



# Polaris Leap User Guide

POLARIS LEAP 1.0 SP1 v.1

INNOVATIVE INTERFACES, INC.

# About Leap Documentation

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# Polaris Leap Overview

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

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

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 workflow 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

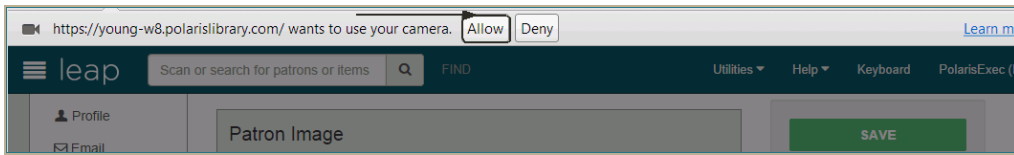
The camera is available to take patron photographs for the following:

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

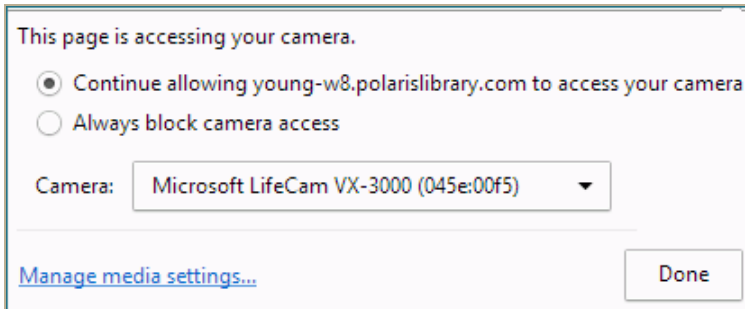
**Note:**

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

## Polaris Leap 1.0 SP1



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.

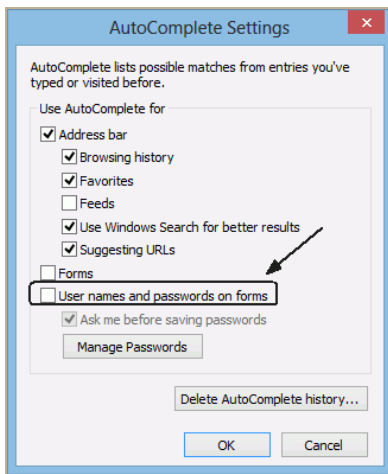
## Browser and Ipad® Issues

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.

Polaris Leap 1.0 SP1

🔍 Password

🖼 Image

Barcode \*

Former Barcode

Last Name \*

Registered At \*

Community Library

Patron Code \*

Regular

Date of Registration

6/4/2015

< >

ItheI'm

QWERTYUIOP⌫

ASDFGHJKLreturn

⬆ZXCVBNM!?.⬆

.?123😊🎤.?123📄⌵

## 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**.

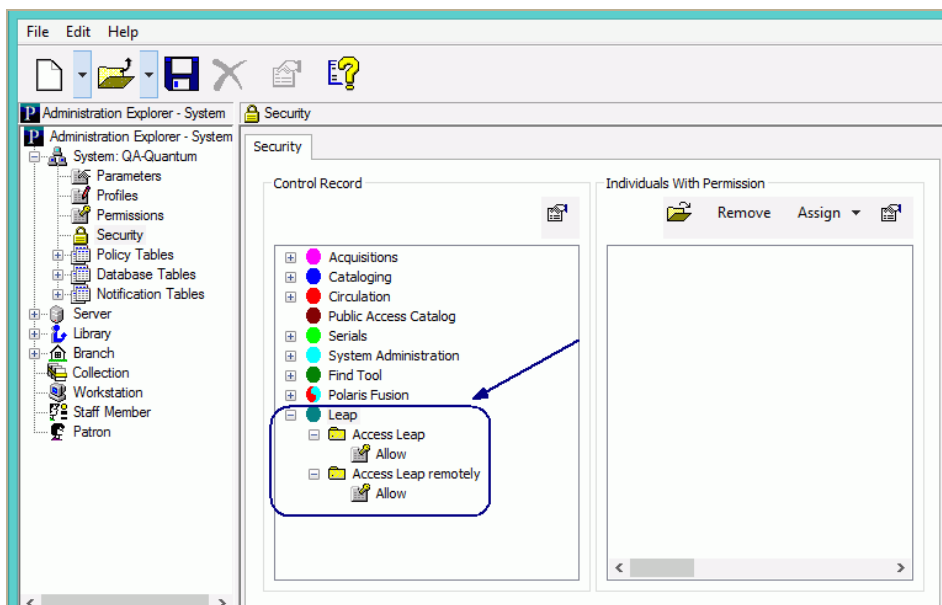
Two URIs are required if your library wants to restrict remote access, for example:

<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.

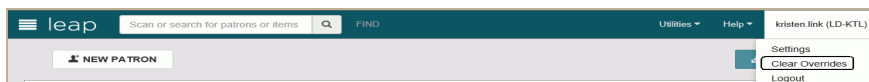
User permissions are checked according to settings in Polaris Administration. For example, if a user has the permission to register patrons in the Polaris staff client, she will be able to register patrons in Leap. In addition, the following Cataloging permissions are required to work with item and bibliographic records in Leap:

- 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.

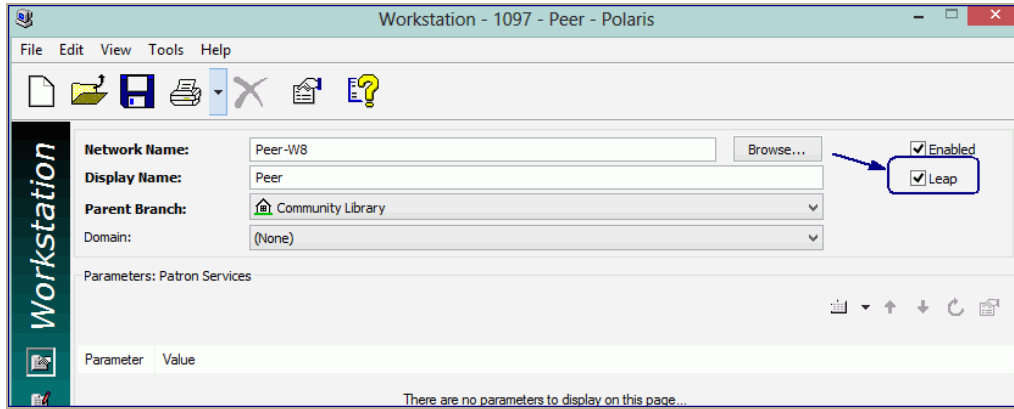


## Enable Leap Access for a Workstation

You can enable Leap access from a library workstation by checking the Leap check box on the Workstation workflow in Polaris Administration. The check box appears on the Workstation workflow 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.





## 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.

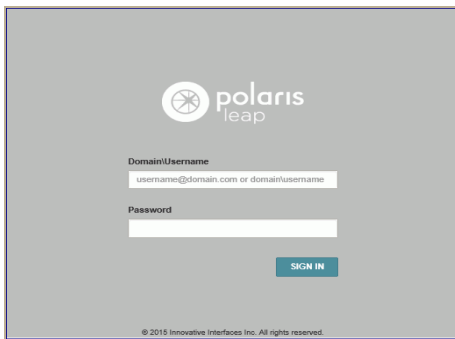
**Important:**

Your username cannot contain spaces.

To sign in to Polaris Leap:

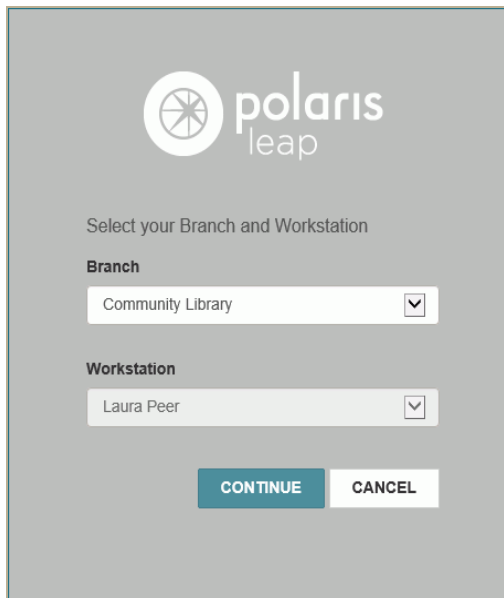
1. Select the Leap icon or shortcut.

The sign in page opens.

A screenshot of the Polaris Leap sign-in dialog box. It features the Polaris Leap logo at the top. Below the logo, there are two input fields: 'Domain\Username' with a placeholder 'username@domain.com or domain\username' and 'Password'. A blue 'SIGN IN' button is located below the password field. At the bottom, there is a small copyright notice: '© 2015 Innovative Interfaces Inc. All rights reserved.'

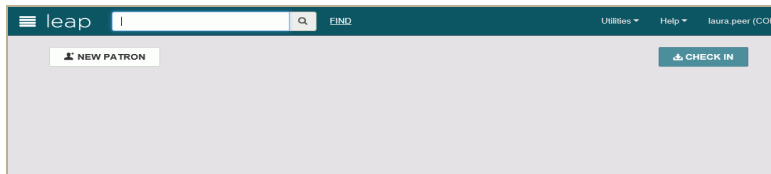
2. Enter your domain and user name in the **Domain\Username** box.
3. Enter your password in the **Password** box.
4. Select **SIGN IN**.

Another page opens where you select your branch and workstation.

A screenshot of the Polaris Leap 'Select your Branch and Workstation' dialog box. It features the Polaris Leap logo at the top. Below the logo, the text 'Select your Branch and Workstation' is displayed. There are two dropdown menus: 'Branch' with 'Community Library' selected and 'Workstation' with 'Laura Peer' selected. At the bottom, there are two buttons: a blue 'CONTINUE' button and a white 'CANCEL' button.

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





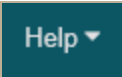
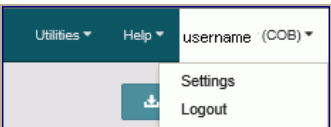
This section describes the general user interface elements that are available throughout the Leap application.

### Leap Header

The Leap header is displayed when you log into Leap.



The Leap header contains the following elements:

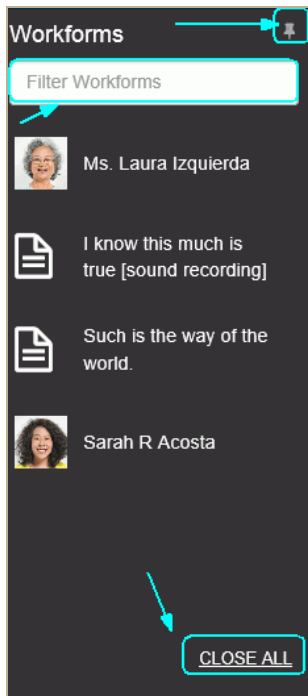
Element	Description
	Select the slide-out button to access a menu. When you click-/tap this button in the Leap header, the Workforms menu opens.
	Enter search criteria to find patrons or titles (bibliographic records). When you enter the search criteria, a list of patron and bibliographic record suggestions 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: <ul style="list-style-type: none"> <li>• <b>Leap Topics</b> - Select this option to open the Leap online Help.</li> <li>• <b>Keyboard</b> - Select this option to see the list of keyboard shortcuts.</li> <li>• <b>About</b> - Select this option to see details about the Leap application.</li> </ul>
	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.

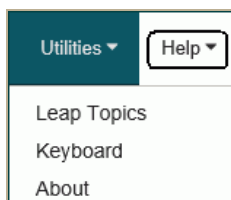


The Workforms tracker displays the open workforms. You can pin the Workforms tracker by selecting the pushpin icon, filter the list by typing in the **Filter Workforms** box, or close all the workforms by selecting **CLOSE ALL**.



## Help Menu

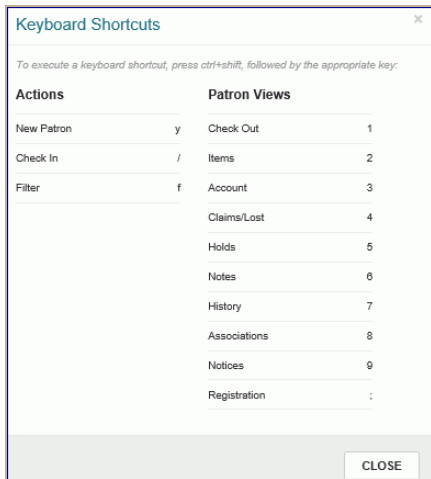
Select **Help** in the Leap header to access the Leap online Help, keyboard shortcuts, and information about Leap.



- 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.

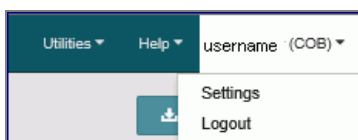


- Select **About** to see details about the Leap application and the logged-in user.



## User Options

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



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

The screenshot shows the 'Settings' page with the 'Print Options' tab selected. The page has a 'SAVE' button (green) and a 'CLOSE' button (red) in the top right corner. The settings are organized into three columns:

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

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.

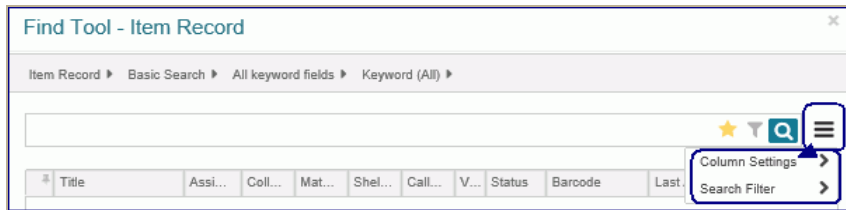
The screenshot shows the 'Settings' page with the 'Special Loan' tab selected. The page has a 'SAVE' button (green) and a 'CLOSE' button (red) in the top right corner. The settings include:

- ☒ Apply to all check-outs
- Date field: 07/17/2015
- Loan period: 58
- Unit: Days (selected from a dropdown menu)
- Calendar: A calendar for July 2015 is displayed, showing the dates from Sunday to Saturday. The date 17 is highlighted.

Select **Logout** to close Leap.

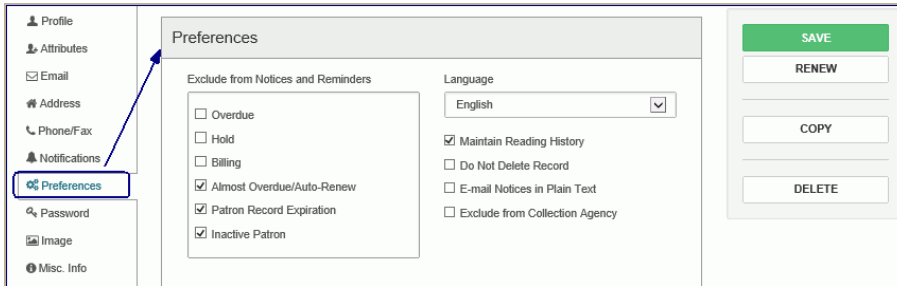
## Options Menus

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



## Navigation Menus

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



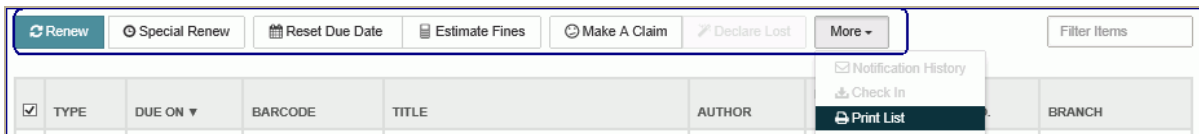
## View Bars

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



## Button Toolbars

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



## Required Fields

Fields marked with an asterisk are required.

Barcode\*

## Check Boxes

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

**Preferences**

☐ Exclude from Collection Agency  
☐ Exclude from Overdue Notice  
☐ Exclude from Hold Notice  
☐ Exclude from Billing  
☐ E-mail notices in plain text

Language

English
▼

☒ Maintain Reading List  
☐ Do Not Delete Record

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.

Renew
Special Renew
Reset Due Date
Estimate Fines
Make A Claim
Declare Lost
More ▾
Filter Items

<input checked="" type="checkbox"/>	TYPE	DUE ON ▼	BARCODE	TITLE	AUTHOR	RENEWALS LEFT	CALL NO.	BRANCH
<input checked="" type="checkbox"/>	Book	9/9/2014	0001000035103	One hundred years of solitude	García Márquez, ...	1 of 5	Fict Gar	Canajoharie Library
<input checked="" type="checkbox"/>	Video	10/16/2014	0000410139414	The Year of living dangerously [DVD]		0 of 0	DVD Fict Yea	Schenectady Branch - Ce...

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.

**CHECK IN**

## Plus Buttons

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

**ADDRESS**



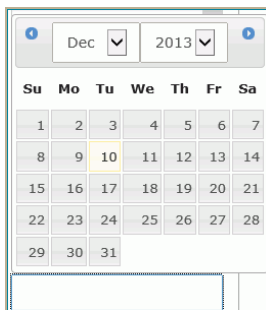
Address Type Home		City COBLESKILL
Postal Code 12043	Zip+4: 	State NY
Street Address 	County SCHOHARIE	
Street Address Line 2 	Country USA	
DELETE		

## Drop-Down List Boxes

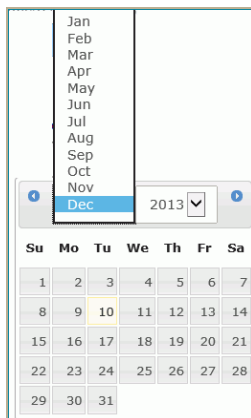
Select an entry in a drop-down list box.

## Date Fields

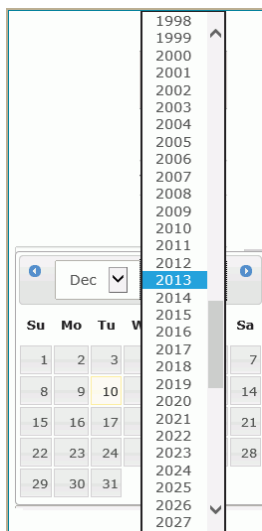
When you click or tap inside a date field, a calendar control appears. To locate and select a date, do the following:



- 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.



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



## Message Boxes

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

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

## Summary Bars

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

Charges: \$0.00		Deposits: \$0.00		Credits: \$0.00		Balance: \$0.00		View: <a href="#">Account Summary</a>	
<input type="checkbox"/>	TYPE	DATE	BARCODE	TITLE	REASON	ORGANIZATION	NOTE	Collection Agency	
								Transaction Summary	

## 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.

## Polaris Leap 1.0 SP1

Check Out (0)
Out (2) / Overdue (1)
Account (\$0.00)
Claims (0) / Lost (0)
Holds (4)
More ▼

Renew
Special Renew
Reset Due Date
Estimate Fines
Make A Claim
Declare Lost
More ▼
Filter Items

<input checked="" type="checkbox"/>	TYPE	DUE ON ▼	BARCODE	TITLE	AUTHOR	RENEWALS LEFT	CALL NO.	BRANCH
<input checked="" type="checkbox"/>	Video	10/16/2014	0000410139414	The Year of living dangerously [DVD]		0 of 0	DVD Fict Yea	Schenectady Branch - Ce...
<input checked="" type="checkbox"/>	Book	7/23/2015	0001000035103	One hundred years of solitude	García Márquez, ...	0 of 5	Fict Gar	Canajoharie Library

## 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.

NEW HOLD

AUTHOR	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS	PICKUP BRANCH	QUEUE	HOLD UNTIL	GROUP
Kolter, Jane Bentley.	Forget me not : a gallery of friendship and album quilts.	Book	746.46 Kol	Tuesday, November 26, 2013	Pending	Community Library	1	Tuesday, December 31, 2013	

## 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.

Printer Options

Printer

Select Printer >

1 Copy

-

+

Print

Print

GeneralOptions

Select Printer

Adobe PDF

Fax

HP LaserJet

Microsoft

Send To

Status: Ready

Location: Syracuse, New York

Comment: Product Development

Print to file

Preferences

Find Printer...

