LEAP MANUAL

An overview of the public services/circulation desk functions in Polaris Leap.

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1. OVERVIEW

Signing in to Polaris Leap

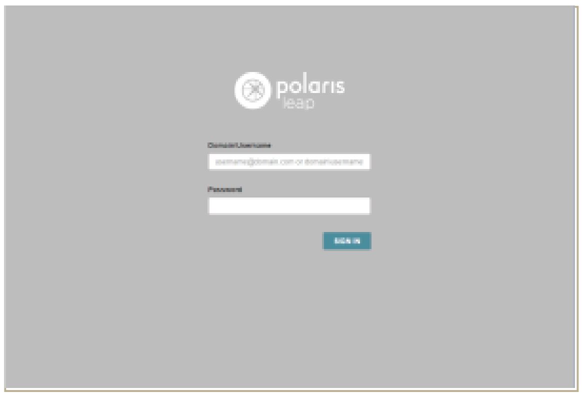
When you sign in to Leap the first time, you enter your domain, user name, and password. Another dialog box opens where you select your branch and workstation. After signing in the first time, you only need to enter your domain, username and password; your branch and workstation are selected automatically.

> **Important:**
> Your username cannot contain spaces.

To sign in to Polaris Leap:

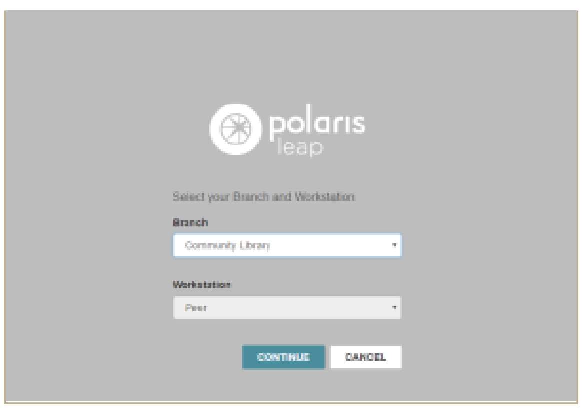
1. Using your favourite web browser, visit:
   https://leap.tracpac.ab.ca

   The sign in page opens.



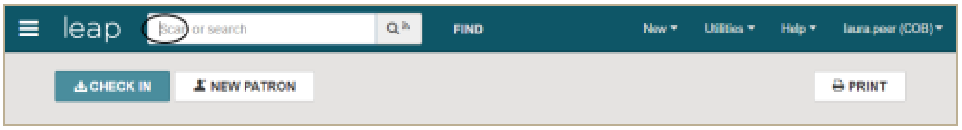
2. Enter **pls\yourpolarisusername** in the **Domain\Username** box.
3. Enter your Polaris password in the **Password** box.
4. Select **SIGN IN**.

   Another page opens where you select your branch and workstation.



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

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



Notes:

If RFID has been enabled for Leap, the RFID indicator appears on the search button .
If you are using Leap on an iPad or another tablet, the **PRINT** button does not appear.

You are here: Polaris Leap Overview > Leap User Interface

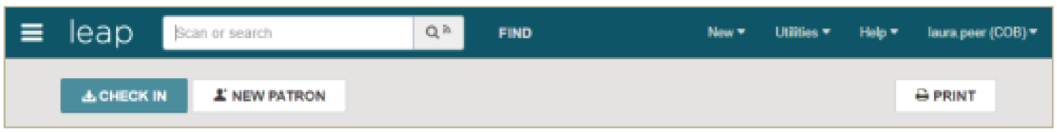
Leap User Interface

This section describes the general user interface (UI) elements that are available throughout Leap in the application's header and workforms.

> **Note:**
> The procedures in the Leap documentation use **click** as the action (click with the mouse button), but if you are using a touch screen, the action is **tap** (tap on the screen).

Leap Header

The Leap header appears when you log into Leap and remains visible throughout the application.



The Leap header includes:

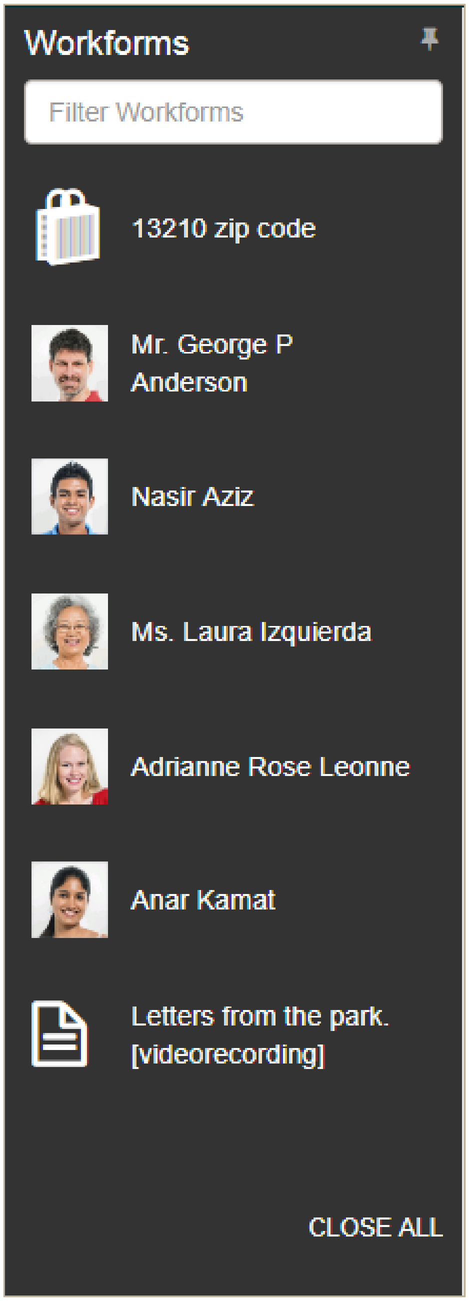
- Workforms Tracker
- Quick Search Box
- Find Tool
- New Menu
- Utilities Menu
- Help Menu
- User Menu

Workforms Tracker

To open the Workforms tracker, click the slide-out (hamburger) button.

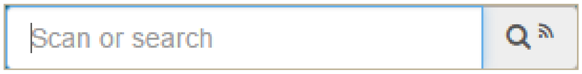
The Workforms tracker displays the open workforms. You can pin the Workforms tracker by selecting the pushpin icon, filter the list by typing in the **Filter Workforms** box, or close all the workforms by selecting **CLOSE ALL**. When you log out of Leap and then sign back in, the tracker remains in the same position (pinned or unpinned) as in your previous session.

> **Note:**
> The pushpin icon may not appear when viewing Leap on a narrow screen or window.



Quick Search Box

When you sign in to the Leap application, the cursor appears in the quick search box where you can scan a patron or item barcode, or enter search criteria to find bibliographic or patron records.



If RFID has been enabled for the workstation, the search button includes an RFID icon.

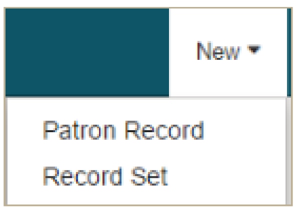
Find Tool

When you click 

in the Leap header, the Find Tool opens where you can search for records and record sets.

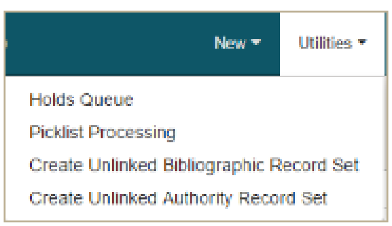
New Menu

The New menu includes options for creating a new patron record or record set.



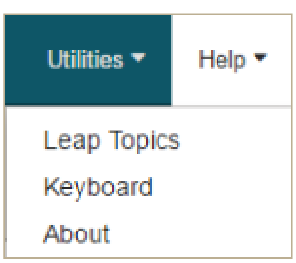
Utilities Menu

The Utilities menu includes options for opening the Holds Queue or Picklist, and options to create unlinked bibliographic or authority record sets.



Help Menu

Click **Help** to open the Help menu, and click **Leap Topics** to open Leap online Help, **Keyboard** to open a list of keyboard shortcuts, or **About** to open the About Leap window.

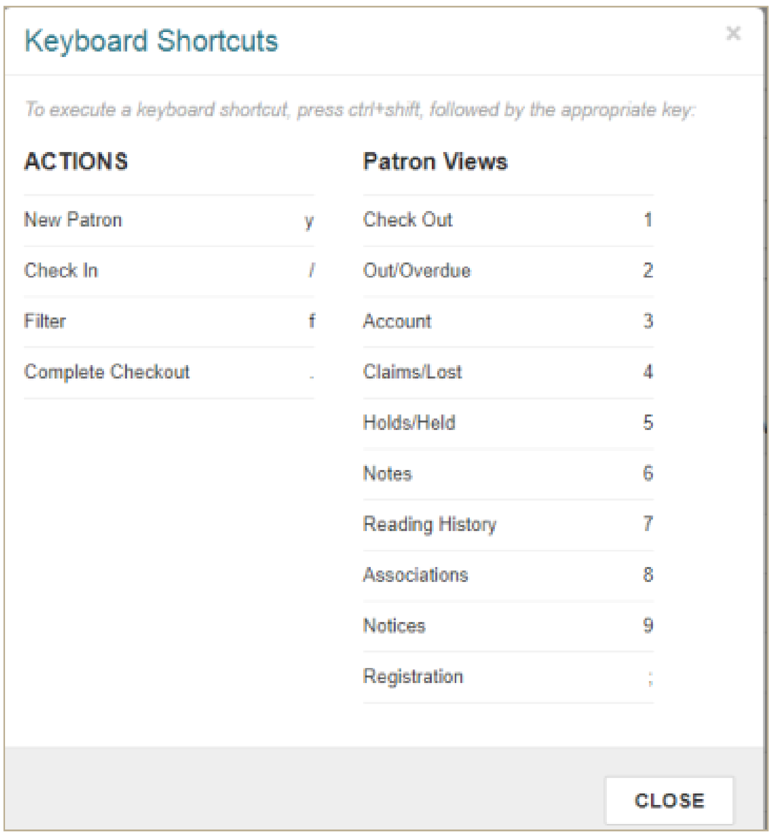


Leap Online Help

To access the Leap online Help, select **Help | Leap Topics**. The Leap online Help includes Contents tab, an Index tab, a search box, a highlight button, and a print button.

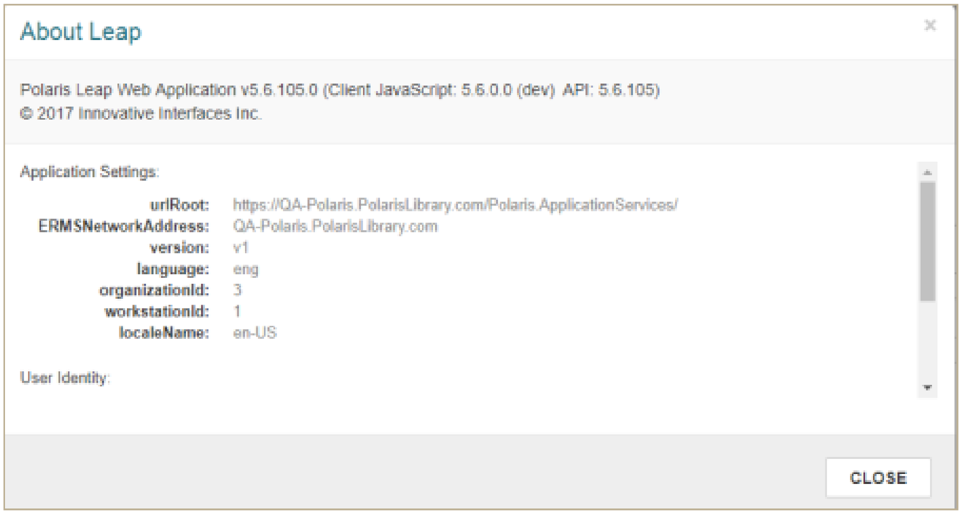
Keyboard Shortcuts

To access the list of keyboard shortcuts for performing actions or going to specific views, select **Help | Keyboard**.



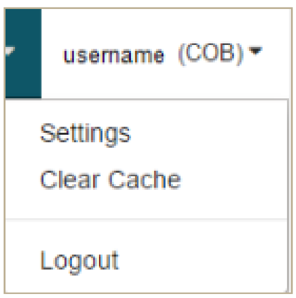
About Leap

To access the About Leap window that contains information about the Leap application, select **Help | About**. The About Leap window contains information about the Leap application including the client JavaScript and API versions.



User Menu

Select your username in the upper-right corner of the Leap header to see the options: **Settings**, **Clear Cache**, and **Logout**.



Leap Workforms

Records, record sets, user settings, and lists (such as the Picklist and Holds Queue) are displayed in workforms (web pages) where you can add data, sort lists, change data, and perform actions (depending on the record type and your permissions). Workforms contain header data that identify the record or record set, and multiple tabbed views that contain different fields.

