Polaris Leap User Guide

POLARIS LEAP 1.0 SP1 v.1

About Leap Documentation

Friday, July 24, 2015

This documentation is written for Polaris Leap 1.0 SP1 Doc. Rev. 1.

Contents

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^{TM} 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.

Leap access is controlled using permissions in Polaris Administration. Once staff members have access to Leap, the circulation functions they can perform in Leap depend on the permissions that control the corresponding functions in the Polaris ILS Staff Client. See "Leap Access and Staff User Permissions Checking in Leap" on page 6.

Your library can also control access to Leap from workstations within the library using a check box on the Workstation workform in Polaris Administration.

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 4
- "Leap Access and Staff User Permissions Checking in Leap" on page 6
- "Signing in to Polaris Leap" on page 9
- "Leap User Interface" on page 11

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 SP1.

> **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.
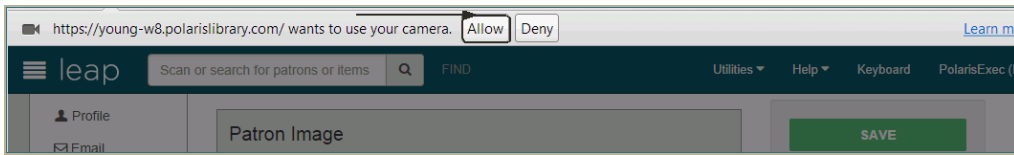
You can select the camera icon in the address bar to view additional options, such as selecting the camera.
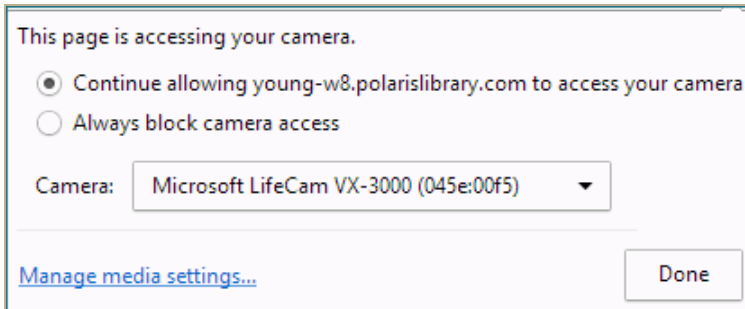
While in Chrome, go to *chrome://settings/contentExceptions#media-stream* to manage media settings.

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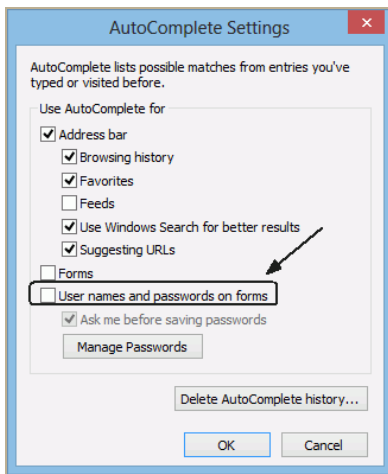
For more information on this issue, which Microsoft has identified as a known bug in IE 11, see:

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 tap inside a field that requires text, the touch keyboard appears. If the keyboard covers part of the Leap page, swipe up or down in the area above the keyboard to see more of the page while keeping the keyboard open.

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🔑 Password

🖼 Image

Barcode *

Registered At *

Community Library ▾

Former Barcode

Patron Code *

Regular ▾

Last Name *

Date of Registration

6/4/2015

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Q W E R T Y U I O P ⌫

A S D F G H J K L return

⇧ Z X C V B N M !, ?. ⇧

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Leap Access and Staff User Permissions Checking in Leap

 The **Access Leap: Allow** permission must be granted to all staff members who will be using Leap. The **Access Leap remotely: Allow** is used to control access to Leap outside of the library system's network. These permissions are not granted by default.

If your library wants to limit who can access Leap remotely, two Leap web applications must be set up, which can be on the same server or different servers. One will be used for staff accessing Leap through the library's network with restrictions based on the library's internal IP address. The second Leap web application will be set up to accept all connections, but access will be granted only if the staff member has the permission **Access Leap remotely: Allow**.

Two URIs are required if your library wants to restrict remote access, for example:

https://mylib.org/leapwebapp

https://mylib.org/leapwebappexternal

Note:
If your library plans to restrict access to Leap depending on the staff member's location, contact your Polaris support representative.
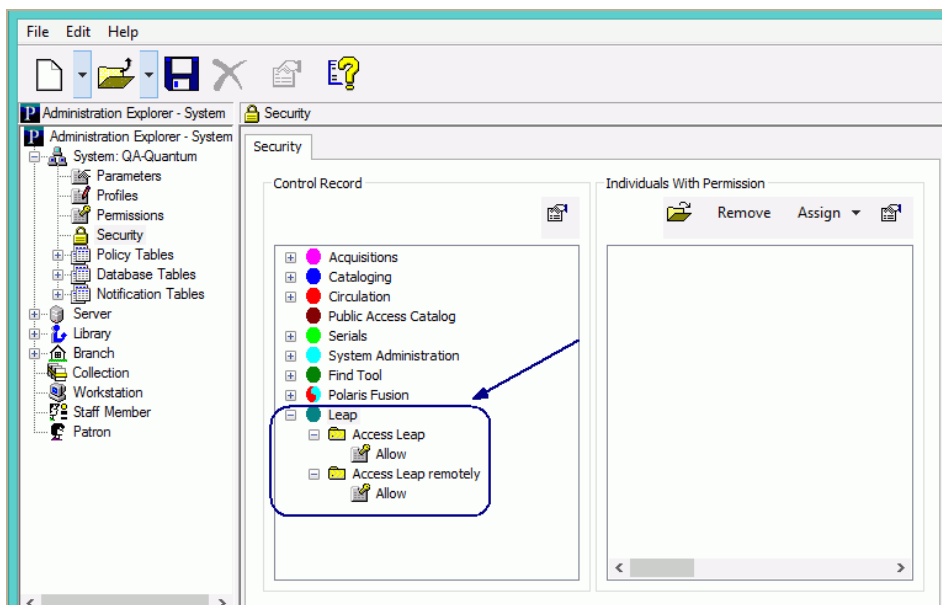
You can also control Leap access from workstations in the library network. See: "Enable Leap Access for a Workstation" on page 8.

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 addition, the following Cataloging permissions are required to work with item and bibliographic records in Leap:

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- To access an Item Record in Leap, the following permissions are required: **Access cataloging subsystem: Allow** and **Item record: Access**

- To access a Bibliographic Record in Leap, the following permissions are required: **Access cataloging subsystem: Allow** and **Bibliographic Record: Access**

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.

- **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.

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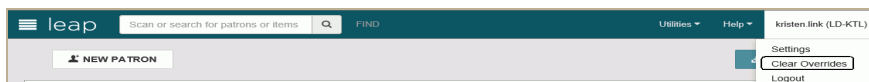
Enable Leap Access for a Workstation

You can enable Leap access from a library workstation by checking the Leap check box on the Workstation workform in Polaris Administration.The check box appears on the Workstation workform when the parent branch or system is licensed for Leap. If the check box is unchecked, users will not be able to log into Leap from the in-network workstation.

Note:
If the user is outside of the library's network, the workstation does not appear in the Workstation drop-down list box at logon.

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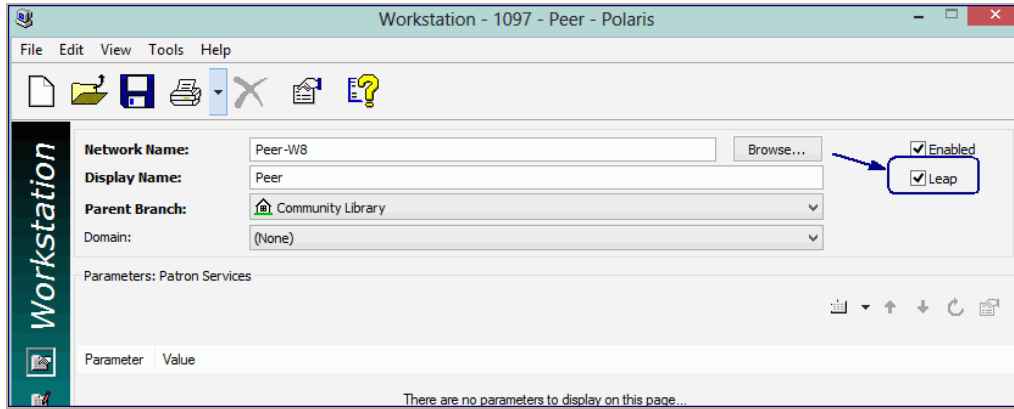
Signing in to Polaris Leap

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.
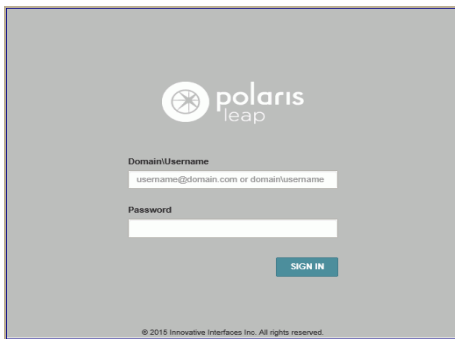
Important:
Your username cannot contain spaces.
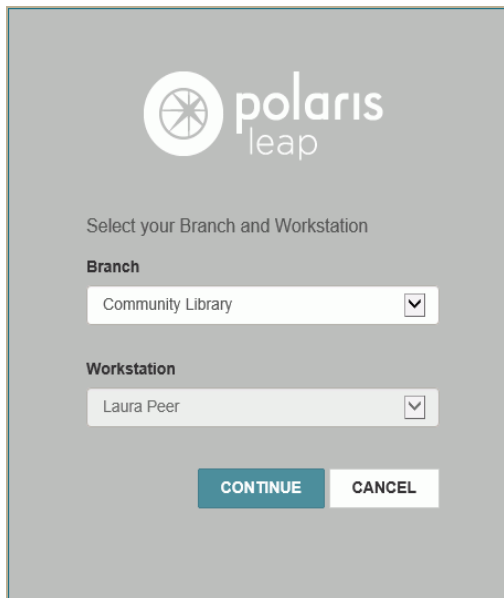
To sign in to Polaris Leap:

1. Select the Leap icon or shortcut.
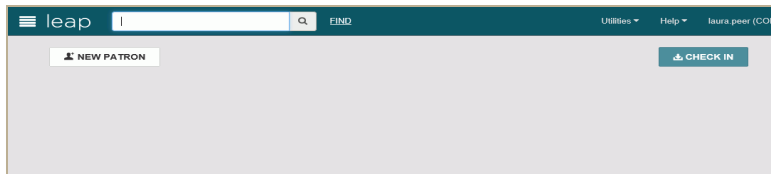
    The sign in page opens.

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.

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.
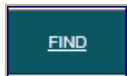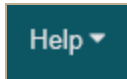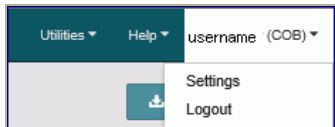
Leap User Interface

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.
	Enter search criteria to find patrons or titles (bibliographic records). When you enter the search criteria, a list of patron and bibliographic record suggestions is displayed.
	Opens the Find Tool to search for patron, bibliographic, and item records.
	Select Utilities to access the Picklist Processing page.
	Opens a menu with the options: • **Leap Topics** - Select this option to open the Leap online Help. • **Keyboard** - Select this option to see the list of keyboard shortcuts. • **About** - Select this option to see details about the Leap application.
	Select your username to access user settings or to log out of Leap.

Workforms Tracker

To open the Workforms tracker, select the slide-out button.

The Workforms tracker displays the open workforms. You can pin the Workforms tracker by selecting the pushpin icon, filter the list by typing in the **Filter Workforms** box, or close all the workforms by selecting **CLOSE ALL**.
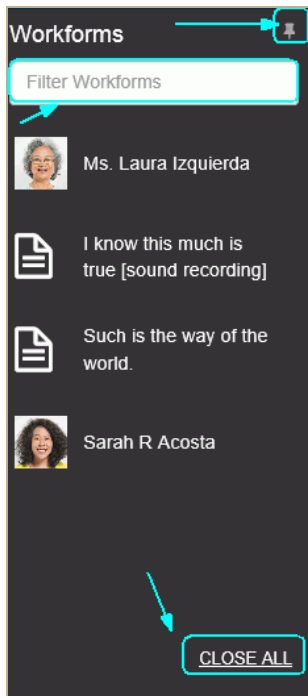
Help Menu

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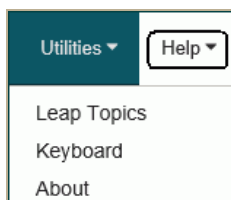
- Select **Leap Topics** to access online Help. If the contents and index tabs are not visible, select the slide-out button in Help to see the tabs. To return to the topic view, click/tap the slide-out button.

- 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.
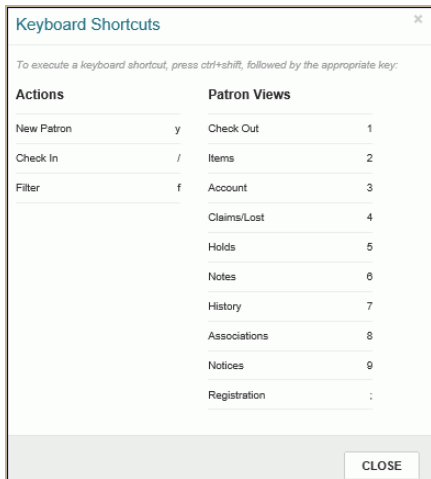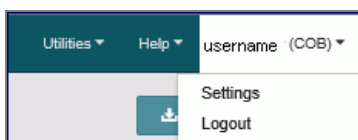

- Select **About** to see details about the Leap application and the logged-in user.