Page Range

All

Selection

Current Page

Pages: 1

Enter either a single page number or a single page range. For example, 5-12

Number of copies: 1

Collate

123

123

Print

Cancel

Apply

- 20 -

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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.

The screenshot shows the Leap application interface. At the top, there is a navigation bar with the Leap logo, a search bar, and user information (laura.peer (COB)). A dropdown menu is open, showing 'Settings' and 'Logout'. The main content area is titled 'Settings' and has two tabs: 'Print Options' (selected) and 'Special Loan'. The 'Print Options' tab contains three columns of settings:

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

At the top right of the Settings page, there are 'SAVE' and 'CLOSE' buttons. An arrow points from the 'Settings' option in the top navigation bar to the 'Settings' tab in the main content area.

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

### Important:

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

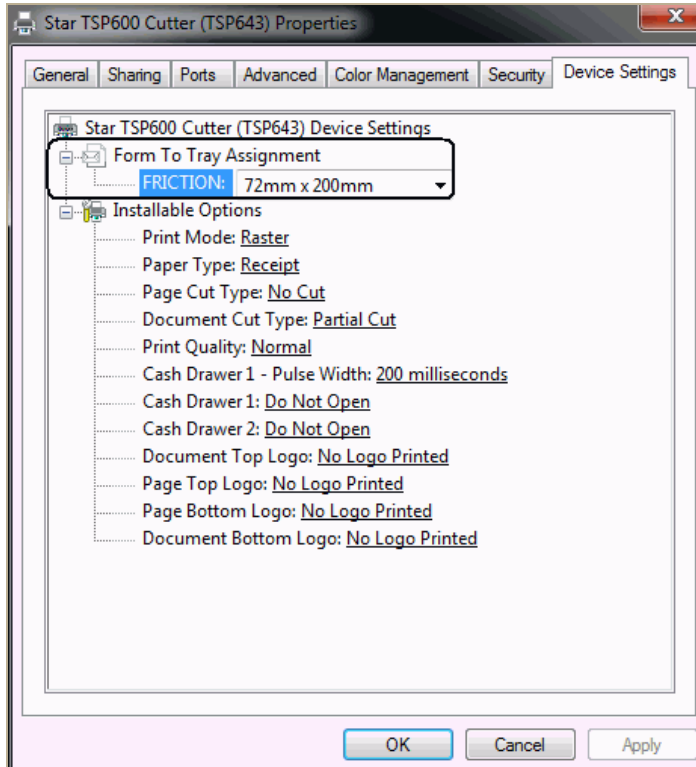
## Configure a receipt printer for IE10 or IE 11 on Windows 7 or 8.1

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 **FRICITION: 72mm x 200 mm**.

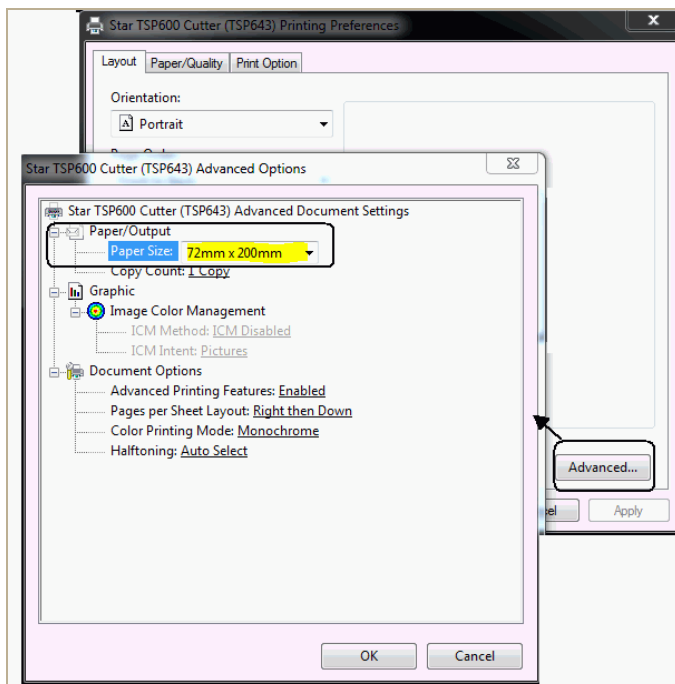


6. Click **OK**.
7. On the Devices and Printers window, right-click the printer, and select **Printing Preferences**.
8. Click **Advanced**.

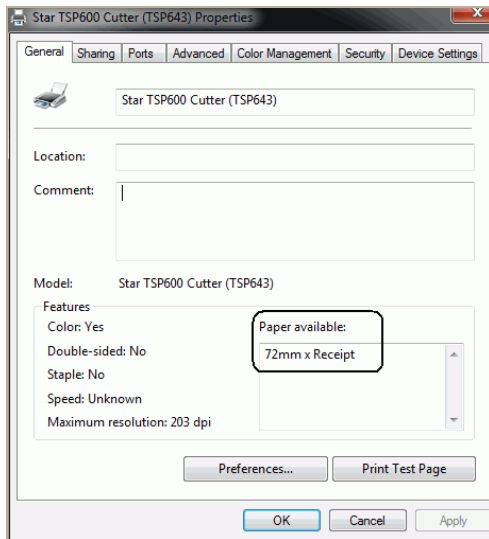
The Advanced Options window is displayed.

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.

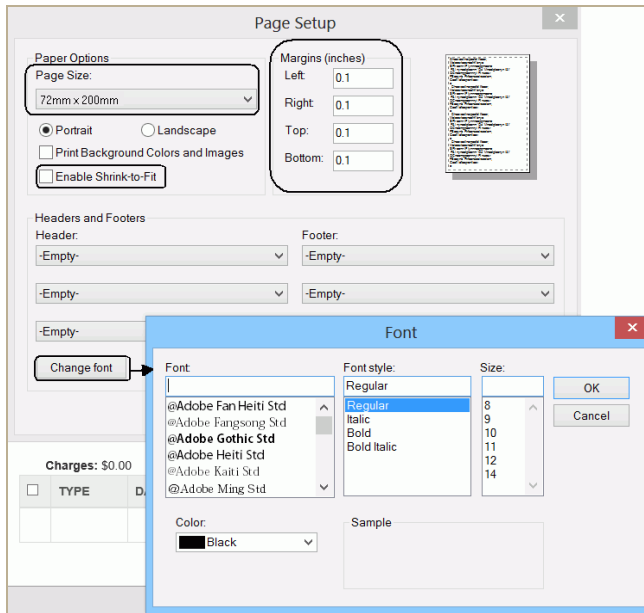
## Set up the receipt page in IE10 or IE11

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**.

## 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.

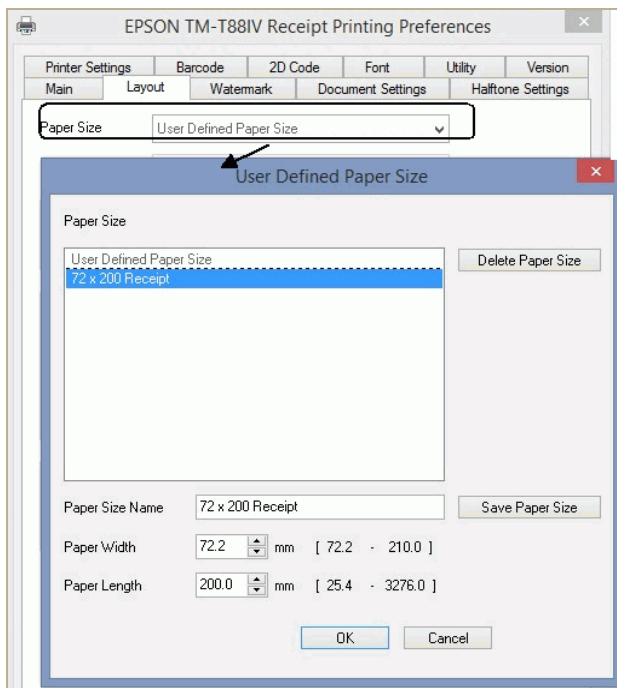
The Printing Preferences window opens.

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:

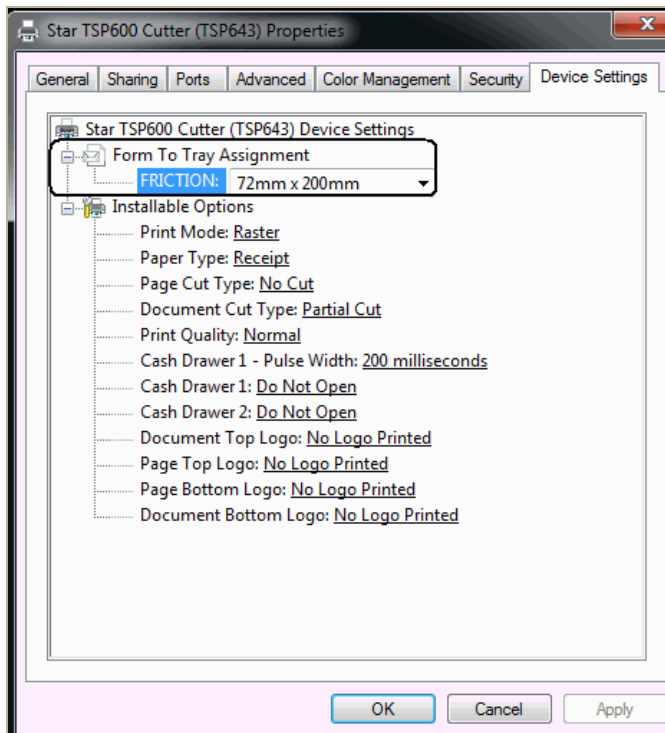
1. In the Control Panel, open the Devices and Printers window.
2. Right-click on the printer and select **Printer Properties**.

The Properties window opens.

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

The Device Settings tabbed page is displayed.

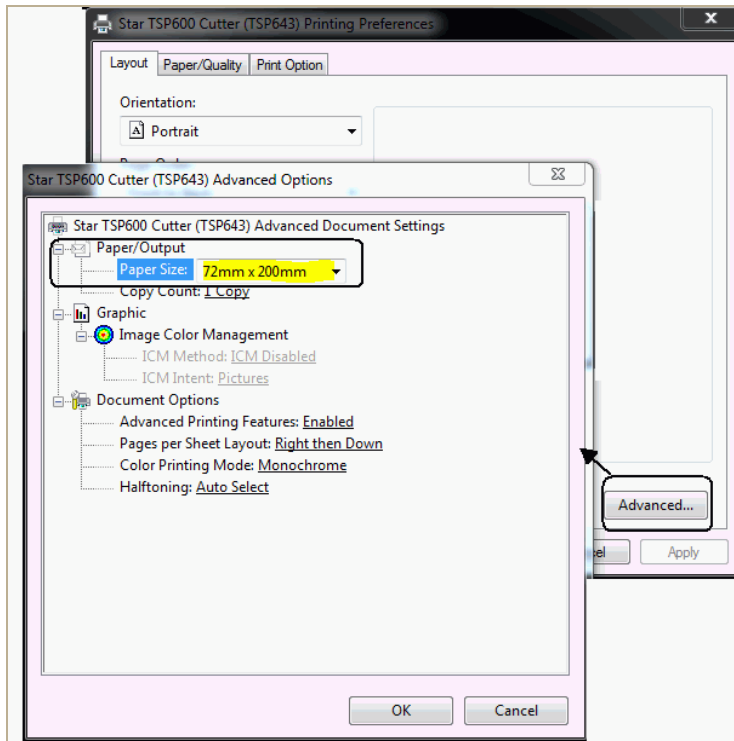
4. Select **Form To Tray Assignment**, and select **FRICITION:72mm x Receipt**.



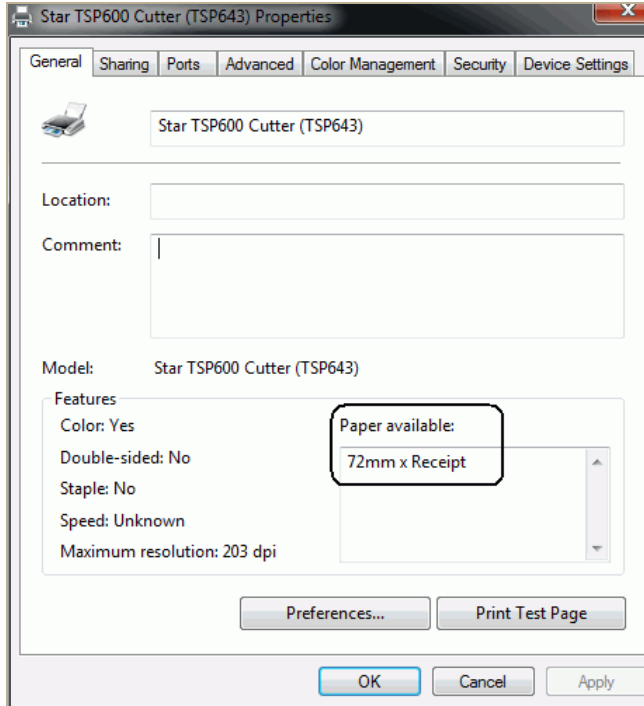
5. Click **OK**.
6. On the Devices and Printers window, right-click the printer, and select **Printing Preferences**.
7. Select **Advanced**.

The Advanced Options window is displayed.

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



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



**Note:**

If the printer driver does not list the expected page size, create a custom form page and select that form page instead. See "Create a receipt size for printing from Chrome on Windows 7 or 8.1" on page 32 (This was necessary for the Epson printer on Windows 8.1.)

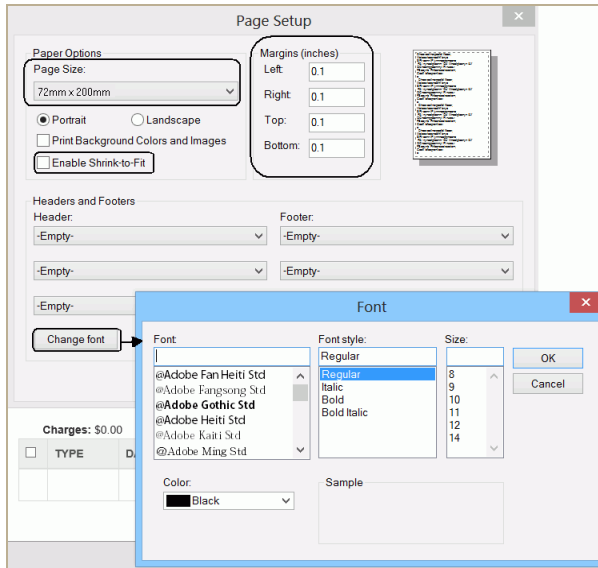
## Set up the receipt page in Chrome on Windows 7 or 8.1

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**.

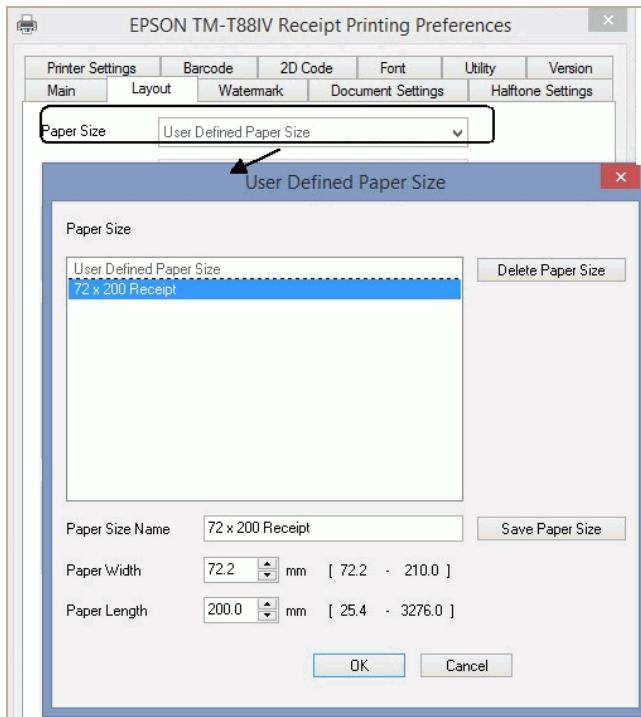
The Printing Preferences window opens.

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.

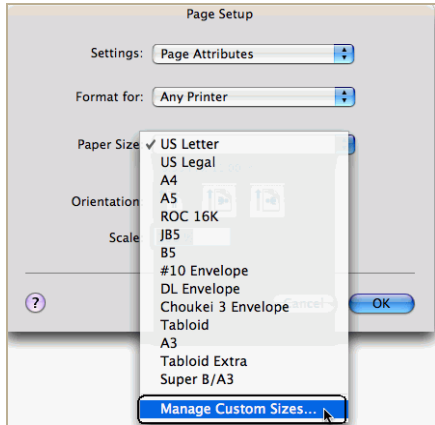
## Create a receipt size for printing from Safari/Chrome on Mac OS X

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

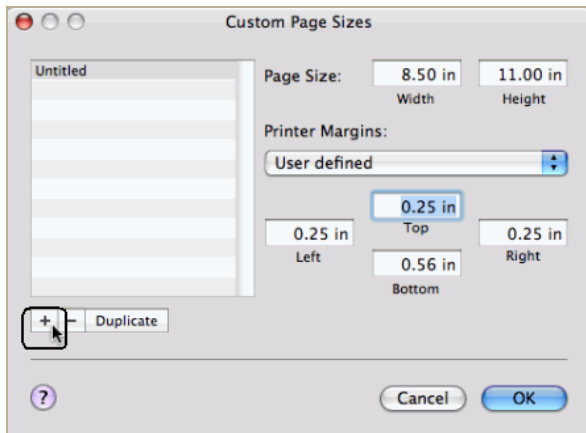
1. Press the **Command** and **P** keys or select **File | Page Setup**, or **File | Print** to open the Page Setup dialog box.



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



The Custom Page Sizes dialog box opens.

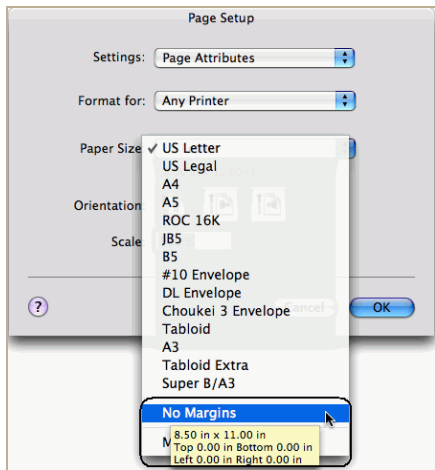


3. Select the plus sign button in the bottom left corner of the dialog box.
4. Double-click the default name **Untitled**, and type a new more descriptive name, such as **No Margins**, and click **OK**.



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

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

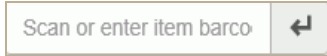


8. Select **OK**.

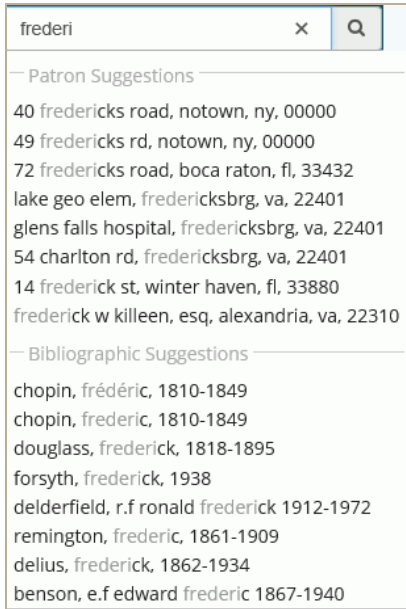
# Search for Records in Leap

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.

A rectangular input field with a light gray border. Inside, the text "Scan or enter item barco" is displayed in a small, sans-serif font. To the right of the text is a small, dark gray square button containing a white left-pointing arrow.