Leap workforms include some or all of the following menus, views, and elements:

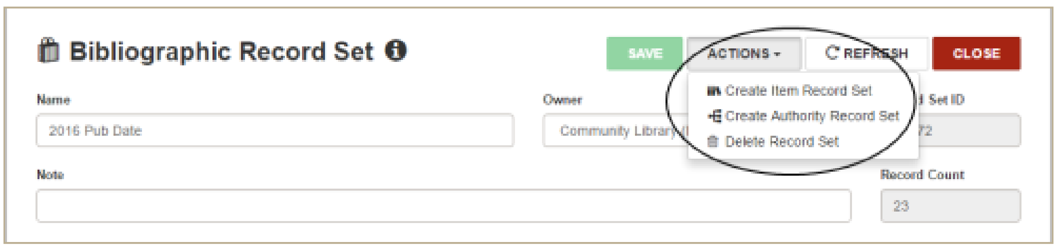
- Actions Menus
- Refresh Button
- Results Button
- Options Menus
- More Menus
- Navigation Menus
- View Bars
- Button Toolbars
- Required Fields
- Check Boxes
- Action Buttons

- Plus Buttons
- Drop-Down Lists
- Date Fields
- Message Boxes
- Summary Bars
- List Views
- Filters
- Links to Other Records

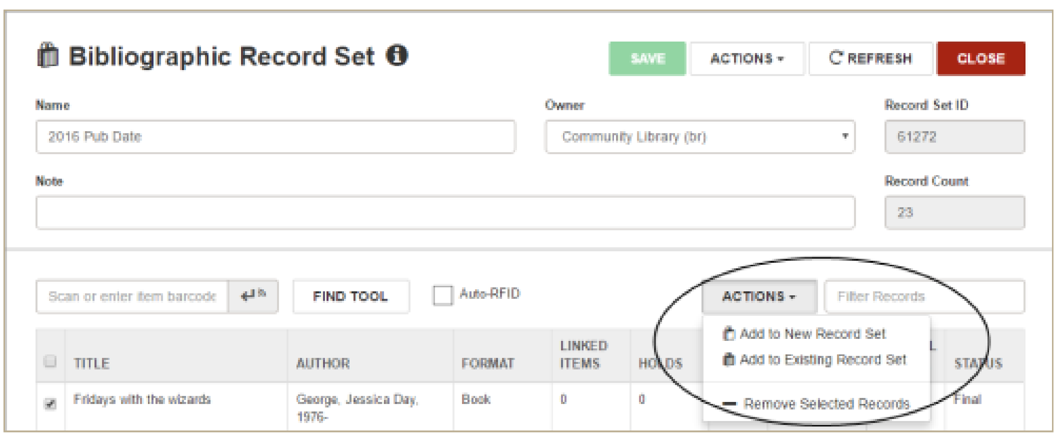
ACTIONS Menus

The **ACTIONS** menu appears on workforms where you can initiate a process or modify a record. It may appear in a workform header or above a list view.

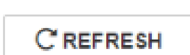
When you click an **ACTION** button in a workform header, the drop-down list opens with actions available for the record as a whole.



ACTION menus in list views are activated only when one or more entries are selected in the list. You first select the entries to which you want to apply the action, then select the appropriate action from the drop-down list.

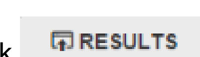


REFRESH Button

You can click 

in a workform header to see recent updates to the record or record set.

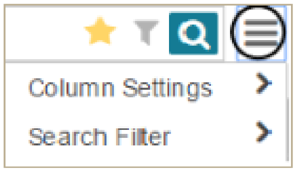
RESULTS Button

If you have opened a record from the Find Tool results, you can click 

to return to the Find Tool results list. If the workform is displayed in a narrow view or window, only the icon appears on the button.

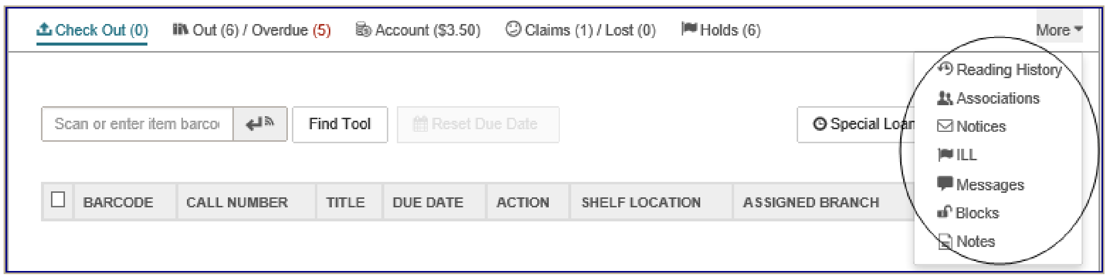
Options Menus

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



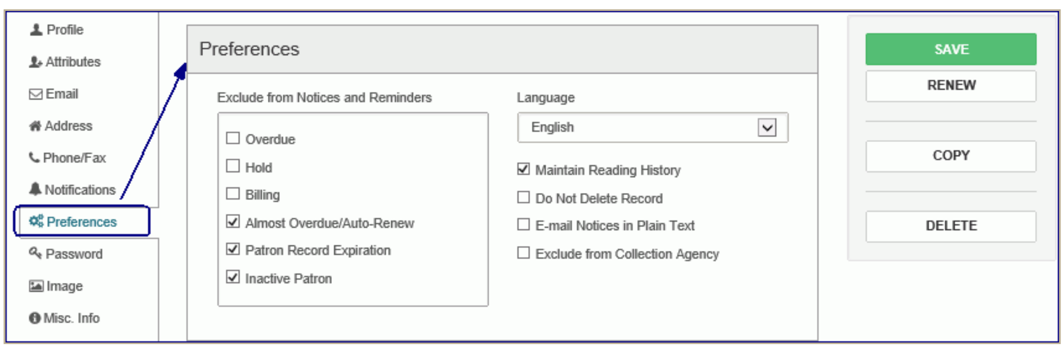
More Menus

Some record views contain a **More** menu that contains additional views and options. Select the down arrow next to **More** to display the list.



Navigation Menus

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

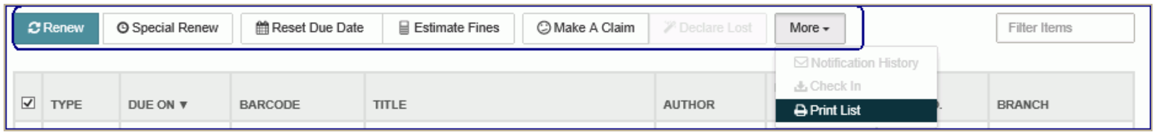


View Bars

View bars provide tabs for different views of a workform. Some tabs include summary information, such as the number of items checked out and overdue for a patron record. The tab for the active view appears in blue.

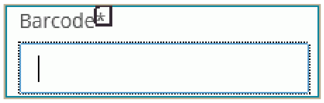
Button Toolbars

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



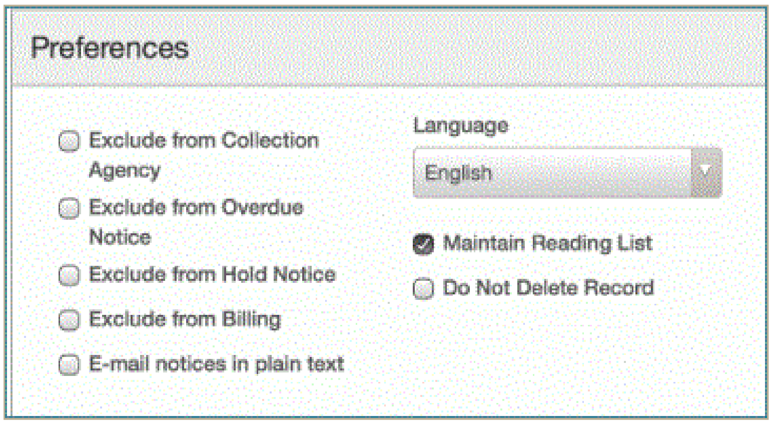
Required Fields

Fields marked with an asterisk are required.



Check Boxes

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



Other check boxes are used to choose a line or lines in a list view and then apply the same function to the selected lines.

For example, choose the check box next to a hold in the Picklist and select **Located**. When you choose an entry or entries in the list, the action buttons become brighter if the action can be performed on the selected entries.

To check all the boxes in a list view, select (check) the box in the list header.

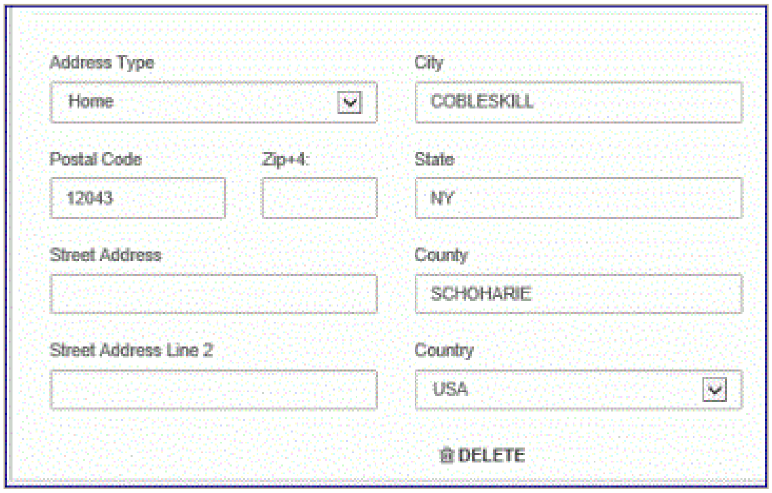
Command Buttons

Buttons, such as  , are used to perform an action.

Plus Buttons

Buttons labeled with a plus sign, such as 

, expand the area on the page so you can enter information.

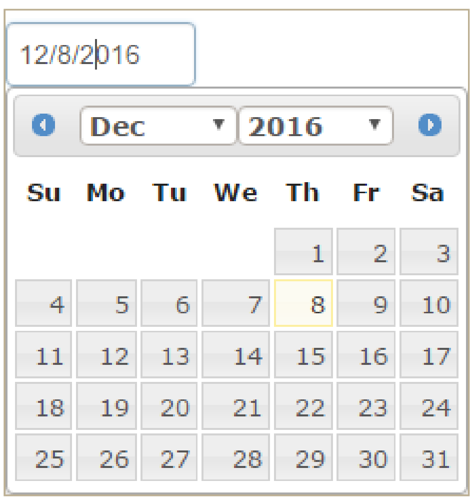


Drop-Down Lists

Select an entry in a drop-down list box You can type the first letter of the entry to quickly go to that portion of a list.

Date Fields

When you click or tap inside a date field, a calendar control appears.



To locate and choose a date, do the following:

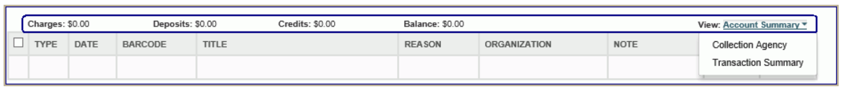
- Select the date in the current month.
- Select the left arrow to go to the previous month.
- Select the right arrow to go to the next month.
- Select the month at the top of the calendar to open the month list, and choose the month.
- Select the year at the top of the calendar to open the year list,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

Message Boxes

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

Summary Bars

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

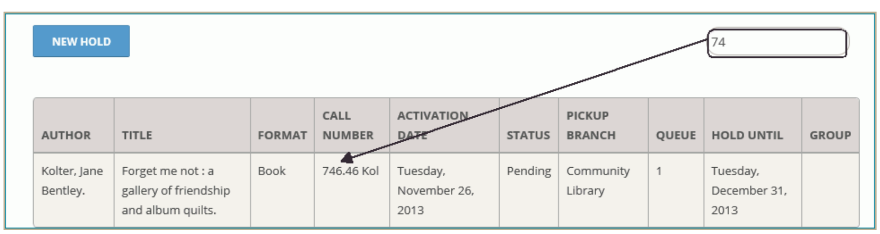


List Views

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

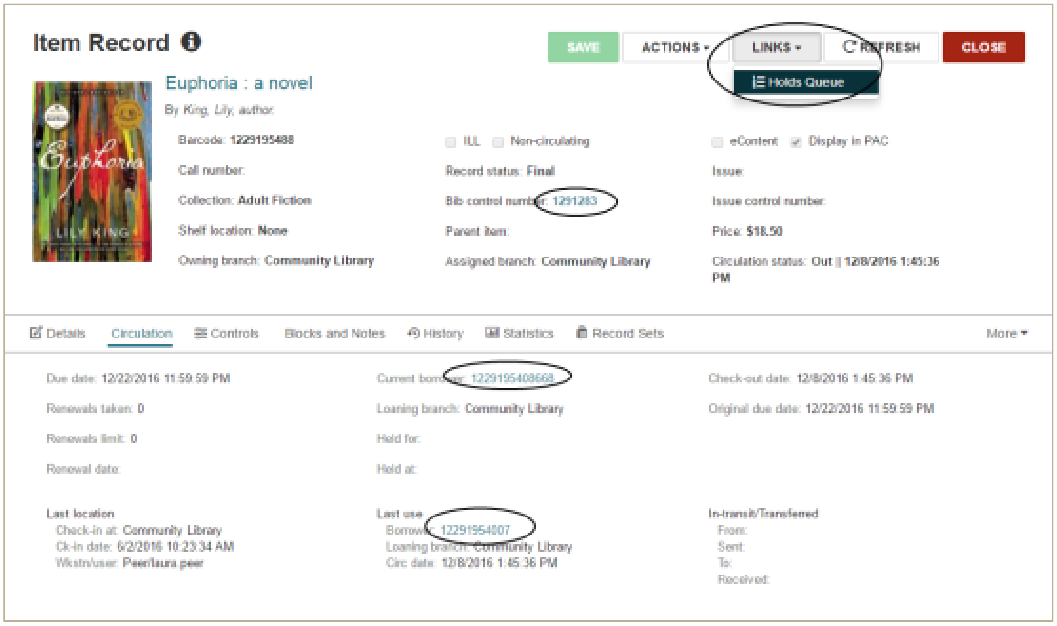
Filters

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



Links to Other Records

To go from a record to another linked record or to an associated list view, select the **LINKS** button, or select a blue text link.


