user 'laura.peer (COB)'. Below the navigation bar, there are two buttons: 'NEW PATRON' and 'CHECK IN'. The main content area is titled 'Check In' and contains a search input field, a 'FIND TOOL' button, 'Free Days' input (set to 0), and a date input (set to 10/29/2014). There are also 'CLOSE' and 'CLEAR' buttons. Below the inputs is a table with the following columns: BARCODE, DUE DATE, STATUS, COMMENT, TITLE, MATERIAL TYPE, SHELF LOCATION, CALL NUMBER, PATRON NAME, and ASSIGNED BRANCH.

BARCODE	DUE DATE	STATUS	COMMENT	TITLE	MATERIAL TYPE	SHELF LOCATION	CALL NUMBER	PATRON NAME	ASSIGNED BRANCH
---------	----------	--------	---------	-------	---------------	----------------	-------------	-------------	-----------------

**Note:**

Bulk check-in is not available in Leap 1.0.

See also:

- "Check in items" on page 147
- "Manage fines during check in" on page 148
- "Resolve billed items during check in" on page 151

## Check in items

To check in items:

1. Log into Leap, and select **CHECK IN**.

The Check In page opens with the cursor in the barcode box.

The screenshot shows the 'Check In' page in the Polaris Leap system. The interface includes a top navigation bar with the 'leap' logo, a search bar, and user information. Below this, there's a section with 'NEW PATRON' and 'CHECK IN' buttons. The main 'Check In' area features a barcode input field, a 'FIND TOOL' button, 'Free Days' and date fields, and a 'CLOSE' button. A table with various item and patron columns is visible at the bottom.

BARCODE	DUE DATE	STATUS	COMMENT	TITLE	MATERIAL TYPE	SHELF LOCATION	CALL NUMBER	PATRON NAME	ASSIGNED BRANCH
---------	----------	--------	---------	-------	---------------	----------------	-------------	-------------	-----------------

2. (Optional) To change the number of free days, type the number in the **Free Days** box. The date changes accordingly.
3. Scan the item barcodes.

**Note:**

You can also select **FIND TOOL** and use the Find Tool to search for an item to check in.

## Manage fines during check in

To check in multiple items and manage fines:

1. Log into Leap, and select **CHECK IN**.

The Check In page opens with the cursor in the barcode box.

The screenshot shows the Leap application interface. At the top, there's a navigation bar with the Leap logo, a search bar, and user information (Laura Peer, COB). Below the navigation bar, there's a 'NEW PATRON' button and a 'CHECK IN' button. The main content area is titled 'Check In'. It features a barcode input field, a 'FIND TOOL' button, 'Free Days' (0), a date field (10/29/2014), and 'CLOSE' and 'CLEAR' buttons. Below this, there's a table with columns for barcode, due date, status, comment, title, material type, shelf location, call number, patron name, and assigned branch.

2. Scan each item's barcode.

If the patron has been billed, the Resolve billed item dialog box opens. See "Resolve billed items during check in" on page 151.

If the item is overdue, the Overdue Fine dialog box opens. You can resolve the overdue fines immediately or select **CONTINUE** to continue checking in items.

The screenshot shows the 'Overdue Fine' dialog box. It displays the following information: Item barcode: 0000100440619, Title: Adirondack wildguide : a natural history of the Adirondack Park, Due date: 9/9/2014, Patron barcode: 1000200780095, Name: Mr. Timothy J Yu, and Fine: \$4.50. Below this, it states 'Patron has account balance'. At the bottom, there are four buttons: 'CONTINUE', 'WAIVE', 'CHARGE ACCOUNT', and 'CANCEL'.

3. If you select **CONTINUE** on the Overdue Fine dialog box, the box closes and you can continue to check in items. Fines will be totaled for each patron, and you can resolve the charges after checking

in all the items.

- To view and resolve the fines, select **RESOLVE CHARGES**.

The patrons for whom the checked-in items included fines are listed at the bottom of the Check In page with totals for new fines and old fines.