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

A screenshot of a search interface. At the top is a search bar with the text "frederi" entered. To the right of the text are two small icons: a square with an 'x' and a magnifying glass. Below the search bar is a list of suggestions. The first section is titled "Patron Suggestions" and lists several addresses: "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", and "frederick w killeen, esq, alexandria, va, 22310". The second section is titled "Bibliographic Suggestions" and lists several names and dates: "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", and "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

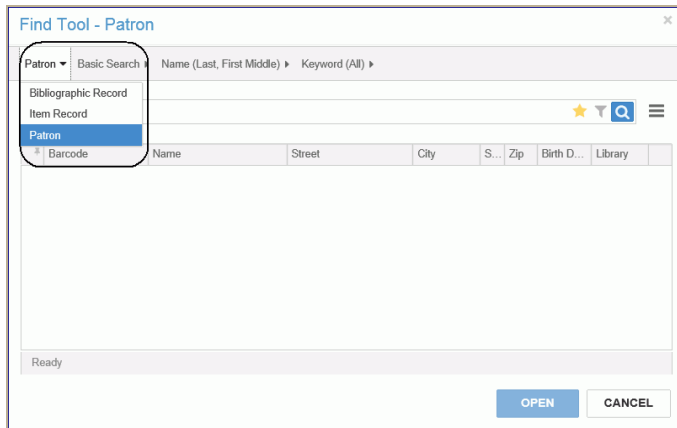
## Do a basic search for a patron, item, or bibliographic record

### Note:

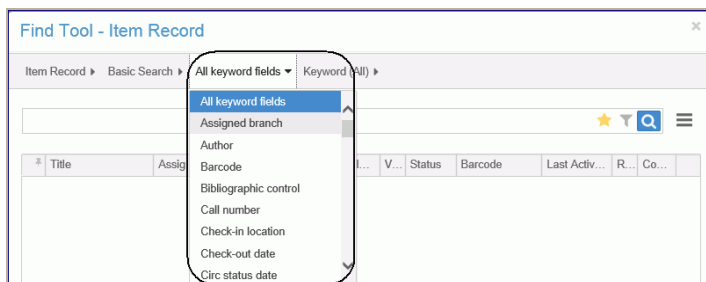
You can set up user defaults for the Find Tool. See: "Save a set of Find Tool search options as your user default" on page 49.

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**.

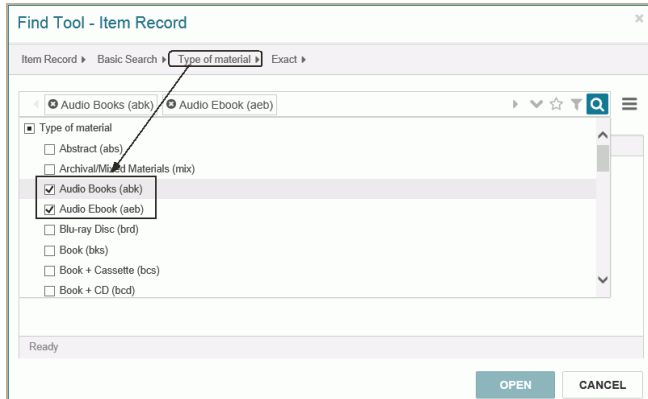
6. Enter or select the search term by doing one of the following:

### 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.

Execution stopped because a resource limit was reached.  
No results were returned.

- 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).

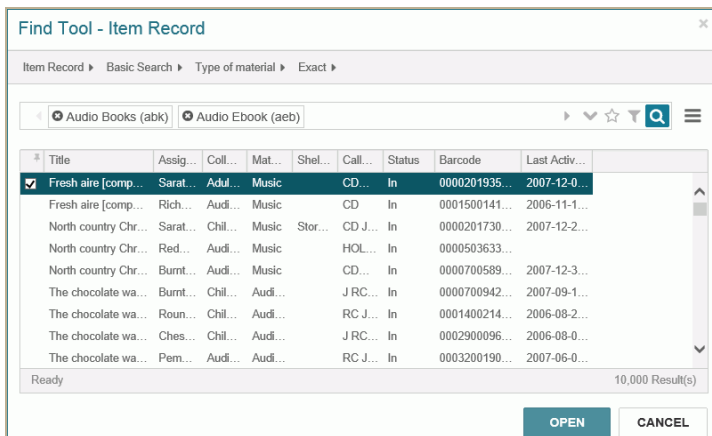


- If the search access point does not have an associated list, type the search term. For example, if you search by Author, type the author's name.

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**.



## Polaris Leap 1.0 SP1

**Item Record**

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

Barcode: 0000201935541      Material type: Music      ☐ ILL  
Call number: CD EA DAVI FA D55      Shelf location: None      ☐ eContent  
Collection: Adult Music      Issue:      ☐ Non-circulating  
Temp location:      Price: \$15.00      ☒ Display in PAC

### 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.

Find Tool - Item Record

Item Record > Basic Search > Circulation status > Exact >

#	Title	Assig...	Coll...	Mat...	Shel...	Call...	Status	Barcode	Last Activ...
No results									

Ready Filtered to 599 of 62,501 result(s)

☒ Count Only

### Do a power search

To do a power search:

#### Note:

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

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



The search results are listed.

Find Tool - Bibliographic Record

Bibliographic Record ▶ Power Search ▶ (unsaved) ▶

SU=Bosnia AND PD>2000 AND GENRE=fiction

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

Ready
14 Result(s)

OPEN CANCEL

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

## Save a power search

### Note:

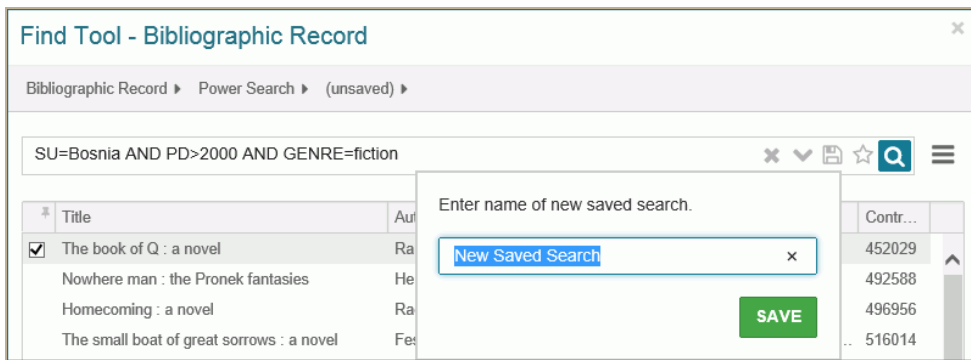
No additional permissions are required to save a power search. Each user sees only their own saved power searches.

To save a power search:

1. Enter the search terms for the power search. See "Do a power search" on page 41.
2. Select the save button.

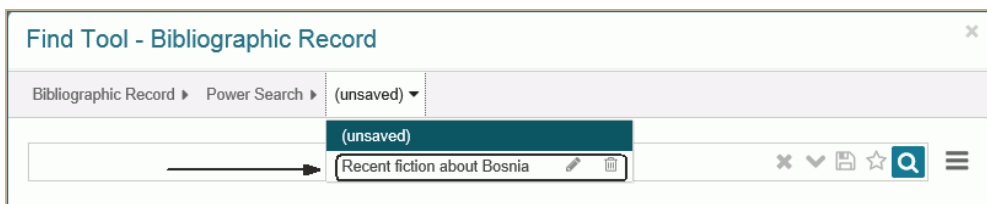


A dialog box opens where you enter the name of the saved search.



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.

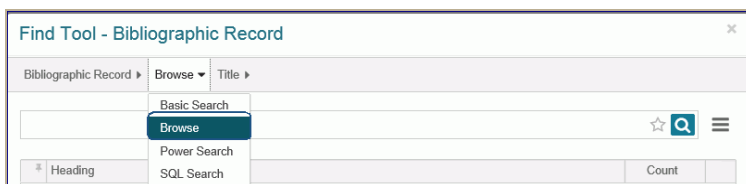


## Browse search for bibliographic records

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.

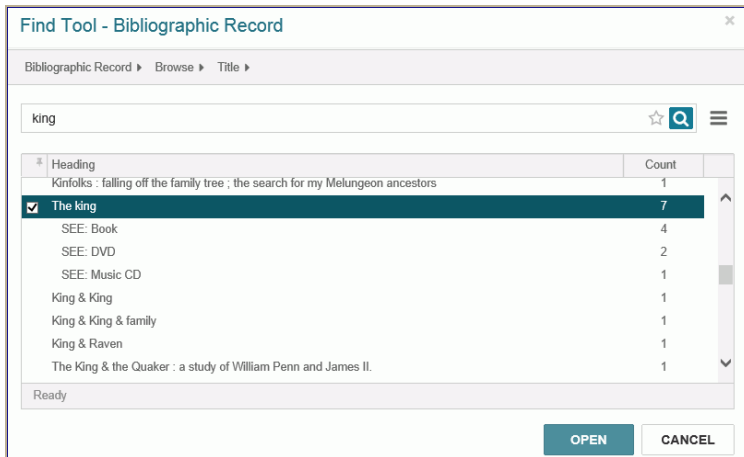
To browse search in the Leap Find Tool:

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



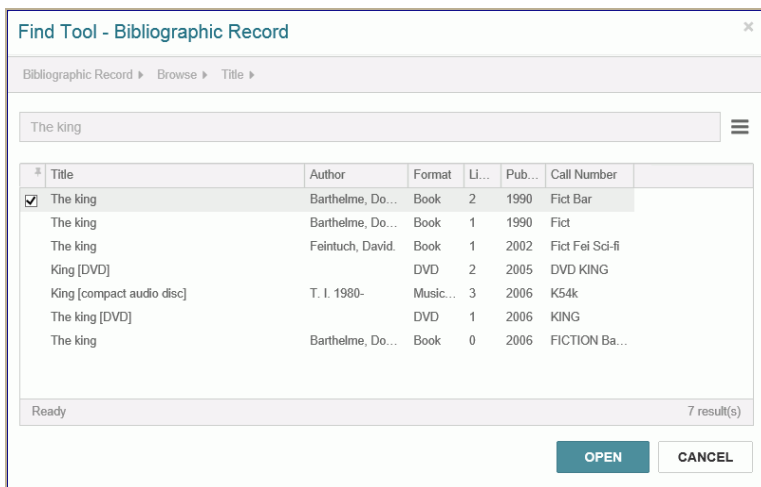
4. Select the search icon.

The search results list displays the headings and counts.



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

The results list displays the titles associated with the selected heading.

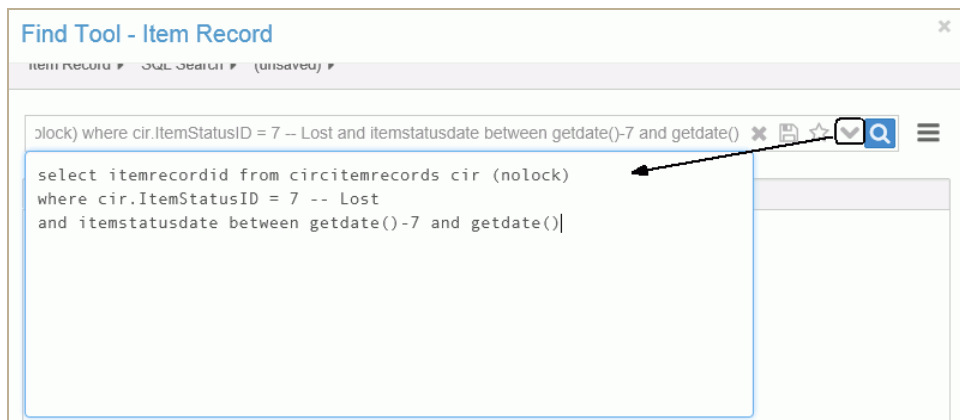


## Set up and save an SQL search

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.

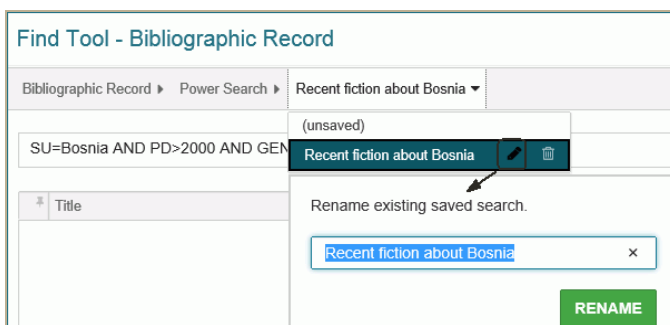
- If you have the permission to save SQL searches, and you want this search query to be saved, select the **Save** button.

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

## Rename a saved search

To rename a saved search:

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



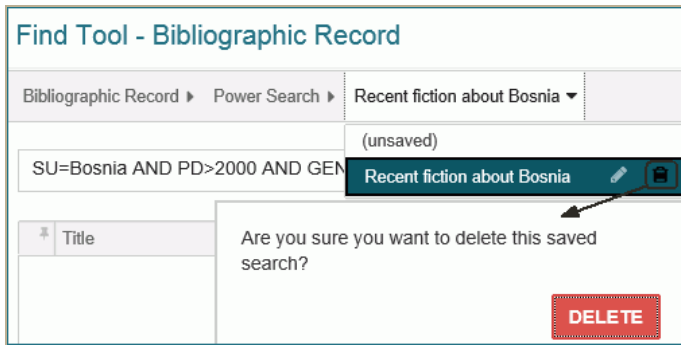
The saved search is listed with the new name.

## Delete a saved search

To delete a saved search:

- 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:

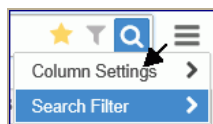
### Note:

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**.

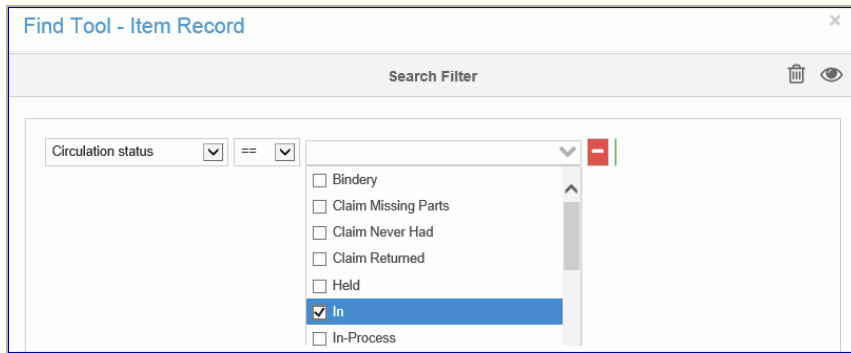


The Filter page opens.

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.

Find Tool - Bibliographic Record

Column Settings

☒ Title  
☒ Author  
☒ Format  
☒ Linked Items  
☒ Holds  
☒ Publication Date  
☒ Call Number  
☒ Control Number

MOVE UP MOVE DOWN

Display Position	1
Folded	False
Name	Title
Pinned	False
Visible	True
Width	21.85

Display Position  
The order of the column in the display.

OPEN CANCEL

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

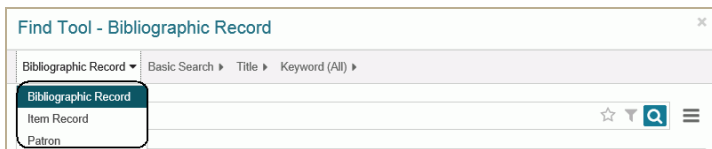
You set up a search and save it so that these Find Tool search options are selected when you open the Find Tool in Leap.

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:

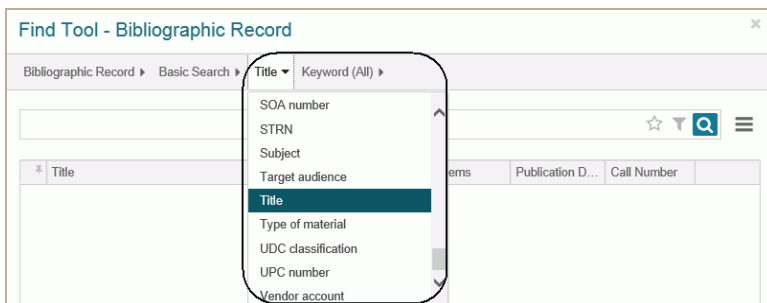
1. Open the Find Tool.
2. Select the record type: **Bibliographic Record**, **Item Record**, **Patron**.



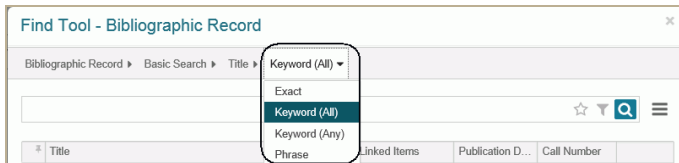
3. Select the search mode: **Basic Search**, **Power Search**, **SQL Search**.



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

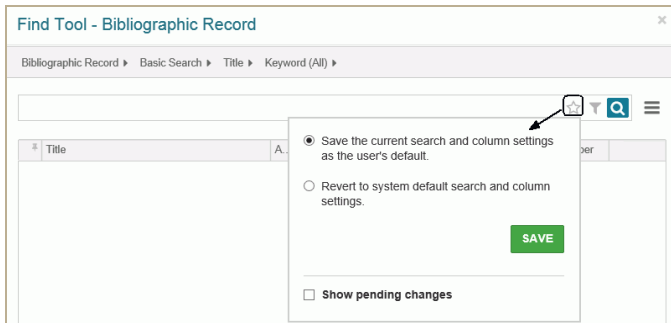


5. Select the search relation - **Exact**, **Keyword (All)**, **Keyword (Any)**, **Phrase** etc.



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.

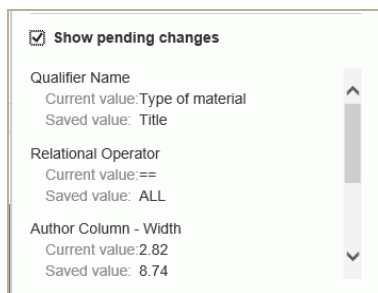
A dialog box opens.



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**.

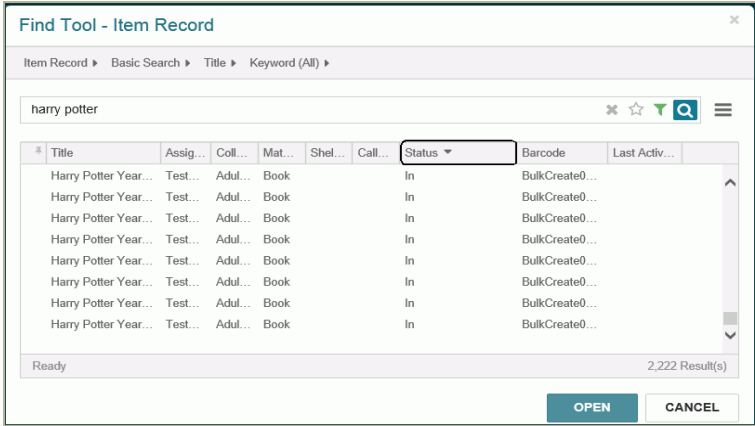
The dialog box closes and the star icon is displayed in yellow, indicating your user defaults are saved.

**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.



## 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


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### 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.


**ANAR KAMAT** ⓘ  
1001900146413  
COMMUNITY LIBRARY

REGISTRATION REFRESH CLOSE

Check Out (0) Out (2) / Overdue (2) Account (\$0.00) Claims (0) / Lost (0) Holds (4) More ▼

Profile

Attributes
Email
Address
Phone/Fax
Notifications
Preferences
Password
Image
Misc. Info

Barcode \*  
1001900146413 x

Former Barcode

Last Name \*  
Kamat

First Name \*  
Anar

Middle Name

Title  
(None)

Gender \*  
☐ Male ☒ Female ☐ N/A

Registered At \*  
Community Library

Patron Code \*  
Regular

Date of Registration  
11/6/2013

Expiration Date \*  
11/6/2019


Birth Date  
4/27/1987

Statistical Class  
(None)

SAVE  
RENEW  
COPY  
DELETE

## 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.


**ANAR KAMAT** ⓘ  
1001900146413  
COMMUNITY LIBRARY

REGISTRATION REFRESH CLOSE

Check Out (0) Out (2) / Overdue (2) Account (\$0.00) Claims (0) / Lost (0) Holds (4) More ▼

Scan or enter item barco Find Tool Reset Due Date

Special Loan

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

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



**ANAR KAMAT** ⓘ

1001900146413

**PATRON INFO**

PATRON CODE: REGULAR

HOME ADDRESS:  
2304 BARCELONA ROAD  
SYRACUSE, NY 13210

PHONE NUMBER: 315-634-1234

EMAIL ADDRESS:

EXPIRATION DATE: 11/6/2019

NOTIFICATION OPTION: MAILING ADDRESS

Check Out

Scan or enter

☐ BARCODE

---

## Item Record

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

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

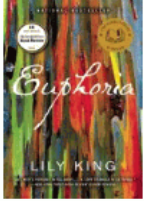
### Note:

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

## Item Record - Circulation view

## Item Record

PLACE HOLD
CHECK IN
REFRESH
CLOSE



### Euphoria : a novel

By King, Lily, author.