Item Record
SAVE
ACTIONS
LINKS
REFRESH
CLOSE
Holds Queue
Euphoria : a novel
By King, Lily, author.
Barcode: 1229195488
Call number:
Collection: Adult Fiction
Shelf location: None
Owning branch: Community Library
ILL
Non-circulating
Record status: Final
Bib control number: 1291283
Parent item:
Assigned branch: Community Library
eContent
Display in PAC
Issue:
Issue control number:
Price: $18.50
Circulation status: Out || 12/8/2016 1:45:36 PM
Details
Circulation
Controls
Blocks and Notes
History
Statistics
Record Sets
More
Due date: 12/22/2016 11:59:59 PM
Renewals taken: 0
Renewals limit: 0
Renewal date:
Current borrower: 1229195408668
Loaning branch: Community Library
Held for:
Held at:
Check-out date: 12/8/2016 1:45:36 PM
Original due date: 12/22/2016 11:59:59 PM
Last location
Check-in at: Community Library
Ck-in date: 6/2/2016 10:23:34 AM
Wkstn/user: Peer/laura peer
Last use
Borrower: 12291954007
Loaning branch: Community Library
Circ date: 12/8/2016 1:45:36 PM
In-transit/Transferred
From:
Sent:
To:
Received:

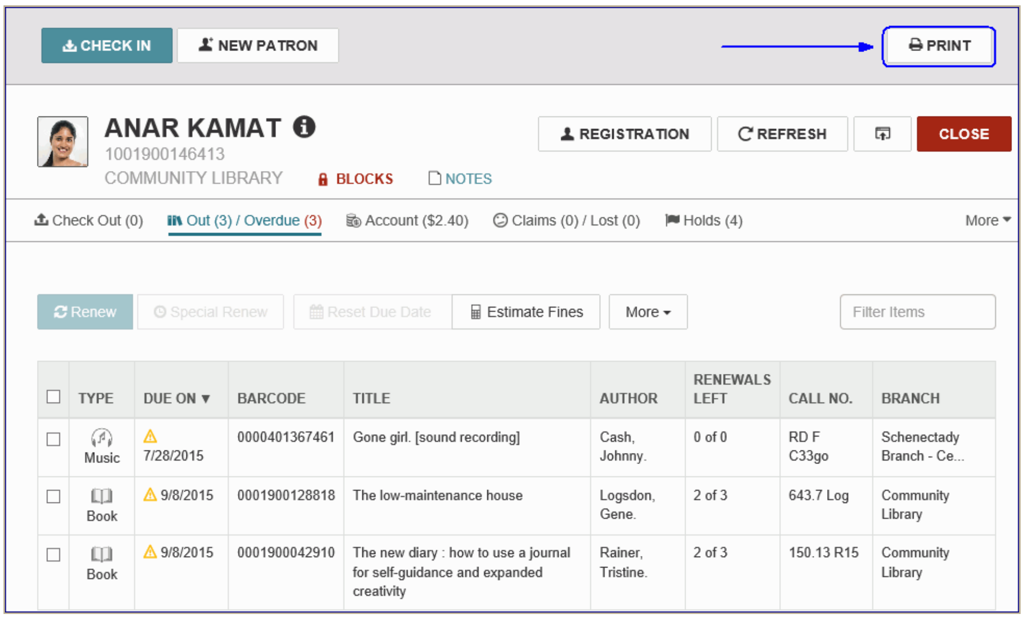
Printing Leap Workforms

The Print function works in the following browsers:

- Windows IE 11
- Windows Chrome 45
- OS X Chrome

Due to iOS limitations, the **PRINT** button does not appear if you are using Leap on an iPad.

When you select the **PRINT** button, the entire view is printed, including all entries in a list view.

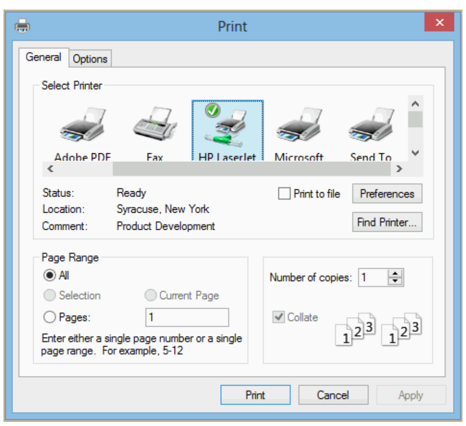


Setting Up Receipt Printing for Leap

Printing receipts from Leap depends on the options set for your library organization in Polaris Administration, the device you are using to access Leap, the workform settings in the Polaris ILS, the Print Options user settings 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 box for an iPad

Print box for Windows



Receipts and slips are printed from Leap according to the settings in Polaris Administration and workform print options, which can be set in the Polaris staff client or in Leap. You can also re-print receipts. For Leap print settings, see Set User Print Options for Receipts and Slips. For information on setting workform print options in the Polaris ILS staff client, see the Polaris online Help.

See also:

Receipt Printer Configuration

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
- Configure a Receipt Printer for Chrome on Windows 7 or 8.1
- Configure a Receipt Printer for Chrome and Safari on Mac OS X

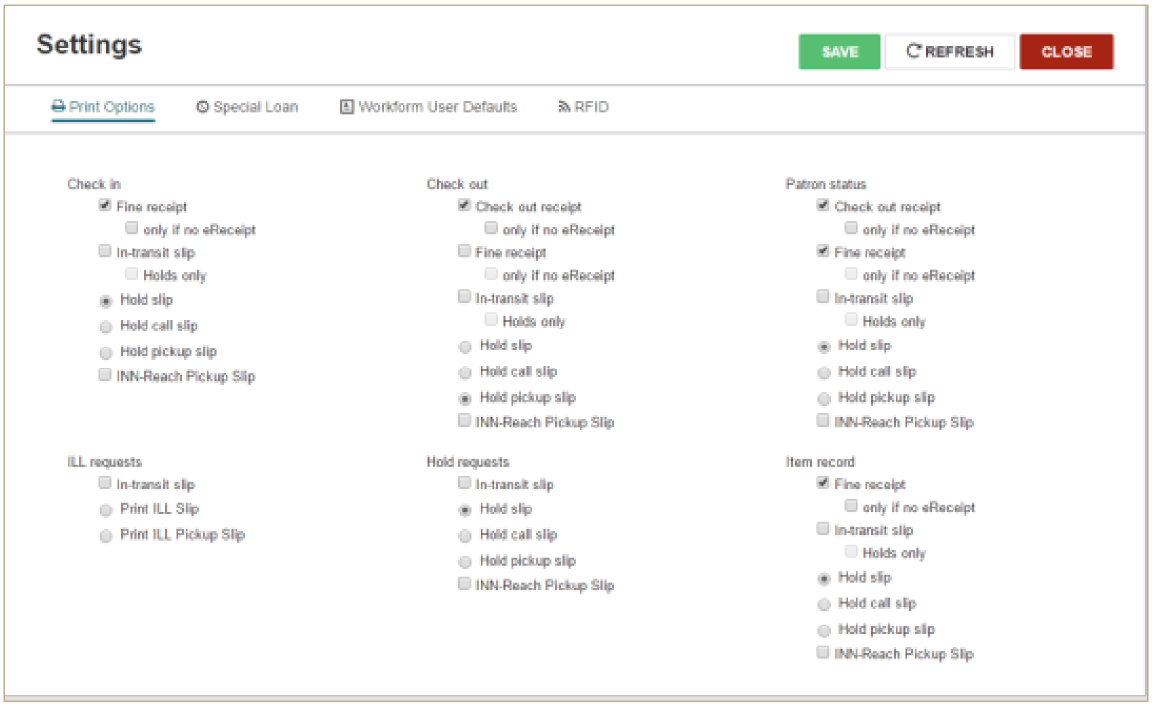
Set User Print Options for Receipts and Slips

If your library has a license for INN-Reach integration with Polaris, you can select the INN-Reach print options.

To set the options for printing receipts and slips in Leap:

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

   The Settings page opens with the Print Options view displayed.



3. Select the receipts and/or slips to print.

   Important:
   Configure the receipt printers to print receipts and slips from Leap.

4. To prevent check out receipts from being printed when the patron has selected **eReceipts** as their notification method, select the **only if no eReceipt** check box.
5. Click **SAVE**.

2. PATRON RECORDS

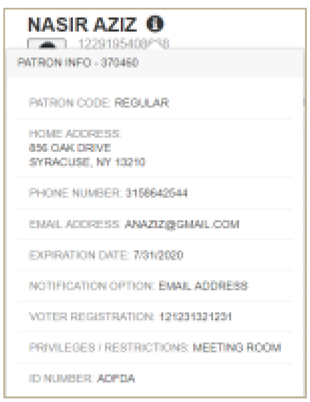
Patron Record

The Patron Record workform in Leap includes header information and two main views: one contains the patron's registration information, and the other contains information about the patron's library account.

Patron Record Workform Header

The Patron Record workform header includes: the patron's name, barcode, and the branch where the patron is registered; an information icon; links to **BLOCKS** and **NOTES** views; a **REGISTRATION** button you can click to go to the patron's registration information; an **ACTIONS** button and menu; and **REFRESH** and **CLOSE** buttons.

You can click to open the **PATRON INFO** pop-up window that displays the patron code, home address, phone number, email address, registration expiration date, and notification preference. Additional user-defined fields (UDFs) appear in this box if they are selected for display in the patron services parameter **Check-out: Optional patron data**. The following additional fields do not appear in this box even if the parameter is set to display them: eReceipt option, Address check date, Birthdate, Last activity date, Phone 2, Phone 3, Registered branch, and Statistical class.



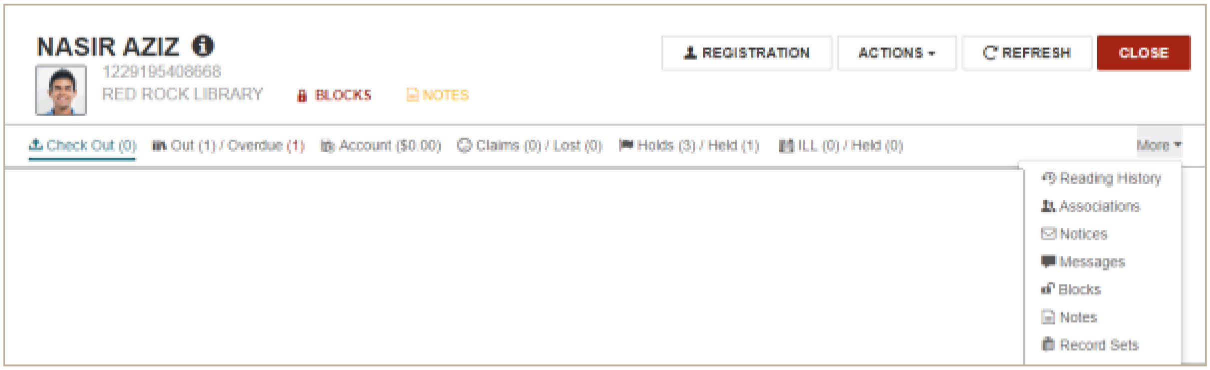
A summary bar displays the number of items out and overdue; the account balance; the number of lost and claimed items; the number of hold requests and held items; and the number of ILL requests and held ILL items.

You can click **More** to open a menu and go to one of the following views:

> **Note:**
> The **More** menu includes the ILL view if the Patron Record workform is displayed in a narrower window.

- Reading History
- Associations
- Notices
- Messages
- Blocks
- Notes
- Record Sets

The cursor is in the **Check out an item box**, where you can scan an item barcode to check out the item to the patron.

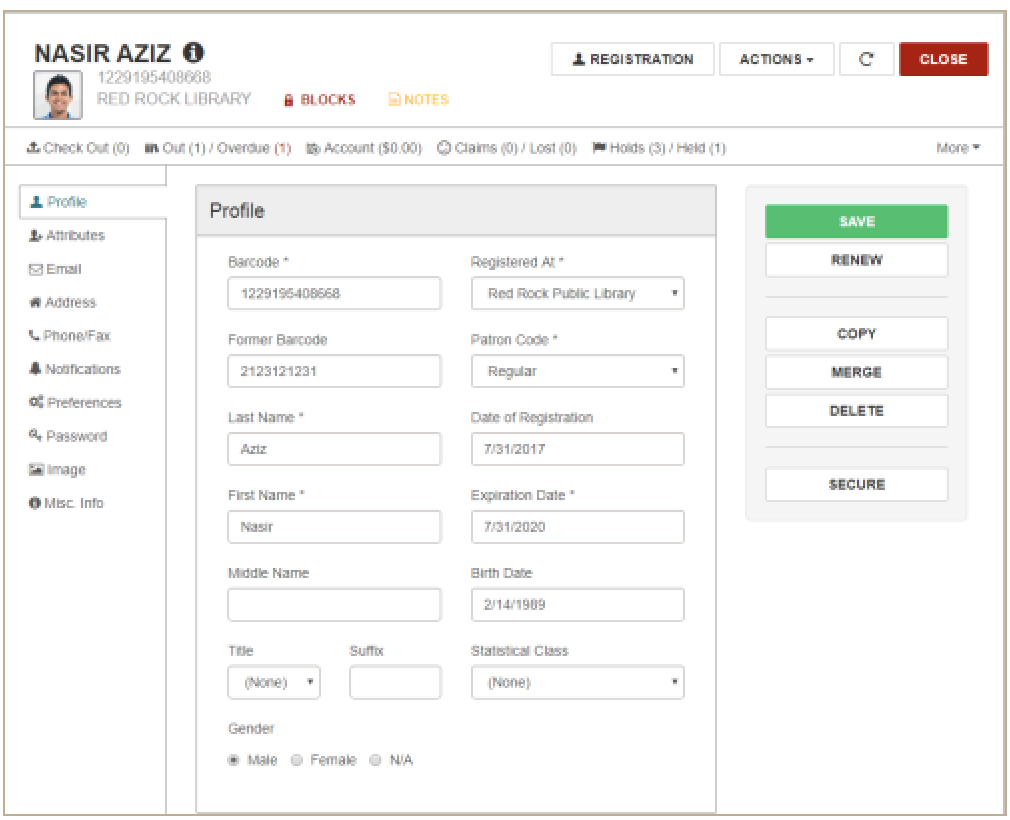


Patron Record - Registration Information

To create a new patron record, click the **NEW PATRON** button or select **New | Patron record**. The Patron Registration view of the patron's record appears.

This view also appears when you click the **REGISTRATION** button on an existing patron's record. Use the navigation menu along the left of the workform to move to specific sections of the patron's registration information.

From this view, you can update the patron's registration information, renew a patron's registration, copy registration information to another patron's record, merge the patron record with another patron record, secure (or release) the patron record, or delete the patron record.