User Options

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

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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 20

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 in the **Loan period** box, 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 154.
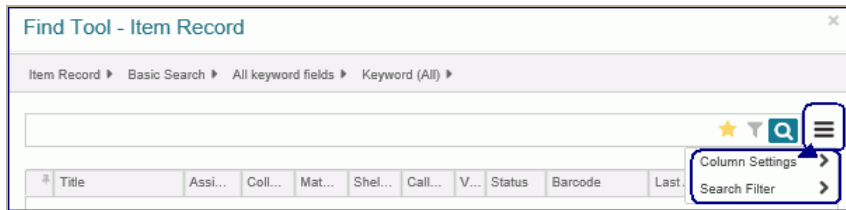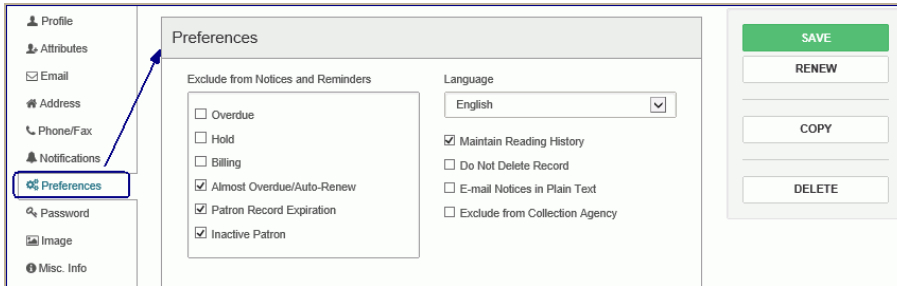

Select **Logout** to close Leap.

Options Menus

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

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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 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.
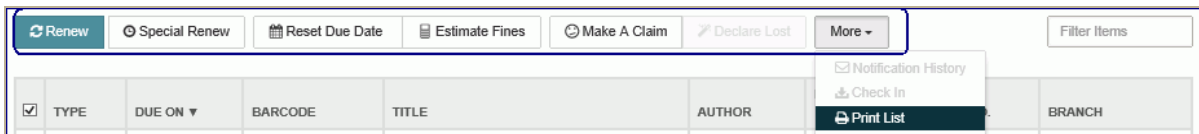
Required Fields

Fields marked with an asterisk are required.

Check Boxes

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

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.

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.

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Address Type | City
Home | COBLESKILL

Postal Code | Zip+4: | State
12043 | | NY

Street Address | County
| SCHOHARIE

Street Address Line 2 | Country
| USA

🗑 DELETE

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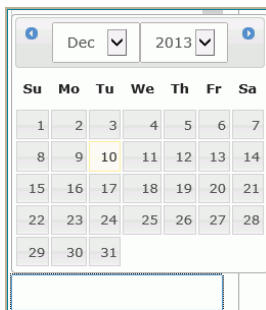
- Select the date in the current month.
- Select the left arrow to go to the previous month.
- Select the right arrow to go to the next month.
- Select the month at the top of the calendar to open the month list, and select the month.

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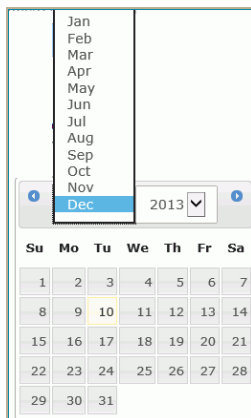
- Select the year at the top of the calendar to open the year list, and select the year.
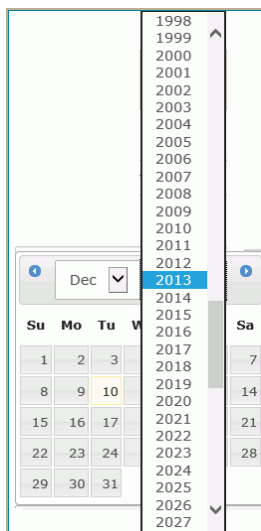
Message Boxes

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.

Summary Bars

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

List Views

In list views, such as a list of the items the patron has checked out, the line items are displayed in rows with sortable column headers. To sort the line items, select a column header. To perform actions on a line item, select the check box. If you select the check box in the header, the check boxes are selected for all lines. When multiple lines are selected, the buttons are activated for the actions that are possible for all the selected lines.

Filters

Some list views, such as the **Holds** list view, have filters which will filter the list as you type. The filter works on any data column. For example, if you start typing a number and a call number begins with that number, the list will show only those line items with call numbers that match the filter entry.

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 Printer Options or Print dialog box opens automatically when the user performs the action.

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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 22
- "Receipt Printer Configuration" on page 23

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.

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 23.

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
Star TSP600	Driver: Star TSP600 Cutter (TSP643) Chrome, IE10, IE11		Star 3.0 Driver for Mac Chrome, Safari
Epson TM-T88IV	Chrome, IE10, IE11	EPSON TM-T88IV ReceiptE4 Chrome, IE11	
Star TSP700		Star TSP700 (TSP743) Chrome, IE11	

See also:

- "Configure a receipt printer for IE10 or IE 11 on Windows 7 or 8.1" on page 24
- "Create a custom receipt size for printing from IE on Windows 7 or 8.1" on page 27
- "Set up the receipt page in IE10 or IE11 " on page 26
- "Configure a receipt printer for Chrome on Windows 7 or 8.1" on page 28
- "Create a receipt size for printing from Chrome on Windows 7 or 8.1" on page 32
- "Set up the receipt page in Chrome on Windows 7 or 8.1" on page 31
- "Configure a receipt printer for Chrome and Safari on Mac OS X" on page 33
- "Create a receipt size for printing from Safari/Chrome on Mac OS X" on page 34

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.
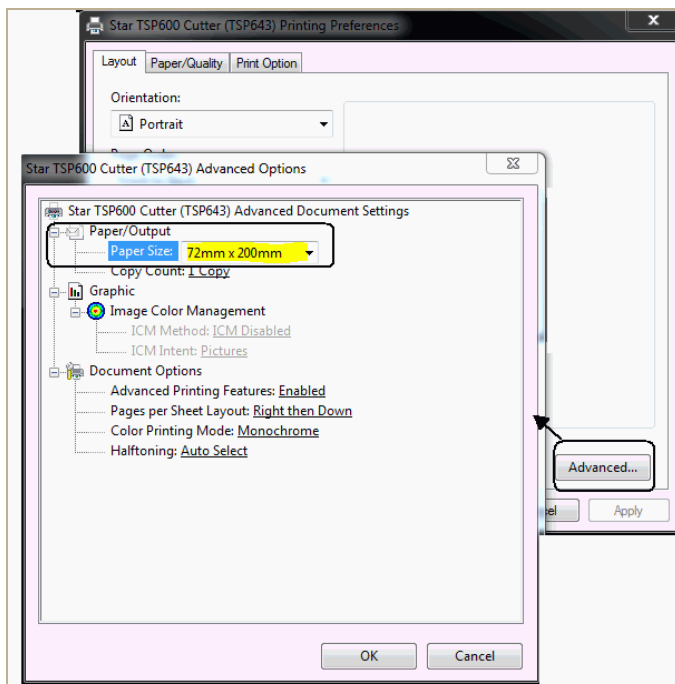5. Select **Form To Tray Assignment**, and select **FRICTION: 72mm x 200 mm**.
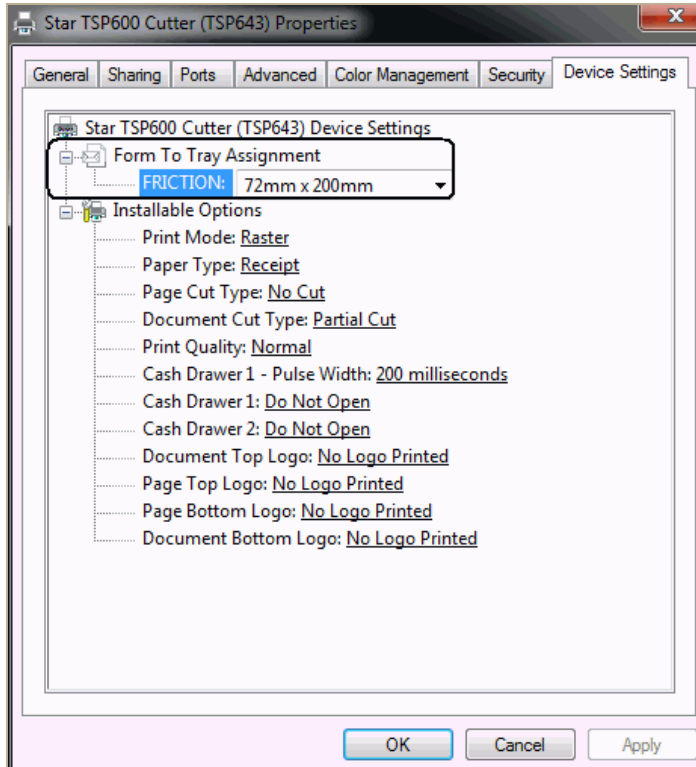
6. Click **OK**.
7. On the Devices and Printers window, right-click the printer, and select **Printing Preferences**.
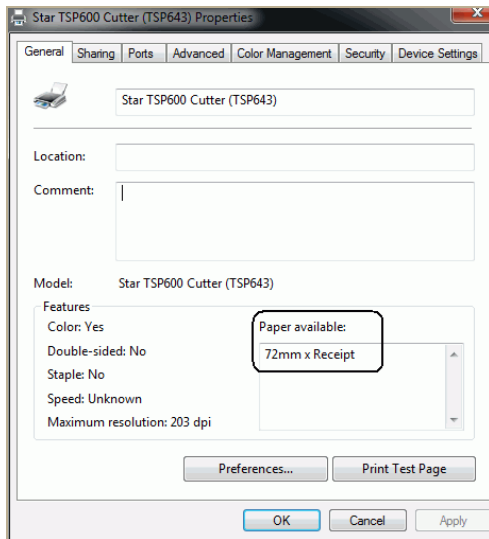8. Click **Advanced**.

   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 27.

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**.

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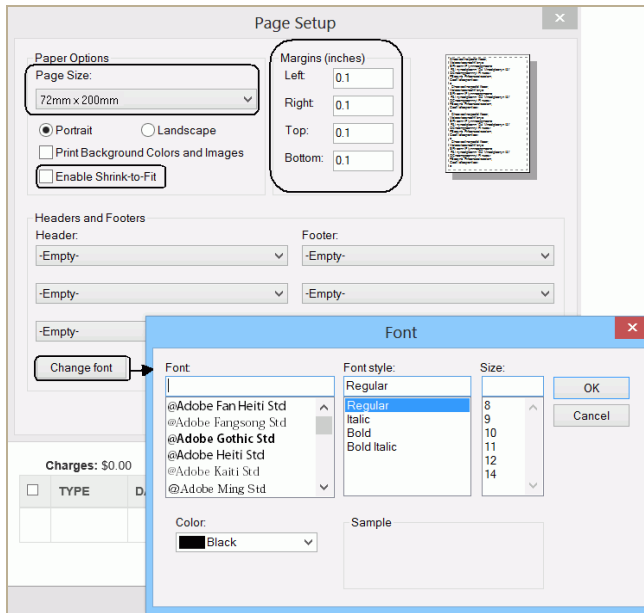
Create a custom receipt size for printing from IE on Windows 7 or 8.1

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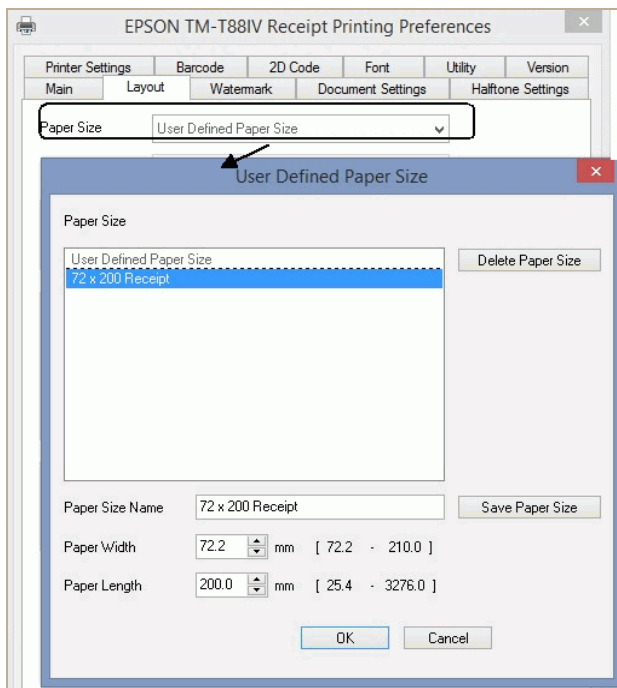
4. Define the paper size and select **Save Paper Size**.

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**FRICTION:72mm x Receipt**.
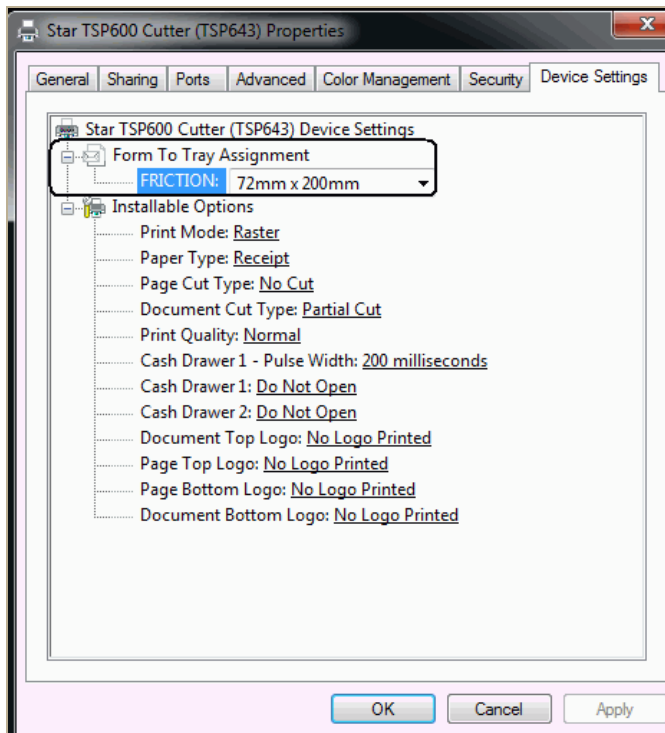
5. Click **OK**.
6. On the Devices and Printers window, right-click the printer, and select **Printing Preferences**.
7. Select **Advanced**.