### Check In

Free Days:

BARCODE	DUE DATE	STATUS	COMMENT	TITLE	MATERIAL TYPE	SHELF LOCATION	CALL NUMBER	PATRON NAME	ASSIGNED BRANCH
0000100368505	9/9/2014	Out -> In-Transit	To Schenectady Branch - Central	Stars	Book		J 523.8 S	Ms. Nancy T Shea	Galway Public Library
3364100100000751	10/17/2014	Out -> In-Transit	To Southern Adirondack Library System	The Vietnamese gulag	Book		959.704 D	Christina M Healey	Southern Adirondack Library System
0000203058680	8/13/2008	Out -> In-Transit	To Schenectady Branch - Central	Searching for dragons [sound recording]	Audiobook		RC J Fict Wre	Mr. Bernard J Foster	Saratoga Springs Public Library

<input type="checkbox"/>	PATRON NAME	BARCODE	NEW FINES	OLD FINES
<input type="checkbox"/>	Ms. Nancy T Shea	1000200336328	\$4.50	\$5.00
<input type="checkbox"/>	Christina M Healey	1000400738240	\$2.40	\$1.60
<input type="checkbox"/>	Sarah R Acosta	1001900144202	\$3.80	\$5.79

- Select the check box next to the patron for whom you are resolving charges, and do one of the following:
  - Select **PAY NEW** to pay the new charges, and enter the payment details in the Pay new fines dialog box.

Pay new fines

Balance: \$2.40

Amount:

Method:

Note:

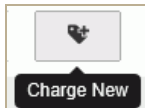
PAY

CANCEL

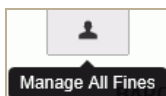
- Select the waive new button to waive the new charges.



- Select the charge new button to charge the new amount to the patron's account.



- Select the manage all fines button to go to the patron's financial account and resolve the new and old fines.



## Resolve billed items during check in

When you check in an item returned by a patron who has billed fines and/or fees, you can resolve the billed item.

To resolve a billed item during check in:

1. Log into Leap, and select **CHECK IN**.

The Check In page opens with the cursor in the barcode box.

2. Scan the item barcode, or search for and select the item.

If the patron has been billed for amounts owed to the library, the Resolve billed item dialog box opens.

Item Barcode: 0000602255028		Title: The Emperor's new clothes [DVD]	
Due Date: 8/23/2013		Billed Date: 9/10/2013 <input checked="" type="checkbox"/> Billed	
Patron Name: Mr. George P Anderson		Patron Barcode: 1000600712177	

	Replacement:	Processing:	Overdue:
Charge:	\$29.99	\$0.00	\$5.00
Paid:	\$29.99	\$0.00	\$0.00
Waived:	\$0.00	\$0.00	\$0.00
Amount due:	\$0.00	\$0.00	\$5.00

Amount:

Actions:

Payment method:

**Total Fine: \$34.99**

**CONTINUE CANCEL**


Under each column, a drop-down list box contains options for performing actions applicable to the charge type.

3. To resolve a charge during check in, select one of the following options in the **Action** box:
  - **Waive**
  - **Leave as is**
  - **Pay**
  - **Charge**
4. Select **CONTINUE** to check in the item and perform the selected action on the charges.



## Check Out/Renew Items

When you open an existing patron's record, **Check Out** is the active option in the toolbar and the cursor is in the box where you can scan a barcode to check out an item. You can also select **FIND TOOL** and search for the item to check out.



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REGISTRATION REFRESH CLOSE

BLOCKS NOTES

Check Out (0) Items (2)(0) Account (\$0.00) Claims/Lost (0/0) Holds (0) More ▼

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

After items are checked out, they are listed in the **Items** view. To renew an item for the patron, select the item in the Items view and select **RENEW**.



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REGISTRATION REFRESH CLOSE

BLOCKS NOTES

Check Out (0) **Items (2)(0)** Account (\$0.00) Claims/Lost (0/0) Holds (0) More ▼

<input type="checkbox"/>	TYPE	DUE ON ▼	BARCODE	TITLE	AUTHOR	RENEWALS LEFT	CALL NO.	BRANCH
<input checked="" type="checkbox"/>	Book	11/6/2014	0001900107994	Manchild in the promised land	Brown, Claude, 193...	3 of 3	B Brown Bro	Community Library

See also:

- "Messages and blocks when checking out/renewing " on page 154
- "Check out items" on page 155
- "Set a special due date/loan period during check out" on page 156
- "Renew items from the items out list" on page 79

## Messages and blocks when checking out/renewing

As you check out items in Leap, messages or blocks may appear due to the status of the item or the patron. For example, the item may be in-transit, or the patron may owe fines.