Patron Record - Library Account Information

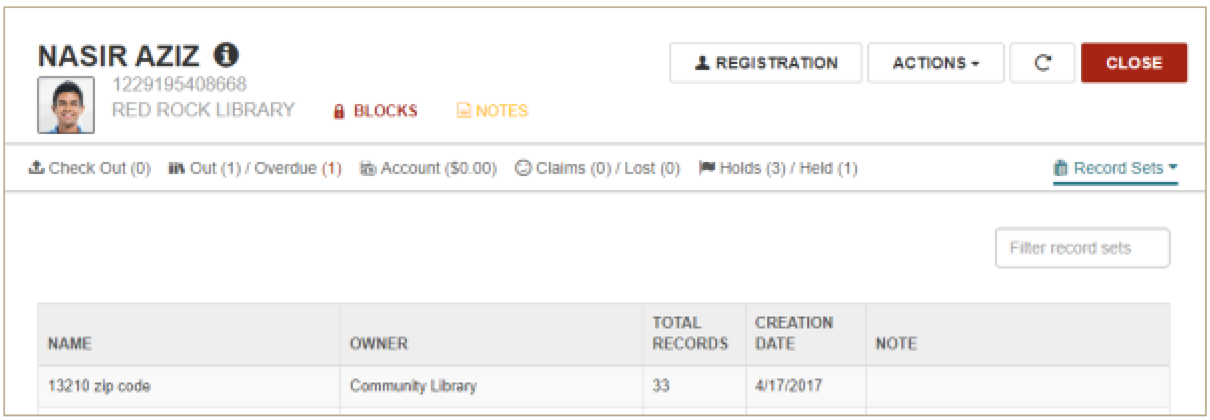
When you open an existing patron record, the Check Out view appears where you can check out items to the patron. To go to other views, click one of these tabs: Out/Overdue, Account, Claims/Lost, Holds/Held, or ILL/Held.

> **Note:**
> The **ILL/Held** option may be under the **More** menu if you are viewing Leap in a narrower window or screen.

Or, from the **More** menu, select: Reading History, Associations, Notices, Messages, Blocks, or Notes.

Patron Record - Record Sets View

To see the record sets to which the patron record belongs, select **More | Record Sets**. You can click on a record set in the list to open the Patron Record Set workform.



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 record appears.

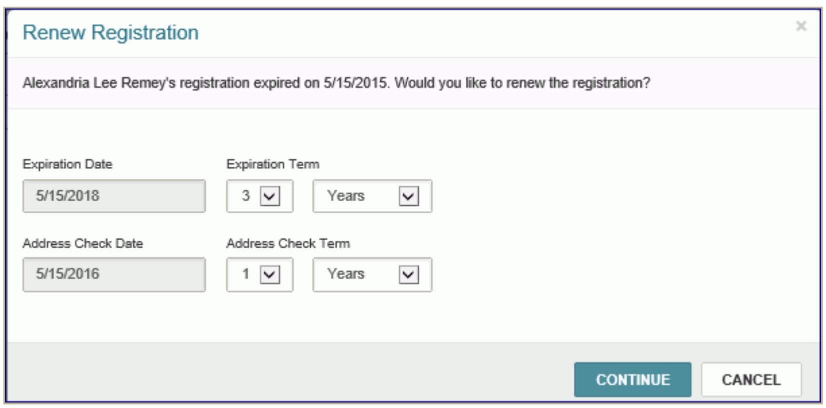
2. Click **REGISTRATION**.

   The Patron record | Registration view appears.

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 click **SAVE**. See Register a New Patron for information on the registration fields.

5. To renew the patron's registration, click **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:

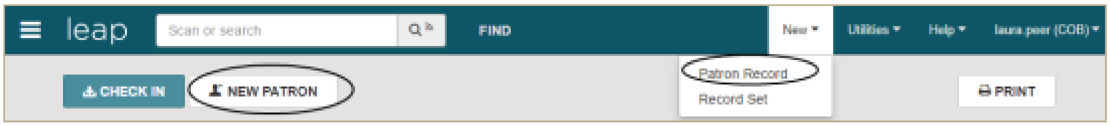
   - Enter a number and select **Years** or **Months**.
   - Select **Exact Date**, and select a date from the calendar.

Register a New Patron

To register a new patron:

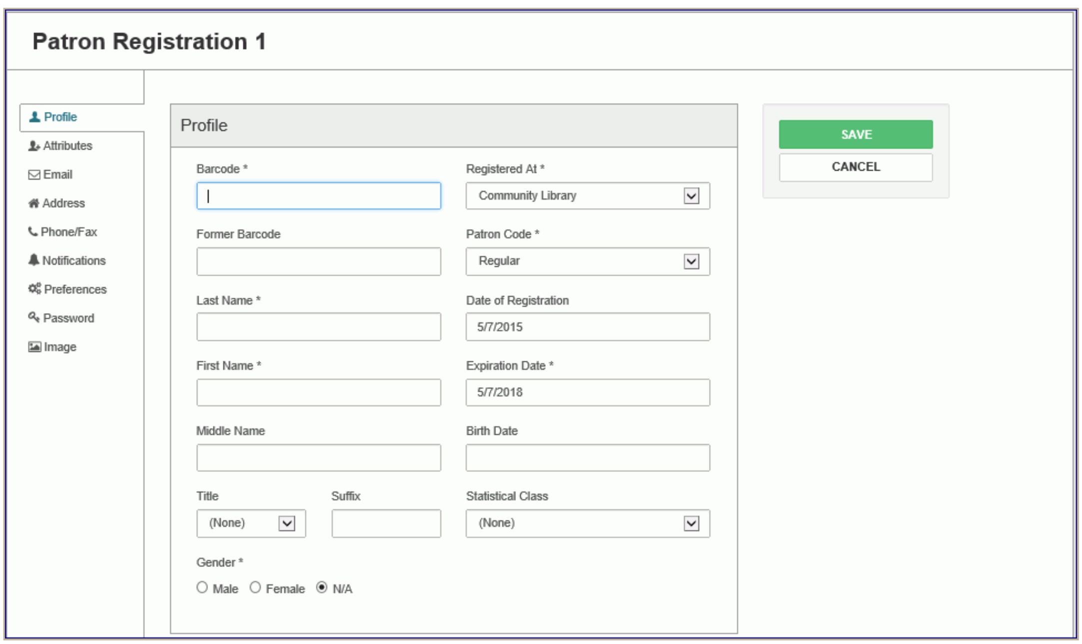
Tip:
You an also copy a patron record to register a new patron.

1. Select **New | Patron Record** or click the **NEW PATRON** button.



The Patron Registration page appears 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.



2. In the Profiles section, enter the following information:

    a. Scan the patron's barcode in the **Barcode** box, or type the barcode.

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

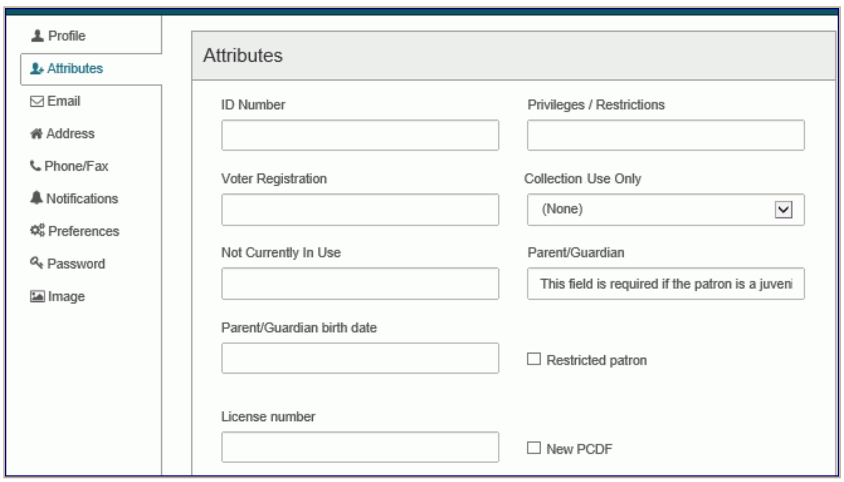
    b. Type the patron’s last name (at least one character) in the **Last name** box.

    Tip:
    Do not use spaces when typing compound last names. For example, type MacDonald

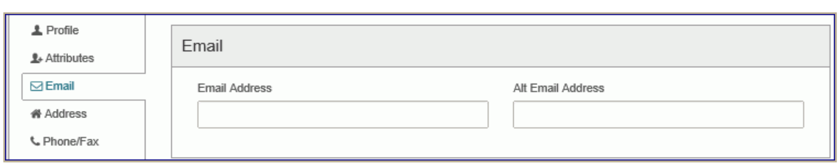
(instead of Mac Donald).

c. Type the first name in the **First Name** box
d. Type the middle name in the **Middle Name** box.
e. Select the patron's title in the **Title** box.
f. Type the patron's suffix (such as Sr., Jr., II, or Ph.D.) in the **Suffix** box.
g. Select the patron's registration branch in the **Registered A**t box.
h. Select the patron's code in the **Patron Code** box.
i. Click/tap in the **Expiration Date** box to open a calendar, and select the date that the patron's registration will expire.
j. Click/tap in the Birth Date box to open a calendar, and select the patron's birth date.
k. Select a statistical class for the patron.
l. Select **Male**, **Female**, or **N/A** under Gender.

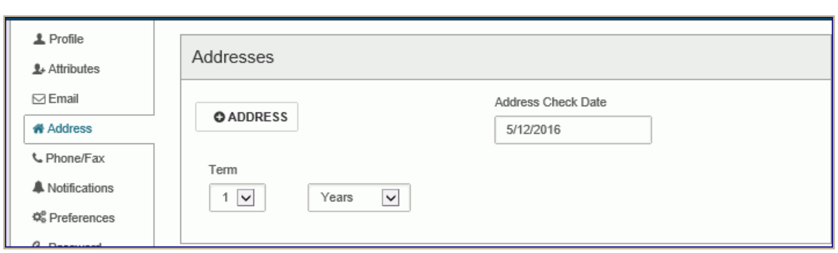
3. Select **Attributes** in the navigation bar to go to the Attributes section, and enter additional information in the user-defined and custom data fields that your library has set up. For more information on user-defined and patron custom data fields, see the Polaris staff-client online Help.



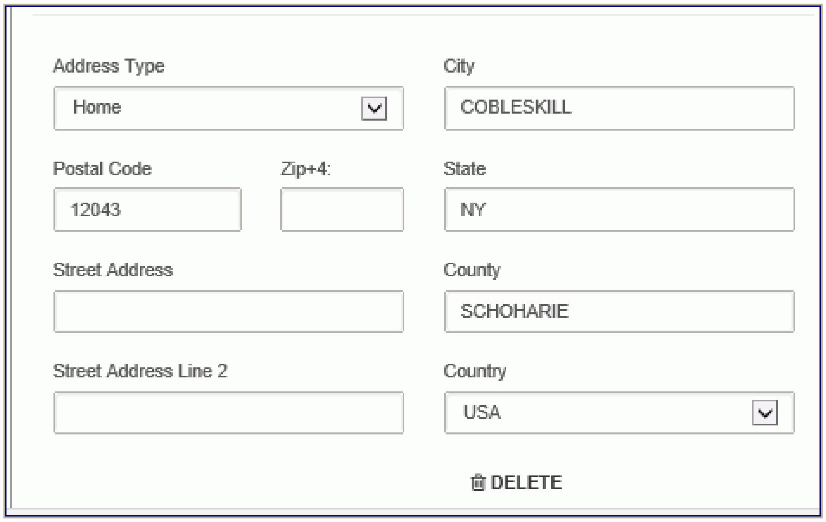
4. Select **Email** in the navigation bar to go to the Email view, and enter the patron's email address and alternate email address (if applicable).



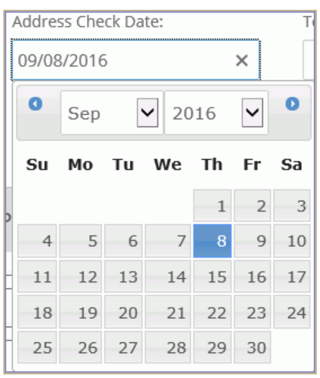
5. Select **Address** in the navigation bar to go to the Addresses section, and click the **ADDRESS** button to add the patron's address.



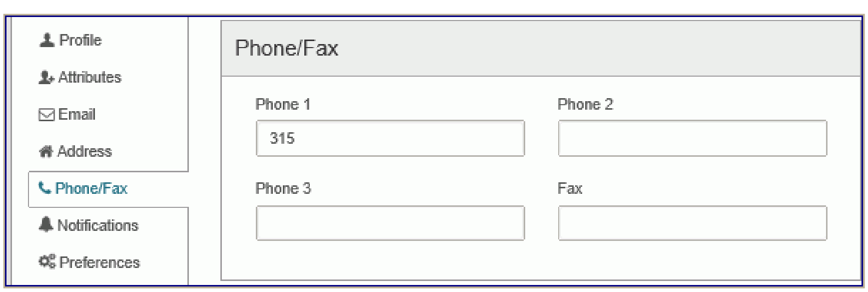
The Address section expands.



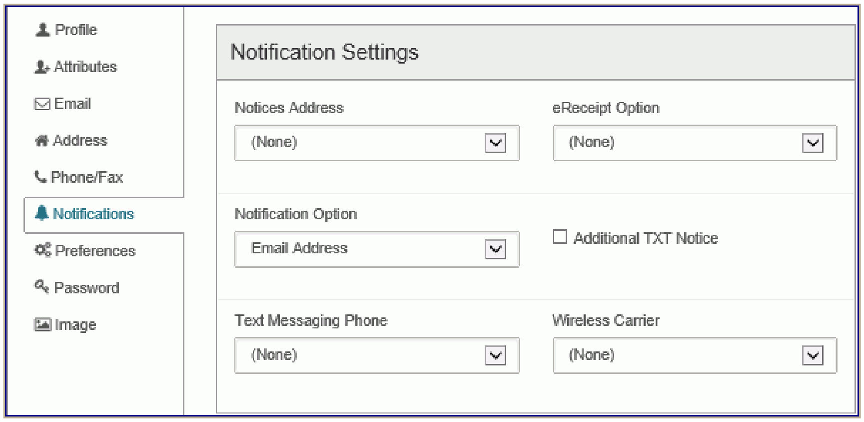
6. Enter the following information in the expanded Address section:
    a. Select an address type in the **Address Type**box.
    b. Enter the postal code in the **Postal Code** box. The **City**, **State**, and **County** boxes are filled in based on the postal code you entered. If these boxes are not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



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



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



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

    a. Select the address type to which notices will be sent. The addresses must be entered in the Addresses section to appear in this list. For example, if you specified a home address, it is listed as **Home**.