Barcode: 1229195488
Call number:
Collection: Adult Fiction
Temp location:
Assigned branch: Community Library

Material type: Book
Shelf location: None
Issue:
Price: \$18.50
Circulation status: Out || 5/8/2015 12:20:26 PM

☐ ILL
☐ eContent
☐ Non-circulating
☒ Display in PAC
Bib control number: 1291283

Circulation
Controls
Blocks and Notes
History

Due date: 5/15/2015 11:59:59 PM
Renewals taken: 0
Renewals limit: 0
Renewal date:

Current borrower: 12291954007
Loaning branch: Community Library
Held for:
Held at:

Check-out date: 5/8/2015 12:20:26 PM
Original due date: 5/15/2015 11:59:59 PM

Last location
Check-in at: Community Library
Ck-in date: 5/8/2015 12:19:34 PM
Wkstn/user: Peer/laura.peer

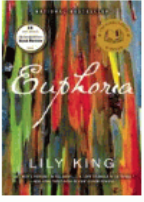
Last use
Borrower: 12291954007
Loaning branch: Community Library
Circ date: 5/8/2015 12:20:26 PM

In-transit/Transferred
From:
Sent:
To:
Received:

## Item Record - Controls view

## Item Record

PLACE HOLD
CHECK IN
REFRESH
CLOSE



### Euphoria : a novel

By King, Lily, author.

Barcode: 1229195488
Call number:
Collection: Adult Fiction
Temp location:
Assigned branch: Community Library

Material type: Book
Shelf location: None
Issue:
Price: \$18.50
Circulation status: Out || 5/8/2015 12:20:26 PM

☐ ILL
☐ eContent
☐ Non-circulating
☒ Display in PAC
Bib control number: 1291283

Circulation
Controls
Blocks and Notes
History

Loan period: Standard
Fine code: Book
Statistical code:
Home branch: Community Library

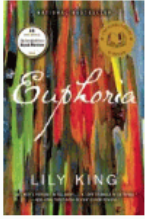
☒ Holdable
☒ Loanable outside system
☐ Do not float

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

## Item Blocks and Notes view

### Item Record

[PLACE HOLD](#)[CHECK IN](#)[REFRESH](#)[CLOSE](#)



**Euphoria : a novel**  
By King, Lily, author.  
Barcode: 1229195488  
Call number:  
Collection: **Adult Fiction**  
Temp location:  
Assigned branch: **Community Library**  
Material type: **Book**  
Shelf location: **None**  
Issue:  
Price: **\$18.50**  
Circulation status: **In || 5/8/2015 12:19:20 PM**  
☐ ILL  
☐ eContent  
☐ Non-circulating  
☒ Display in PAC  
Bib control number: **1291283**

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

Library Assigned Block:

Free Text Block:

System Block:

Public Note:

Non-Public Note:

Physical Condition:

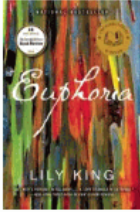
Special Item Check-In:



## Item History view

### Item Record

PLACE HOLD
CHECK IN
REFRESH
CLOSE



**Euphoria : a novel**  
By King, Lily, author.

Barcode: 1229195488      Material type: Book      ☐ ILL

Call number:      Shelf location: None      ☐ eContent

Collection: Adult Fiction      Issue:      ☐ Non-circulating

Temp location:      Price: \$18.50      ☒ Display in PAC

Assigned branch: Community Library      Circulation status: Out || 5/8/2015 12:20:26 PM      Bib control number: 1291283

Circulation
Controls
Blocks and Notes
History

DATE	ASSIGNED BRANCH	STATUS	ACTION	LOCATION	USER/WKS	PATRONID
5/12/2015 6:04:38 AM	Community Library	Out	Reminder notice: Email	Community Library	PolarisExec/QA-QUANTUM	370481
5/8/2015 12:20:27 PM	Community Library	In -> Out	Checked out	Community Library	laura.peer/Peer-W8	370481

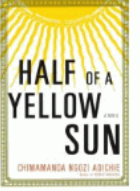
## Bibliographic Record

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

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

Brief
Full
Availability

English
Community Library

**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.

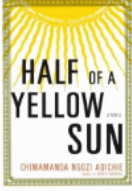
2006

## Bibliographic Record - Items View

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

### Bibliographic Record

PLACE HOLD
PAC
REFRESH
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

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 001 005 008 020 082 00 092 099 100 1 245 10 260 300 303 355
|||||nam a22||||| a 4500
001 665743
005 20130417135020.0
008 060815s2008 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.
303 $a397587
355 $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\$z0000

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.



Community Library

LIBRARY INFO
SEARCH
COMMUNITY
MY ACCOUNT
HELP

Save Search

Related searches

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)

Keyword search for: 965743
Go!
Search by: Any Field
Using: Local Polaris PAC DB
Limit by: All Items - All Libraries
Select Databases
Course reserve items only
More Search Options

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.

**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](#)

Filter Items

ASSIGNED BRANCH	COLLECTION	MATERIAL TYPE	SHELF LOCATION	CALL NUMBER	VOLUME	STATUS	BARCODE	LAST ACTIVITY	RECORD STATUS	CONTROL NUMBER
Clifton Park-Hatfield Public Library		Book		Fict Adi		In	0000802827396	12/12/2007	Final	2480332

### Item Record Links

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

**Item Record** [PLACE HOLD](#) [CHECK IN](#) [REFRESH](#) [CLOSE](#)

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

Barcode: 0000602827396 Material type: Book ☐ ILL  
Call number: Fict Adi Shelf location: None ☐ eContent  
Collection: None Issue: ☐ Non-circulating  
Temp location: Price: \$24.95 ☒ Display in PAC  
Assigned branch: Clifton Park Circulation status: In || 12/12/2007 9:28:29 AM Bib control number: 665743

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

Due date: Current borrower: Check-out date:  
Renewals taken: 0 Loaning branch: Original due date:  
Renewals limit: 2 Held for:  
Renewal date: Held at:

Last location: **Last use** In-transit/Transferred  
Check-in at: Clifton Park Borrower: 1000201257986 From: Burnt Hills  
Clk-in date: 12/12/2007 9:28:29 AM Loaning branch: Clifton Park Sent: 12/10/2007 10:15:58 AM  
Wkstn/user: CPH-Mary/moconnell Circ date: 11/25/2007 1:46:57 PM To: Clifton Park  
Received: 12/12/2007 9:28:29 AM

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

## Polaris Leap 1.0 SP1

**Item Record** PLACE HOLD CHECK IN REFRESH RESULTS CLOSE

And then there were none [DVD]

Barcode: 0000203505508      Material type: Video      ☐ ILL  
 Call number: DVD ANDT      Shelf location: None      ☐ eContent  
 Collection: None      Issue:      ☐ Non-circulating  
 Temp location:      Price: \$30.00      ☒ Display in PAC  
 Assigned branch: Kellie's Branch      Circulation status: Held || 10/29/2014 12:22:18 PM      Bib control number: 612563

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

Due date:      Current borrower:      Check-out date:      Original due date:  
 Renewals taken: 0      Lending branch:      Held for: conner2  
 Renewals limit: 1      Held at: Kellie's Branch (KMC)

Last location:      Last use:      In-transit/Transferred  
 Check-in at: Kellie's Branch      Borrower: 1000201371100      From: Kellie's Branch  
 Cl-in date: 10/29/2014 12:22:07 PM      Lending branch: Saratoga-5.0      Sent: 2/4/2014 1:54:17 PM  
 Wkst/user: Kellie Conner/kellie.conner      Clrc date: 12/18/2007 4:34:37 PM      To: Saratoga-5.0  
 Received:

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

**Item Record** PLACE HOLD CHECK IN REFRESH CLOSE

Half of a yellow sun : a novel

By Adichie, Chimamanda Ngozi, 1977-

Barcode: 0000602827396      Material type: Book      ☐ ILL  
 Call number: Fict Adi      Shelf location: None      ☐ eContent  
 Collection: None      Issue:      ☐ Non-circulating  
 Temp location:      Price: \$24.95      ☒ Display in PAC  
 Assigned branch: Clifton Park      Circulation status: In || 12/12/2007 9:28:29 AM      Bib control number: 665743

## 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.

Request ID: 44596      Bib Control Number: 47244      Activation: 4/9/2015      SAVE CLOSE

Package: Community Library      Unclaimed: 5/1/2015      Expiration: 4/26/2015

Status: Held 4/10/2015      Request Date: 4/1/2015      Origin: Library

☐ This item only      ☐ Borrow by Mail      Tracking Number:

Title: Love in the time of cholera      Barcode:      Format: Book

Author: Garcia Márquez, Gabriel, 1927-2014      ISBN1539: 0140119906 (Penguin pbk.)      Pages:

Series:      Edition:      Issue:

Publisher: Knopf      Call NO:      Serial Copy:

Date: 1988      LOCN: 87040484      Volume:

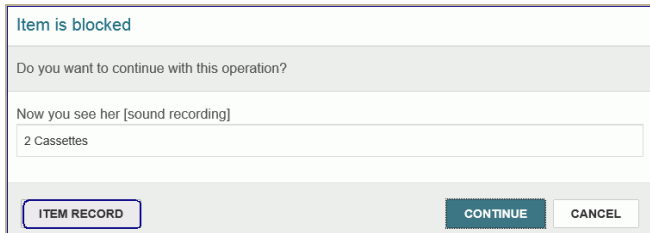
Constituent Title/Author:

Notes:

Request Satisfied By	ITEM BARCODE	STATUS	BRANCH	NOT SUPPLIED REASON
BIB CONTROL #	47244	Out	Saratoga Springs Public Library	

## Item and Patron Block Message Box Links

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



**Item is blocked**

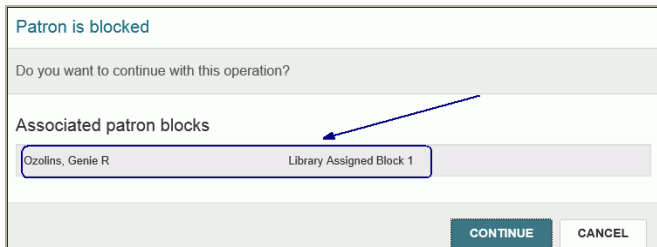
Do you want to continue with this operation?

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?

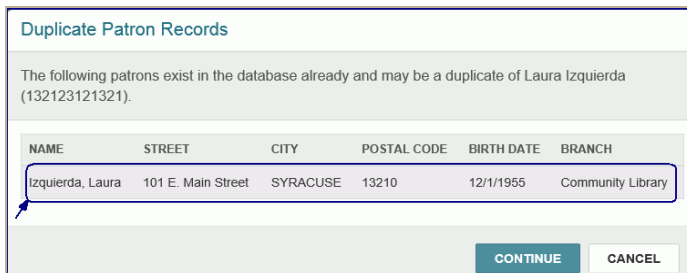
Associated patron blocks

Ozollins, Genie R	Library Assigned Block 1
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[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

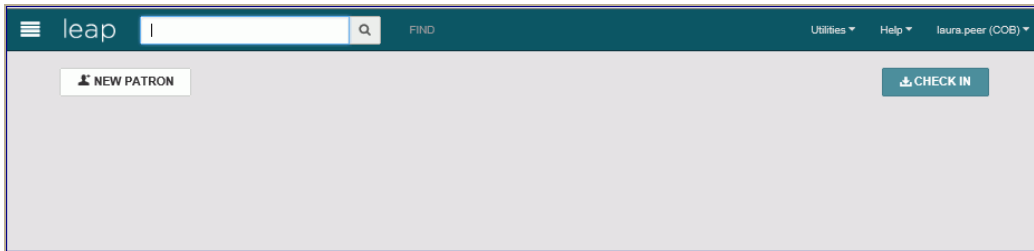
[CONTINUE](#) [CANCEL](#)





# 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" on page 66
- "Use the Find Tool to search for a patron" on page 68
- "View, edit, or renew an existing patron's registration" on page 70
- "Register a new patron" on page 72
- "Copy an existing patron record" on page 77
- "Delete a patron record" on page 80

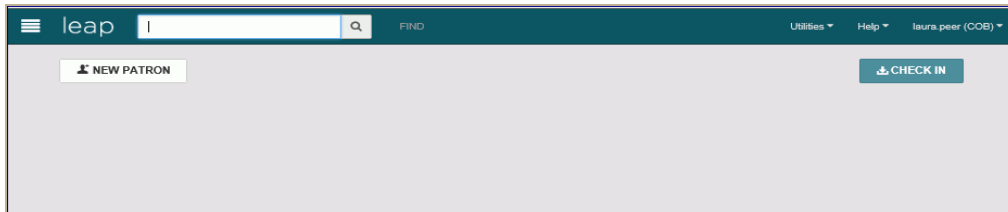
## Do a quick search for an existing patron

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.

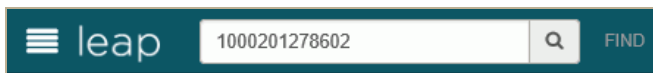
To do a quick search for an existing patron's record:

1. Sign in to Polaris Leap.

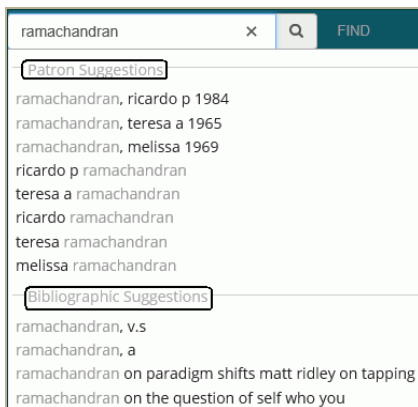
The Circulation page opens with the cursor in the search box.



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	<input type="text"/>	<input type="button" value="FIND"/>
<p>Please choose one of the following to narrow your search for <b>"ramachandran"</b></p> <p><a href="#">Bibliographic Keywords (6)</a></p> <p><a href="#">Patron Keywords (3)</a></p>		

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.	<input type="button" value="X"/>
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## Use the Find Tool to search for a patron

To search for a patron using the Find Tool:

1. Sign in to Polaris Leap.

The Circulation page opens.

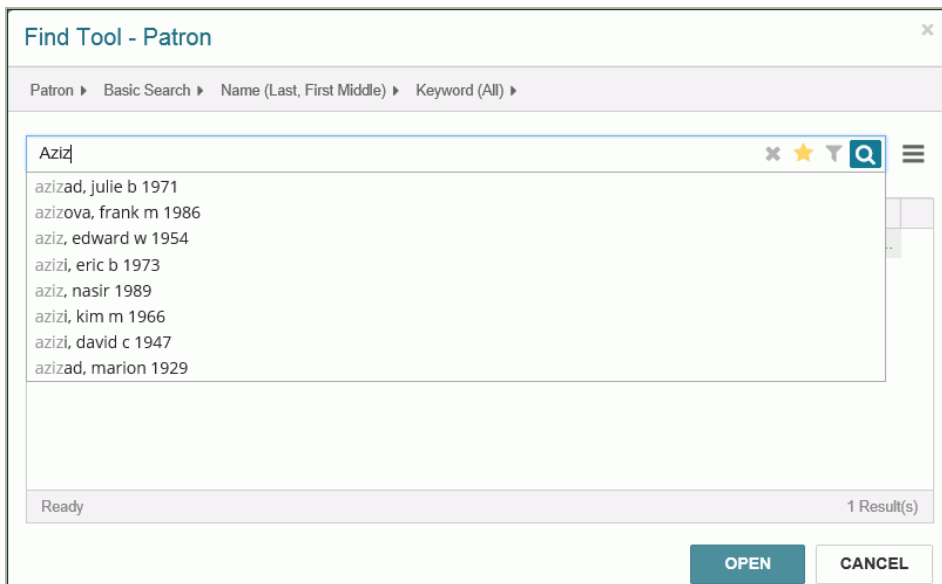
2. Select **FIND**.



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

3. Enter the search criteria.

As you type, automatic suggestions are displayed.



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

The patron's record opens.

Find Tool - Patron

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

aziz, nasir 1989

✕

★

⌵

Q

≡

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

Ready

1 Result(s)

OPEN

CANCEL

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.

**ALEXANDRIA LEE REMEY** ⓘ  
122919540926  
COMMUNITY LIBRARY   **BLOCKS**   **NOTES**

REGISTRATION   REFRESH   CLOSE

Check Out (0)   Out (3) / Overdue (2)   Account (\$0.00)   Claims (1) / Lost (0)   Holds (4)   More ▾

  Find Tool   Reset Due Date   Special Loan

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

2. Select **REGISTRATION**.

The page displays the patron's registration information.

**ALEXANDRIA LEE REMEY** ⓘ  
122919540926  
COMMUNITY LIBRARY   **BLOCKS**   **NOTES**

REGISTRATION   REFRESH   CLOSE

Check Out (0)   Out (3) / Overdue (2)   Account (\$0.00)   Claims (1) / Lost (0)   Holds (4)   More ▾

**Profile**

Barcode \*   Registered At \*  
 x   Community Library ▾

Former Barcode   Patron Code \*  
   Regular ▾

Last Name \*   Date of Registration  
  

First Name \*   Expiration Date \*  
  

Middle Name   Birth Date  
  

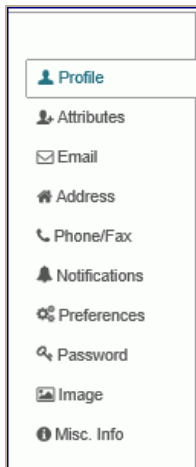
Title   Suffix   Statistical Class  
 ▾       ▾

Gender \*  
☐ Male   ☒ Female   ☐ N/A

SAVE  
RENEW  
COPY  
DELETE

Profile  
Attributes  
Email  
Address  
Phone/Fax  
Notifications  
Preferences  
Password  
Image  
Misc. Info

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**.



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.

A screenshot of the "Patron Registration 1" web form. The form has a header "Patron Registration 1" and a left-hand navigation bar with links: Profile (selected), Attributes, Email, Address, Phone/Fax, Notifications, Preferences, Password, and Image. The main content area is titled "Profile" and contains several input fields: "Barcode \*" (with a vertical scrollbar), "Former Barcode", "Last Name \*" (with a vertical scrollbar), "First Name \*" (with a vertical scrollbar), "Middle Name", "Title" (dropdown menu with "None" selected), "Suffix", "Registered At \*" (dropdown menu with "Community Library" selected), "Patron Code \*" (dropdown menu with "Regular" selected), "Date of Registration" (pre-filled with "5/7/2015"), "Expiration Date \*" (pre-filled with "5/7/2018"), "Birth Date", and "Statistical Class" (dropdown menu with "None" selected). At the bottom, there is a "Gender \*" section with radio buttons for "Male", "Female", and "N/A" (which is selected). To the right of the form are two buttons: a green "SAVE" button and a white "CANCEL" button with a grey border.

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 At** 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.

The screenshot shows the 'Attributes' section of the Polaris Leap interface. On the left, a navigation bar lists 'Profile', 'Attributes' (selected), 'Email', 'Address', 'Phone/Fax', 'Notifications', 'Preferences', 'Password', and 'Image'. The main content area is titled 'Attributes' and contains several input fields and checkboxes. The fields include 'ID Number', 'Voter Registration', 'Not Currently In Use', 'Parent/Guardian birth date', and 'License number'. The 'Privileges / Restrictions' field is a dropdown menu currently set to '(None)'. There is also a checkbox for 'Collection Use Only' which is checked. Below the 'Parent/Guardian birth date' field, there is a note: 'This field is required if the patron is a juvenile'. At the bottom, there are two checkboxes: 'Restricted patron' and 'New PCDF'.