**Patron is blocked**

Do you want to continue with this operation?

Patron owes money. Amount due: \$10.00

Patron has exceeded maximum fees permitted. Amount due: \$10.00

Patron has unread messages

CONTINUE

CANCEL

If a message or block appears in Leap, you can select **CONTINUE** (if you have the appropriate permissions) or **CANCEL**.

These messages and blocks appear in Leap according to the same criteria that they appear in the Polaris staff client. For more information on the types of messages and blocks that may appear when checking out items in Leap, see the topic *Check-Out Blocks and Messages* in Polaris ILS Help.

## Check out items

To check out items to a patron:

**Tip:**

If you have the required permissions, you can set a special due date or loan period that remains in effect for the entire session for which you are signed into Leap. See "Leap User Interface" on page 9

1. Open the patron's record.

The Check Out view is selected, and the cursor is in the **Scan or enter item barcode** box.

2. Scan the item in the barcode box, or select **FIND TOOL** and search for the item to check out. See "The Leap Find Tool" on page 34.
3. If you get the message that the item is from another branch, select **CONTINUE**.

A **Checkout successful** message is displayed (when there are no blocking conditions), the item is listed as checked out, and the Check Out count indicates the number of items the patron has checked out.

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REGISTRATION REFRESH COMPLETE

BLOCKS NOTES

Check Out (1) Items (2)(0) Account (\$0.00) Claims/Lost (0/0) Holds (0) More ▾

FIND TOOL

<input type="checkbox"/>	BARCODE	CALL NUMBER	TITLE	DUE DATE	ACTION	SHELF LOCATION	ASSIGNED BRANCH	MATERIAL TYPE
<input type="checkbox"/>	0001900176742	809.3 Son	Illness as metaphor.	11/11/2014	Check Out		Community Library	Book

## Set a special due date/loan period during check out

To set a special due date or specify a special loan period when checking out items:

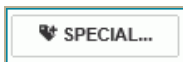
**Note:**

You can also select **Settings** under your username to specify a special loan period for all items checked out during your logged-in session. See Leap User Interface.

Open the patron's record.

The Check Out view is displayed.

1. Select **SPECIAL**



The area below the button expands.

2. Set the special due date using one of these methods:
  - Select a date using the calendar control.
  - Type a number in the **Loan period** box, and select **Days**, **Hours**, or **Minutes** in the drop-down list box.
3. To use this special loan period for the next item checked out to this patron, select **Apply to next item only**.

4. To use this special loan period for all items you check out to this patron during this session, select **Apply to all items for this patron**.
5. Select **OK**.

## Reset a special due date/loan period

To reset a special due date:

1. Open the patron's record.

If a special due date has been applied for the next item or all items that will be checked out to the patron, the date displays next to the **SPECIAL** button.



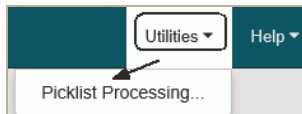
2. Select **RESET**.

The special due date no longer appears, and the loan period is set to the default.

## Holds Picklist

With the picklist, you can take a tablet into the library stacks and indicate whether items on the pending hold request list have been located. The picklist page is similar to the Request to Fill (RTF) list in the staff client.

To open the Holds Picklist, select the **Utilities|Picklist processing**.



When you open the Picklist, the Pending requests are listed.

Each request is displayed in a row with information about the request in the following columns, from left to right: Collection, Shelf Location, Call Number, Author, Title, Format, and Item Barcode. If the hold request is for a serial, the call number includes the volume and copy, and the title includes the serial title and designation.

**Note:**

To return to Leap Circulation, close the dialog box, and select the back button.