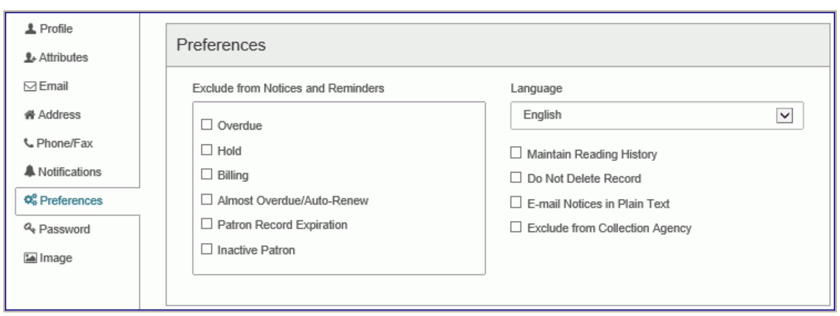
    b. Select the electronic receipt option in the **eReceipt Option** box.

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

    d. If an additional text message notice will be sent to the patron, select the following options:

    - Select the **Additional TXT Notice** box
    - Select the phone (1, 2, or 3) to which text messages will be sent in the **Text Messaging Phone** box.
    - Select the wireless carrier in the **Wireless Carrier** box.

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



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

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

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

    c. Select the other applicable preference check boxes.

12. In the **Password** section, enter the patron’s password and re-enter it to confirm it in the **Password (Confirm)** box.

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

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

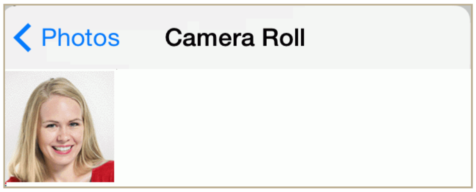
Note:
To take a new patron photograph from a workstation, a webcam must be installed. If you are

running Leap on an iPad, you can use the iPad camera.

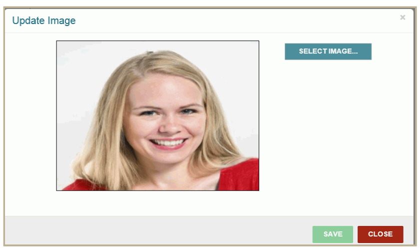
a. Select **UPDATE IMAGE**.

b. Click/tap **SELECT IMAGE** and select one of the following options:

- **TAKE PHOTO** - The camera opens. Take the patron's photo and select Use Photo to use the image as it was captured. You can select Retake to take a new photograph.
- **CHOOSE EXISTING**- Browse and select the existing patron photo. On an iPad, you can select the picture from the Camera Roll.



The picture is displayed in the Update Image view.



c. Select **SAVE** to save the patron's picture.

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

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

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

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

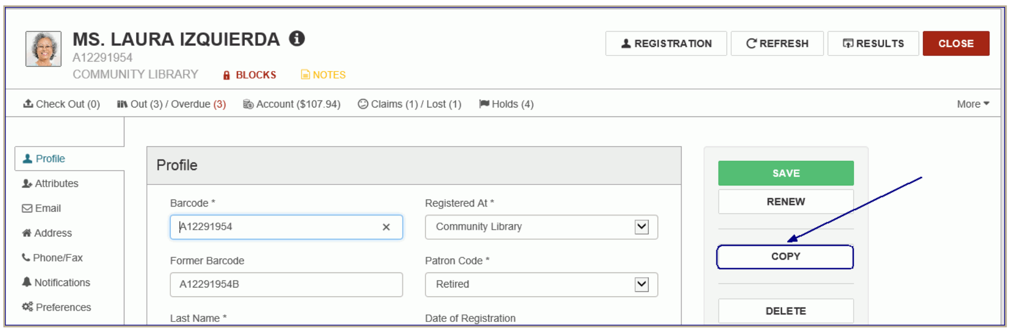
Note:
You can update the photo by replacing it, or if you want to delete the photo, select it and select **DELETE**.

Copy an Existing Patron Record

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

To copy a patron's registration:

1. Open the patron record that you want to copy.
2. Click **REGISTRATION** to go to the Registration view.
3. Click **COPY**.



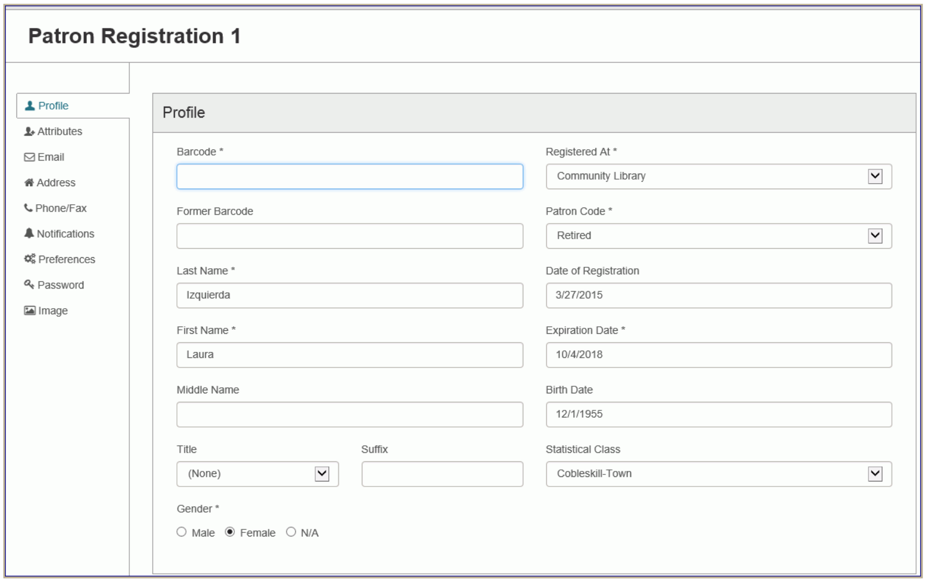
The patron record is copied and the Patron Registration page displays with the name **Patron Registration 1**. Many field values are copied to the new patron record.

4. Enter the patron's name, barcode, and other information.
5. Click **SAVE** to save the new patron record.

Field values and settings copied to the new patron record.

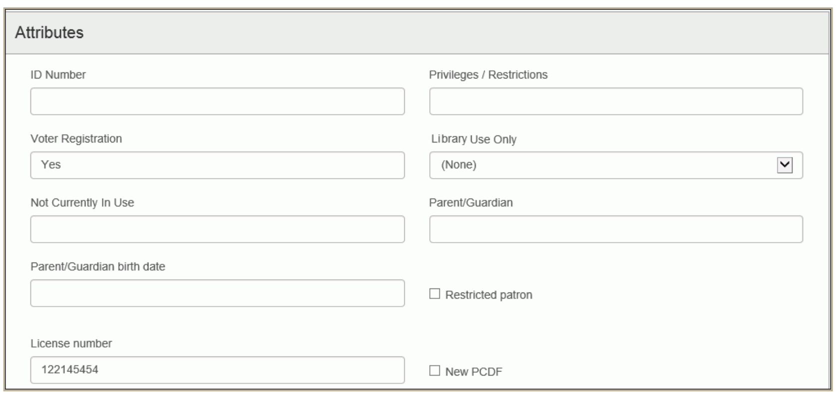
Profile view

- Last name
- First name
- Middle name
- Title
- Suffix
- Registered Branch
- Patron Code
- Expiration Date
- Birth Date
- Gender



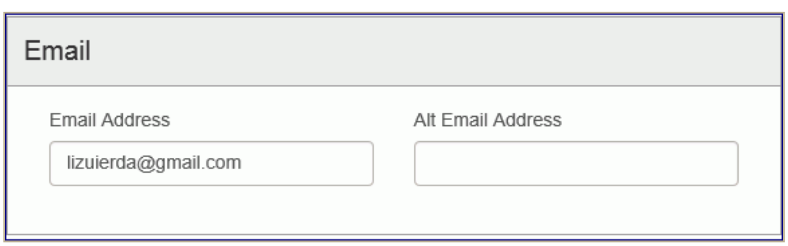
Attributes view

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



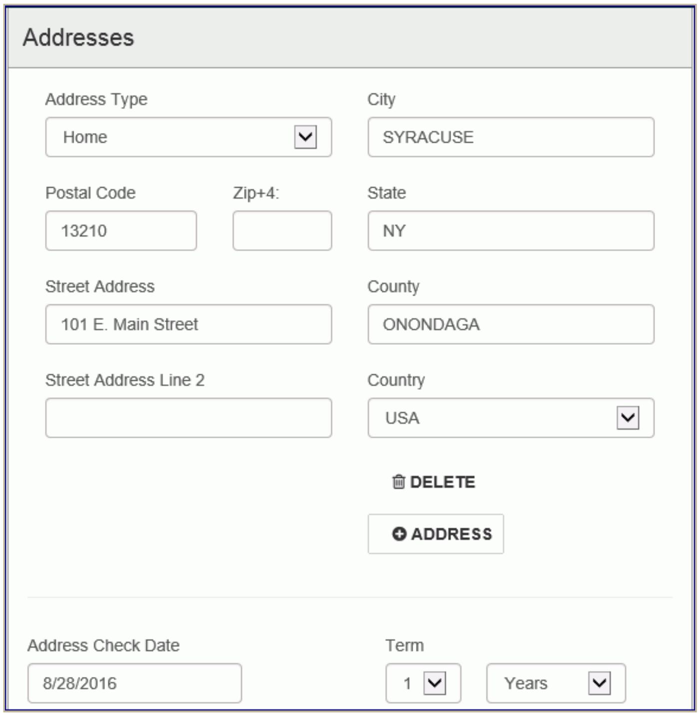
Email view

- Email Address
- Alt Email Address



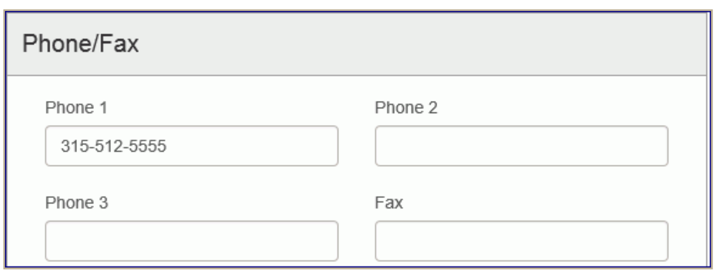
Addresses view

- All addresses
- Address Check Date



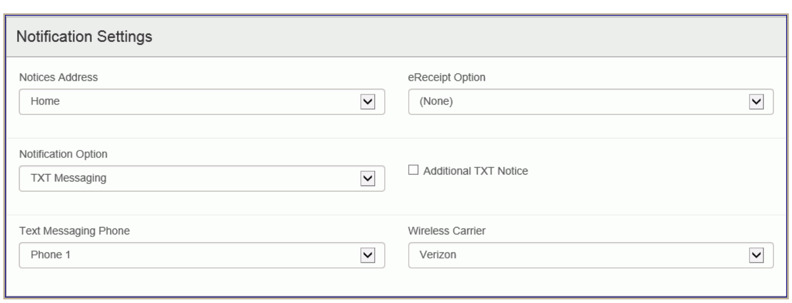
Phone/fax view

- Phone 1,2,3
- Fax



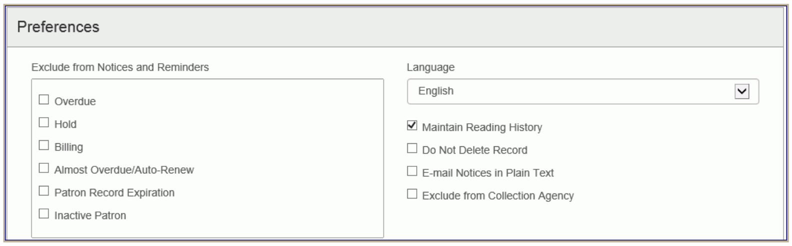
Notification Settings view

All field values and settings are copied.



Preferences view

All field values and settings are copied.


Preferences
Exclude from Notices and Reminders
Overdue
Hold
Billing
Almost Overdue/Auto-Renew
Patron Record Expiration
Inactive Patron
Language
English
Maintain Reading History
Do Not Delete Record
E-mail Notices in Plain Text
Exclude from Collection Agency

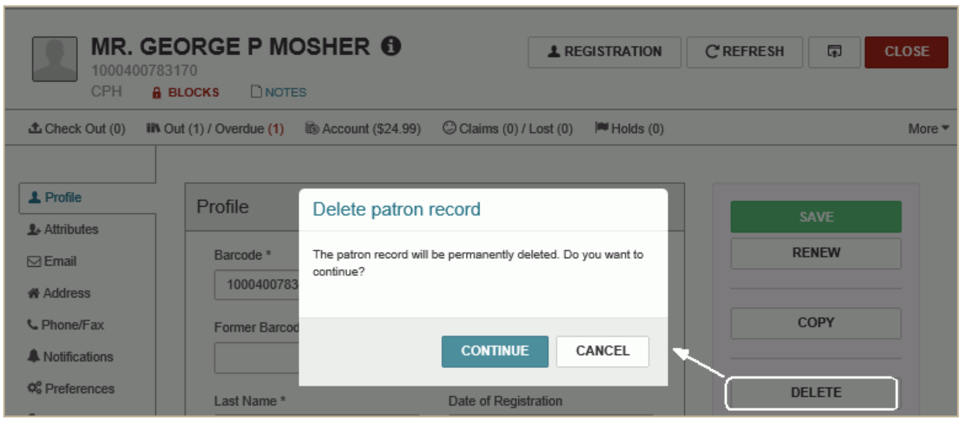
Delete a Patron Record

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

To delete a patron record from Leap:

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

   A confirmation message appears.