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).

The screenshot shows the 'Email' section of the Polaris Leap interface. On the left, the navigation bar lists 'Profile', 'Attributes', 'Email' (selected), 'Address', 'Phone/Fax', 'Notifications', 'Preferences', 'Password', and 'Image'. The main content area is titled 'Email' and contains two input fields: 'Email Address' and 'Alt Email Address'.

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).

The screenshot shows the 'Phone/Fax' section of the Polaris Leap 1.0 SP1 interface. On the left is a navigation bar with icons and labels for Profile, Attributes, Email, Address, Phone/Fax (highlighted), Notifications, and Preferences. The main content area has a header 'Phone/Fax' and four input fields arranged in a 2x2 grid: 'Phone 1' (containing the number '315'), 'Phone 2', 'Phone 3', and 'Fax'.

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

The screenshot shows the 'Notification Settings' section of the Polaris Leap 1.0 SP1 interface. The left navigation bar now has 'Notifications' selected. The main content area has a header 'Notification Settings' and several configuration options: 'Notices Address' (dropdown menu showing '(None)'), 'eReceipt Option' (dropdown menu showing '(None)'), 'Notification Option' (dropdown menu showing 'Email Address'), an unchecked checkbox for 'Additional TXT Notice', 'Text Messaging Phone' (dropdown menu showing '(None)'), and 'Wireless Carrier' (dropdown menu showing '(None)').

9. In the Notification Settings section, select from the following options:
- Select the address type to which notices will be sent. The addresses must be entered in the Addresses section to appear in this list. For example, if you specified a home address, it is listed as **Home**.
  - Select the electronic receipt option in the **eReceipt Option** box.
  - Select the notification option to use in the **Notification Option** box.
  - If an additional text 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.

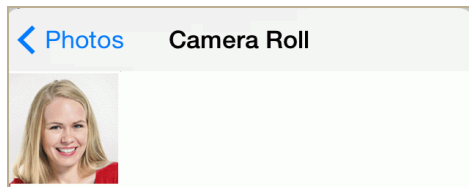
If the passwords do not match, the Password (Confirm) box has a red border.

13. To save a patron's picture in the record, go to the Patron Image section, and do the following steps:

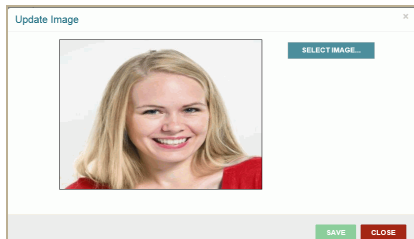
**Note:**

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 screenshot shows the 'Patron Registration' page for a user named MS. LAURA IZQUIERDA. The page has a top navigation bar with buttons for 'REGISTRATION', 'REFRESH', 'RESULTS', and 'CLOSE'. Below this is a sub-navigation bar with links for 'Check Out (0)', 'Out (3) / Overdue (3)', 'Account (\$107.94)', 'Claims (1) / Lost (1)', and 'Holds (4)'. The main content area is divided into two panels. The left panel shows the 'Profile' view with fields for 'Barcode \*' (containing 'J12291954'), 'Registered At \*' (set to 'Community Library'), 'Former Barcode' (containing 'A12291954B'), 'Patron Code \*' (set to 'Retired'), and 'Last Name \*'. The right panel contains buttons for 'SAVE', 'RENEW', 'COPY' (highlighted with a blue arrow), and 'DELETE'.

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

**Patron Registration 1**

Profile
Attributes
Email
Address
Phone/Fax
Notifications
Preferences
Password
Image

**Profile**

Barcode \*
Registered At \*
Community Library

Former Barcode
Patron Code \*
Retired

Last Name \*
Izquierda
Date of Registration
3/27/2015

First Name \*
Laura
Expiration Date \*
10/4/2018

Middle Name
Birth Date
12/1/1955

Title
None
Suffix
Statistical Class
Cobleskill-Town

Gender \*
Male
Female
N/A

## Attributes view

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

**Attributes**

ID Number
Privileges / Restrictions

Voter Registration
Yes
Library Use Only
None

Not Currently In Use
Parent/Guardian

Parent/Guardian birth date

☐ Restricted patron
☐ New PCDF

License number
122145454

## Email view

- Email Address
- Alt Email Address

Email	
Email Address	Alt Email Address
<input type="text" value="lizuierta@gmail.com"/>	<input type="text"/>

#### Addresses view

- All addresses
- Address Check Date

Addresses			
Address Type		City	
<input type="text" value="Home"/>		<input type="text" value="SYRACUSE"/>	
Postal Code	Zip+4:	State	
<input type="text" value="13210"/>	<input type="text"/>	<input type="text" value="NY"/>	
Street Address		County	
<input type="text" value="101 E. Main Street"/>		<input type="text" value="ONONDAGA"/>	
Street Address Line 2		Country	
<input type="text"/>		<input type="text" value="USA"/>	
DELETE			
ADDRESS			
Address Check Date		Term	
<input type="text" value="8/28/2016"/>		<input type="text" value="1"/> <input type="text" value="Years"/>	

#### Phone/fax view

- Phone 1,2,3
- Fax

Phone/Fax	
<b>Phone 1</b> <input type="text" value="315-512-5555"/>	<b>Phone 2</b> <input type="text"/>
<b>Phone 3</b> <input type="text"/>	<b>Fax</b> <input type="text"/>

### Notification Settings view

All field values and settings are copied.

Notification Settings	
<b>Notices Address</b> <input type="text" value="Home"/>	<b>eReceipt Option</b> <input type="text" value="(None)"/>
<b>Notification Option</b> <input type="text" value="TXT Messaging"/>	<input type="checkbox"/> Additional TXT Notice
<b>Text Messaging Phone</b> <input type="text" value="Phone 1"/>	<b>Wireless Carrier</b> <input type="text" value="Verizon"/>

### Preferences view

All field values and settings are copied.

Preferences	
<b>Exclude from Notices and Reminders</b> <input type="checkbox"/> Overdue <input type="checkbox"/> Hold <input type="checkbox"/> Billing <input type="checkbox"/> Almost Overdue/Auto-Renew <input type="checkbox"/> Patron Record Expiration <input type="checkbox"/> Inactive Patron	<b>Language</b> <input type="text" value="English"/> <input checked="" type="checkbox"/> Maintain Reading History <input type="checkbox"/> Do Not Delete Record <input type="checkbox"/> E-mail Notices in Plain Text <input type="checkbox"/> 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.

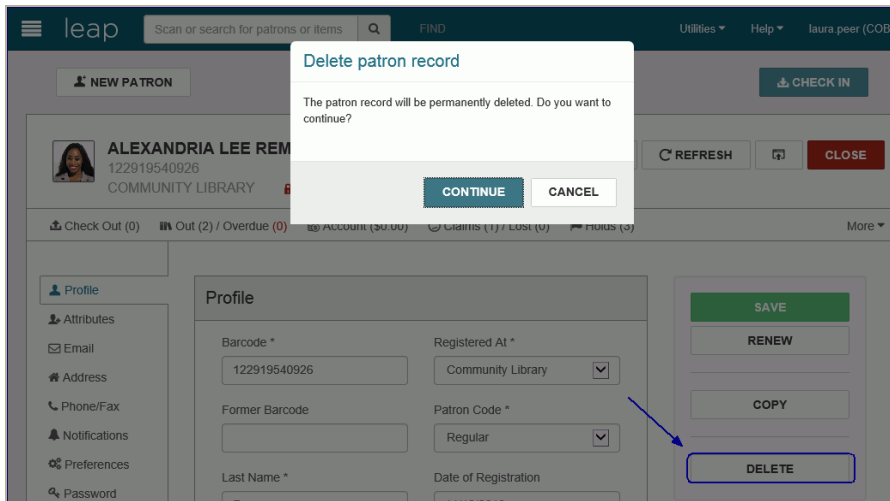
To delete a patron record from Leap:

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

A confirmation message appears.



## Polaris Leap 1.0 SP1



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.

**ANAR KAMAT** ⓘ  
1001900146413  
COMMUNITY LIBRARY

REGISTRATION REFRESH CLOSE

BLOCKS NOTES

Check Out (0) Out (2) / Overdue (2) Account (\$0.00) Claims (0) / Lost (0) Holds (4) More ▾

Scan or enter item barcode ↵ Find Tool Reset Due Date Special Loan

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

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.

**ANAR KAMAT** ⓘ  
1001900146413  
COMMUNITY LIBRARY

REGISTRATION REFRESH CLOSE

Check Out (0) **Out (2) / Overdue (1)** Account (\$0.00) Claims (0) / Lost (0) Holds (4) More ▾

Renew Special Renew Reset Due Date Estimate Fines Make A Claim Declare Lost More ▾ Filter Items

<input type="checkbox"/>	TYPE	DUE ON ▾	BARCODE	TITLE	AUTHOR	RENEWALS LEFT	CALL NO.	BRANCH
<input type="checkbox"/>	Video	10/16/2014	0000410139414	The Year of living dangerously [DVD]		0 of 0	DVD Fict Yes	Schenectady Branch - Ce...
<input type="checkbox"/>	Book	7/23/2015	0001000035103	One hundred years of solitude	García Márquez, ...	0 of 5	Fict Gar	Canajoharie Library

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**.

**ANAR KAMAT** ⓘ  
1001900146413  
COMMUNITY LIBRARY

REGISTRATION REFRESH CLOSE

BLOCKS NOTES

Check Out (0) Out (2) / Overdue (1) Account (\$0.00) Claims (0) / Lost (0) Holds (4) More ▾

Renew Special Renew Reset Due Date Estimate Fines Make A Claim Declare Lost More ▾ Filter Items

<input type="checkbox"/>	TYPE	DUE ON ▾	BARCODE	TITLE	AUTHOR	RENEWALS LEFT	CALL NO.	BRANCH
<input type="checkbox"/>	Video	10/18/2014	0000410139414	The Year of living dangerously [DVD]		0 of 0	DVD Fict Yea	Schenectady Branch - Ce...
<input type="checkbox"/>	Book	7/23/2015	0001000035103	One hundred years of solitude	García Márquez, ...	0 of 5	Fict Gar	Catsjoharie Library

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.



**ALEXANDRIA LEE REMEY** ⓘ  
 122919540926  
 COMMUNITY LIBRARY

REGISTRATION  
 REFRESH  
 COMPLETE

BLOCKS  
 NOTES

[Check Out \(1\)](#)
[Out \(4\) / Overdue \(1\)](#)
[Account \(\\$4.60\)](#)
[Claims \(1\) / Lost \(0\)](#)
[Holds \(5\)](#)
[More](#)

	BARCODE	CALL NUMBER	TITLE	DUE DATE	ACTION	SHELF LOCATION	ASSIGNED BRANCH	MATERIAL TYPE
<input checked="" type="checkbox"/>	0000409568797	574.5 Ago	Thieves, deceivers, and killers : tales of chemistry in nature	7/31/2015	Check Out		Schenectady Branch - Central	Book

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.

The screenshot shows the 'Special Renew' modal in the Polaris Leap interface. At the top, the patron's name 'ANAR KAMAT' and ID '1001900146413' are displayed. Below this, there are tabs for 'Check Out (1)', 'Out (2) / Overdue (0)', 'Account (\$0.00)', 'Claims (0) / Lost (0)', and 'Holds (4)'. The 'Special Renew' button is selected in the top bar. The modal contains a calendar for June 2015, a 'Loan period' input field, and two radio buttons: 'Apply to next item only' (selected) and 'Apply to all items for this patron'. At the bottom right, there are 'SPECIAL RENEW' and 'CANCEL' buttons.

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.

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

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.

Choose a claim status: Claim Returned

<input checked="" type="checkbox"/>	TYPE	DUE ON ▼	BARCODE	TITLE	AUTHOR	RENEWALS LEFT	CALL NO.	BRANCH
<input checked="" type="checkbox"/>	Book	4/7/2015	12291954001	Pluto : New Horizons for a lost horizon : astronomy, astrology, mythology		0 of 0		Saratoga Springs Public...

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.

<input checked="" type="checkbox"/>	TYPE	DUE ON ▼	BARCODE	TITLE	AUTHOR	RENEWALS LEFT	CALL NO.	BRANCH
<input checked="" type="checkbox"/>	Book	4/7/2015	12291954001	Pluto : New Horizons for a lost horizon : astronomy, astrology, mythology		0 of 0		Saratoga Springs Public...

The Declare lost item dialog box opens.

**Declare lost item**

Item Barcode: 12291954001      Title: Pluto : New Horizons for a lost horizon : astronomy, astrology, mythology

Due Date: 4/7/2015      Billed Date: ☐ Billed

Patron Name: Acosta, Sarah R      Patron Barcode: 1001900144202

Charge:	Replacement: \$25.00	Processing: \$0.00	Overdue: \$0.00
Paid:	\$0.00	\$0.00	\$0.00
Waived:	\$0.00	\$0.00	\$0.00
Amount due:	\$25.00	\$0.00	\$0.00

Amount:

Actions:

Payment method:  Total Fine: \$25.00

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.



ALEXANDRIA LEE REMEY ⓘ

122919540926

COMMUNITY LIBRARY

REGISTRATION

REFRESH

CLOSE

Check Out (0)

Out (3) / Overdue (2)

Account (\$0.00)

Claims (1) / Lost (0)

Holds (4)

More ▾

Renew






Special Renew

Reset Due Date

Estimate Fines

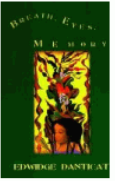
More ▾

Filter Items

<input type="checkbox"/>	TYPE	DUE ON ▾	BARCODE	TITLE	AUTHOR	RENEWALS LEFT	CALL NO.	BRANCH
<input type="checkbox"/>	 Video	 3/31/2015	122919545555	Fruitvale Station [videorecording]		0 of 0		Saratoga Springs Public...
<input checked="" type="checkbox"/>	 Book	 4/7/2015	0000101520286	Breath, eyes, memory [large print]	Danticat, Edwidge...	0 of 2	LT Fict Dan	Lake Pleasant Public Li...
<input type="checkbox"/>	 Book	6/17/2015	0000200041036	Far from the sea	Hunter, Evan, 1928...	1 of 3	Fict Hun	Saratoga Springs Public...

2. Select an item in the list.


The item record's details are displayed.

<b>Item Record</b>		<a>PLACE HOLD</a> <a>CHECK IN</a> <a>REFRESH</a> <a>CLOSE</a>	
 <b>Breath, eyes, memory [large print]</b> By Danticat, Edwidge, 1969-			
Barcode: 0000101520286	Material type: Book	<input type="checkbox"/> ILL <input type="checkbox"/> eContent <input type="checkbox"/> Non-circulating <input checked="" type="checkbox"/> Display in PAC	
Call number: LT Fict Dan	Shelf location: None		
Collection: Large Type	Issue:		
Temp location:	Price: \$25.00		
Assigned branch: Lake Pleasant	Circulation status: Out    8/26/2014 2:25:03 PM	Bib control number: 561428	
<a>Circulation</a> <a>Controls</a> <a>Blocks and Notes</a> <a>History</a>			
Due date: 4/7/2015 11:59:00 PM	Current borrower: 122919540926	Check-out date: 8/26/2014 2:25:03 PM	
Renewals taken: 3	Loaning branch: Community Library	Original due date: 9/9/2014 11:59:59 PM	
Renewals limit: 2	Held for:		
Renewal date: 3/23/2015 3:30:01 PM	Held at:		
<b>Last location</b>	<b>Last use</b>	<b>In-transit/Transferred</b>	
Check-in at:	Borrower:	From:	
Wkstn/user:	Loaning branch: Community Library	Sent:	
	Circ date: 3/23/2015 3:30:01 PM	To:	

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.


**HAROLD T SMYTHE** ⓘ  
 12291954022100  
 COMMUNITY LIBRARY

REGISTRATION REFRESH RESULTS CLOSE

BLOCKS NOTES

Check Out (0) Out (0) / Overdue (0) Account ((\$4.50)) Claims (1) / Lost (0) Holds (0) More ▼

Pay Waive Charge Add Charge Create Credit Refund Credit Notification History More ▼ Filter Charges

Charges: \$0.50 Deposits: \$0.00 Credits: \$5.00 Balance: (\$4.50) View: Account Summary ▼

<input type="checkbox"/>	TYPE	DATE	BARCODE	TITLE	REASON	ORGANIZATION	NOTE	AMOUNT	BALANCE
<input type="checkbox"/>	Credit	10/30/2014				Community Library		(\$5.00)	(\$5.00)
<input type="checkbox"/>	Charge	8/27/2014	0000400560710	The theatre of Tennessee Williams	Overdue Item	Community Library		\$0.10	\$0.10
<input type="checkbox"/>	Charge	8/27/2014	0000405654906	Zen art for meditation	Overdue Item	Community Library		\$0.10	\$0.10
<input type="checkbox"/>	Charge	8/27/2014	0000409188828	White teeth : a novel	Overdue Item	Community Library		\$0.10	\$0.10
<input type="checkbox"/>	Charge	8/27/2014	0000600056733	Remembrance of things past	Overdue Item	Community Library		\$0.10	\$0.10
<input type="checkbox"/>	Charge	8/27/2014	0000201647757	The Australian outback	Overdue Item	Community Library		\$0.10	\$0.10
									(\$4.50)

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.

**NASIR AZIZ** 1229195408668  
COMMUNITY LIBRARY

REGISTRATION REFRESH CLOSE

Check Out (0) Out (0) / Overdue (0) **Account (\$3.10)** Claims (0) / Lost (0) Holds (0) More ▾

Pay Waive Charge Add Charge Create Credit Refund Credit More ▾ Filter Charges

Charges: \$3.10 Deposits: \$0.00 Credits: \$0.00 Balance: \$3.10 View: Account Summary ▾

<input checked="" type="checkbox"/>	TYPE	DATE	BARCODE	TITLE	REASON	ORGANIZATION	NOTE	AMOUNT	BALANCE
<input checked="" type="checkbox"/>	Charge	1/30/2015	0001900107994	Manchild in the promised land	Overdue Item	Community Library		\$3.10	\$3.10
									\$3.10

4. Select **PAY**.

The area below the button expands.

Pay Waive Charge Add Charge Create Credit Refund Credit More ▾ Filter Charges

Balance: \$3.10

Amount:  x

Method:  ▾

Note:

PAY CANCEL

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.

**NASIR AZIZ** 1229195408668  
COMMUNITY LIBRARY

REGISTRATION REFRESH CLOSE

Check Out (0) Out (0) / Overdue (0) **Account (\$3.10)** Claims (0) / Lost (0) Holds (0) More ▾

Pay Waive Charge Add Charge Create Credit Refund Credit More ▾ Filter Charges

Charges: \$3.10 Deposits: \$0.00 Credits: \$0.00 Balance: \$3.10 View: Account Summary ▾

<input checked="" type="checkbox"/>	TYPE	DATE	BARCODE	TITLE	REASON	ORGANIZATION	NOTE	AMOUNT	BALANCE
<input checked="" type="checkbox"/>	Charge	1/30/2015	0001900107994	Manchild in the promised land	Overdue Item	Community Library		\$3.10	\$3.10
									\$3.10

3. Select the **Waive Charge** button.

The area below the toolbar buttons expands.

Pay Waive Charge Add Charge Create Credit Refund Credit Notification History More ▾ Filter Charges

Balance: \$16.00  
Amount to waive: \$16.00 ☐ Distributed waive  
Note:

WAIVE CANCEL

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.