Pending

Located

Branch:

Schenectady Branch - Central

LOCATED

DENY

ASK ME LATER

CANCEL

REFRESH

Filter requests

Total items | 7 total

<input type="checkbox"/>	COLLECTION	SHELF LOCATION	CALL NUMBER	AUTHOR	TITLE	FORMAT	ITEM BARCODE
<input type="checkbox"/>			Fict Bol	Bolano, Robert.	By night in Chile	Book	0000411659881
<input type="checkbox"/>	Adult Nonfiction		581.974 N84	Norman, Marcia Gaylord.	A beachcomber's botany.	Book	0000410249478
<input type="checkbox"/>	Adult Nonfiction		751 Cre Oversize	Crespo, Michael, 1947-	Watercolor day by day	Book	0000401208061
<input type="checkbox"/>	Adult Nonfiction	Storage - Adult	966 Per	Pern, Stephen, 1950-	The beach of morning : a walk in West Africa.	Book	0000400708970
<input type="checkbox"/>	Children's Nonfiction		j 398 McK	McKinley, Robin	Beauty : a retelling of the story of Beauty & the beast	Book	0000402829667
<input type="checkbox"/>	Large Type		LT Fict	Heller, Joseph.	Catch-22 : [large print] a novel.	Book	0000400854238
<input type="checkbox"/>	Paperbacks		PB Fict Con	Conroy, Pat.	Beach music	Book	0000412119166

## Changing pending hold requests from the holds picklist

To perform an action on hold requests in the picklist:

1. Select one or more hold requests by selecting the check box to the left of each hold request you want to change. To select all the requests, select the check box in the column header.

Branch: Community Library

Filter requests

LOCATED DENY ASK ME LATER CANCEL REFRESH

Total items | 2 total

<input type="checkbox"/>	COLLECTION	SHELF LOCATION	CALL NUMBER	AUTHOR	TITLE	FORMAT	ITEM BARCODE
<input checked="" type="checkbox"/>	Adult Fiction			Moore, Lorrie.	Bark : stories	Book	1229195400023
<input type="checkbox"/>	Local History	Storage	92 Byron	Byron, George Gordon Byron, Baron, 1788-1824.	Lord Byron : selected letters and journals in one volume from the unexpurgated twelve volume edition	Book	0000012131321

2. Select a command button to change the pending hold request.

Command Button	Action
	Indicates that the item has been selected and is on the way to a processing location where it will become held for the patron or go in-transit. The pending request moves to the Located list, which you can view by clicking Located at the top of the page.
	The hold request is denied, and it is removed from the pending list.
	The hold request is removed from the pending list, and it moves to the next step in the Request to Fill (RTF) process.
	The hold request is canceled and removed from the pending list.



See also:

- "Sort and filter the picklist" on page 162
- "View hold details from the picklist" on page 166
- "Indicate an item was located" on page 164
- "Deny hold requests in the picklist" on page 168
- "Cancel hold requests in the picklist" on page 169
- "Return a located item to the Pending list " on page 165

## Sort and filter the picklist

To sort and filter the picklist:

In the **Branch** drop-down list box, select the branch or branches with the pending hold requests you want to see.

To facilitate processing multiple items located in the same area of the library, you can sort the list by any of its columns. Or, you can start typing in the Filter requests box to filter the list to see only the requests with the filter text. Then, you can go to the area of the library that contains these items.

### Example:

Start typing a call number. If you type **91**, the titles beginning with this call number are listed.

Pending Located

Branch: Community Library

LOCATED DENY ASK ME LATER CANCEL

91

<input type="checkbox"/>	COLLECTION	SHELF LOCATION	CALL NUMBER	AUTHOR	TITLE	FORMAT	ITEM BARCODE
<input type="checkbox"/>	Adult Nonfiction		910 Chi		Chicken soup for the traveler's soul : stories of adventure, inspiration and insight to celebrate the spirit of travel	Book	0000602125627
<input type="checkbox"/>	Adult Nonfiction		910 Dic 2000		The dictionary of human geography	Book	0000410459671
<input type="checkbox"/>	Adult Nonfiction		910 Exp		Expat : women's true tales of life abroad	Book	0000203184635
<input type="checkbox"/>	Adult Nonfiction		914.21/04		Avant guide. London.	Book	0042049704587
<input type="checkbox"/>	Adult Nonfiction		917.290453	Showker, Kay.	100 Best Resorts of the Caribbean	Book	0042066202871

## Mark a hold request with *Ask Me Later*

Use the *Ask Me Later* option when you cannot immediately locate the item, but you do not want to deny the request.