   The Advanced Options window is displayed.

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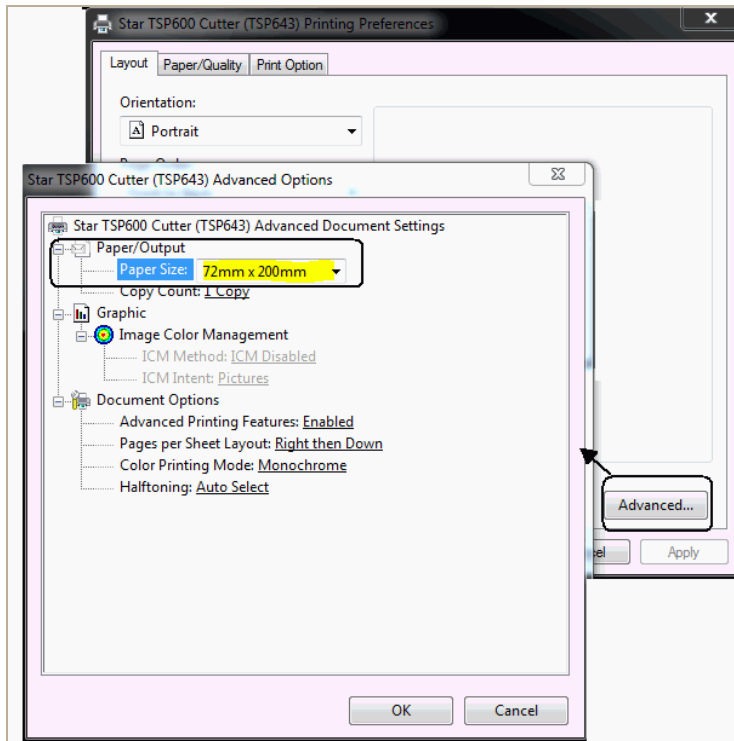
9. Select **OK**.

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

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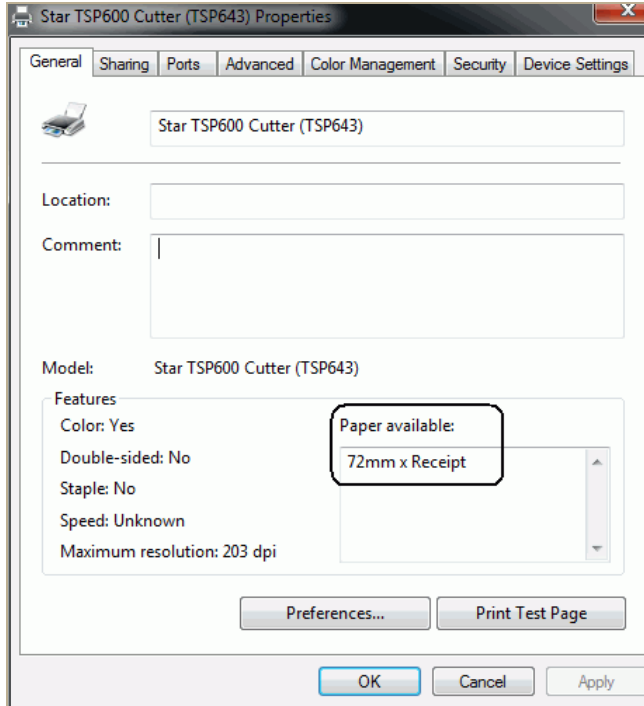
Note:

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 32 (This was necessary for the Epson printer on Windows 8.1.)
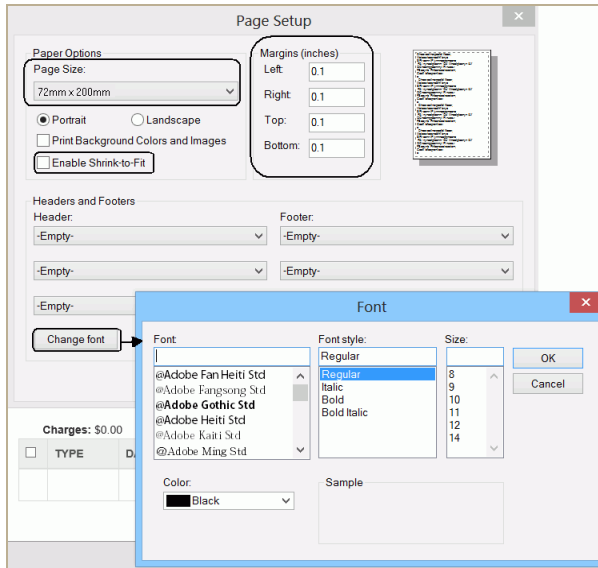
Set up the receipt page in Chrome on Windows 7 or 8.1

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**.

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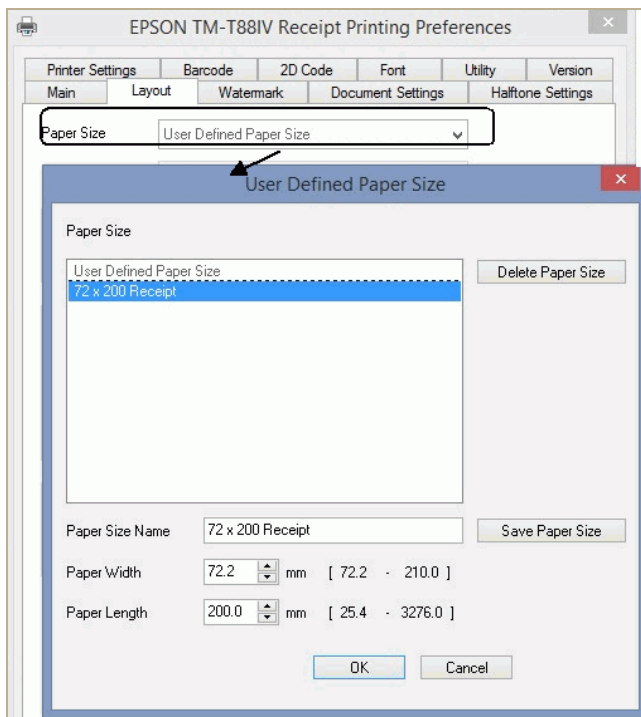
4. Define the paper size and select **Save Paper Size**.

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 34.

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**.
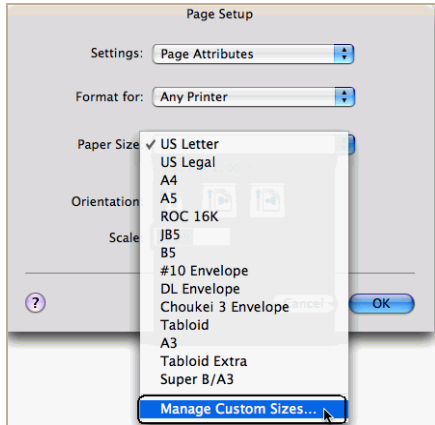
The Custom Page Sizes dialog box opens.
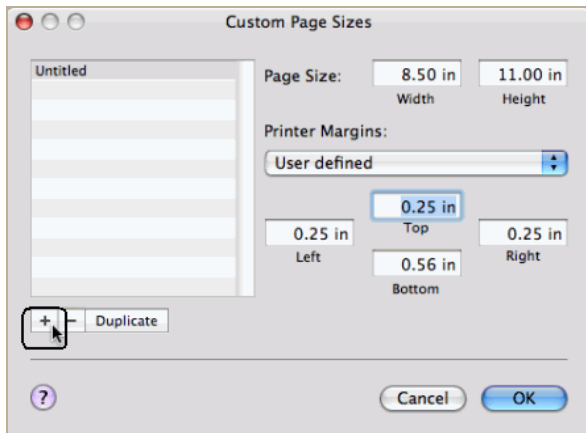
3. Select the plus sign button in the bottom left corner of the dialog box.

4. Double-click the default name Untitled, and type a new more descriptive name, such as No Margins, and click **OK**.

5. Press and to go to the Page Setup dialog box.

- 34 -

6. Click in the Paper Size box to open the drop-down list.

7. Select the custom paper size name, for example **No Margins**.
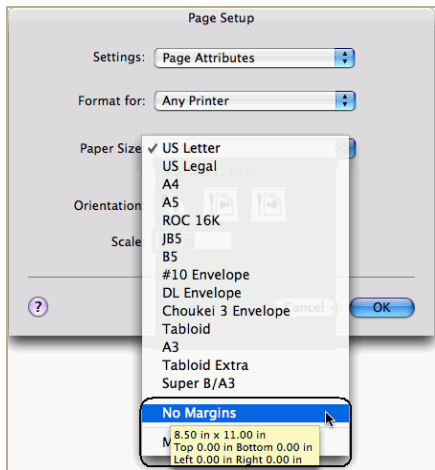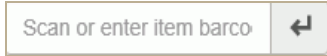
8. Select **OK**.
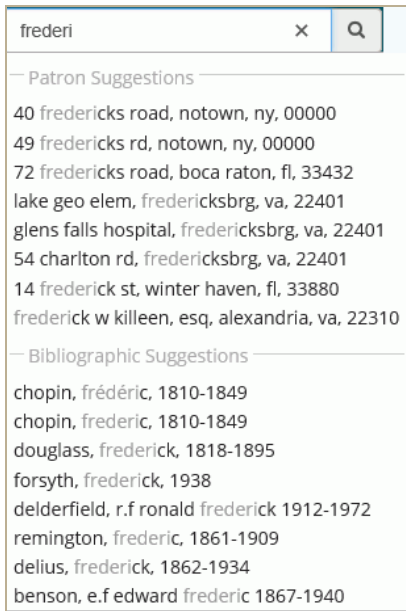
Search for Records in Leap

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.