The screenshot shows the 'Account' view for a patron named Harold T Smythe. The account summary at the top shows a balance of \$4.50. Below the summary, there is a toolbar with buttons for 'Pay', 'Wave Charge', 'Add Charge', 'Create Credit', 'Refund Credit', 'Notification History', and 'More'. The 'Add Charge' button is highlighted. Below the toolbar, the 'Add Charge' dialog box is expanded, showing fields for 'Amount', 'Fee Reason', 'Item Barcode', and 'Notes'. The 'Amount' field is empty. The 'Fee Reason' dropdown is set to 'Select one'. The 'Item Barcode' field has a 'Scan or enter item barcode' button and a 'FIND TOOL' button. The 'Notes' field is empty. At the bottom right of the dialog box, there are 'ADD CHARGE' and 'CANCEL' buttons.

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.

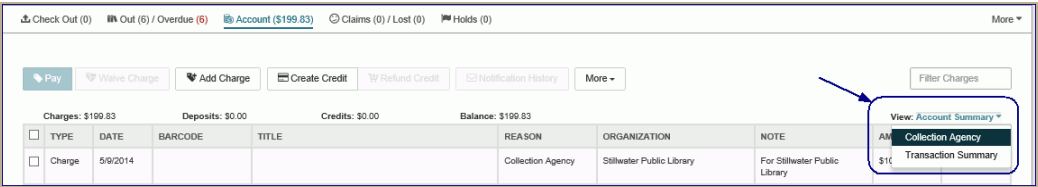
View a patron’s collection summary

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.

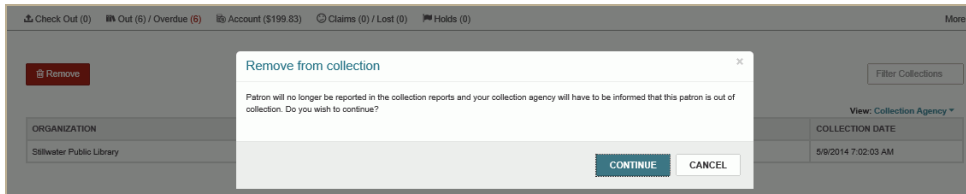


## Remove a patron account from collections

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.

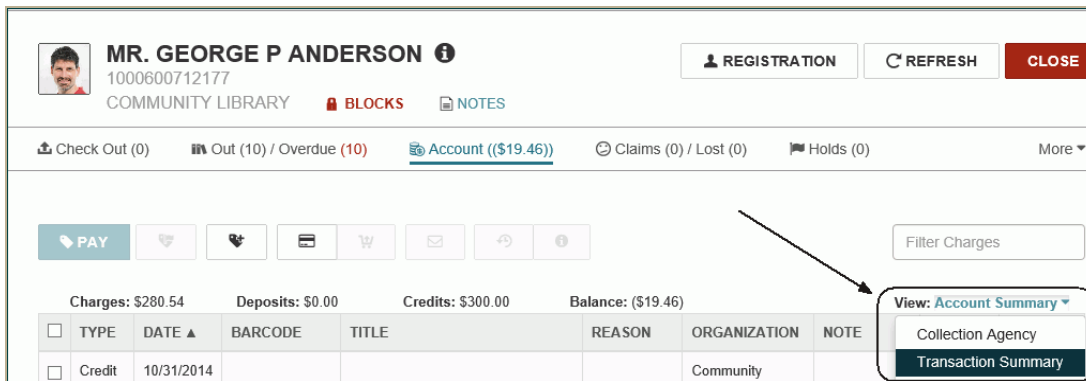
## View a patron's transaction summary

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**.



**MR. GEORGE P ANDERSON** ⓘ  
1000600712177  
COMMUNITY LIBRARY

REGISTRATION REFRESH CLOSE

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

PAY

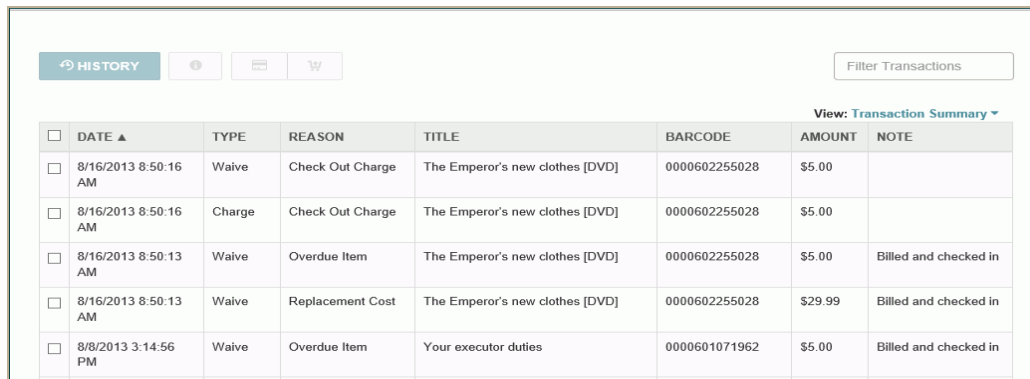
Charges: \$280.54 Deposits: \$0.00 Credits: \$300.00 Balance: (\$19.46)

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

Filter Charges

View: Account Summary ▾  
Collection Agency  
Transaction Summary

The Transaction Summary view opens.



HISTORY

Filter Transactions

View: Transaction Summary ▾

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

The patron's transaction history is displayed.


### Note:

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

## Claimed and Lost Items

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

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



**HAROLD T SMYTHE** ⓘ  
 12291954022100  
 COMMUNITY LIBRARY

REGISTRATION
 REFRESH
 CLOSE

BLOCKS
 NOTES

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

RESET CLAIM COUNT
 Filter Claims

Total Claims: 1
 Current Claims: 1
 Lost: 0

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

See also:

- "View estimated fines for claimed and lost items" on page 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.

**HAROLD T SMYTHE** ⓘ  
12291954022100  
COMMUNITY LIBRARY

REGISTRATION REFRESH CLOSE

Check Out (0) Out (0) / Overdue (0) Account ((\$4.50)) **Claims (1) / Lost (0)** Holds (0) More ▾

Reset Claim Count Estimate Fines Notification History Declare Lost 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

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

The Estimate Fines dialog box opens.

Estimated Fines of **\$5.00** based on return date of 6/10/2015 **SELECT DATE**

TITLE	Su	Mo	Tu	We	Th	Fr	Sa	ITEM STATUS	DUE DATE	FINE
The theatre of Tennessee Williams								Claim Never Had	9/9/2014	\$5.00
Estimated Fine Total:										\$5.00


CLOSE

5. To see fines based on a different return date click/tap the **SELECT DATE** button and select another date. The estimated fine amount changes.
6. Select **CLOSE** to close the dialog box.

## 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.



**HAROLD T SMYTHE** ⓘ  
 12291954022100  
 COMMUNITY LIBRARY

REGISTRATION  
 REFRESH  
 CLOSE

BLOCKS  
 NOTES

Check Out (0) Out (0) / Overdue (0) Account ((\$4.50)) **Claims (1) / Lost (0)** Holds (1) More ▾

Reset Claim Count  
 Estimate Fines  
 Notification History  
 Declare Lost  
 Filter Claims

Total Claims: 1 Current Claims: 1 Lost: 0

<input checked="" type="checkbox"/>	BARCODE	TITLE	CLAIM DATE	DESCRIPTION	DUE DATE
<input checked="" type="checkbox"/>	0000400580710	The theatre of Tennessee Williams	9/17/2014	Claim Never Had/Accruing	8/28/2014

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

Notification History

Title: The theatre of Tennessee Williams  
 Material Type: Book

NOTICE	METHOD	DATE	FROM	AMOUNT	STATUS
1st Overdue	Email	8/29/2014	COB		Email Completed

ITEM RECORD  
 CLOSE

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

The item record is displayed.

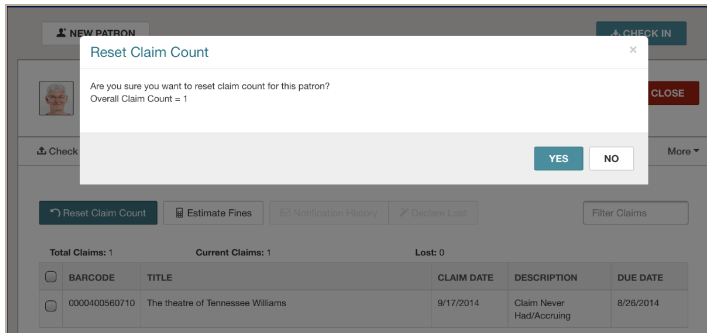
## Reset the claim count

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

To reset the count of claimed items for a patron:

1. Open the patron's record.
2. Go to the **Claims/Lost** view. See "Claimed and Lost Items" on page 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.


**ALEXANDRIA LEE REMEY** ⓘ  
 122919540926  
 COMMUNITY LIBRARY

REGISTRATION
 REFRESH
 CLOSE

BLOCKS
 NOTES

Check Out (0)
 Out (3) / Overdue (1)
 Account (\$4.60)
 Claims (1) / Lost (0)
 **Holds (5)**
 More ▼

New Hold
 Deny
 Ask Me Later
 Cancel
 Reactivate
 More ▼
 Filter Holds

<input type="checkbox"/>	AUTHOR ▼	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS	PICKUP BRANCH	QUEUE	HOLD UNTIL	GROUP
<input type="checkbox"/>		Hokum : an anthology of African-American humor	Book	817.08 Hok	6/12/2015	Pending	Community Library	1		
<input type="checkbox"/>		Fruitvale Station [videorecording]	Blu-ray Disc		11/7/2014	Out to patron	Community Library			
<input type="checkbox"/>	Akhitorskaya, Yelena.	Panic in a suitcase : a novel	Book	F	8/14/2014	Unclaimed	Community Library		8/22/2014	
<input type="checkbox"/>	García Márquez, Gabriel, 1927-2014	Love in the time of cholera	Book	Fict Gar	4/9/2015	Shipped	Duane Branch - Schenectady County Public Library	2		

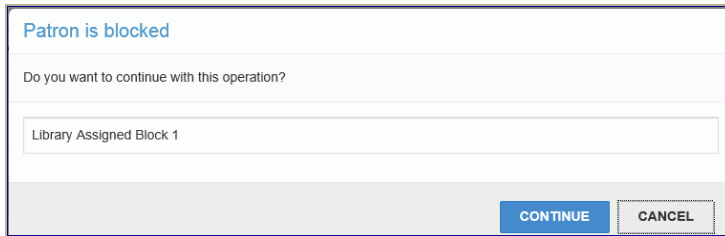
See also:

- "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**.



The screenshot shows a modal dialog box with a light gray border. At the top, the title 'Patron is blocked' is displayed in blue text. Below the title, the question 'Do you want to continue with this operation?' is shown in a smaller, gray font. Underneath this question is a text input field containing the text 'Library Assigned Block 1'. At the bottom of the dialog, there are two buttons: a blue button labeled 'CONTINUE' and a gray button labeled 'CANCEL'.

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



## Place a single hold request for a patron

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

To place a hold from a patron record:

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

The patron's holds are displayed.

The screenshot shows a patron record for ALEXANDRIA LEE REMEY. The page includes a header with the patron's name, ID, and library affiliation. Below this, there are tabs for Check Out, Out / Overdue, Account, Claims, and Holds. The Holds tab is selected, showing a list of holds. The list has columns for checkboxes, author, title, format, call number, activation date, status, pickup branch, queue, hold until, and group. There are also buttons for New Hold, Deny, Ask Me Later, Cancel, Reactivate, and a Filter Holds button.

<input type="checkbox"/>	AUTHOR ▼	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS	PICKUP BRANCH	QUEUE	HOLD UNTIL	GROUP
<input type="checkbox"/>		Hokum : an anthology of African-American humor	Book	817.08 Hok	6/12/2015	Pending	Community Library	1		
<input type="checkbox"/>		Fruitvale Station [videorecording]	Blu-ray Disc		11/7/2014	Out to patron	Community Library			
<input type="checkbox"/>	Akhitorskaya, Yelena.	Panic in a suitcase : a novel	Book	F	8/14/2014	Unclaimed	Community Library		8/22/2014	
<input type="checkbox"/>	García Márquez, Gabriel, 1927-2014	Love in the time of cholera	Book	Fict Gar	4/9/2015	Shipped	Duane Branch - Schenectady County Public Library	2		

3. Select **NEW HOLD**.

The area below the button expands.

The screenshot shows the 'New Hold' form expanded. It includes fields for Activation, Expiration, and Pickup. Below these are fields for Title, Author, Edition, Pages, Series, Call NO, Issue, Publisher, LCCN, Serial Copy, ISBN/ISSN, Format, Tracking Number, Barcode, and Date. There is a 'FIND TOOL' button and a 'PLACE HOLD' button.

Activation: 06/12/2015  
 Expiration: 6/27/2015  
 Pickup: Community Library

Buttons: PLACE HOLD, CANCEL

Fields:

- Title: Search for a title
- Author:
- Edition:
- Pages:
- Series:
- Call NO:
- Issue:
- Publisher:
- LCCN:
- Serial Copy:
- ISBN/ISSN:
- Format:
- Tracking Number:
- Barcode: Scan a barcode
- Date:

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

**Find Tool - Bibliographic Record**

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

When we were ✕ ★ 🔍 ☰

☐	Title	Author	Format	Li...	H...	Pub...	Call Number	Contr...	
<input checked="" type="checkbox"/>	When we were young : an album of stars.	Fortunato, Pat.	Book	1	0	1979	920 For	5800	⬆
	When we were very young	Milne, A. A. (Al...	Book	14	0	1924	J 821 Mil	13400	⬆

**Note:**

When you search for a title, the Find Tool opens with **Bibliographic Record** selected. If the patron wants a hold placed on a specific item, and your library allows item-specific holds, you can select **Item Record** in the Find Tool and select an item record on which to place the hold.

- Select the title to place a hold.
- 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**.

**Bibliographic Record**

**PLACE HOLD** **PAC** **REFRESH** **RESULTS** **CLOSE**

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

Control number: 990175 ☒ Display in PAC ☐ ILL  
Owner: QA-Quantum 5.0 (sys) ☐ Do not overlay ☐ Host  
Record status: Final

**Preview** **Items** **MARC** **Statistics** **Resources**

**Brief** **Full** **Availability** English **Community Library**

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

Publisher, Date: New York : Riverhead Books, a member of Penguin Group (USA) 2014.  
Web Site: [Cover image](#)  
Description: 458 pages : 24 cm

2014

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.

**Select a patron**

**PATRON**


☐ Anar Kamat

☐ Ms. Laura Izquierda

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

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.



**ANAR KAMAT** ⓘ  
 1001900146413  
 COMMUNITY LIBRARY

REGISTRATION  
 REFRESH  
 CLOSE

BLOCKS  
 NOTES

Check Out (0)   Out (2) / Overdue (0)   Account (\$0.00)   Claims (0) / Lost (0)   **Holds (4)**   More ▾

New Hold   Deny   Ask Me Later   Cancel   Reactivate   More ▾   Filter Holds

Activation  
06/13/2015

Expiration  
6/28/2015

Pickup  
Community Library ▾

PLACE HOLD   CANCEL

Title  
The swan gondola   ↵

FIND TOOL

Author  
Schaffert, Timothy.

Edition

Pages

Series

Call NO

Issue

Publisher

LCCN  
2013030317

Serial Copy

ISBN/ISSN  
9781594486098 (hbk.) :

Format  
Book

Tracking Number

Barcode  
Scan a barcode

Date  
2014

- 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

**Item Record**

**Euphoria : a novel**  
By King, Lily, author.

Barcode: 1229129665      Material type: Book      ☐ ILL  
 Call number:      Shelf location: None      ☐ eContent  
 Collection: Adult Fiction      Issue:      ☐ Non-circulating  
 Temp location:      Price: \$18.50      ☒ Display in PAC  
 Assigned branch: Community Library      Circulation status: In || 5/8/2015 12:14:47 PM      Bib control number: 1291283

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

Due date:	Current borrower:	Check-out date:
Renewals taken: 0	Loaning branch:	Original due date:
Renewals limit: 0	Held for:	
Renewal date:	Held at:	
<b>Last location</b>	<b>Last use</b>	<b>In-transit/Transferred</b>
Check-in at:	Borrower:	From:
Ck-in date:	Loaning branch:	Sent:
Wkstn/user:	Circ date:	To:
		Received:

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.

Select a patron

PATRON


☐ Anar Kamat

☐ Ms. Laura Izquierda

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

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

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



**ANAR KAMAT** ⓘ  
1001900146413  
COMMUNITY LIBRARY

REGISTRATION

CLOSE

Check Out (0)

Items (2)(0)

Account (\$0.00)

Claims/Lost (0/0)

Holds (2)

More ▾

NEW HOLD

Filter Holds

Activation

Expiration

Pickup

PLACE HOLD

CANCEL

Title

Drown

FIND TOOL

Author

Díaz, Junot, 1968-

Edition

Pages

Series

Call NO

Issue

Publisher

Riverhead Books,

LCCN

96018362

Serial Copy

ISBN/ISSN

1573220418 (hc) :

Format

Book

Tracking Number

Barcode

0000410237689

Date

1996

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

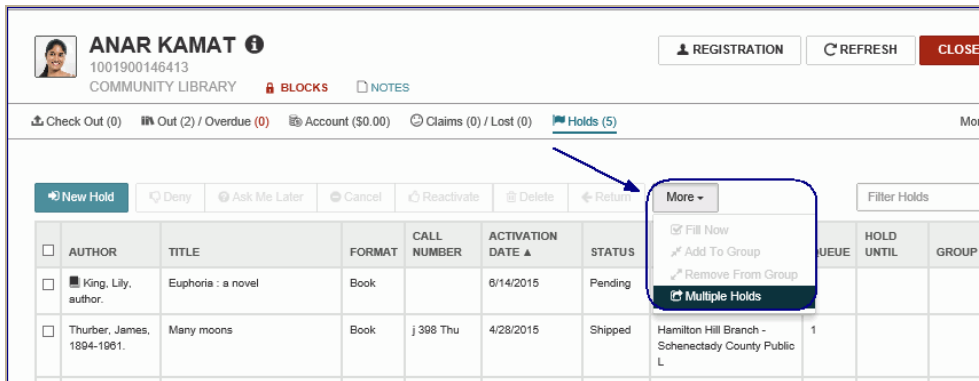
## Place multiple holds for the same patron

To place multiple holds at once for the same patron:

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

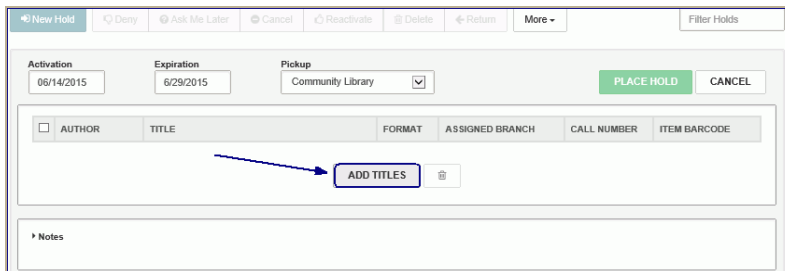
The patron's holds list is displayed.

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.