3. Select **CONTINUE** to delete the patron record.

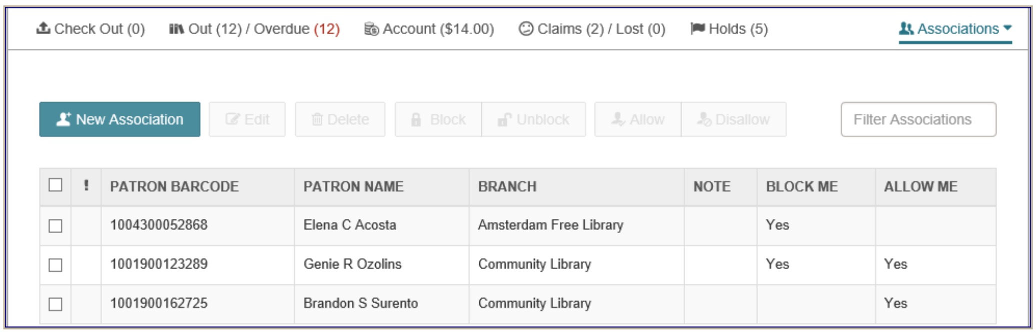
   If there are any conditions that prevent the patron record from being deleted, a message (or messages) is displayed.

Add a New Associated Patron

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

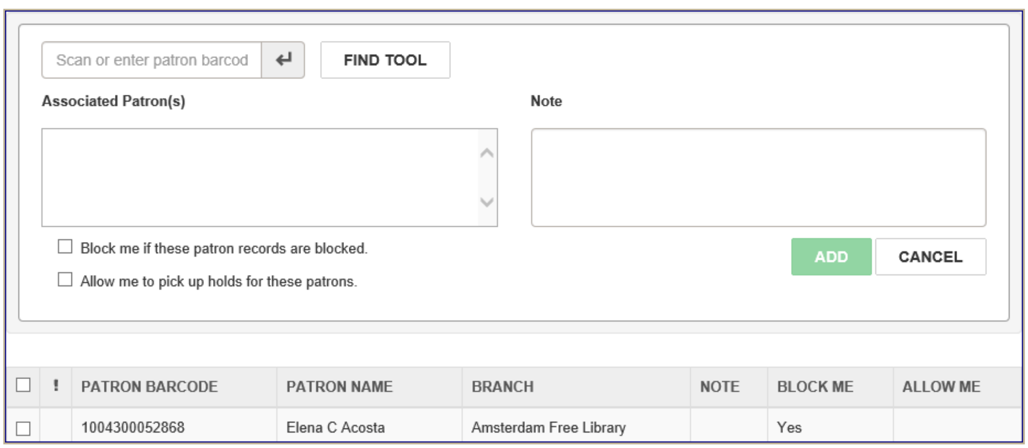
1. Open the patron record.
2. Select **More | Associations**.

   The Associations view opens.



3. Click **New Association**.

   The area below the button expands.



4. Scan the patron's barcode, or choose **FIND TOOL** to search for and choose 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, choose additional patrons to associate with the displayed patron record.
7. To block the patron if the associated patron is blocked, choose **Block me if these patron records are blocked**.
8. To allow the patron to pick up held items for the new associated patron, choose **Allow me to pick up holds for these patrons**.
9. Click **ADD** to add the associated patron(s).

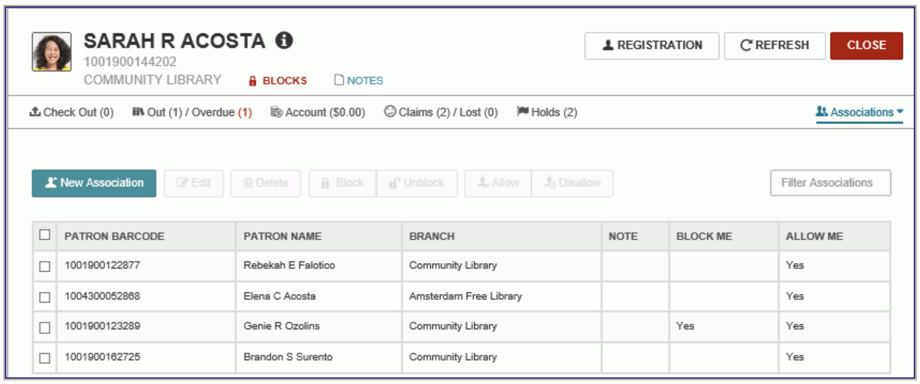
   The new associated patron or patrons appear in the associations list.

Edit a Patron Association

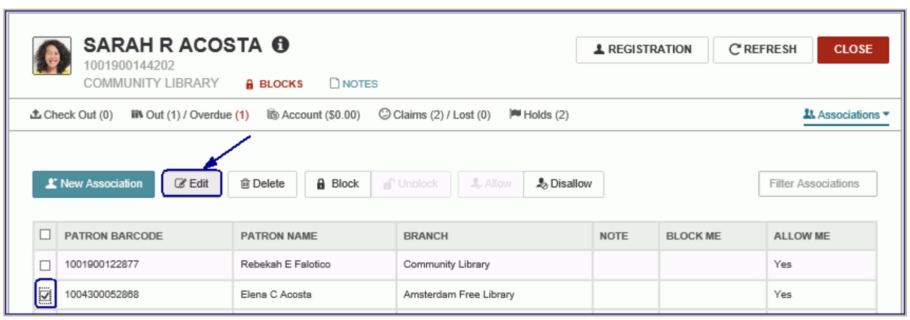
To edit a patron association:

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

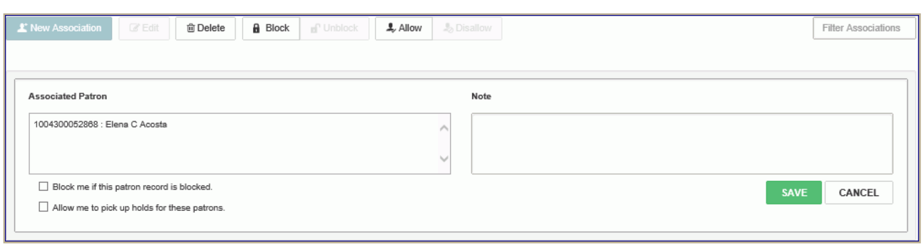
   The Associations view is displayed.



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



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



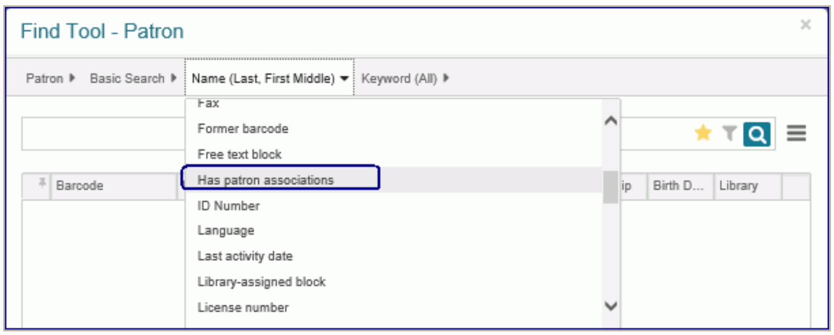
4. Select **SAVE**.

   The patron association is modified.

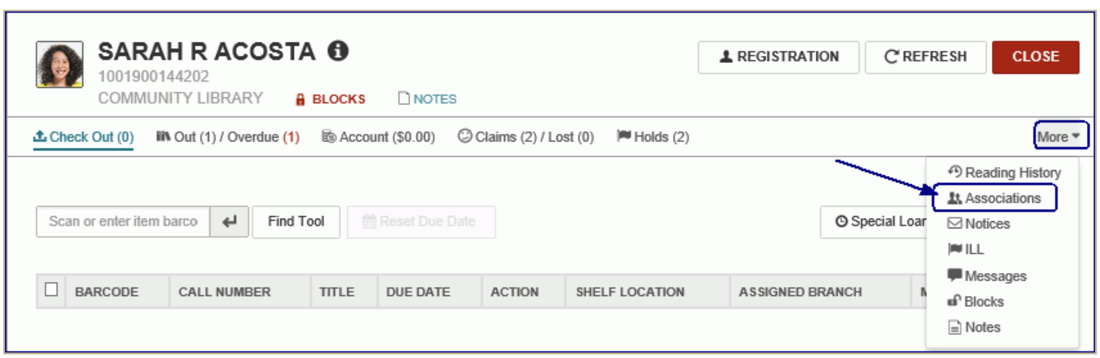
Viewing and Modifying Patron Associations

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

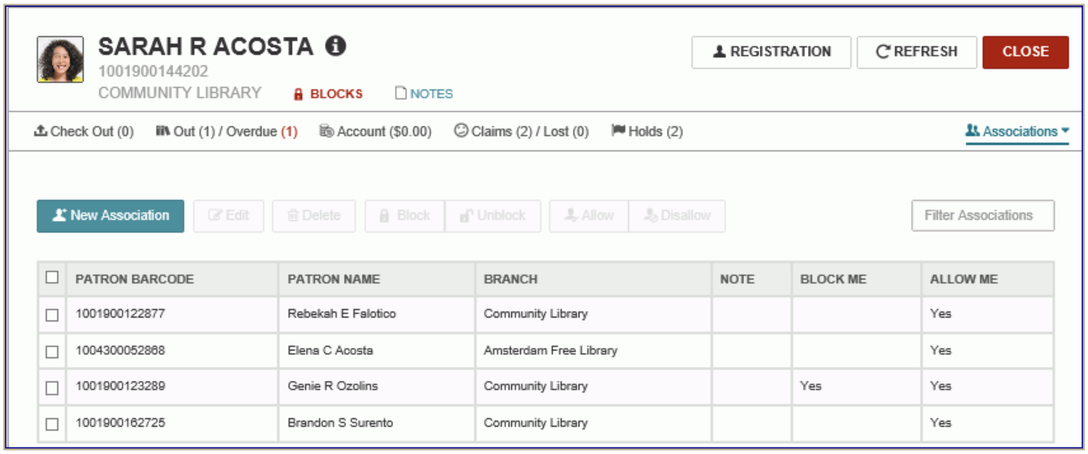
To find patron records that have associations, you can limit patron searches in the Find Tool using the qualifier **Has patron associations**.



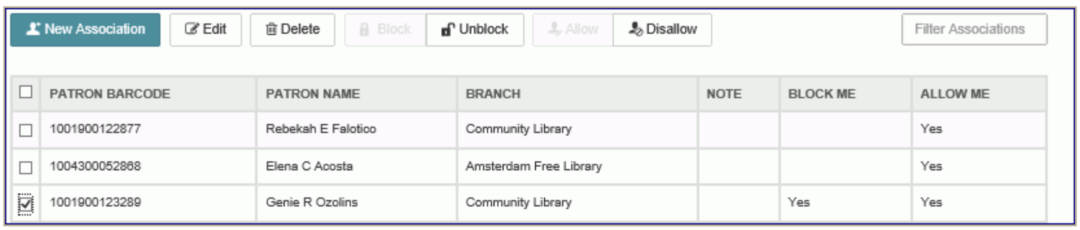
To see the associated patrons, select **More | Associations**.



If the patron has any associations, the Associations view displays a list. From this view, you can: add a new associated patron; go to the associated patron's record; edit a patron association; or delete an association.



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



See also:

- Add a New Associated Patron
- Edit a Patron Association
- Delete a Patron Association

Delete a Patron Association

To edit a patron association:

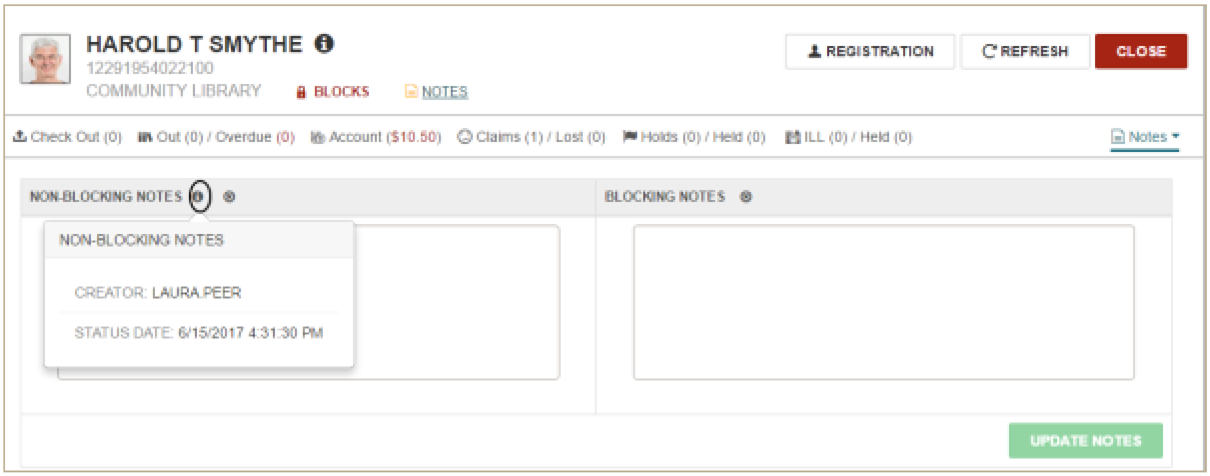
1. Open the patron record.
2. Select **More | Associations**in the summary bar.

   The Associations view is displayed.
3. Select the check box next to the associated patron you want to delete and choose **Delete**.

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

Viewing and Modifying 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 **More | Notes**. If the **NOTES** button is yellow, the patron record contains notes. You can click on the information icon to see the note creator and the date and time the note was added or updated.