| Scan or enter item barco | ↵ |

- Start typing in a search box, and automatic suggestions for patron and bibliographic records are displayed, if matches are found.

```
frederi                        ×    🔍

─ 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 37.

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 SP1, records listed in search results cannot be placed in record sets, bulk changed, deleted, or otherwise modified. You can create new patron records in Leap, but item and bibliographic records are created in the Polaris staff client and display in Leap.

Polaris Find Tool permissions, such as those for setting up and saving SQL searches, are checked in the Leap application.

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

- 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. 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 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:

- 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 39
- "Search for records and get a count" on page 41
- "Do a power search" on page 41
- "Save a power search" on page 42
- "Browse search for bibliographic records" on page 43

- "Set up and save an SQL search" on page 44
- "Rename a saved search" on page 45
- "Delete a saved search" on page 45
- "Apply a filter to a Find Tool search" on page 46
- "Specify columns for search results" on page 47
- "Save a set of Find Tool search options as your user default" on page 49
- "Sort Find Tool search results list" on page 51

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

> **Note:**
> You can set up user defaults for the Find Tool. See: "Save a set of Find Tool search options as your user default" on page 49.

To search for patron, item, or bibliographic records:

1. Open the Find Tool.
2. Select the record type if it is not already selected.
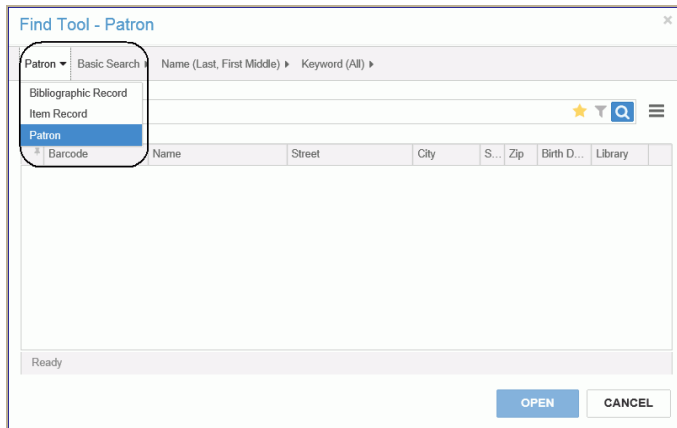
3. Select **Basic Search**.
4. Select the search by access point or qualifier.
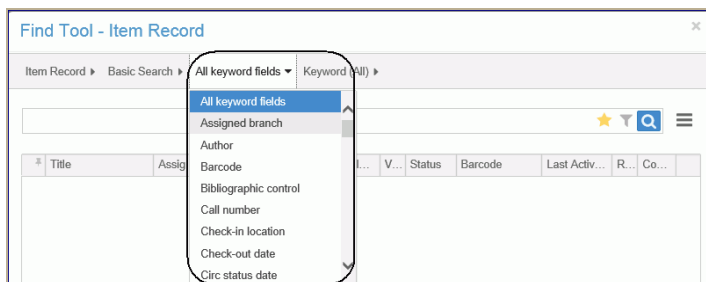
5. Select the relation option. The options depend on the selected search by access point or qualifier.

    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:

> **Note:**
> If you enter an asterisk in the search box and search keyword fields, a message may indicate a search limit was reached. Use a different search term or type.

- 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).

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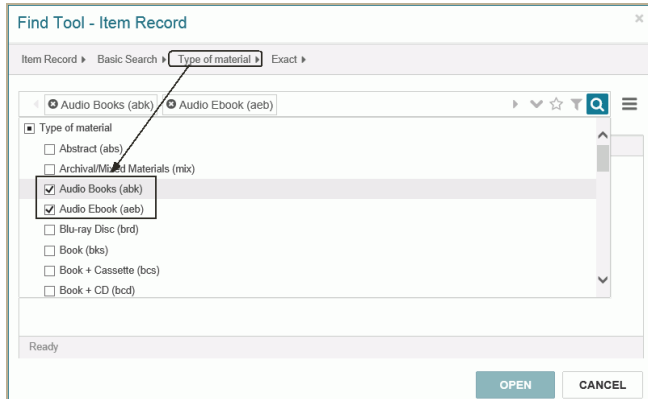
- If the search access point does not have an associated list, type the search term. For example, if you search by Author, type the author's name.

7. Select the search button to start the search.

The search results list is displayed.
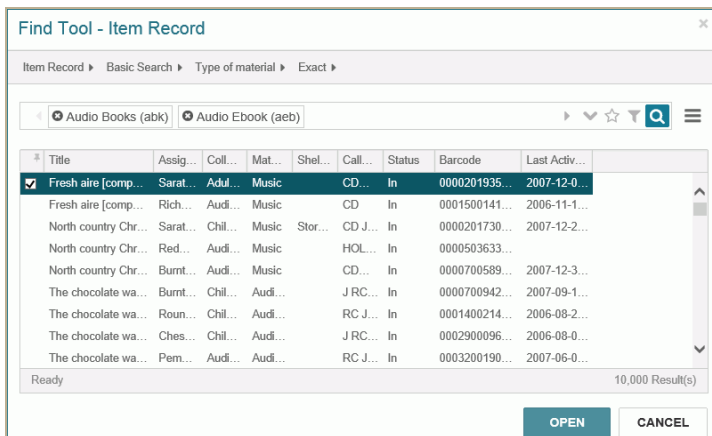
8. Select the record in the list, and select **OPEN**.

The record opens.

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

Search for records and get a count

To see a count of records in the Find Tool without returning search results:

1. Open the Find Tool.
2. Type or select the search criteria, including any filters.
3. Select the **Count Only** check box, and select the search button.

   The count is returned in the bottom right corner of the page.

   > **Note:**
   > If a filter was applied, the results display both the filtered results and the basic search results.

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.

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 41.
2. Select the save button.

A dialog box opens where you enter the name of the saved search.
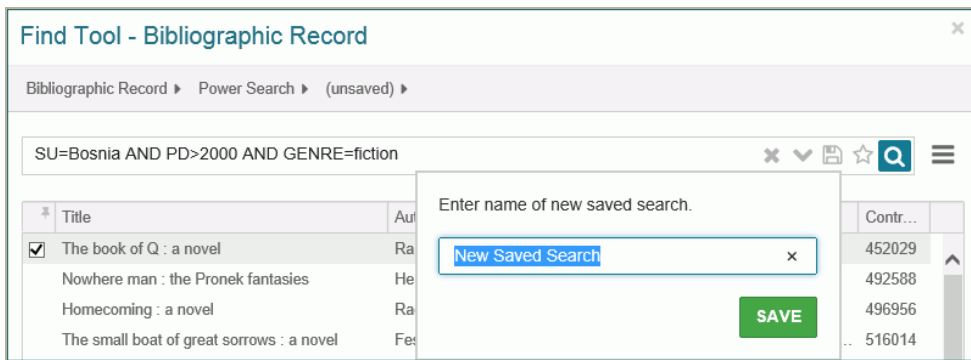
3. Type the name of the saved search, and select **SAVE**.

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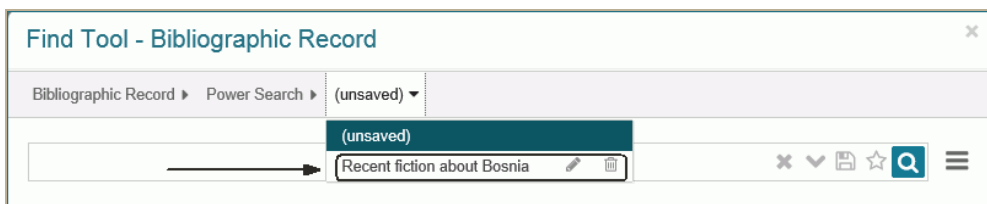
Browse search for bibliographic records

When searching for bibliographic records in the Leap Find Tool, you can select **Browse** as the search type. For more information on Browse searching, see the Polaris staff client online Help.

To browse search in the Leap Find Tool:

1. Open the Find Tool.
2. Select **Bibliographic Record**.
3. Select **Browse**.
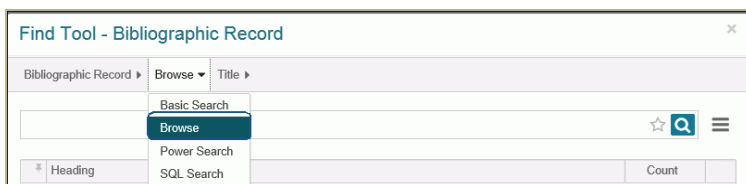
4. Select the search icon.

    The search results list displays the headings and counts.

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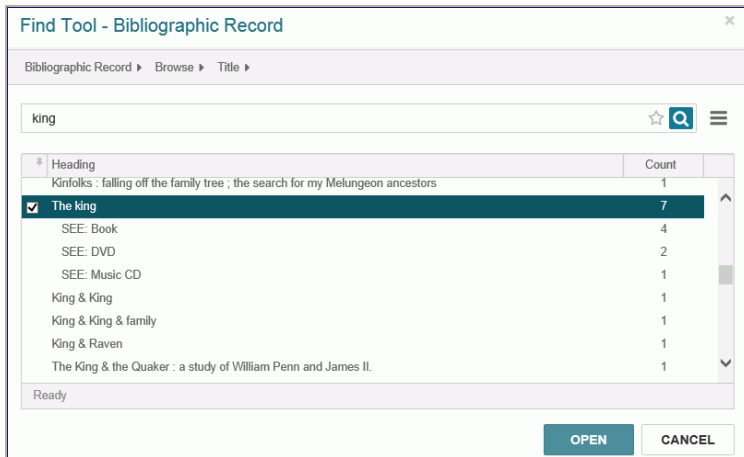
5. Select a heading, and select **OPEN**.

   The results list displays the titles associated with the selected heading.
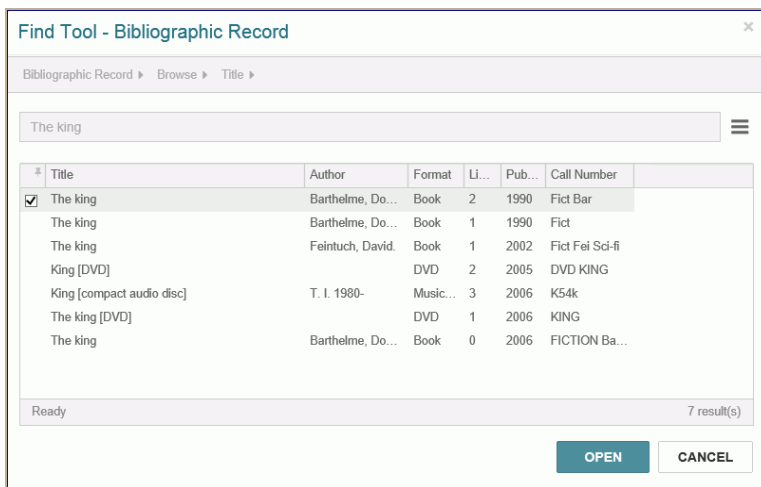
Set up and save an SQL search

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.
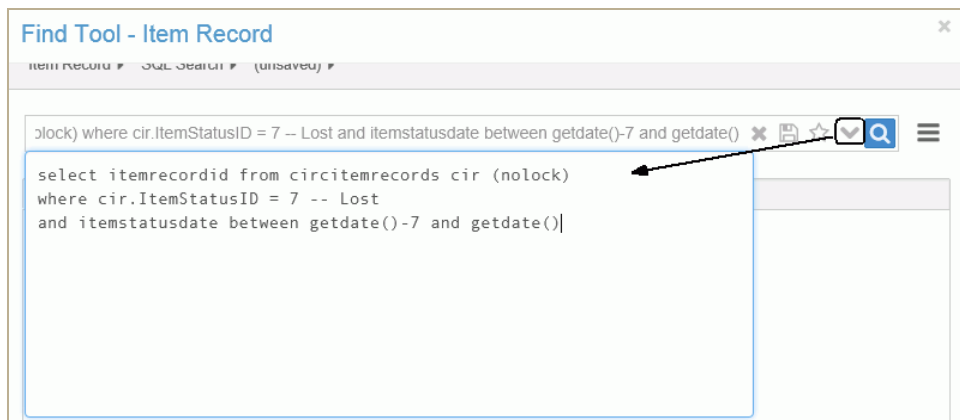
Tip:
You can save an SQL search as your user default.

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**.
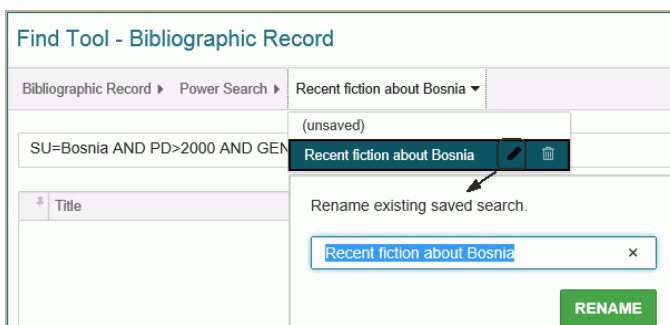
The saved search is listed with the new name.

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**.
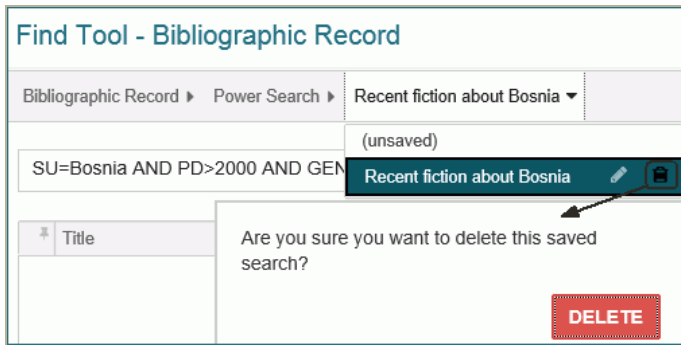
The saved power search is deleted from the list.

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 49.

1. Set up the search criteria. See "Do a basic search for a patron, item, or bibliographic record" on page 39 .

2. Select the filter icon.

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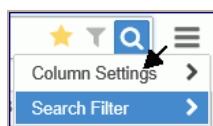
The Filter page opens.

4. Select **ADD CONDITION**.

.

5. Select the access point.

6. Select the qualifier.
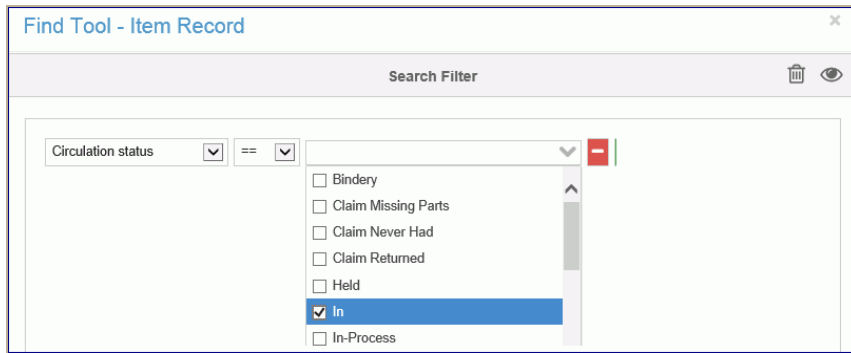
7. Add more conditions, as necessary.

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 save it so that these Find Tool search options are selected when you open the Find Tool in Leap.

To save a set of Find Tool search options 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**.
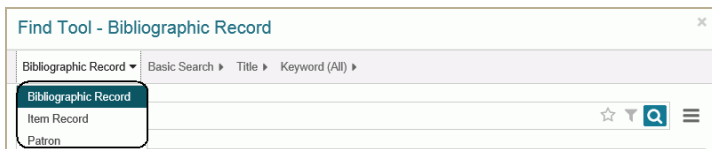
3. Select the search mode: **Basic Search**, **Power Search**, **SQL Search**.

4. Select the search qualifier (access point or search by) option: **Title**, **Author**, **Type of material** etc.
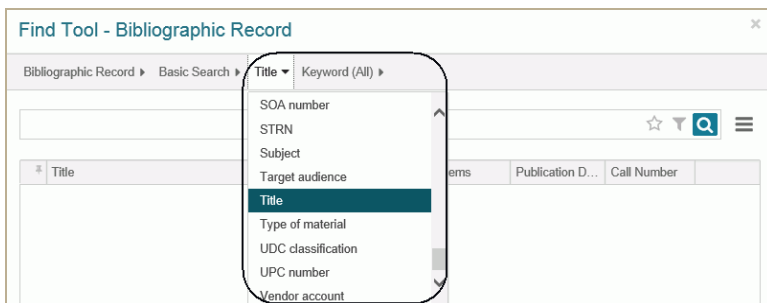
5. Select the search relation - **Exact**, **Keyword (All)**, **Keyword (Any)**, **Phrase** etc.
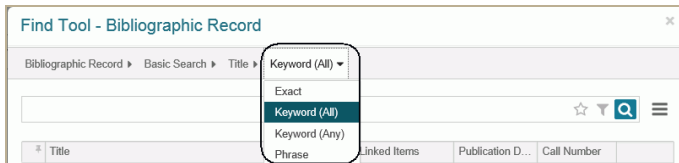
6. To include specific columns for search results in your user default, set up the columns. See "Specify columns for search results" on page 47.

7. Select the star icon.

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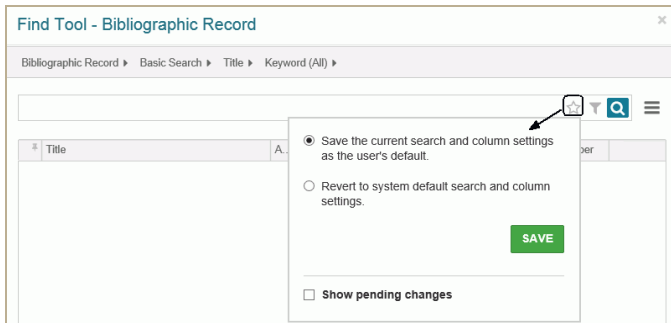
8. Select **Save the current search and column settings as the user's default**.

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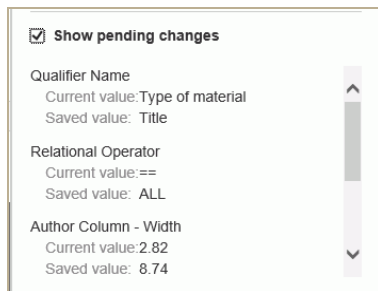
9. Select **SAVE**.

   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.

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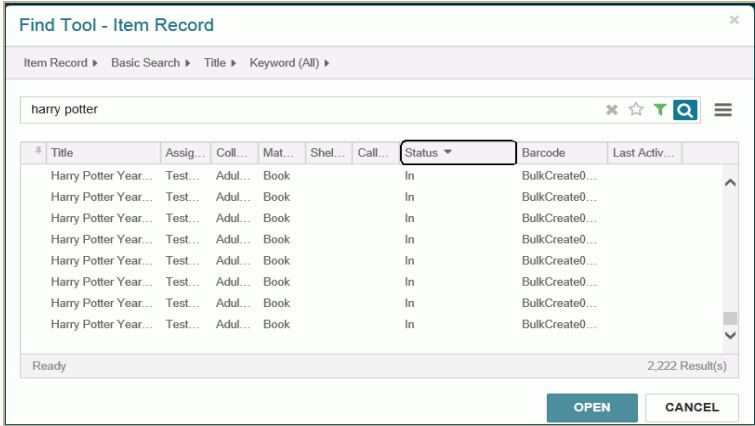
Patron, Item, and Bibliographic Records in Leap

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.

You can also open the Find Tool and use various options to search for records. See "The Leap Find Tool" on page 37..

When you find the record, select it, and select **OPEN**, the record is displayed. Only patron records can be created and modified in Leap 1.0 SP; item and bibliographic records are read-only. When you close a record, the previous record or view is displayed. Multiple records can be open at the same time, and you can move among records using the workform tracker view.

Throughout the Leap application, you can link from one record to another. For example, from a bibliographic record, you can link to the item records associated with that title.

See also:

- "Patron Record" on page 52
- "Item Record" on page 54
- "Bibliographic Record" on page 57
- "Linking to Records" on page 61

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. You can go to the Registration view to register a new patron or to view or edit an existing patron's information.

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. For information on using this view, see "Patron Record - Registration " on page 65.

Patron Record - Library Account view

The patron's account view displays information regarding the patron's library account. For information on using this view, see "Patron Record - Library Account " on page 82.

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

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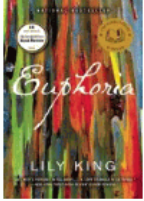
> **Note:**
> If you use the Find Tool to access a record in Leap, a **RESULTS** button is displayed in the record header. Select **RESULTS** to return to the Find Tool results. This button does not display if you opened the record from a quick search or from a list view.

Item Record - Circulation view
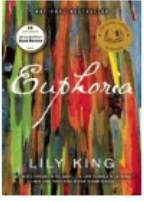
Item Record - Controls view

Item Blocks and Notes view

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Item History view

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 - Preview
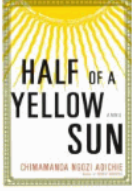
Bibliographic Record - Items View

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

<div align="right">

PLACE HOLD | PAC | REFRESH | RESULTS | CLOSE
</div>

Half of a yellow sun : a novel

By *Adichie, Chimamanda Ngozi, 1977-*

Control number: **665743**	☑ 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
Clifton Park-Halfmoon Public Library		Book		Fict Adi		In	0000602827396	12/12/2007	Final	2460332
Greenwich Free Library		Book		Fict Adi		In	0004100155656	12/12/2007	Final	2615365
Johnsburg Library, Town of		Book		Fict Adi		In	0002500290107	11/15/2007	Final	2495378

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 | RESULTS | CLOSE

Half of a yellow sun : a novel
By *Adichie, Chimamanda Ngozi, 1977-*

Control number: 665743   ☑ Display in PAC   ☐ ILL

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

Record status: **Final**

⊕ Preview   📖 Items   ▣ MARC   ☷ Statistics   ☁ Resources