Find Tool - Bibliographic Record

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

gladwell, malcolm, 1963

* Title	Author	Format	Li...	H...	Pub...	Call Number	Contr...
<input checked="" type="checkbox"/> The tipping point : how little things can make...	Gladwell, Malc...	Book	19	2	2000	302 Gla	429422
The tipping point : [sound recording] how littl...	Gladwell, Malc...	Nonm...	2	0	2000	RC 302 Gla	481005
<input checked="" type="checkbox"/> Blink : the power of thinking without thinking	Gladwell, Malc...	Book	54	0	2005	153.4 Gla	540032
Blink : [sound recording] the power of thinkin...	Gladwell, Malc...	Nonm...	3	0	2005	RC 153.4 Gla	553995
Blink : [compact audio disc] the power of thin...	Gladwell, Malc...	Nonm...	10	0	2005	CD 153.4 Gla	615127
<input type="checkbox"/> The tipping point : [compact audio disc] (abrid...	Gladwell, Malc...	Nonm...	3	0	2005	CD 302 Gla	631098
The tipping point : how little things can make...	Gladwell, Malc...	Book	9	4	2002	302 Gla	632600
Blink : the power of thinking without thinking	Gladwell, Malc...	Book	6	0	2007	153.4 Gla	719858
<input checked="" type="checkbox"/> What the dog saw and other adventure stories	Gladwell, Malc...	Book	11	0	2009	814/.6	913136

Ready 11 result(s)

☐ Count Only

OPEN CANCEL

7. Select **OPEN**.

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

Activation: 8/14/2015 Expiration: 6/25/2015 Patron: Community Library

**PLACE HOLD** CANCEL

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

ADD TITLES 0

Notes

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 screenshot shows the patron record for ANAR KAMAT (ID: 1001900146413) at COMMUNITY LIBRARY. The 'Holds (8)' tab is selected. A toolbar contains buttons: New Hold, Deny, Ask Me Later, Cancel, Reactivate, Delete, Return, and More. The 'More' dropdown menu is open, showing options: Fill Now, Add To Group, Remove From Group, and Multiple Holds. Below the toolbar is a text input field for 'Scan/enter item barcode to fill now:'. At the bottom is a table of holds:

	AUTHOR ▼	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS	PICKUP BRANCH	QUEUE	HOLD UNTIL	GROUP
<input type="checkbox"/>	Gladwell, Malcolm, 1963-	What the dog saw and other adventure stories	Book		6/14/2015	Active	Community Library	1		
<input checked="" type="checkbox"/>	King, Lily, author	Euphoria : a novel	Book		6/14/2015	Pending	Community Library	1		

The area below the button bar expands.

This screenshot shows the expanded area below the toolbar. It features a text input field for 'Scan/enter item barcode to fill now:' and two buttons: OK and CANCEL.

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.

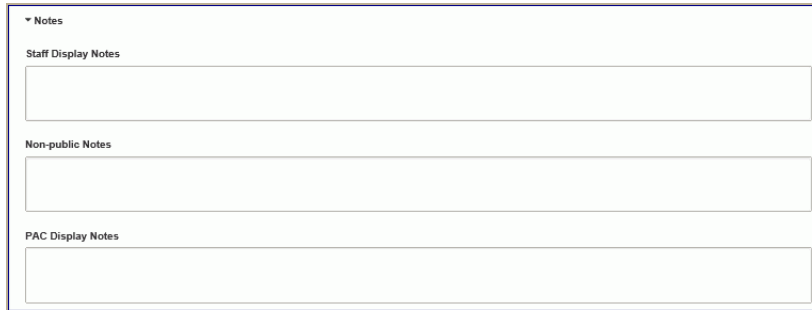
The hold details are displayed.

The screenshot shows the 'Modify a hold' form for a patron named ANAR KAMAT. The form is divided into several sections. At the top, there is a header with the patron's name, ID, and library name. Below this, there is a navigation bar with links to Check Out, Out, Overdue, Account, Claims, Lost, and Holds. The Holds section is selected, showing a list of holds. The form itself contains various fields for editing the hold details, including Request ID, Bib Control Number, Activation, Expiration, Pickup, Status, Request Date, Origin, Title, Barcode, Format, Author, ISBN/ISSN, Pages, Series, Edition, Issue, Publisher, Call NO, Serial Copy, Date, LCCN, Volume, and Constituent Title/Author. There are also buttons for New Hold, Deny, Ask Me Later, Cancel, Reactivate, Delete, Return, and Filter Holds.

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** dropdown 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.



▼ Notes

Staff Display Notes

Non-public Notes

PAC Display 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.


**ANAR KAMAT** ⓘ  
 1001900146413  
 COMMUNITY LIBRARY

REGISTRATION REFRESH CLOSE

BLOCKS NOTES

Check Out (0) Out (2) / Overdue (0) Account (\$0.00) Claims (0) / Lost (0) **Holds (8)** More ▾

New Hold Deny Ask Me Later Cancel **Reactivate** Delete Return More ▾

Filter Holds

<input type="checkbox"/>	AUTHOR ▾	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS	PICKUP BRANCH	QUEUE	HOLD UNTIL	GROUP
<input checked="" type="checkbox"/>	Gladwell, Malcolm, 1963-	Blink : the power of thinking without thinking	Book		6/14/2015	Cancelled	Community Library			

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**.


**ANAR KAMAT** ⓘ  
 1001900146413  
 COMMUNITY LIBRARY

REGISTRATION REFRESH CLOSE

BLOCKS NOTES

Check Out (0) Out (2) / Overdue (0) Account (\$0.00) Claims (0) / Lost (0) **Holds (8)** More ▾

New Hold Deny Ask Me Later **Cancel** Reactivate Delete Return More ▾ Filter Holds

<input type="checkbox"/>	AUTHOR ▾	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS	PICKUP BRANCH	QUEUE	HOLD UNTIL	GROUP
<input type="checkbox"/>	Gladwell, Malcolm, 1963-	What the dog saw and other adventure stories	Book		6/14/2015	Active	Community Library	1		
<input type="checkbox"/>	King, Lily, author.	Euphoria : a novel	Book		6/14/2015	Pending	Community Library	1		
<input checked="" type="checkbox"/>	Gladwell, Malcolm, 1963-	The tipping point : how little things can make a big difference	Book	302 Gla	6/14/2015	Pending	Community Library	3		

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

## Deny a hold

To deny a hold:

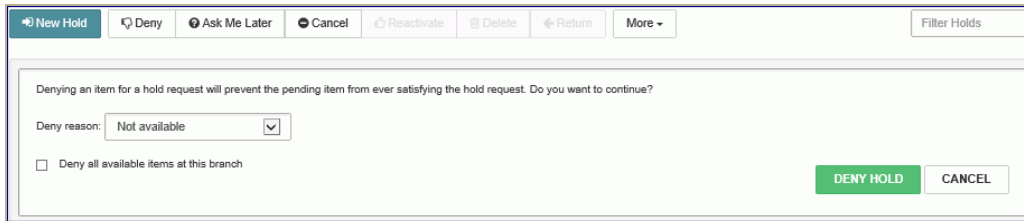
1. Open the patron's record.
2. Select **Holds**.

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**.

MR. GEORGE P ANDERSON 1000600712177  
COMMUNITY LIBRARY

Check Out (0) Out (6) / Overdue (6) Account (\$38.55) Claims (0) / Lost (0) Holds (3)

New Hold Deny Ask Me Later Cancel Reactivate Delete Return More Filter Holds

<input checked="" type="checkbox"/>	AUTHOR ▼	TITLE	FORMAT	CALL NUMBER	ACTIV DATE	STATUS	PICKUP BRANCH	QUEUE	HOLD UNTIL	GROUP
<input checked="" type="checkbox"/>	Herbert, Don.	Mr. Wizard's supermarket science	Book	J 507.2 H	6/15/2015	Pending	Community Library	1		
<input checked="" type="checkbox"/>	Renner, Al G.	Experimental fun with the yo-yo and other science projects	Book		6/15/2015	Active	Community Library	1		
<input checked="" type="checkbox"/>	Shalit, Nathan.	Science magic tricks.	Book	J 793.8 Sha	6/15/2015	Pending	Community Library	1		

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

<input type="checkbox"/>	AUTHOR ▼	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS	PICKUP BRANCH	QUEUE	HOLD UNTIL	GROUP
<input type="checkbox"/>	Herbert, Don.	Mr. Wizard's supermarket science	Book	J 507.2 H	6/15/2015	Pending	Community Library	1		A
<input type="checkbox"/>	Renner, Al G.	Experimental fun with the yo-yo and other science projects	Book		6/15/2015	Active	Community Library	1		A
<input type="checkbox"/>	Shalit, Nathan.	Science magic tricks.	Book	J 793.8 Sha	6/15/2015	Pending	Community Library	1		A

### 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.

**HAROLD T SMYTHE** ⓘ  
12291954022100  
COMMUNITY LIBRARY

REGISTRATION REFRESH CLOSE

Check Out (0) Out (0) / Overdue (0) Account ((\$4.50)) Claims (1) / Lost (0) **Holds (1)** More ▾

New Hold Deny Ask Me Later Cancel Reactivate Delete Return More ▾ Filter Holds

<input checked="" type="checkbox"/>	AUTHOR ▾	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS	PICKUP BRANCH	QUEUE	HOLD UNTIL	GROUP
<input checked="" type="checkbox"/>		Star wars, episode 1 : [videorecording] the phantom menace	Videotape	VC Fict Sta	8/15/2015	Pending	Community Library	1		

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.

**SARAH R ACOSTA** ⓘ  
1001900144202  
COMMUNITY LIBRARY

REGISTRATION REFRESH CLOSE

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

New Hold Deny Ask Me Later Cancel Reactivate **Delete** Return More ▾ Filter Holds

	AUTHOR ▾	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS	PICKUP BRANCH	QUEUE	HOLD UNTIL	GROUP
<input checked="" type="checkbox"/>		Pluto : New Horizons for a lost horizon : astronomy, astrology, mythology	Book		3/24/2015	Out to patron	Community Library			

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.

The screenshot shows the patron's hold list for ALEXANDRIA LEE REMEY. The interface includes a header with the patron's name, ID (122919540926), and library (COMMUNITY LIBRARY). There are buttons for REGISTRATION, REFRESH, and CLOSE. Below the header, a navigation bar shows various account statuses: Check Out (0), Out (3) / Overdue (1), Account (\$4.60), Claims (1) / Lost (0), and Holds (5). The main area displays a table of holds with columns: AUTHOR, TITLE, FORMAT, CALL NUMBER, ACTIVATION DATE, STATUS, PICKUP BRANCH, QUEUE, HOLD UNTIL, and GROUP. The table lists four holds, including 'Hokum : an anthology of African-American humor' and 'Fruitvale Station [videorecording]'. Action buttons like 'New Hold', 'Deny', 'Ask Me Later', 'Cancel', 'Reactivate', and 'More' are visible above the table.

	AUTHOR ▼	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS	PICKUP BRANCH	QUEUE	HOLD UNTIL	GROUP
<input type="checkbox"/>		Hokum : an anthology of African-American humor	Book	817.08 Hok	6/12/2015	Pending	Community Library	1		
<input type="checkbox"/>		Fruitvale Station [videorecording]	Blu-ray Disc		11/7/2014	Out to patron	Community Library			
<input type="checkbox"/>	Akhfiorakaya, Yelena.	Panic in a suitcase : a novel	Book	F	8/14/2014	Unclaimed	Community Library		8/22/2014	
<input type="checkbox"/>	García Márquez, Gabriel, 1927-2014	Love in the time of cholera	Book	Fict Gar	4/9/2015	Shipped	Duane Branch - Schenectady County Public Library	2		

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

The held title's details are displayed.

The screenshot shows the detailed view of a hold request. It includes fields for Request ID (841324), Bib Control Number (644573), Activation date (6/12/2015), and Expiration date (6/27/2015). There are buttons for SAVE and CLOSE. The Pickup location is set to Community Library. The Status is Pending 6/12/2015. The Request Date is 6/12/2015. The Origin is Library. The Title is 'Hokum : an anthology of African-American humor'. The Format is Book. The Author is 'Hokum : an anthology of African-American humor'. The ISBN/ISSN is 9781582344348. There are also checkboxes for 'This item only' and 'Borrow By Mail', and a field for Tracking Number.

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
044573	0000203774058	In	Saratoga Springs Public Library	
044573	0000413100371	In	Schenectady Branch - Central	

Request History

DATE	STATUS	BARCODE	BRANCH	USER	ACTION
0/14/2015	Pending	0000203774058	Saratoga Springs Public Library	PolarisExec	Primary RTF processing placed request on pick list - primary RTF routing cycle completed
0/13/2015	Pending	0000413100371	Schenectady Branch - Central	PolarisExec	Primary RTF processing placed request on pick list
0/12/2015	Pending	0000203774058	Saratoga Springs Public Library	laura.peer	Primary RTF processing placed request on pick list
0/12/2015	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.




**NASIR AZIZ** ⓘ  
1229195408668  
COMMUNITY LIBRARY

REGISTRATION

REFRESH

CLOSE

 **BLOCKS**

NOTES

Check Out (0)

Out (0) / Overdue (0)

Account (\$3.10)

Claims (0) / Lost (0)

Holds (0)

Blocks ▾

Add Block

Delete

Filter Blocks

<input type="checkbox"/>	BLOCK DESCRIPTION
<input type="checkbox"/>	Patron owes money. Amount due: \$3.10
<input type="checkbox"/>	Patron has unread messages

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.

Check Out (0) Out (0) / Overdue (0) Account ((\$4.50)) Claims (1) / Lost (0) Holds (0) Blocks

ADD BLOCK [trashcan icon] Filter Items


<input type="checkbox"/>	BLOCK DESCRIPTION
<input checked="" type="checkbox"/>	Free text block.
<input type="checkbox"/>	Library Assigned Block 1

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**.



ALEXANDRIA LEE REMEY ⓘ

122919540926

COMMUNITY LIBRARY

REGISTRATION

REFRESH

CLOSE

Check Out (0)

Out (2) / Overdue (0)

Account (\$0.00)

Claims (1) / Lost (0)

Holds (10)

Notes ▾

NON BLOCKING NOTES ⓘ

This is a non-blocking note.

BLOCKING NOTES ⓘ

This is a blocking note.

UPDATE 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.

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

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

The notes are updated.



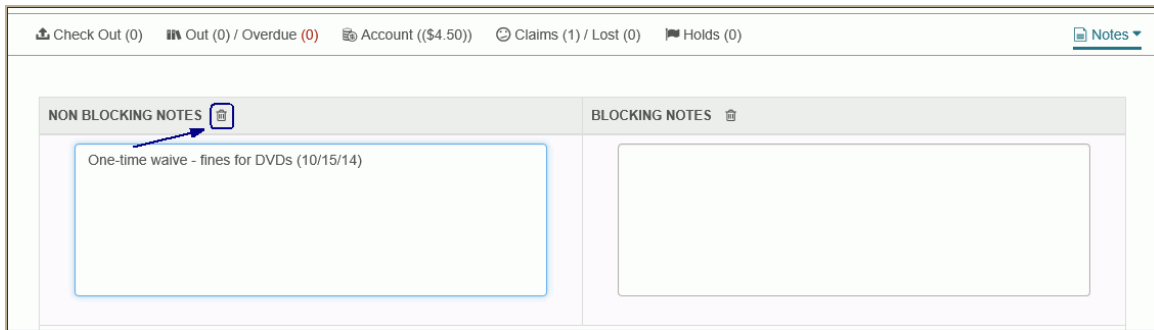
## Delete a patron note

To delete a patron note:

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

The Notes view opens.

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




The note is deleted.

## Reading History

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

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



**ALEXANDRIA LEE REMEY** ⓘ  
 122919540926  
 COMMUNITY LIBRARY

REGISTRATION
 REFRESH
 CLOSE

BLOCKS
 NOTES

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

Reading History

REMOVE

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

Filter
 

- Blocks
- Notes
- Reading History
- Associations
- Notices
- ILL
- Messages

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**.



**ALEXANDRIA LEE REMEY** ⓘ  
 122919540926  
 COMMUNITY LIBRARY

REGISTRATION  
 REFRESH  
 CLOSE

BLOCKS  
 NOTES

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

Reading History ▼

REMOVE

Filter History


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

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



## Notices

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



**ALEXANDRIA LEE REMEY** ⓘ  
 122919540926  
 COMMUNITY LIBRARY

REGISTRATION
 REFRESH
 CLOSE

BLOCKS
 NOTES

Check Out (0)
 Out (3) / Overdue (1)
 Account (\$4.60)
 Claims (1) / Lost (0)
 Holds (5)

TITLE	TYPE	DATE ▲	METHOD
Far from the sea	Almost overdue/Auto-renew reminder	6/14/2015	Email
Breath, eyes, memory [large print]	1st Overdue	4/10/2015	Email
Fruitvale Station [videorecording]	1st Overdue	4/3/2015	Email
Zaishi chigai hōken teppai mondai : chigai hōken ni kansuru kenkyū	1st Overdue	2/2/2014	Email

Notices ▼
 Reading History
 Associations
 Notices
 ILL
 Messages
 Blocks
 Notes

See also:

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

## View an item's notification history

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

1. Open the patron's record.
2. Select **More** | Notices to open the notices view.

The Notices view is displayed.

TITLE	TYPE	DATE	METHOD
Far from the sea	Almost overdue/Auto-renew reminder	6/14/2015	Email
Breath, eyes, memory [large print]	1st Overdue	4/10/2015	Email
Fruitvale Station [videorecording]	1st Overdue	4/3/2015	Email
Zaishi chigai hōken teppai mondai : chigai hōken ni kansuru kenkyū	1st Overdue	2/2/2014	Email

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

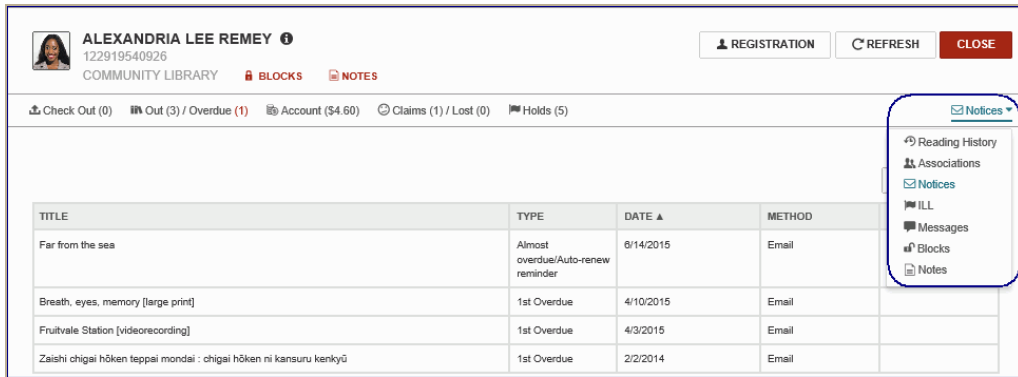
NOTICE	METHOD	DATE	FROM	AMOUNT	STATUS
Almost overdue/Auto-renew reminder	Email	9/6/2014	COB		Email Completed
1st Overdue	Email	9/12/2014	COB		Email Completed

## 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.**

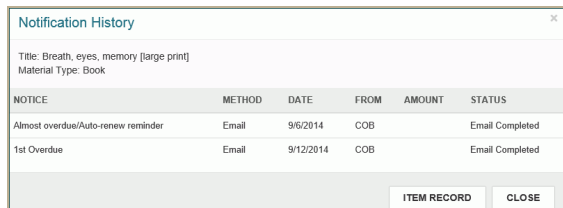
The patron's notification history is displayed.



TITLE	TYPE	DATE ▲	METHOD
Far from the sea	Almost overdue/Auto-renew reminder	6/14/2015	Email
Breath, eyes, memory [large print]	1st Overdue	4/10/2015	Email
Fruitvale Station [videorecording]	1st Overdue	4/3/2015	Email
Zaishi chigai hōken mondai : chigai hōken ni kansuru kenkyū	1st Overdue	2/2/2014	Email

3. Select a notice in the list.

The Notification History for the item is displayed.



NOTICE	METHOD	DATE	FROM	AMOUNT	STATUS
Almost overdue/Auto-renew reminder	Email	9/6/2014	COB		Email Completed
1st Overdue	Email	9/12/2014	COB		Email Completed

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**.

The screenshot displays the Polaris Leap interface for a patron named NASIR AZIZ (ID: 1229195408668) from the COMMUNITY LIBRARY. The interface includes a header with a profile picture, name, and ID, along with buttons for REGISTRATION, REFRESH, and CLOSE. Below the header, there are tabs for BLOCKS and NOTES. A status bar shows various account metrics: Check Out (0), Out (0) / Overdue (0), Account (\$3.10), Claims (0) / Lost (0), and Holds (0). A Messages dropdown menu is open, showing options like Reading History, Associations, Notices, ILL, Messages (selected), Blocks, and Notes. Below the status bar, there are buttons for New Message, Delete, and Properties. A table lists messages, with one message visible: "Please stop by the circulation desk to pick up your class materials." The table has columns for a checkbox, the message text, and a "PATRON HAS" status, which is currently "No".