See also:

- Add a Patron Note
- Delete a Patron Note

Add a Patron Note

To add a patron note:

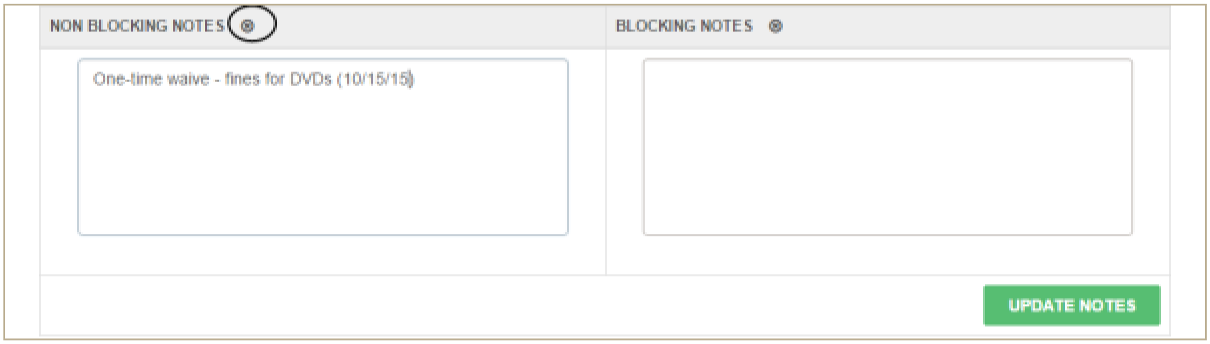
1. Open the patron record, Notes view.
2. Type notes in the **NON BLOCKING NOTES** or **BLOCKING NOTES** box.
3. Click **UPDATE NOTES.**

   The notes are updated.

Delete a Patron Note

To delete a patron note:

1. Open the patron record, Notes view.
2. Select the note you want to delete, and choose the delete button above the note.



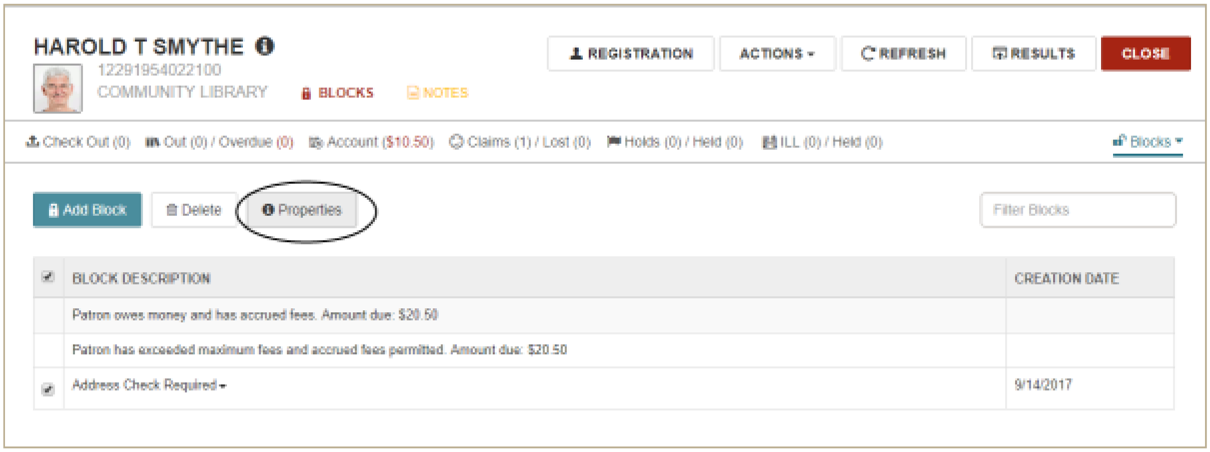
The note no longer appears.

3. Select **UPDATE NOTES** to save your changes.

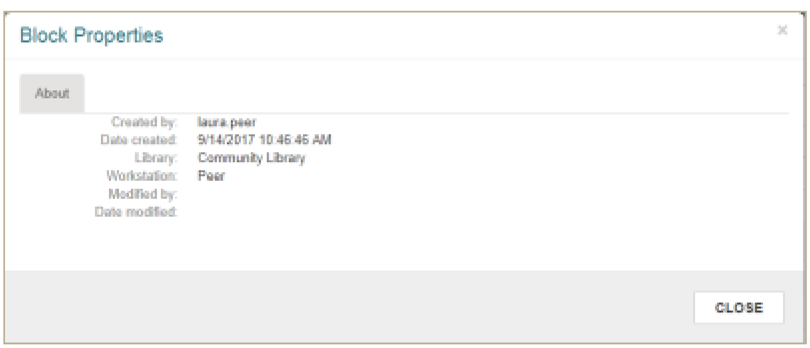
Viewing and Modifying Patron Blocks

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. To see a patron's blocks, click the **BLOCKS** icon or select **More | Blocks**. The blocks are listed with the block description and creation date.

To view more details about a library-assigned or free-text block, select the block in the list, and click **Properties**.



The Block Properties window displays the user name of the staff member who created the block; the date the block was created; the sign-in branch for the staff member who created the block; the workstation where the block was created; and the staff member who modified the block and the date modified (if the block was modified).



See also:

- Add a Patron Block
- Delete a Patron Block

Add a Patron Block

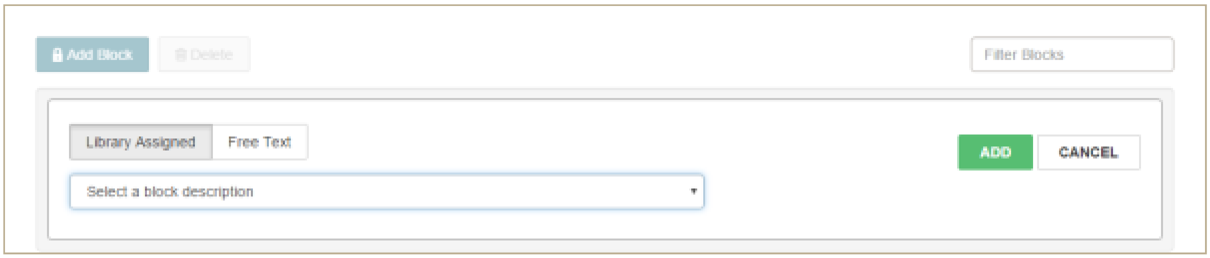
To add a patron block:

1. Open the patron record, Blocks view.

   The list of blocks (if any) is displayed.

2. Click **Add Block**.

   The area under the button expands.



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

   - To add a library assigned block, choose **Library Assigned** and choose the block description from the list box.
   - To add a free text block, choose **Free Text**, and type the free text block in the box provided.

5. Click **ADD**.

   The block is added to the list.

Delete a Patron Block

You can delete patron blocks that are not system-generated, provided you have the appropriate permissions. If you have permission to remove collection agency blocks, you can also delete these.

To delete a patron block:

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

   The blocks list appears.

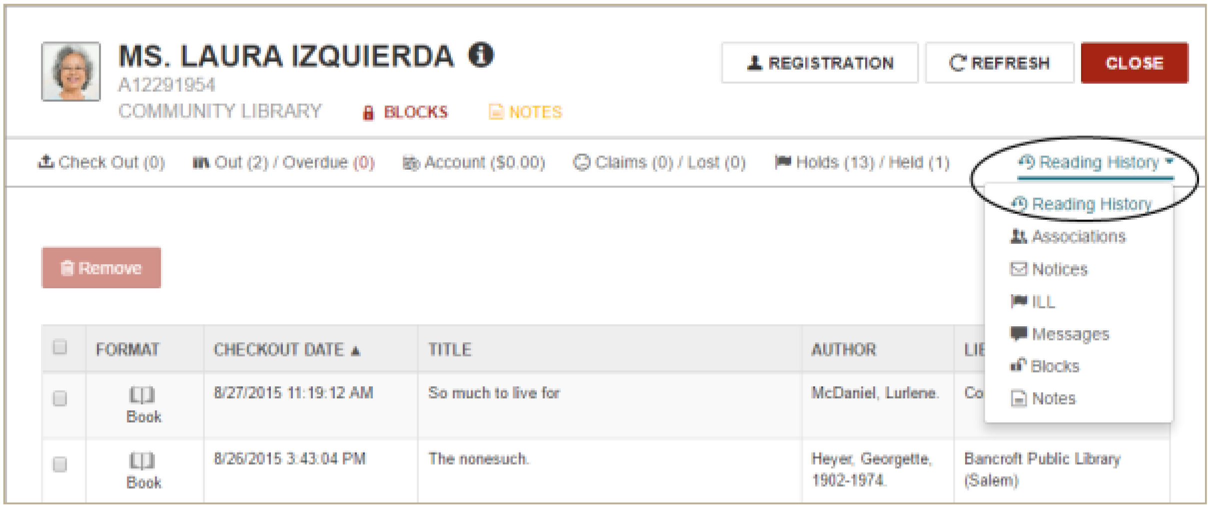
3. Select one or more blocks in the list, and choose the delete (trashcan) button.

   The selected patron blocks are deleted.

Viewing and Modifying a Patron's Reading History

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

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



See also: Remove an Item from a Patron's Reading History

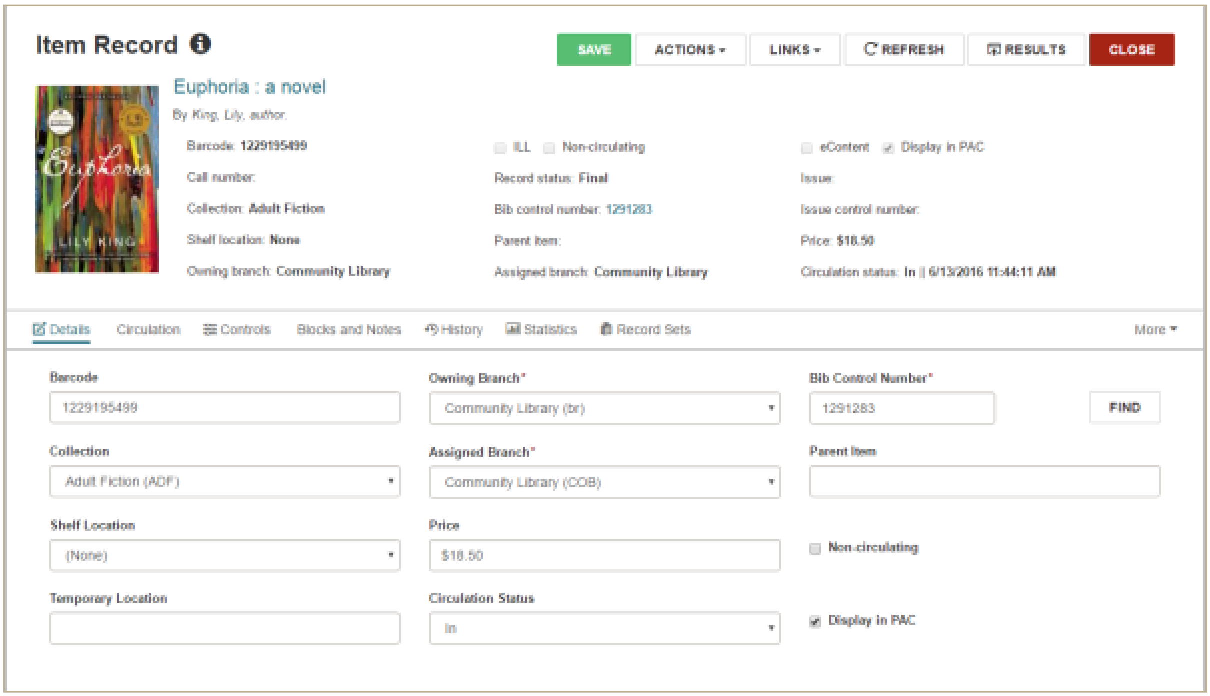
3. ITEM RECORDS

Item Record

If you have the required permissions set in Polaris Administration, you can search for, access, copy, create, and modify item records in Leap.

The settings that apply to item records in the Polaris staff client (such as the loan period, item home branch, and hold limited to) are also applied to item records displayed in Leap.

When you open an item record, it is displayed in the Item Record workform.



The Item Record workform header displays the following information:

- The Information icon and Properties window - When you hover over the icon, the Properties window displays the following information:
    - Item Record ID
    - Barcode
    - Record Status
    - Creator
    - Creation Date
    - Modifier
    - Modification Date
    - First Available Date
- The book jacket image (if one is associated with the item record)
- Title and author
- Barcode
- Call number
- Collection

- Shelf location
- Owning branch
- ILL, eContent, Non-circulating, and Display in PAC check boxes - A check indicates the option is active. For example, a check box in Display in PAC means the item appears in the Polaris PowerPAC and Mobile PAC.
- Record status
- Bib control number - You can click the link to go to the bibliographic record.
- Parent item
- Assigned branch
- Issue control number
- Price
- Circulation status

The **ACTIONS** menu includes the following options:

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

The **LINKS** menu provides links to:

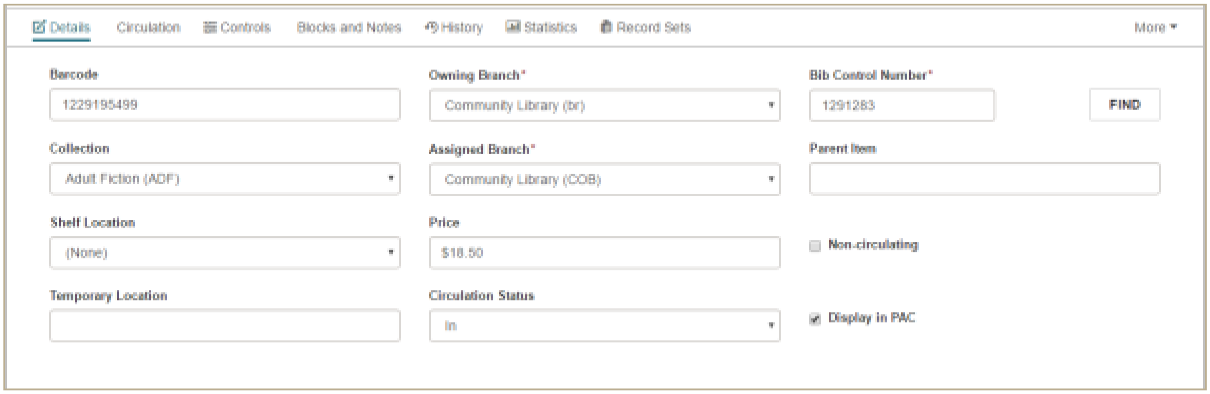
- Holds Queue

The bottom part of the page changes depending on the selected view: Details, Circulation, Controls, Blocks and Notes, History, Statistics, Record Set, Notices, or Source and Donor. If there are blocks or notes associated with the item record, the Blocks and Notes icon appears in red.