```
LDR    |||||nam a22||||| a 4500
001    665743
005    20130417135020.0
008    060615s2006 nyu 000 1 eng u
020    $a1400044162 : $c$24.95
082 00 $a823/.92 $222
092    $aFict $bAdi
099    $aFict $bAdi
100 1  $aAdichie, Chimamanda Ngozi, $d1977-
245 10 $aHalf of a yellow sun : $ba novel / $cChimamanda Ngozi Adichie.
260    $aNew York : $bAlfred A. Knopf, $c2006.
300    $a435 p. ; $c24 cm.
035    $a397587
035    $a(OCoLC)62878418
```

Bibliographic Record - Statistics view

Bibliographic Record

> PLACE HOLD | PAC | REFRESH | RESULTS | CLOSE

Half of a yellow sun : a novel
By *Adichie, Chimamanda Ngozi, 1977-*

Control number: 665743   ☑ 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: 8	Year-to-date circulation: 0	Year-to-date in-house use: 0
Number of holds: 0	Previous year-to-date circulation: 1	Previous year-to-date in-house use: 0
First available date: 10/14/2007	Lifetime circulation: 13	Lifetime in-house use: 0

Bibliographic Resources view

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

Bibliographic Record

PLACE HOLD | PAC | REFRESH | RESULTS | CLOSE

Half of a Yellow Sun [electronic resource]

By Adichie, Chimamanda Ngozi

Control number: 1276195	☑ Display in PAC	☐ ILL	
Owner: QA-Quantum 5.0 (sys)	☐ Do not overlay	☐ Host	
Record status: Final			

⊕ Preview   ▥ Items   ▤ MARC   ▥ Statistics   ☁ Resources

OverDrive - Clark County

Account Name:	OverDrive - Clark County
Active:	Yes
Resource Group:	OverDrive - Clark County (Burnt Hills)
Imported MARC Data:	856 40 ‡3Click for more information‡uhttp://api.overdrive.com/v1/collections/v1L2BGQAAAHwOAAA1z/products/e361c3cf-f625-45da-9efb-f4db4ee4c324‡x0660
Object Identifier:	E361C3CF-F625-45DA-9EFB-F4DB4EE4C324
URL:	http://api.overdrive.com/v1/collections/v1L2BGQAAAHwOAAA1z/products/e361c3cf-f625-45da-9efb-f4db4ee4c324
Link Text:	Click for more information
Cover Image URL:	http://images.contentreserve.com/ImageType-200/0111-1/{E361C3CF-F625-45DA-9EFB-F4DB4EE4C324}Img200.jpg
Public Note:	
Non-Public Note:	
Creator:	PolarisExec
Creation Date:	4/7/2015 10:47:08 AM
Modifier:	

Go to the Title in the PAC

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

PAC

Community Library

LIBRARY INFO ▼   SEARCH ▼   COMMUNITY ▼   MY ACCOUNT ▼   HELP ▼

Save Search	Keyword search for: 365743 ✕ Go!
Related searches ⊖	Search by: Any Field ⌄ Using: Local Polaris PAC DB ⌄
	Limit by: All Items - All Libraries ⌄ Select Databases
	More Search Options ☐ Course reserve items only

▼ **Authors**
- Adichie, Chimamanda Ngozi, 1977-

▼ **Other Searches**
- Any Field Search
- Title Search
- Author Search
- Subject Search
- General Notes Search
- Publisher Search
- Genre Search
- Series Search

▼ **Other Databases**
- Local Polaris PAC DB
- AIP Journals Online (museglobal.AIP)
- Amazon (Books)
- ContentDM (EPLS)

1 - 1 of 1   Page: [1]

1. **Half of a yellow sun : a novel**
   by Adichie, Chimamanda Ngozi, 1977-

   Publisher, Date: New York : Alfred A. Knopf, 2006.
   Description: 435 p. ; 24 cm.

   see reviews/add a review, 108 reviews
   (★★★★)

   Google Preview

   Availability | Full Display | Place Request

   ▥ 2006

   Add to My List

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

Linking to Records

You can open records from links in other records, from message boxes, and from list views:

Bibliographic Record Links

- Link to an item record from the Items list view by selecting an item in the list.

Item Record Links

- Link to the current or previous borrower by selecting the barcode link.

- For held items, link to the patron for whom the item is being held.

- Link to the bibliographic record by selecting the Bib control number link.

Hold Request Links

- Link to Bibliographic Record by selecting Bib control number .
- Link to the Item Record by selecting an item barcode in the Request Satisfied By list.

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Item and Patron Block Message Box Links

- Link to the item record from the Item is blocked message box.

Item is blocked
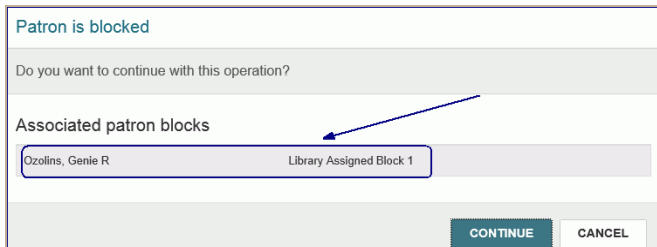
Do you want to continue with this operation?

Now you see her [sound recording]

2 Cassettes

ITEM RECORD   CONTINUE   CANCEL

- Link to the patron record from the Patron is blocked message box.

Patron is blocked

Do you want to continue with this operation?
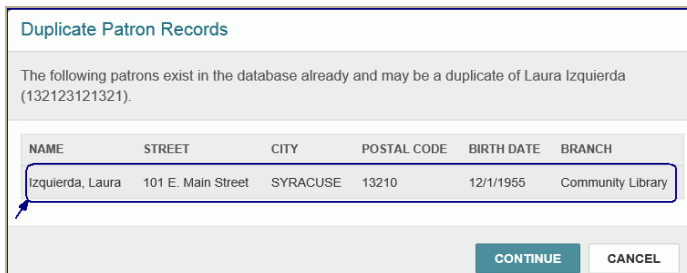
Associated patron blocks

Ozolins, Genie R   Library Assigned Block 1

CONTINUE   CANCEL

Duplicate Patron Registration Message Box Link

- Link to the existing Patron Record when you register a new patron and a possible duplicate patron is detected.

Duplicate Patron Records

The following patrons exist in the database already and may be a duplicate of Laura Izquierda (132123121321).

NAME	STREET	CITY	POSTAL CODE	BIRTH DATE	BRANCH
Izquierda, Laura	101 E. Main Street	SYRACUSE	13210	12/1/1955	Community Library

CONTINUE   CANCEL

Patron Record - Registration

When you first sign in to Leap, the Circulation page opens.
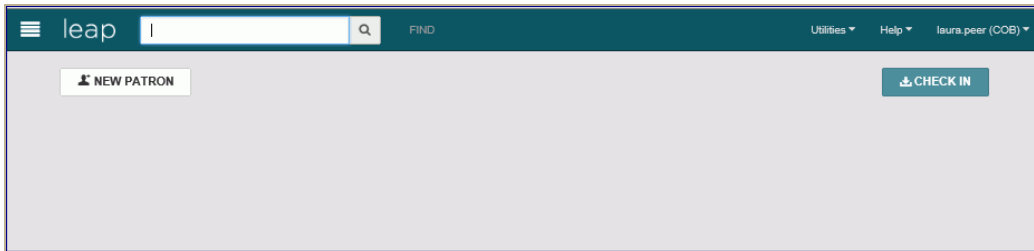
From this page, you can access an existing patron record by scanning the patron's barcode or by searching for the patron. Or, you can register a new patron by selecting **NEW PATRON**.

> **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

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 68.

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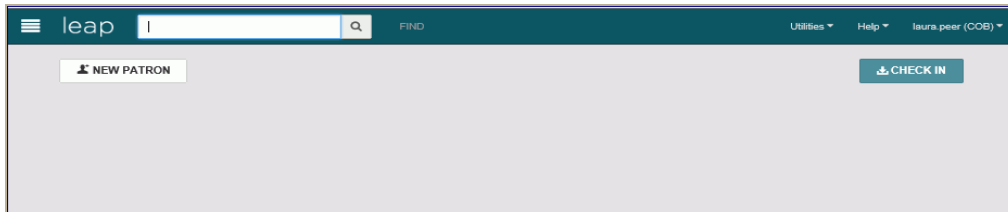
2. Open the patron's record by one of these methods:

- Scan the patron's barcode on the patron's library card.
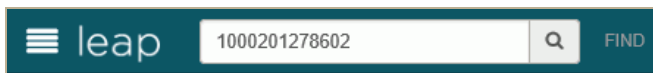
- Start entering search criteria in the box. As you type, automatic suggestions are displayed that may include both patron and bibliographic records. If only one patron record matches the entry, it opens immediately. You can select a patron from the list of automatic suggestions or press **Enter** or tap **Go**.
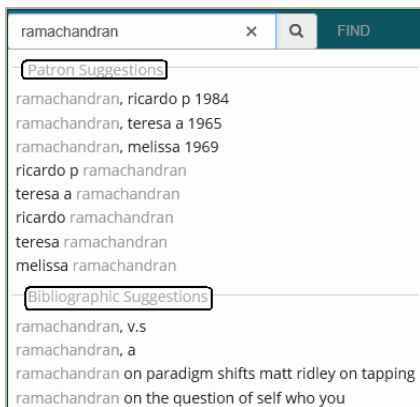
- If you press **Enter** or tap **Go**, and the search criteria matches keywords in both patron and bibliographic records, a total count is displayed for each type of record. Select **Patron Keywords** to open the Find Tool. Select a patron in the Find Tool results list.

```
Scan or search for patrons or items    🔍   FIND

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 70.