To mark a hold request with *Ask Me Later*:

1. Select the check box next to the hold request(s) you want to mark as *Ask Me Later*.
2. Select **Ask Me Later**.

The request is removed from the Pending list and moves to the next step in the RTF process, which allows the request to go to the next branch as soon as possible. This leaves the item eligible to fill the request. If no other branch in the RTF fills the request, the request will be routed back to you, giving you a second chance to find the item. If no other items can fill the request, you will see a message alerting you that your library has the only item. In this case, the request remains Pending at your branch until some other action is taken (the request is denied, canceled, or set to inactive).

## Indicate an item was located

To mark items as located in the picklist:

1. Open the picklist.

Your login branch is the default branch displayed in the **Branch** box.

2. To select a different branch, select a branch in the **Branch** list box.
3. To filter the hold requests by a category, such as collection, that corresponds with the location of items in the library, start typing the filter term in the **Filter requests** box.

4. Locate the items on the shelves that match the hold requests in the list.
5. Select the check box next to each found item in the picklist.
6. Select **Located**.

Pending
Located

Branch: Stillwater Public Library

LOCATED
DENY
ASK ME LATER
CANCEL
REFRESH

Total items | 2 total

<input type="checkbox"/>	COLLECTION	SHELF LOCATION	CALL NUMBER	AUTHOR	TITLE	FORMAT	ITEM BARCODE
<input checked="" type="checkbox"/>	Adult Nonfiction				Cats [videorecording].	Book	BulkCreate004536663
<input checked="" type="checkbox"/>	Adult Nonfiction		J 636.8 Wra	Wratten, Peggy.	Cats	Book	0003300066770

The following occurs for each hold request marked as Located:

- The hold request status changes to Located
- The item status remains In
- The request moves from the **Pending** list to the **Located** list.

After marking the requested items in the picklist as Located, you can take the located items to the pickup location where they can be scanned at a Polaris workstation where they become “held.” All other holds processing and notices function according to established methods in the Polaris staff client.

## Return a located item to the Pending list

To return a hold request to the Pending list when it was marked as "located" in error:

1. Select **Located** at the top of the picklist page to see the list of located items.

Pending **Located** Branch: Community Library

**RETURN** **REFRESH** Filter requests

Total items | 1 total

<input type="checkbox"/>	COLLECTION	SHELF LOCATION	CALL NUMBER	AUTHOR	TITLE	FORMAT	ITEM BARCODE
<input type="checkbox"/>	Local History	Storage	92 Byron	Byron, George Gordon Byron, Baron, 1788-1824.	Lord Byron : selected letters and journals in one volume from the unexpurgated twelve volume edition	Book	0000012131321

2. Select the item that was located in error.
3. Select **RETURN**.

The hold request returns to the Pending list, and the hold status reverts to Pending.

**Note:**

Your library can set the length of time that requests can remain in the Located status before they revert to Pending.

## View hold details from the picklist

To see more details for a hold request, select anywhere in a hold request row to open the details view.

**Note:**



To return to Leap Circulation, close the dialog box, and select the back button.

The dictionary of human geography		ITEM BARCODE
<input type="checkbox"/> COLLECTION		0042043100012
<input type="checkbox"/> Adult Nonfiction		0000000061245
<input type="checkbox"/> Adult Nonfiction		0000602125627
<input type="checkbox"/> Adult Nonfiction		0000410459671
<input type="checkbox"/> Adult Nonfiction		0000203184635
<input type="checkbox"/> Adult Nonfiction		0042049704587
<input type="checkbox"/> Adult Nonfiction		0042066202871
<input type="checkbox"/> Adult Nonfiction		peer000000005
<input type="checkbox"/> Children's Audiovisual		004228400