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

See also:

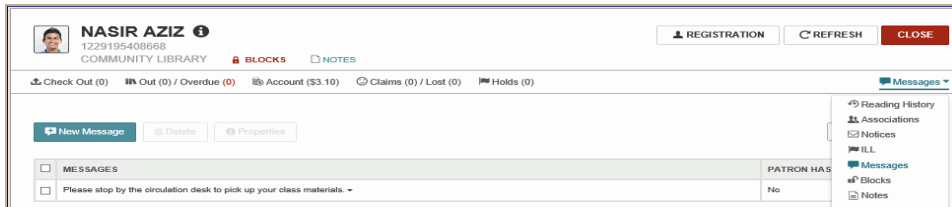
- "Add a patron message " on page 137
- "Delete a patron message" on page 138



## Add a patron message

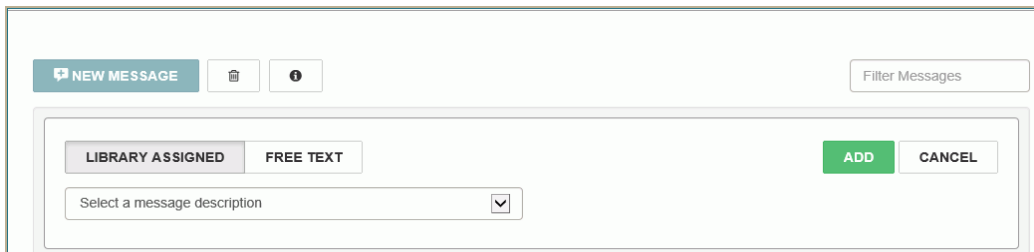
To add a patron message:

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.



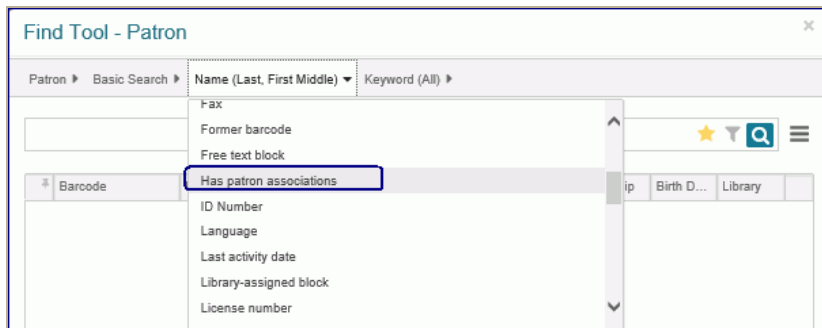
4. Select the message you want to delete, and select **Delete**.

The patron message is deleted.

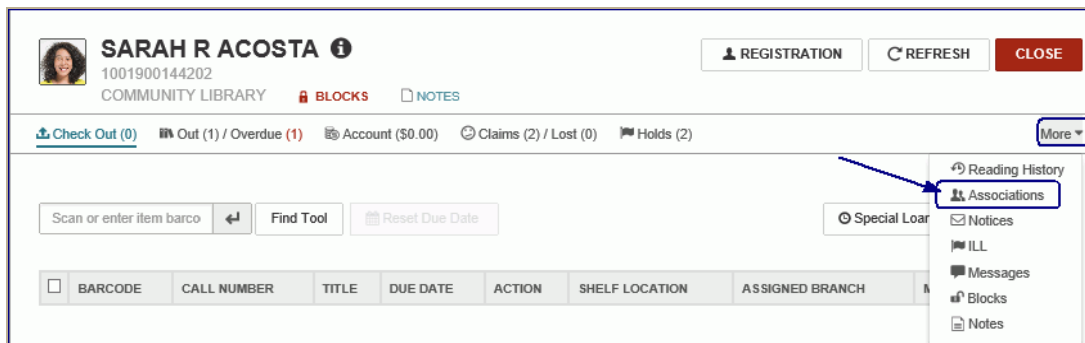
## Patron Associations

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.



**SARAH R ACOSTA** ⓘ  
 1001900144202  
 COMMUNITY LIBRARY

REGISTRATION  
 REFRESH  
 CLOSE

BLOCKS

NOTES

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

Associations ▼

New Association   Edit   Delete   Block   Unblock   Allow   Disallow   Filter Associations

<input type="checkbox"/>	PATRON BARCODE	PATRON NAME	BRANCH	NOTE	BLOCK ME	ALLOW ME
<input type="checkbox"/>	1001900122877	Rebekah E Falotico	Community Library			Yes
<input type="checkbox"/>	1004300052888	Elena C Acosta	Amsterdam Free Library			Yes
<input type="checkbox"/>	1001900123289	Genie R Ozolins	Community Library		Yes	Yes
<input type="checkbox"/>	1001900162725	Brandon S Surento	Community Library			Yes

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.

New Association   Edit   Delete   Block   Unblock   Allow   Disallow   Filter Associations

<input type="checkbox"/>	PATRON BARCODE	PATRON NAME	BRANCH	NOTE	BLOCK ME	ALLOW ME
<input type="checkbox"/>	1001900122877	Rebekah E Falotico	Community Library			Yes
<input type="checkbox"/>	1004300052888	Elena C Acosta	Amsterdam Free Library			Yes
<input checked="" type="checkbox"/>	1001900123289	Genie R Ozolins	Community Library		Yes	Yes

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.

PATRON BARCODE	PATRON NAME	BRANCH	NOTE	BLOCK ME	ALLOW ME
1001900122877	Rebekah E Falotico	Community Library			Yes
1004300052888	Elena C Acosta	Amsterdam Free Library			Yes
1001900123289	Genie R Ozolins	Community Library		Yes	Yes
1001900182725	Brandon S Surento	Community Library			Yes

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**.

The screenshot shows the 'Associations' view for a patron named Sarah R Acosta. At the top, there's a header with the patron's name, ID (1001900144202), and library (COMMUNITY LIBRARY). Below this, a summary bar shows various statistics: Check Out (0), Out (1) / Overdue (1), Account (\$0.00), Claims (2) / Lost (0), and Holds (1). The 'Associations' tab is selected. Below the summary bar, there's a toolbar with buttons: New Association, Edit, Delete, Block, Unblock, Allow, Disallow, and a Filter Associations button. The main area contains a table with two rows of associations.

<input type="checkbox"/>	PATRON BARCODE	PATRON NAME	BRANCH	NOTE	BLOCK ME	ALLOW ME
<input type="checkbox"/>	1004300052868	Elena C Acosta	Amsterdam Free Library		Yes	
<input type="checkbox"/>	1001900122877	Rebekah E Falotico	Community Library			Yes

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.

The screenshot shows the 'Check In' interface of the Leap library system. The top navigation bar includes the 'leap' logo, a search bar, and user details like 'laura.peer (COB)'. Below this, there are buttons for 'NEW PATRON' and 'CHECK IN'. The main 'Check In' section features a barcode input field with a cursor, a 'FIND TOOL' button, 'Free Days' and date fields, and 'CLOSE' and 'CLEAR LIST' buttons. At the bottom, there is a table header with columns: BARCODE, DUE DATE, STATUS, COMMENT, TITLE, MATERIAL TYPE, SHELF LOCATION, CALL NUMBER, PATRON NAME, and ASSIGNED BRANCH.

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

**Note:**

You can also select **FIND TOOL** and use the Find Tool to search for an item to check in. See "Check in from the Item Record" on page 145.

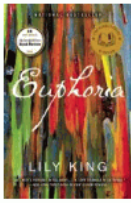
## Check in from the Item Record

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.

### Item Record

PLACE HOLD
CHECK IN
REFRESH
RESULTS
CLOSE



**Euphoria : a novel**  
By King, Lily, author.

Barcode: 1229195488      Material type: Book      ☐ ILL

Call number:      Shelf location: None      ☐ eContent

Collection: Adult Fiction      Issue:      ☐ Non-circulating

Temp location:      Price: \$18.50      ☒ Display in PAC

Assigned branch: Community Library      Circulation status: Out || 5/8/2015 12:20:26 PM      Bib control number: 1291283

Circulation
Controls
Blocks and Notes
History

Due date: 5/15/2015 11:59:59 PM  
Renewals taken: 0  
Renewals limit: 0  
Renewal date:

Current borrower: 12291954007  
Loaning branch: Community Library  
Held for:  
Held at:

Check-out date: 5/8/2015 12:20:26 PM  
Original due date: 5/15/2015 11:59:59 PM

Last location  
Check-in at: Community Library  
Ck-in date: 5/8/2015 12:19:34 PM  
Wkstn/user: Peer/laura.peer

Last use  
Borrower: 12291954007  
Loaning branch: Community Library  
Circ date: 5/8/2015 12:20:26 PM

In-transit/Transferred  
From:  
Sent:  
To:  
Received:

A message box is displayed.

Check in item

This item will be checked in.

CONTINUE
CANCEL

- 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.

The screenshot shows the Leap library system interface. At the top, there's a dark teal header with the 'leap' logo, a search bar with the text 'Scan or search', and a 'FIND' button. To the right of the header are links for 'Utilities', 'Help', and a user profile 'laura.peer (COB)'. Below the header is a light gray bar with a 'NEW PATRON' button and a 'CHECK IN' button. The main content area is titled 'Check In' and contains a barcode input field, a 'FIND TOOL' button, 'Free Days' (0) and 'Due Date' (5/15/2015) fields, and 'CLOSE' and 'CLEAR LIST' buttons. At the bottom, there's a table header with columns: BARCODE, DUE DATE, STATUS, COMMENT, TITLE, MATERIAL TYPE, SHELF LOCATION, CALL NUMBER, PATRON NAME, and ASSIGNED BRANCH.

2. Scan each item's barcode.

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

**Check In**

Scan or enter item barcode  **FIND TOOL** Free Days:   **RESOLVE CHARGES** **CLEAR LIST** **CLOSE**

BARCODE	DUE DATE	STATUS	COMMENT	TITLE	MATERIAL TYPE	SHELF LOCATION	CALL NUMBER	PATRON NAME	ASSIGNED BRANCH
000101432037	5/13/2015	Out -> In-Transit	To Lake Pleasant Public Library, Town of	Under the Tuscan sun : [sound recording] at home in Italy	Audiobook		RC 914 .B5 May	Mr. Mark M Swota	Lake Pleasant Public Library, Town of
36878000002319	4/5/2015	Out -> In-Transit	To Mary Cay's Branch	The art of calligraphy: a practical guide.	Book		745.6 A38	Mrs. Connie Colson	Schenectady Branch - Central
0004400197200	5/29/2015	Out -> In-Transit	To Frothingham Free Library (Fonda)	Water for elephants [large print]	Book		LT Fict 99	Miss Rachael A Gaal	Frothingham Free Library (Fonda)
0001000035103	7/23/2015	Out -> In-Transit	To Canajoharie Library	One hundred years of solitude	Book		Fict Gar	Anar Kamat	Canajoharie Library
3364100100000751		In-Transit -> In-Transit	To Southern Adirondack Library System	The Vietnamese gulag	Book		959.704 D		Southern Adirondack Library System
0000100368505		In-Transit -> In-Transit	To Schenectady Branch - Central	Stars	Book		J 623.8 3		Galway Public Library

**Pay New** **Waive New** **Charge New** **Manage All Fines** **Hide**

<input type="checkbox"/>	PATRON NAME	BARCODE	NEW FINES	OLD FINES
<input type="checkbox"/>	Mr. Mark M Swota	1000201342622	\$3.30	\$0.00
<input type="checkbox"/>	Mrs. Connie Colson	1000401539316	\$5.00	\$12.90
<input type="checkbox"/>	Miss Rachael A Gaal	1000402454762	\$2.04	\$6.60

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

The action buttons to manage charges become active.

**Pay New** **Waive New** **Charge New** **Manage All Fines** **Hide**

<input type="checkbox"/>	PATRON NAME	BARCODE	NEW FINES	OLD FINES
<input checked="" type="checkbox"/>	Mr. Mark M Swota	1000201342622	\$3.30	\$0.00
<input type="checkbox"/>	Mrs. Connie Colson	1000401539316	\$5.00	\$12.90
<input type="checkbox"/>	Miss Rachael A Gaal	1000402454762	\$2.04	\$6.60

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.

Item Barcode: 0000602255028		Title: The Emperor's new clothes [DVD]	
Due Date: 8/23/2013		Billed Date: 9/10/2013 <input checked="" type="checkbox"/> Billed	
Patron Name: Mr. George P Anderson		Patron Barcode: 1000600712177	
	Replacement:	Processing:	Overdue:
Charge:	\$29.99	\$0.00	\$5.00
Paid:	\$29.99	\$0.00	\$0.00
Waived:	\$0.00	\$0.00	\$0.00
Amount due:	\$0.00	\$0.00	\$5.00
Amount:	<input type="text" value="\$29.99"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$5.00"/>
Actions:	<input type="text" value=""/>	Leave as is <input type="text" value=""/>	<input type="text" value=""/>
Payment method:	<input type="text" value="Cash"/>	<b>Total Fine: \$34.99</b>	

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.

The screenshot shows the Polaris Leap interface for a patron's record. The header displays the patron's name "NASIR AZIZ", ID "1229195408668", and "COMMUNITY LIBRARY". There are buttons for "REGISTRATION", "REFRESH", and "CLOSE". Below the header, there is a toolbar with options: "Check Out (0)", "Out (0) / Overdue (0)", "Account (\$3.10)", "Claims (0) / Lost (0)", and "Holds (0)". At the bottom, there is a search bar with a "Find Tool" button and a "Special Loan" button.

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 select **CONTINUE** (if you have the appropriate permissions) or **CANCEL**.

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

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.

Scan or enter item barcode 

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.


**NASIR AZIZ** ⓘ  
 1229195408668  
 COMMUNITY LIBRARY

REGISTRATION REFRESH COMPLETE

BLOCKS NOTES

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

Scan or enter item barcode  FIND TOOL  RESET SPECIAL...

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

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

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

**Note:**

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

Open the patron's record.

The Check Out view is displayed.

1. Select **SPECIAL LOAN**.

The area below the button expands.


The screenshot shows the Polaris Leap 1.0 SP1 interface for a patron named NASIR AZIZ. The interface includes a header with the patron's name, ID (1229195408668), and library name (COMMUNITY LIBRARY). Below the header are tabs for 'Check Out (0)', 'Out (0) / Overdue (0)', 'Account (\$3.10)', 'Claims (0) / Lost (0)', and 'Holds (0)'. The 'Check Out (0)' tab is active. In the 'Check Out' section, there is a 'Special Loan' button. Below this button, a calendar for June 2015 is displayed on the left, and a 'Loan period' section is on the right. The 'Loan period' section has a text input box, a dropdown menu, and two radio button options: 'Apply to next item only' (selected) and 'Apply to all items for this patron'. At the bottom right of the 'Special Loan' section are 'OK' and 'CANCEL' buttons.

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**.



**ALEXANDRIA LEE REMEY** ⓘ  
 122919540926  
 COMMUNITY LIBRARY

REGISTRATION  
 REFRESH  
 COMPLETE

BLOCKS  
 NOTES

[Check Out \(1\)](#)
[Out \(4\) / Overdue \(1\)](#)
[Account \(\\$4.60\)](#)
[Claims \(1\) / Lost \(0\)](#)
[Holds \(5\)](#)
[More](#)

	BARCODE	CALL NUMBER	TITLE	DUE DATE	ACTION	SHELF LOCATION	ASSIGNED BRANCH	MATERIAL TYPE
<input checked="" type="checkbox"/>	0000409568797	574.5 Ago	Thieves, deceivers, and killers : tales of chemistry in nature	7/31/2015	Check Out		Schenectady Branch - Central	Book

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**.

**ANAR KAMAT** ⓘ  
1001900146413  
COMMUNITY LIBRARY

REGISTRATION REFRESH CLOSE

Check Out (0) Out (2) / Overdue (1) Account (\$0.00) Claims (0) / Lost (0) Holds (4) More ▾

Renew Special Renew Reset Due Date Estimate Fines Make A Claim Declare Lost More ▾ Filter Items

<input type="checkbox"/>	TYPE	DUE ON ▼	BARCODE	TITLE	AUTHOR	RENEWALS LEFT	CALL NO.	BRANCH
<input type="checkbox"/>	Video	10/18/2014	0000410139414	The Year of living dangerously [DVD]		0 of 0	DVD Fict Yea	Schenectady Branch - Ce...
<input type="checkbox"/>	Book	7/23/2015	0001000035103	One hundred years of solitude	García Márquez, ...	0 of 5	Fict Gar	Catsajoharie Library

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:	<input type="text" value="\$1.00"/>

- If you want to change the amount that is paid, waived, or charged, modify the amount in the **Charge** box.
- 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:	<input type="text" value="\$1.00"/>
Method:	<input type="text" value="Cash"/> ▼
Note:	<input type="text"/>

- 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.

Circulation Controls Blocks and Notes History						
DATE	ASSIGNED BRANCH	STATUS	ACTION	LOCATION	USER/WKS	PATRONID
2/17/2015 12:04:49 PM	Schenectady Branch - Central	In -> Out	Checked out by associated patron	Community Library	laura.peer/Peer-W8	208972
11/25/2013 3:44:29 PM	Schenectady Branch - Central	In	Created via Circulation	Schenectady Branch - Central	Phelps/Phelps-W8	

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

Request History					
DATE	STATUS	BARCODE	BRANCH	USER	ACTION
2/17/2015	Out to patron	test112513	Schenectady Branch - Central	laura.peer	Request satisfied by associated patron

## 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.

Quick-circ

A quick-circ item barcode has been detected. Please specify the number of items you are checking out.

Enter the number of items:  X

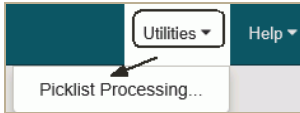
CONTINUE CANCEL



## 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.

### Picklist

CLOSE

Pending Located

Branch: Stillwater Public Library





LOCATED
ASK ME LATER
MISSING
REFRESH
DENY
Filter requests

Total items | 3 total

<input type="checkbox"/>	COLLECTION	SHELF LOCATION	CALL NUMBER	AUTHOR	TITLE	FORMAT	ITEM BARCODE
<input checked="" type="checkbox"/>	Adult Nonfiction		636.753 Mar	Martin, Peter, 1940-	A dog called Perth : the true story of a beagle	Book	0003300176983
<input type="checkbox"/>	Children's Fiction		JE Fict Ric	Richter, Alice Numeroff.	You can't put braces on spaces	Book	0003300134271
<input type="checkbox"/>	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
	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 <b>Located</b> at the top of the page.
	The hold request is removed from the pending list, and it moves to the next step in the Request to Fill (RTF) process.
	The item is set to Missing.
	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.

### Picklist

CLOSE

[Pending](#)
[Located](#)

Branch:

LOCATED
ASK ME LATER
MISSING
REFRESH
DENY

Filtered items | 2 of 10 total

<input type="checkbox"/>	COLLECTION	SHELF LOCATION	CALL NUMBER	AUTHOR	TITLE	FORMAT	ITEM BARCODE
<input type="checkbox"/>	Adult Nonfiction		636.7 Eok	Eckhardt, Linda West, 1939-	The dog ate it : cooking for yourself and your four-legged friends	Book	0000203925383
<input type="checkbox"/>	Children's Nonfiction		J 635.21 Wat	Watts, Barrie.	Potato	Book	0000202094829

## 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**.

### Picklist

CLOSE

Pending Located

Branch: Stillwater Public Library

LOCATED
ASK ME LATER
MISSING
REFRESH
DENY
Filter requests

Total items | 3 total

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

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.

### Picklist

CLOSE

Pending
Located

Branch: Stillwater Public Library

RETURN
REFRESH
Filter requests

Total items | 1 total

<input type="checkbox"/>	COLLECTION	SHELF LOCATION	CALL NUMBER	AUTHOR	TITLE	FORMAT	ITEM BARCODE
<input type="checkbox"/>	Adult Nonfiction		636.753 Mar	Martin, Peter, 1940-	A dog called Perth : the true story of a beagle	Book	0003300176983

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.

**Picklist** CLOSE

Pending Located Branch: Stillwater Public Library ▼

Total items | 3 total

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

2. Select **DENY**.

A dialog box opens.

**Deny Item for Hold Request** ✕

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

Reason:

Not available ▼

OK CANCEL

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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