Note:
If the patron record requires updates, a message appears.

```
The patron registration has expired. Please update.            ✕
```

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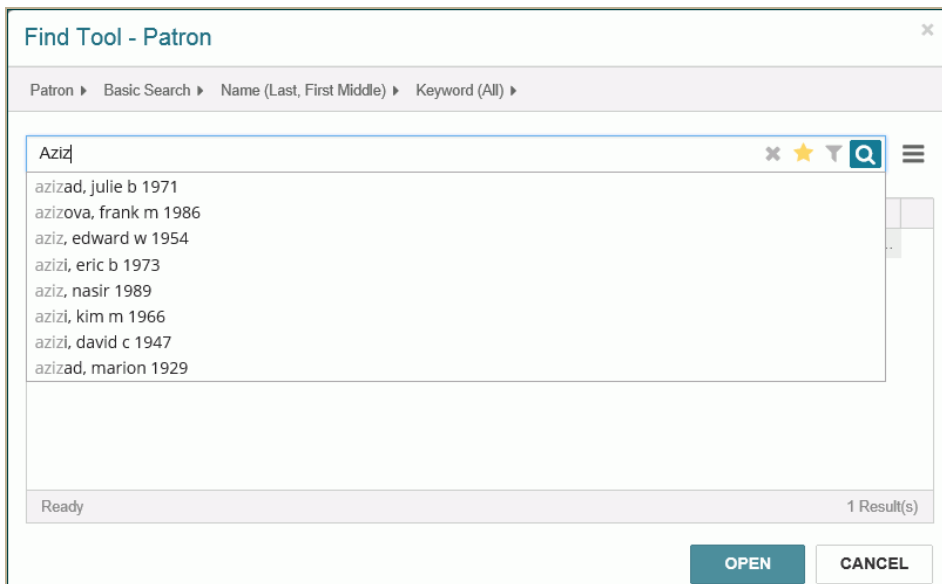
4. Open the patron record:
   - If the patron is listed in the automatic suggestions list, select the patron in the list, and select **OPEN**.
   - Select the search button to go to the Find Tool search results list, select the patron in the list, and select **OPEN**.

   The patron's record opens.

For more information, see "The Leap Find Tool" on page 37.

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.

2. Select **REGISTRATION**.

   The page displays the patron's registration information.

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3. To go to different sections of the patron record, select an item from the left navigation menu.
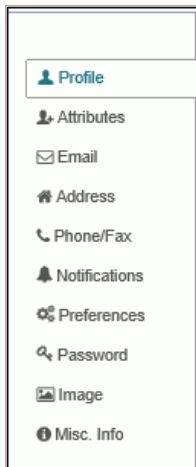
4. To edit the patron's registration information, type the text or select options, and select **SAVE**. See "Register a new patron" on page 72 for information on the registration fields.

5. To renew the patron's registration, select **RENEW** to open the Renew Registration box.

6. To specify the renewal expiration and address check date, you can enter a length of time or an exact date:

   - Enter a number and select **Years** or **Months**.
   - Select **Exact Date**, and select a date from the calendar.

Register a new patron

To register a new patron:

1. Select **NEW PATRON**.

   > 👤 NEW PATRON

   The Patron Registration page opens with the Profile view selected.

   > **Tips:**
   > Required fields are marked with an asterisk.
   > You can use the vertical scroll bar to scroll through the sections of the Patron Registration page.
   > Or, to quickly go to a section of page, select an option in the left navigation bar.

   Patron Registration 1

👤 Profile	Profile
👥 Attributes	
✉ Email	Barcode *
🏠 Address	Registered At * — Community Library
📞 Phone/Fax	Former Barcode — Patron Code * — Regular
🔔 Notifications	Last Name * — Date of Registration — 5/7/2015
⚙ Preferences	First Name * — Expiration Date * — 5/7/2018
🔑 Password	Middle Name — Birth Date
🖼 Image	Title (None) — Suffix — Statistical Class (None)
	Gender * ○ Male ○ Female ⦿ N/A

   SAVE   CANCEL

2. Select **Profile** in the navigation bar, and enter the patron's information:

   a. Scan the patron's barcode 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.

   b. 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).

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

d. Type the middle name in the **Middle Name** box.

e. Select the patron's title in the **Title** box.

f. Type the patron's suffix (such as Sr., Jr., II, or Ph.D.) in the **Suffix** box.

g. Select the patron's registration branch in the **Registered A**t box.

h. Select the patron's code in the **Patron Code** box.

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

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

k. Select a statistical class for the patron.

l. Select **Male**, **Female**, or **N/A** under Gender.

3. Select **Attributes** in the navigation bar to go to the Attributes section, and enter additional information in the user-defined and custom data fields that your library has set up. For more information on user-defined and patron custom data fields, see the Polaris staff-client online Help.

4. Select **Email** in the navigation bar to go to the Email view, and enter the patron's email address and alternate email address (if applicable).

5. Select **Address** in the navigation bar to go to the Addresses section, and select the **ADDRESS** button to add the patron's address.

The Address section expands.

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

   a. Select an address type in the **Address Type** box.

   b. 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.

   c. Type the patron's street address in the **Street Address** and, if necessary, the **Street Address Line 2** boxes.

   d. 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.

7. Select **Phone/Fax** in the navigation bar and enter the patron's phone number(s) and fax number (if applicable).

8. Select **Notification Settings** to go to the Notification Settings section.

9. In the Notification Settings section, select from the following options:

   a. 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**.

   b. Select the electronic receipt option in the **eReceipt Option** box.

   c. Select the notification option to use in the **Notification Option** box.

   d. If an additional text message notice will be sent to the patron, 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.

10. Select **Preferences** to go to the Preferences section.

11. In the Preferences section, select the check boxes that indicate the patron's preferences:

    a. Under Exclude from Notices and Reminders, select the notice and reminder types that the patron does not want to receive.

    b. If the patron speaks a language other than English, select it in the Language box.

    c. Select the other applicable preference check boxes.

12. 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.

13. 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.
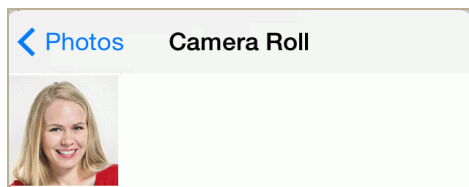
    The picture is displayed in the Update Image view.
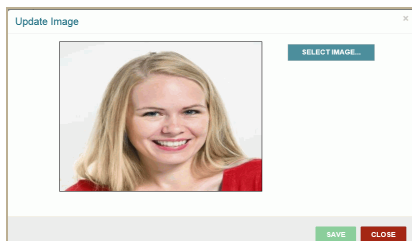
c. Select **SAVE** to save the patron's picture.

d. Select **CLOSE** to close the Update Image box and return to the patron's record.

14. 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**.

Copy an existing patron record

You can copy a patron's registration information when registering a new patron who has similar information, such as a family member.

To copy a patron's registration:

1. Open the patron record that you want to copy, and select **REGISTRATION** to go to the Registration page.

2. Select **COPY**.

The patron record is copied and the Patron Registration page displays with the name **Patron Registration 1**. Many field values are copied to the new patron record.

3. Enter the patron's name, barcode, and other information.

4. Select **SAVE** to save the new patron record.

Field values and settings copied to the new patron record.

Profile view

- Last name
- First name
- Middle name
- Title
- Suffix

- Registered Branch
- Patron Code
- Expiration Date
- Birth Date
- Gender

Attributes view

All field values are copied if defined: five user-defined fields (UDFs) and the patron custom data fields (PCDFs) the library uses.

Email view

- Email Address
- Alt Email Address

Email

Email Address

lizuierda@gmail.com

Alt Email Address

Addresses view

- All addresses
- Address Check Date

Addresses

Address Type

Home

City

SYRACUSE

Postal Code

13210

Zip+4:

State

NY

Street Address

101 E. Main Street

County

ONONDAGA

Street Address Line 2

Country

USA

🗑 DELETE

⊕ ADDRESS

Address Check Date

8/28/2016

Term

1   Years

Phone/fax view

- Phone 1,2,3
- Fax

Phone/Fax

Phone 1
315-512-5555

Phone 2

Phone 3

Fax

Notification Settings view

All field values and settings are copied.

Notification Settings

Notices Address
Home

eReceipt Option
(None)

Notification Option
TXT Messaging

☐ Additional TXT Notice

Text Messaging Phone
Phone 1

Wireless Carrier
Verizon

Preferences view

All field values and settings are copied.

Preferences

Exclude from Notices and Reminders

☐ Overdue
☐ Hold
☐ Billing
☐ Almost Overdue/Auto-Renew
☐ Patron Record Expiration
☐ Inactive Patron

Language
English

☑ Maintain Reading History
☐ Do Not Delete Record
☐ E-mail Notices in Plain Text
☐ Exclude from Collection Agency

Delete a patron record

When a user attempts to delete a patron record in Leap, the same permissions and blocking conditions are checked as with the Polaris ILS. For information about the blocking conditions that prevent deletion of patron records, and the permissions required to delete patron records, see the Polaris ILS online Help.

To delete a patron record from Leap:

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

   A confirmation message appears.
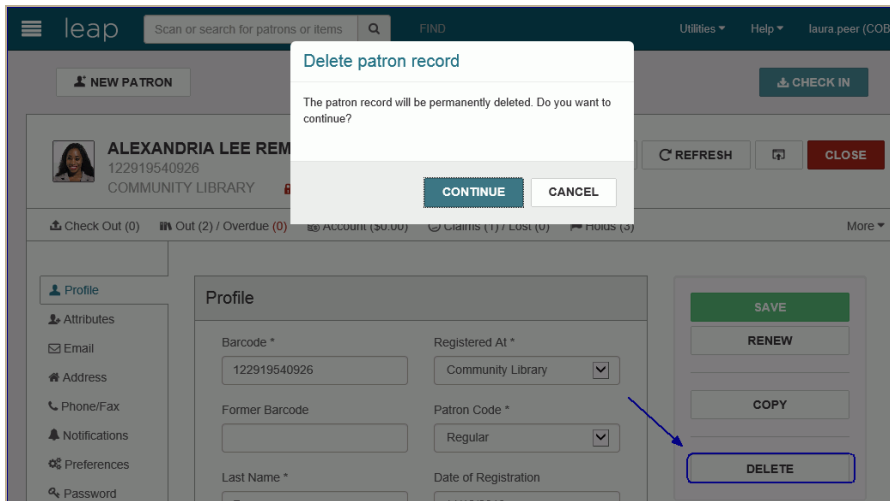
3. Select **CONTINUE** to delete the patron record.

    If there are any conditions that prevent the patron record from being deleted, a message (or messages) is displayed.

Patron Record - Library Account

When you access an existing patron's record in Leap, 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.

To check out an item to the patron, scan the barcode. You can also search for an item and check it out. See "Checking Out and Renewing Items" on page 151.

<table>
<tr><td colspan="7">ANAR KAMAT ⓘ
1001900146413
COMMUNITY LIBRARY   🔒 BLOCKS   🗋 NOTES</td><td>👤 REGISTRATION</td><td>⟳ REFRESH</td><td>CLOSE</td></tr>
<tr><td colspan="10">⬆ Check Out (0)   📖 Out (2) / Overdue (2)   📖 Account ($0.00)   ☺ Claims (0) / Lost (0)   ⚑ Holds (4)   More ▾</td></tr>
<tr><td colspan="10">Scan or enter item barco   ↵   [Find Tool]   [📅 Reset Due Date]   [🕐 Special Loan] [   ]</td></tr>
<tr><td>☐</td><td>BARCODE</td><td>CALL NUMBER</td><td>TITLE</td><td>DUE DATE</td><td>ACTION</td><td>SHELF LOCATION</td><td>ASSIGNED BRANCH</td><td>MATERIAL TYPE</td></tr>
</table>

See also:

- "Items Out List" on page 83
- "Patron's Financial Account " on page 91
- "Claimed and Lost Items" on page 99
- "Hold Requests " on page 103
- "Patron Blocks" on page 124
- "Patron Notes" on page 127
- "Notices" on page 133
- "Patron Messages" on page 136
- "Reading History" on page 130
- "View a patron's interlibrary loan (ILL) requests" on page 132
- "Patron Associations" on page 139

Items Out List

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

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.

See also:

- "Renew items from the items out list" on page 156
- "Reset the due date from the items out list" on page 85
- "Set a special renew date or loan period from the items out list" on page 86
- "Estimate fines from the items out list" on page 87
- "Claim an item from the items out list" on page 88
- "Declare an item lost from the items out view" on page 89
- "View the item record from the items out list" on page 90

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**.

The item is renewed if there are no conditions preventing its renewal, and the new due date is displayed in the **DUE ON** column.

A message appears if the renewal exceeds the limit.

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 91.

If your library prints receipts for renewals, the print dialog box opens. See "Receipt Printing from Leap" on page 20.

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.

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.

Set a special renew date or loan period from the items out list

To set a special renew date or renewal loan period:

1. Open the patron's record.

2. Select the items view.

3. Select an item in the list, and select the special renew button.

    The area below the button bar expands.

4. Do one of these steps to set the special renewal:

    -   Select a specific due date from the calendar.

    -   Specify the duration of the loan in the **Loan period** boxes by typing a number and selecting **Days**, **Hours**, or **Minutes** from the drop-down list box.

5. (Optional) If you want the loan period to apply to other items for this patron, select **Apply to next item only** or **Apply to all items for this patron**.

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.

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 the items out button.

    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.

    The area below the button expands.

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. Open the patron's record and select the items out button.

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 declare lost, and select the **Declare Lost** button.
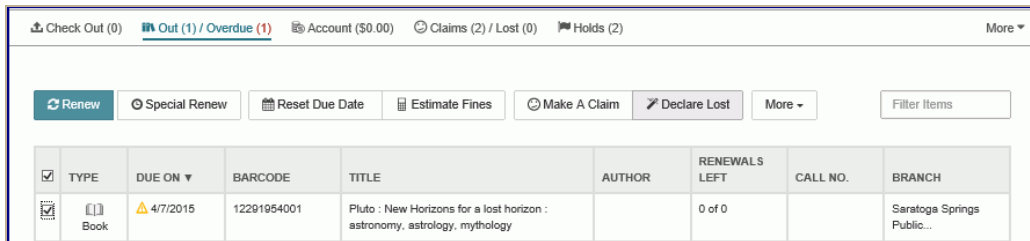
The Declare lost item dialog box opens.