REQUEST ID:	826141
STATUS DATE:	MONDAY, NOVEMBER 11, 2013
EXPIRATION DATE:	THURSDAY, NOVEMBER 21, 2013
ACTIVATION DATE:	MONDAY, NOVEMBER 11, 2013
PICKUP BRANCH:	COMMUNITY LIBRARY
PATRON BRANCH:	COMMUNITY LIBRARY
ITEM BRANCH:	COMMUNITY LIBRARY
AUTHOR:	
TITLE:	THE DICTIONARY OF HUMAN GEOGRAPHY
MATERIAL TYPE:	BOOK
ITEM BARCODE:	0000410459671
CALL NUMBER:	910 DIC 2000

**CLOSE**

The following details are displayed:

- Request ID
- Status Date
- Activation Date
- Pickup Branch
- Patron Branch
- Item Branch
- Author
- Title
- Material Type
- Item Barcode
- Call Number
- Collection
- Shelf Location
- Patron Name
- Patron Barcode
- Staff Notes

- **Non-Public Notes**
- **PAC Notes**

## Deny hold requests in the picklist

If an item is not found or it is found but it is damaged or otherwise unavailable to fill the hold request, you can deny the request from the picklist.

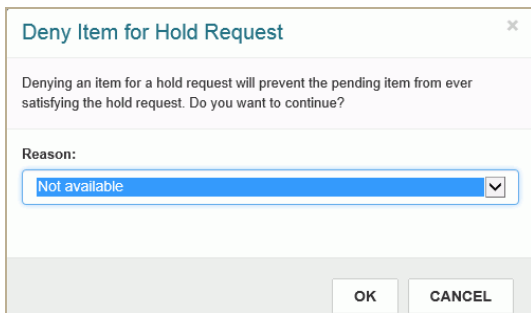
To deny one or multiple hold requests from the picklist:

**Note:**

If you are denying multiple hold requests, but for different reasons, deny each hold request separately.

1. Select the check box next to the hold request or requests you want to deny.
2. Select **DENY**.

A dialog box opens.



3. Select the reason the hold request was denied from the **Reason** drop-down list box.

The hold request or requests are canceled.



## Cancel hold requests in the picklist

To cancel one or more hold requests in the picklist:

1. Open the picklist. See "Holds Picklist " on page 159

Branch: Saratoga Springs Public Library

LOCATED DENY ASK ME LATER CANCEL REFRESH Filter requests

Total items | 6 total

<input type="checkbox"/>	COLLECTION	SHELF LOCATION	CALL NUMBER	AUTHOR	TITLE	FORMAT	ITEM BARCODE
<input type="checkbox"/>				Arbor, Jane.	Tree of paradise	Book	588585
<input type="checkbox"/>	Adult Nonfiction		779 S Oversize vol. 2	Szarkowski, John.	The work of Atget	Book	0000200288959
<input type="checkbox"/>	Adult Nonfiction		780.92 S	Siohan, Robert, 1894-	Stravinsky.	Book	0000200290435
<input type="checkbox"/>	Adult Nonfiction		799.27 H	Hemingway, Ernest, 1899-1961.	Green hills of Africa	Book	0000200320505
<input type="checkbox"/>	Children's Nonfiction		J 636.8 Ald	Alderton, David, 1956-	Cats	Book	0000202123881
<input type="checkbox"/>	Children's Nonfiction		J 636.8 Lau	Lauber, Patricia.	The true-or-false book of cats	Book	0000202134870

2. Select the check box next to the hold requests you want to cancel.
3. Select **CANCEL**.

The request or requests are canceled.