3. Select **Pay**, **Waive**, or **Charge** in the **Actions** box.

4. Select the method of payment in the **Payment method** box.

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

5. 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 83.

2. Select an item in the list.

    The item record's details are displayed.

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. 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.

See also:

- "Add a charge to a patron's account" on page 94
- "Pay patron charges" on page 92
- "Waive charges" on page 93
- "Add a credit to a patron's account" on page 95

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.

5. If the amount paid is different from that displayed in the **Amount** box, type the amount.
6. Select a payment method in the **Method** box.
7. (Optional) Type a note in the **Note** box.
8. 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.

    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.

    The area below the toolbar buttons expands.

4. (Optional) Enter a note regarding the waived amount.
5. Select **WAIVE** to waive the amount displayed, or:

    *   Enter an amount less than the total amount of the charge, enter it in the **Amount to waive** box, and select **WAIVE**.
    *   If you selected multiple charges and want the waived amount to be distributed among the selected charges, select **Distributed waive**, enter an amount in the **Amount to waive** box, and select **WAIVE**.

    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.

    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**.

    The area below the button toolbar expands.

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.

    The charge is added to the patron's account.

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.

   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.

   The area below the button toolbar expands.

3. Enter the amount in the **Credit to add** box.
4. Select the payment method in the **Method** box.

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

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

View a patron's collection summary

To view a patron's collection summary:

1. Open the patron's record, and 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.

2. Select **View | Collection Agency**.
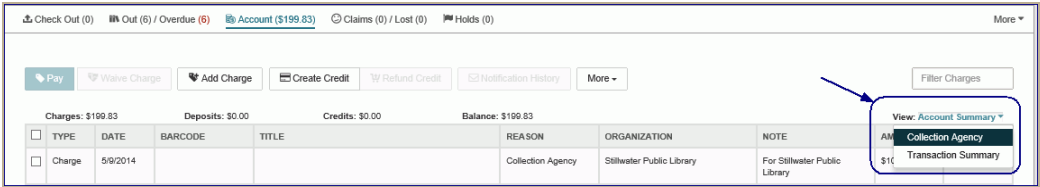
The Collection Agency view is displayed.

See also: "Remove a patron account from collections" on page 97.

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 96

2. Select the line for the amount in collection.

3. Select **Remove**.

   A message informs you that the patron's account will be removed from collections.
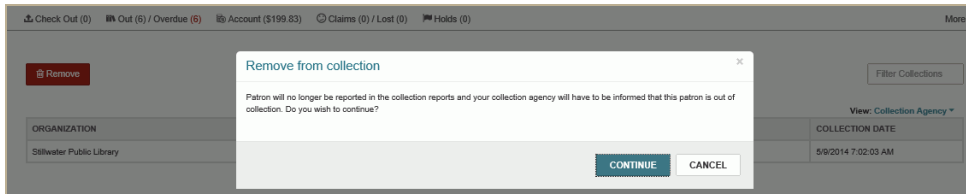
4. Select **CONTINUE** to remove the account from collections.

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**.

The Transaction Summary view opens.

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 ❶			👤 REGISTRATION	⟳ REFRESH	⬆	CLOSE

12291954022100
COMMUNITY LIBRARY 🔓 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

☐	BARCODE	TITLE	CLAIM DATE	DESCRIPTION	DUE DATE
☐	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 100
- "View notices for claimed or lost items" on page 101
- "Reset the claim count" on page 102

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.

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.

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.
6. Select **CLOSE** to close the dialog box.

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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.

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 99.
3. Select **RESET CLAIM COUNT**.

   A confirmation dialog box opens.
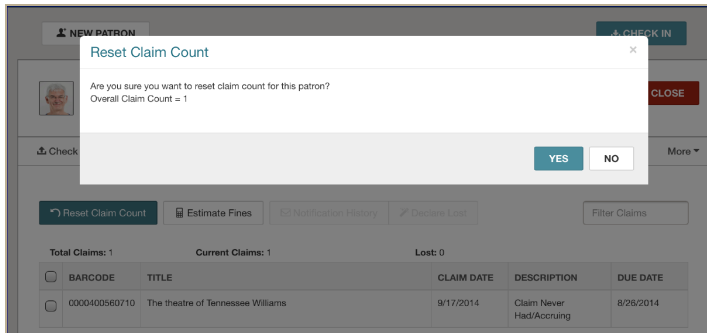
4. Select **YES** to reset the patron's claimed items count.

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

Hold Requests

You can 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. The active buttons and their associated actions are active if action can be performed on all the selected holds.

See also:

- "Place a single hold request for a patron" on page 105
- "Place a hold request from the bibliographic record" on page 107
- "Place a hold request from the item record" on page 109
- "Place multiple holds for the same patron" on page 111
- "Fill a hold now" on page 113
- "Modify a hold " on page 114
- "Reactivate a hold" on page 116
- "Cancel a hold " on page 117
- "Group multiple holds" on page 119
- "Deny a hold " on page 118
- "Mark a hold request with Ask Me Later" on page 164
- "Delete a hold " on page 121
- "View a hold's details and history " on page 122

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**.

Patron is blocked

Do you want to continue with this operation?

Library Assigned Block 1

CONTINUE   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.
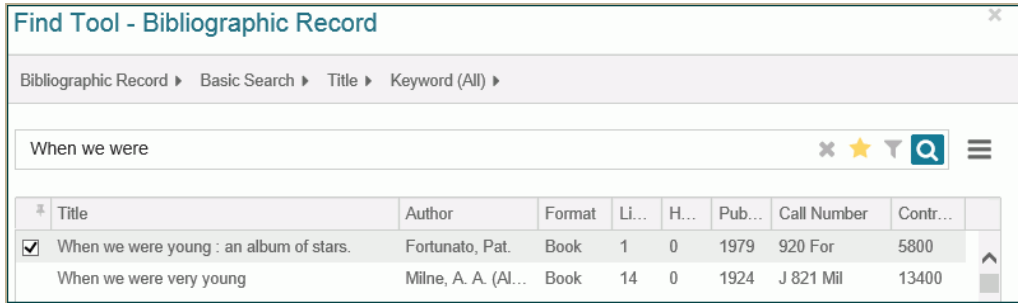
Note:

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 da. 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 he or she is placing the hold.

If the patron record is not open, select **FIND TOOL...** and search for the patron.

When you select the patron, the patron's record opens to the Holds view with the title selected.

3. Review the information and select **PLACE HOLD**. For more details, see "Place a single hold request for a patron" on page 105

Place a hold request from the item record

To place a hold request from the item record:

1. Open the item record. and

2. Select **PLACE HOLD**.

    If patron records are open, the Select a patron box opens, 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.

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

    The patron record opens to the Holds view with the new hold details displayed.

3. 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 **More** to display a menu of additional options.
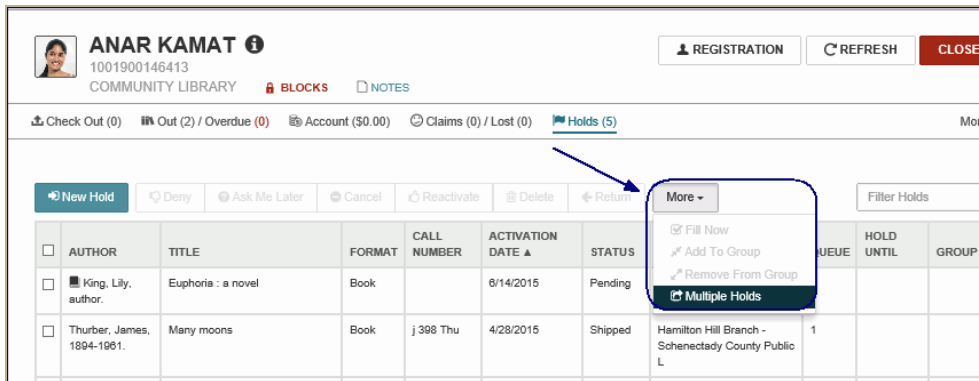
The area below the button bar expands.

4. Select **ADD TITLES** to open the Find Tool.
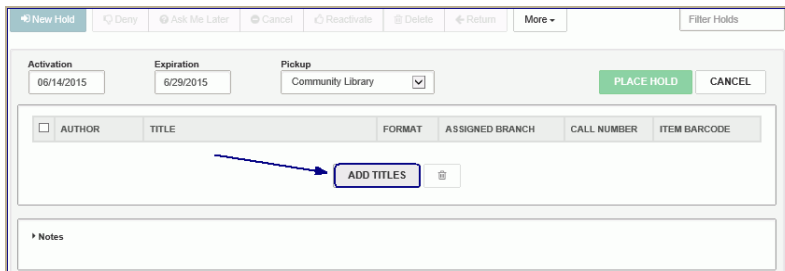
5. Search for the titles that the patron wants to request.

   The search results are displayed.

6. Select the check boxes next to the titles to hold for the patron.

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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, or select the check box in the column header to select all titles.

10. If you want to enter notes regarding this hold request, select Notes to expand the area and type the notes.

11. 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 title in the holds list.
4. Select **More**, and select **Fill Now**.

The area below the button bar expands.

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

   The hold request is filled, and the pending hold request's status 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.

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.

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

4. Select **Reactivate** 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 **Cancel**.

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.

   The area below the button bar expands.

5. Select the reason for denying the hold in the **Deny reason** box.
6. (Optional) If you want to deny holds for all items at this branch, select **Deny all available items at this branch**.
7. 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 the holds to group.
4. Select **More | Add to Group**.

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.

When you 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 are no longer listed.

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 Ask Me Later.

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

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 **Delete**.

   Note:
   The **Delete** button is active only when the hold can be deleted.

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

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

   The held title's details are displayed.

4. To view notes, go to the bottom of the hold details view, and select the arrow next to **Notes** to expand the area.
5. To view the request history, select the arrow next to **Request History** to expand the area.

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

Notes

Staff Display Notes

Non-public Notes

PAC Display Notes

Patron Notes

Request Satisfied By

BIB CONTROL #	ITEM BARCODE	STATUS	BRANCH	NOT SUPPLIED REASON
644573	0000203774658	In	Saratoga Springs Public Library	
644573	0000413100371	In	Schenectady Branch - Central	

Request History

DATE	STATUS	BARCODE	BRANCH	USER	ACTION
6/14/2015	Pending	0000203774658	Saratoga Springs Public Library	PolarisExec	Primary RTF processing placed request on pick list - primary RTF routing cycle completed
6/13/2015	Pending	0000413100371	Schenectady Branch - Central	PolarisExec	Primary RTF processing placed request on pick list
6/12/2015	Pending	0000203774658	Saratoga Springs Public Library	laura.peer	Primary RTF processing placed request on pick list
6/12/2015	Active			laura.peer	Request activated during request creation

Patron Blocks

The **BLOCKS** icon is a red closed lock if the patron has blocks that prevent circulations or a green open lock if the patron has no blocks.

See also:

- "Add a patron block" on page 125
- "Delete patron blocks" on page 126

Add a patron block

To add a patron block:

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

   The list of blocks (if any) is displayed.

3. Select **Add Block**.
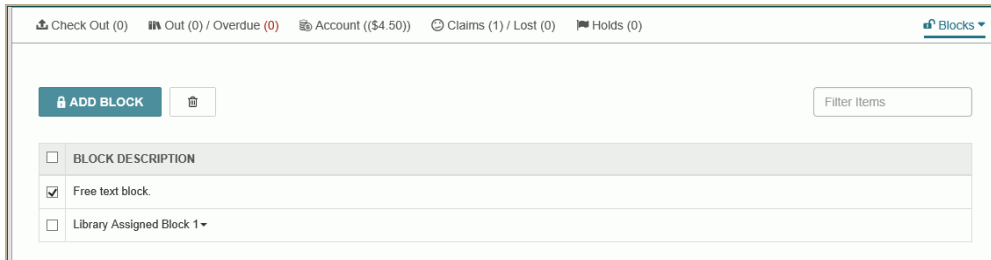
   The area under the button displays the hold options.

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.

5. Select **ADD**.

Delete patron blocks

To delete a patron block:

1. Open the patron record.
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**.

See also:

- "Add a patron note" on page 128
- "Delete a patron note" on page 129

Add a patron note

To add a patron note:

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

   The Notes view opens.

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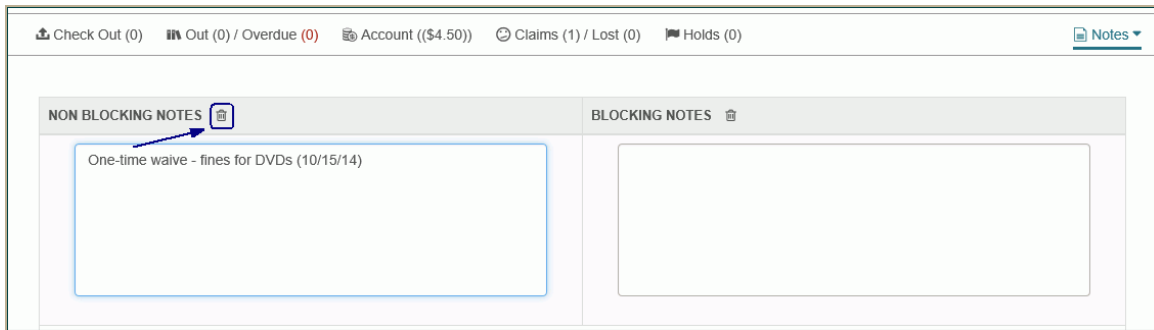4. Select **UPDATE NOTES.**

   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**.

See also:

- "Remove an item from a patron's reading history" on page 131

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**.

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

View a patron's interlibrary loan (ILL) requests

You cannot place interlibrary loan requests from Leap, but you can view a patron's ILL loan requests on the ILL view of the patron's library account.

To view a patron's interlibrary loans, open the patron's record and select **More | ILL**.

The patron's interlibrary loans are listed.

▲ Check Out (0)	📖 Out (1) / Overdue (0)	🗄 Account ($2.00)	☺ Claims (0) / Lost (0)	🚩 Holds (3)		🚩 ILL ▾

Filter ILLs

AUTHOR	TITLE	FORMAT	ACTIVATION DATE	STATUS	ITEM	PICKUP BRANCH
Knauth, Percy, 1914-1995.	The North Woods	Book		Inactive		Schenectady Branch - Central
Dickinson, Peter, 1927-	The Ropemaker	Book		Inactive		Schenectady Branch - Central

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.

See also:

- "View an item's notification history" on page 134
- "Open the item record associated with a notice" on page 135

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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** | Notices to open the notices view.

   The Notices view is displayed.

3. Select a notice in the list to see the notification history. You can also select Item Record to view the item's details.

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.

3. Select a notice in the list.

   The Notification History for the item is displayed.

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

You can select **Properties** to see the user, workstation, date created, and date modified (if the message was updated).

See also:

- "Add a patron message " on page 137
- "Delete a patron message" on page 138
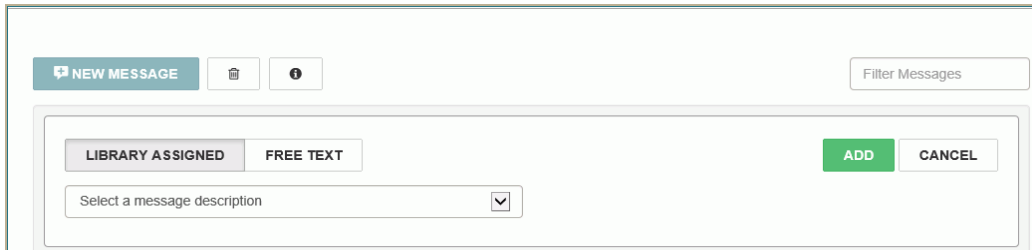
Add a patron message

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.

4. Select **NEW MESSAGE**.

   The area below the button expands.

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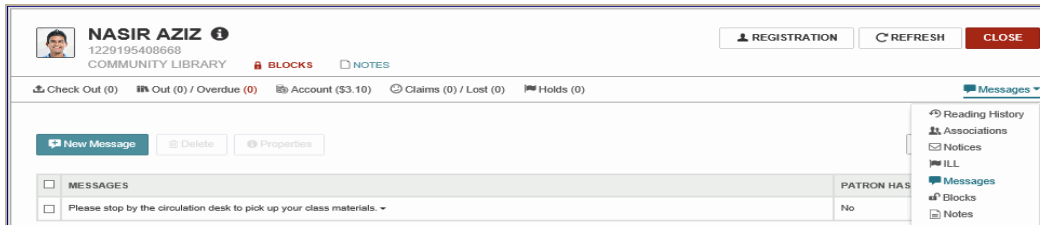6. Select **ADD** to add the message.

   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, and select **Delete**.

   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 associated patron records 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 default settings in Polaris Administration, patrons may be blocked when their associated patrons are blocked, and/or they may be allowed to check out items for their associated patrons.

To find patron records that have associations, you can limit patron searches in the Find Tool using the qualifier **Has patron associations**.
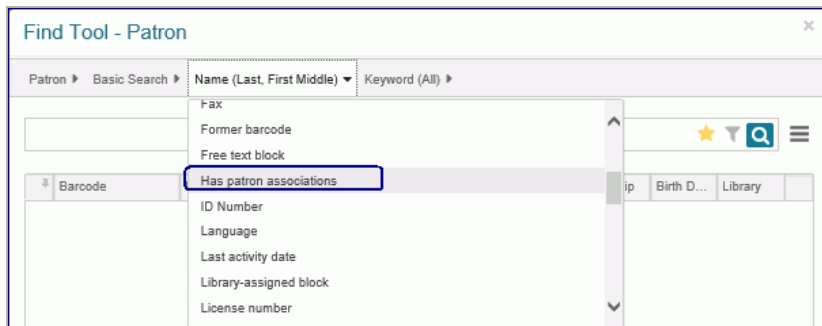
To see the associated patrons, select **More | Associations**.
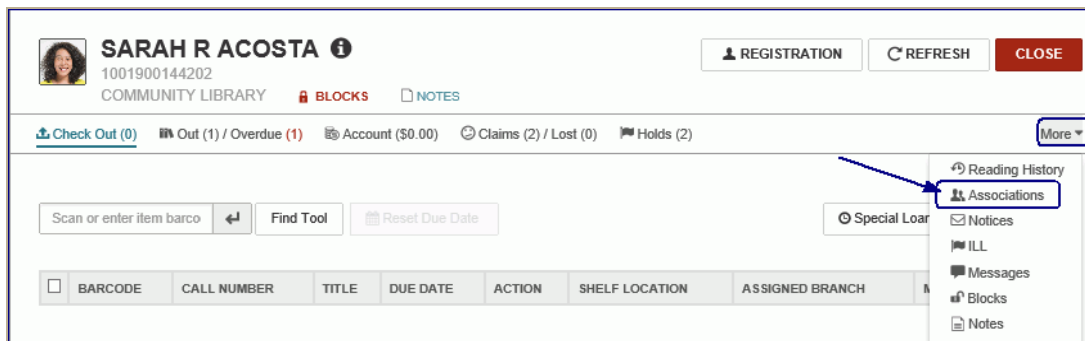
If the patron has any associations, the Associations view displays a list. From this view, you can: add a new associated patron; go to the associated patron's record; edit a patron association; or delete an association.

When you select a patron in the list, the active buttons correspond to actions that are possible for the selected patron. To select all the associated patrons, select the check box in the header line. The active buttons correspond to actions that are possible for all the selected patrons.

See also:

- "Add a new associated patron" on page 141
- "Edit a patron association" on page 142
- "Delete a patron association" on page 143
- "Check out an item for an associated patron" on page 158

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**.

3. Select **NEW ASSOCIATION**.

   The area below the button expands.

4. Scan the patron's barcode, or select **FIND TOOL** to 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. To allow the patron to pick up held items for the new associated patron, select **Allow me to pick up holds for these patrons**.

9. 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.

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

   The area below the button displays the settings for the associated patron.

4. 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.

3. Select the check box next to the associated patron you want to delete and select **Delete**.

    A message box opens.

4. Select **CONTINUE** to delete the patron association. This does not delete the patron record, only the association between the records.

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. You can also check in an item from the Item Record.

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.

Note:
Bulk check-in is not available in this version of Leap.

See also:

- "Check in items" on page 145
- "Check in from the Item Record" on page 145
- "Manage fines during check in" on page 147
- "Resolve billed items during check in" on page 149

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.

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. See "Check in from the Item Record" on page 145.
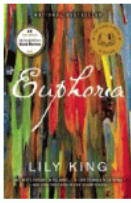
Check in from the Item Record

To check in an item directly from the Item Record:

1. Open the item in the Item Record page, and select the **CHECK-IN** button.

A message box is displayed.

2. Select **CONTINUE** to continue checking in the item.

> **Note:**
> Checking in items in Leap uses the same processing, block checking, and permissions checking as in the Polaris staff client.

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.

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 149.

   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.

   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.

3. 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.

4. Select the check box next to the patron for whom you are resolving charges.

    The action buttons to manage charges become active.

5. Select the appropriate action button. If you select **Manage all Fines**, you can go to the patron's account and manage all the patron's charges. See also: "Patron's Financial Account " on page 91.

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.
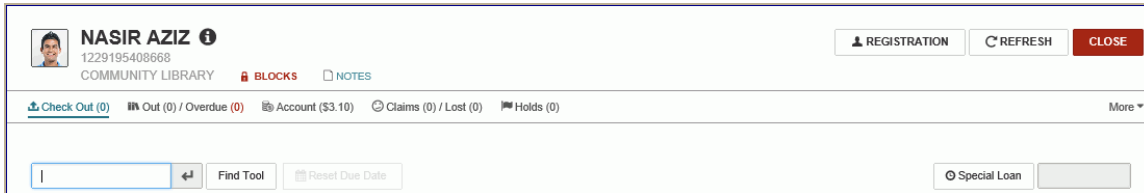

   Under each column, a drop-down list box contains options for performing actions applicable to the charge type.

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.

Checking Out and Renewing 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.

After items are checked out, they are listed in the **Items** view. You can renew items from this list.

If your library has enabled charging for checkouts and/or renewals in Polaris Administration, you can manage these charges in Leap by paying, waiving, or charging the amount.

The permissions required to manage charges in Leap and the Polaris ILS are the same. For example, to manage fines in Leap, the **Fines: Pay fines at circ** and **Fines: Waive fines at circ** permissions are required.

If configured in Polaris Administration, a prompt appears in Leap when a charge has been enabled for the item's assigned branch and that charge applies to: the action (check out or renewal); the item's material type; and the patron code. The charges for check-out and renewals are set for the item's assigned branch using the Check-out: Charge Options dialog box in Polaris Administration.

> **Note:**
> For more information on Polaris permissions and parameters, see the Polaris online Help.

If a patron is allowed to check out items held for an associated patron, you can scan the item's barcode and check it out to the primary patron.

See also:

- "Messages and blocks during check outs and renewals" on page 151
- "Check out items" on page 153
- "Set a special due date/loan period during check out" on page 154
- "Reset the due date/loan period " on page 155
- "Renew items from the items out list" on page 156
- "Manage charge for check-outs/renewals" on page 156
- "Check out an item for an associated patron" on page 158

Messages and blocks during check outs and renewals

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 selec t**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.

Delete this text and replace it with your own content.

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.

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 .

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.

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 LOAN**.

   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 the due date/loan period

To reset a the due date for an item:

1. Open the patron's record, and select the items out view.

2. Select the item, and select **Reset Due Date**.

The calendar opens.

3. Select a new due date.

The due date is changed.

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**.

The item is renewed if there are no conditions preventing its renewal, and the new due date is displayed in the **DUE ON** column.

A message appears if the renewal exceeds the limit.

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 91.

If your library prints receipts for renewals, the print dialog box opens. See "Receipt Printing from Leap" on page 20.

Manage charge for check-outs/renewals

To manage charges for check-outs and renewals in Leap:

1. Check-out or renew an item for which a charge has been assigned for check-out/renewal in Polaris Administration.

   The Patron Check-out Charge or Patron Renewal Charge dialog box opens where you can manage the charge.

Patron Check-out Charge

There is a charge to check out this item.

Item barcode:	123456789
Title:	The tiger's wife : a novel
Patron barcode:	A12291954
Name:	Ms. Laura Izquierda
Charge:	$1.00

PAY...   WAIVE   CHARGE ACCOUNT   CANCEL

2. If you want to change the amount that is paid, waived, or charged, modify the amount in the **Charge** box.

3. Select one of the following buttons:

- **PAY -** The area below the charge expands.

Patron Check-out Charge

There is a charge to check out this item.

Balance:	$1.00
Amount:	$1.00
Method:	Cash
Note:	

PAY   CANCEL

- If the amount paid is different than the amount charged, you can enter it in the **Amount** box.
- Select the payment method in the **Method** box.
- Select **PAY**. The amount is paid, and the item is checked out.

- **WAIVE** - The charge is waived and the item is checked out.
- **CHARGE ACCOUNT** - the charge is added to the patron's account, and the item is checked out.

Check out an item for an associated patron

If the primary patron is allowed to pick up held items for an associated patron, the primary patron can pick up and check out held items for the associated patron.

To check out items to a primary patron when the items are on hold for an associated patron:

> **Note:**
> The primary patron must be allowed to pick up held items for the associated patron.

1. Open the primary patron's record.
2. Select **CHECK OUT**.
3. Scan the held item's barcode.

   The item is checked out to the primary patron and the history view is updated for the item and the hold request.

   In the **ACTION** column of the item record's history view, the text, **Checked out by associated patron**, is displayed.

In the **ACTION** column of the request history, **Request satisfied by associated patron**, is displayed.

Check out Quick Circ items

Quick Circ items can be checked out and checked in from Leap by scanning the barcode. Check out receipts are also printed for Quick Circ items.

When you scan a Quick Circ item barcode to check it out to a patron, a dialog box opens where you can enter the number of items. For more information on circulating ephemeral or Quick Circ items, see Polaris staff client Help.
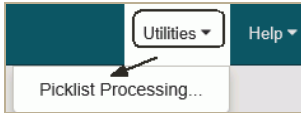
Using the Holds Picklist

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.

To perform an action on hold requests in the picklist, 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.

	COLLECTION	SHELF LOCATION	CALL NUMBER	AUTHOR	TITLE	FORMAT	ITEM BARCODE
✔	Adult Nonfiction		636.753 Mar	Martin, Peter, 1940-	A dog called Perth : the true story of a beagle	Book	0003300176983
	Children's Fiction		JE Fict Ric	Richter, Alice Numeroff.	You can't put braces on spaces	Book	0003300134271
	Young Adult Fiction		YA Fict Row 2	Rowling, J. K.	Harry Potter and the sorcerer's stone	Book	0003300139619

Then, select a command button to change the pending hold request.

Command Button	Action
↱ LOCATED	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 selecting **Located** at the top of the page.
❷ ASK ME LATER	The hold request is removed from the pending list, and it moves to the next step in the Request to Fill (RTF) process.
⚲ MISSING	The item is set to Missing.
⛔ DENY	The hold request is denied, and it is removed from the pending list.

See also:

- "Sort and filter the picklist" on page 163
- "View hold details from the picklist" on page 167
- "Indicate an item was located" on page 165
- "Deny hold requests in the picklist" on page 168
- "Return a located item to the Pending list " on page 166

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 **63**, the titles beginning with this call number are listed.

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.

Filter requests

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**.

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.

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.

The dog ate it : cooking for yourself and your four-legged friends	✕
Hold	
Request ID:	840501
Status Date:	3/19/2015
Expiration Date:	3/18/2016
Activation Date:	3/19/2015
Pickup Branch:	Kellie's Branch
Patron Branch:	Kellie's Branch
Item Branch:	Saratoga Springs Public Library

CLOSE

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.

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