# Index

---

## A

### account

waiving charges from a patron's financial 88

### associations

adding patron 141

editing existing 143

### associations, patron

deleting 145

### asterisks

indicating required fields 14

## B

### bibliographic records

go to title in PAC 60

opening and viewing 52, 59

placing hold requests from 105

### blocks

adding patron 124

encountered during check outs and renewals 154

### blocks, patron

deleting 125

### branch

entering to sign in 5

## C

### camera

requirements 2

### charges

adding to a patron's account 90

checking in

items 147

managing fines 148

overview 146

checking out

setting a special due date or loan period 156

checking out and renewing

messages and blocks 154

claiming

from the items out list 83

claims

resetting the claims count 100

collections

removing a patron's financial account from 95

viewing a patron's summary 94

credits

adding to a patron's account 92

## D

dates

entering 15

entering in Leap 15

default search options

specifying in Find Tool 48

denying hold requests

picklist 168

## E

estimating fines

from the items out list 82

## F

### filter

keyboard shortcut 10

### filters

applying in Find Tool 44

using 17

### Find Tool

applying filters 44

customizing by user 48

differences in Leap and Polaris ILS 34

doing a basic search 36

Polaris administration settings that do not affect 34

results list 34

setting columns for search results 46

setting up a power search 39

setting up an SQL search 41

sorting search results 51

tabs 34

### fines

estimating from the items out list 82

managing during check-in 148

## H

### Help menu

options 10

### history

viewing holds 121

### hold requests

canceling from the picklist 169

denying from the picklist 168

mark as Ask Me Later 163

placing from bibliographic records 105

holds

canceling 115

deleting 120

denying 116

filling now 111

grouping 117

messages or blocks when placing 102

modifying 112

placing from a patron's record 103

placing multiple for same patron 109

reactivating 114

viewing details and history 121

holds picklist

indicating items were located 164

overview 159

## I

IE11

patron password issue 7

iPad

display issues 7

requirements 2

item record

described 55

item records

opening and viewing 52

opening from the notices view 135

items

checking in 147

items out list

claiming from 83

declaring an item lost 84

estimating fines from 82

renewing from 79

viewing 77

## K

keyboard shortcuts

accessing the list 10

## L

Leap application

client requirements 1

details and user information 10

permissions 4

required fields 14

user interface elements 9

library account

overview of patron's 76

list views

using 17

lists

summary bar 16

lost items

declaring from the items out list 84

## M

messages

adding patron 138

encountered during check out and renewal 154

messages and blocks

hold requests 102

messages, patron

deleting 139

## **N**

notes

adding to a patron record 127

notices

opening the associated item record 135

viewing the history for an item 133

notification history

viewing an item's 133

## **O**

overview 1

## **P**

patron's checked out items

viewing 77

patron's reading history

viewing the list 129

patron associations

adding 141

deleting 145

editing existing 143

patron blocks

adding 124

deleting 125

patron messages

deleting 139

patron notes

deleting 128

patron passwords

    issue in IE11 7

patron pictures

    updating 74

patron record

    described 53

    overview of library account view 76

patron records

    finding existing 65

    opening and viewing 52

    registering a new patron 71

    using additional search options 67

patron registration

    viewing, editing, or renewing 69

patron's collection summary

    viewing 94

patron's financial account

    adding a charge 90

    adding credits 92

    paying charges 87

    removing from collections 95

    viewing 86

    viewing a patron's transaction summary 96

patron's transaction summary

    viewing 96

patrons

    adding a photo to registration 74

    registering new 71

paying charges

    from patron's financial account 87



permissions

overriding 4

overview 4

user 4

picklist

deny a hold request 168

indicating items were located 164

overview 159

power search

saving 40

setting up 39

print options

user 12

printers, receipt 24

configuring for IE on Windows 22

creating a custom paper size for Chrome on Windows 29

## R

reading history

removing items from 130

viewing the patron's 129

receipt printers

configuring for Chrome and Safari on MAC OS X 31

configuring for Chrome on Windows 26

configuring for IE on Windows 22

creating a custom paper size for Chrome on Windows 29

creating a custom paper size for IE on Windows 24

creating a custom paper size for Safari or Chrome on MAC OS 32

records

opening and viewing in Leap 52

renewing 79

setting a special due date or loan period 81

required fields

asterisks 14

## S

saved searches

deleting 43

search results

setting columns in Find Tool 46

sorting 51

searching

automatic suggestions 65

doing a basic search for a record 36

for records 18

patron records 65

patron records, Find Tool 67

using search boxes 18

sign in

Leap 5

signing in

entering branch and workstation 5

entering username and password 5

special loan

setting for session 12

special loan period

resetting 158

setting during check out 156

SQL search

setting up 41

## T

transaction summary

viewing a patron's 96

## U

### user

customizing Find Tool 48

print options 12

setting special loan for session 12

### user interface

elements 9

### username and password

entering 5

### users

permissions 4

## W

### waiving charges

from patron's financial account 88

### workforms

moving among 10

opening multiple 10

### workstation

entering to sign in 5

requirements 2