> **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.

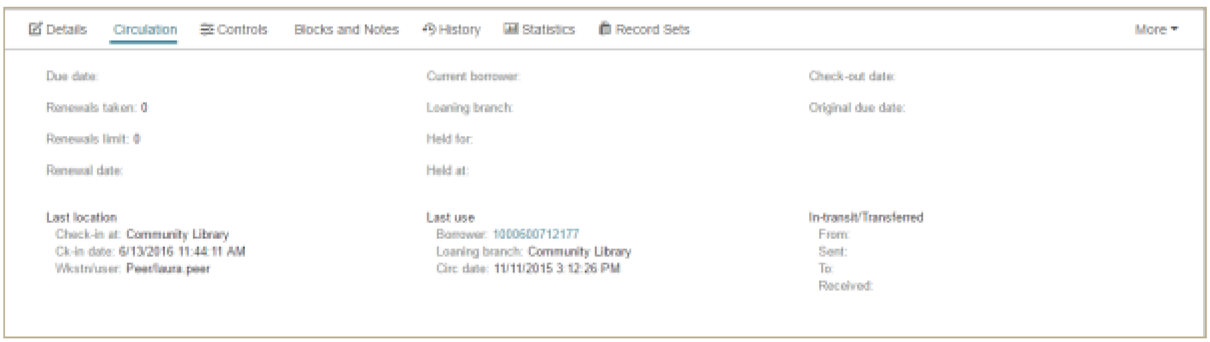
Item Record - Details View

If you have permission to modify item records, you can use the Details view to change the item record's header information.



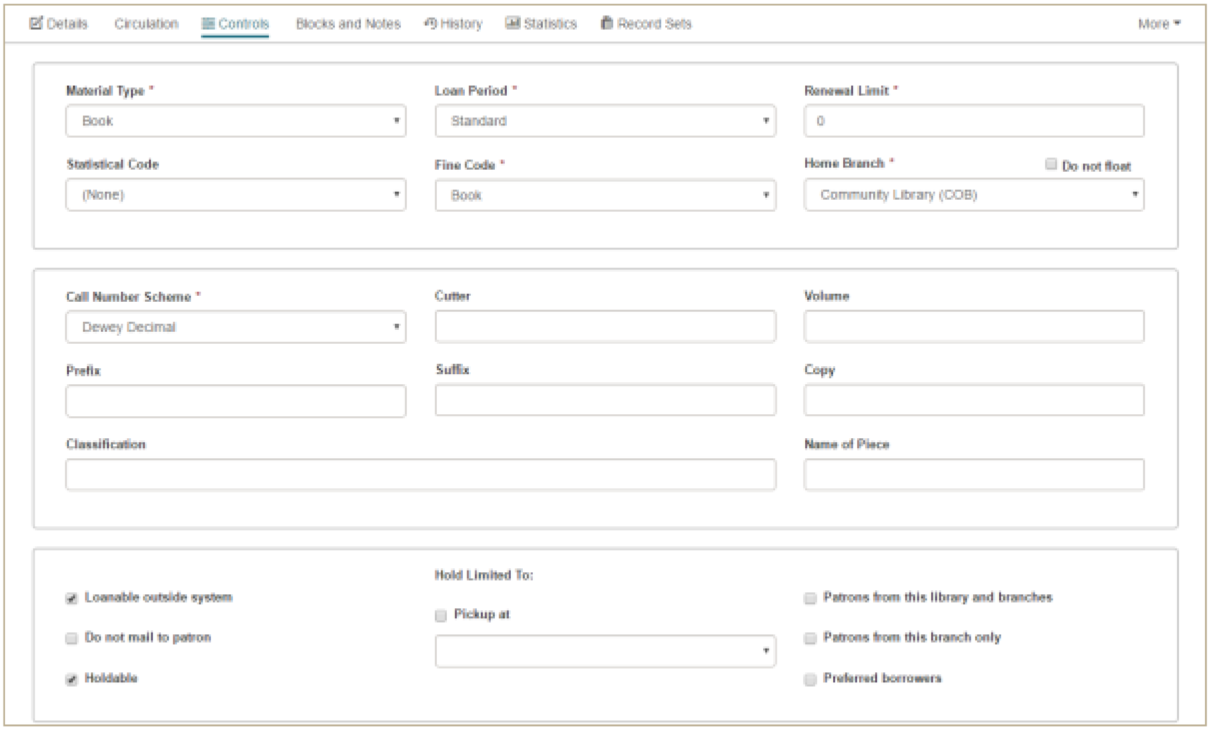
Item Record - Circulation View

The Circulation view of the Item Record displays circulation information for the item.



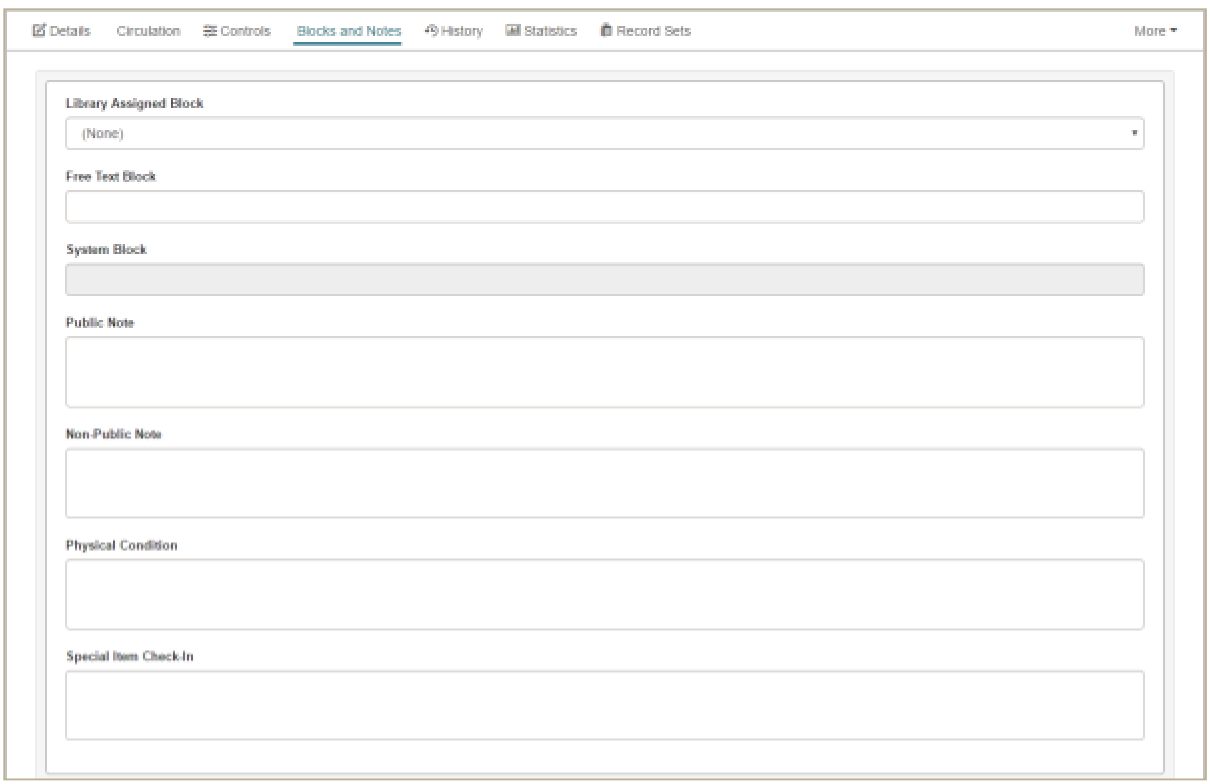
Item Record - Controls View

The Controls view of the Item Record displays controls or settings for the item.



Item Record - Blocks and Notes View

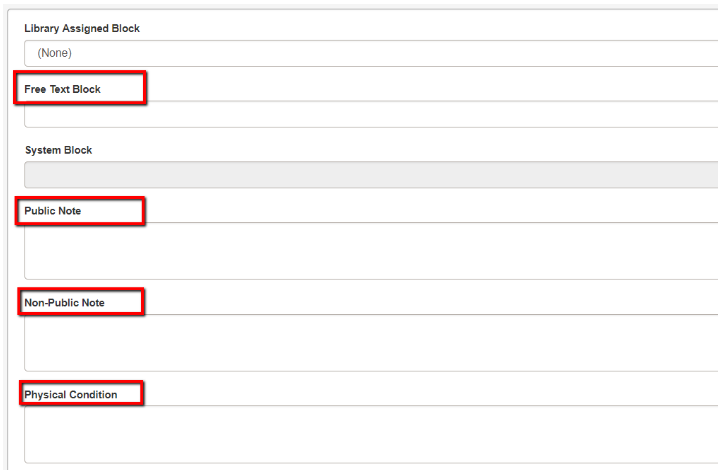
The Blocks and Notes view displays blocks and notes associated with the item.



Item Record - History View

Notes Procedure

Please make sure when adding a note into an item record that the note is necessary and in the appropriate spot. Below you will find a breakdown of the different note and block fields and what information is appropriate for each.



Public Notes

Only the owning library is permitted to enter comments in the public notes field and only if it will be helpful to the general public as any information entered in this field will appear on TRACpac for all patrons to see. No information that is already in the bibliographic record should be added to this field. Only pertinent information to patrons regarding the owning library's item should be placed in the public notes field. If the information applies to all items associated to the bib record it should not be entered in this field. Here are examples of suitable and unsuitable notes for the public notes field:

<u>Suitable Public Notes:</u>

- Map is missing from this book
- Workbook can be found on shelves under 722.538

<u>Unsuitable Public Notes:</u>

- Newbery award winner (this information applies to all the items in the bib record)
- Level 3 (this information would be better suited in the suffix field)
- Give to Bob for cleaning (this information can appear under free text or physical condition)
- Cover is ripped (damaged notes belong in the free text block field)
- Softcover (this information is in the bib record)
- Please give to John Smith (no patron information should appear in this field)
- 8 cds (this information can go in the free text block field)

This note field does not pop up in Polaris when the item is checked in or out.

Non-Public Notes

Only the owning library is permitted to enter comments in the non-public notes field. This note does not show to patrons and will not pop up in Polaris when the item is checked in or out. This field is suitable for comments internal to the owning library regarding their item.

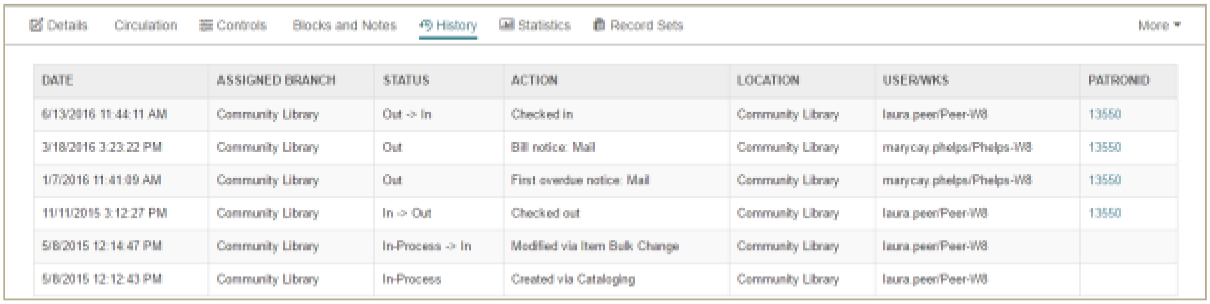
Physical Condition Notes

Only the owning library is permitted to enter comments in the physical condition field. This note will not show to patrons and will not pop up in Polaris when the item is checked in or out. Damaged notes should only go in the free text block.

Free Text Blocks

All libraries may use this field for damage notes, reminder notes, contents notes, etc. that they wish to alert the owning library or transacting library about. This note does not show to patrons but does pop up in Polaris when the item is checked in or out. If a transacting library receives an item that is damaged it is important to enter in a damaged note before checking the item out to a patron or returning the item to the owning library. When entering a damage note in the free text field please include your library's national code and the date the note was entered. If you are the transacting library do not delete notes that other libraries have placed. Only the owning library may delete notes from the item record when necessary.

The History view displays the transaction history for the items. You can click the patron ID to go to the patron record associated with the transaction.

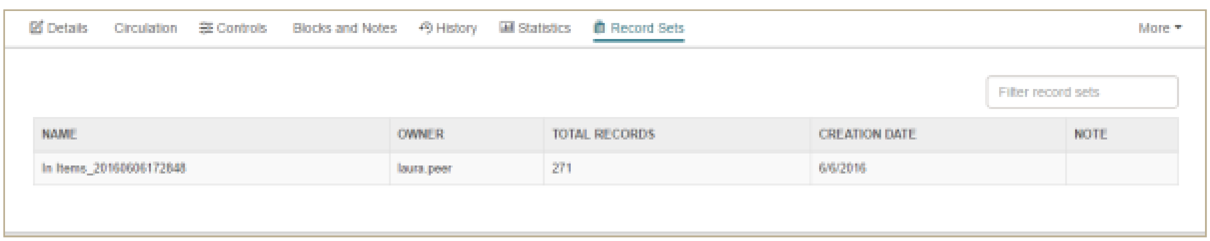


Item Record - Statistics View

The Statistics view displays circulation and inventory statistics for the item.

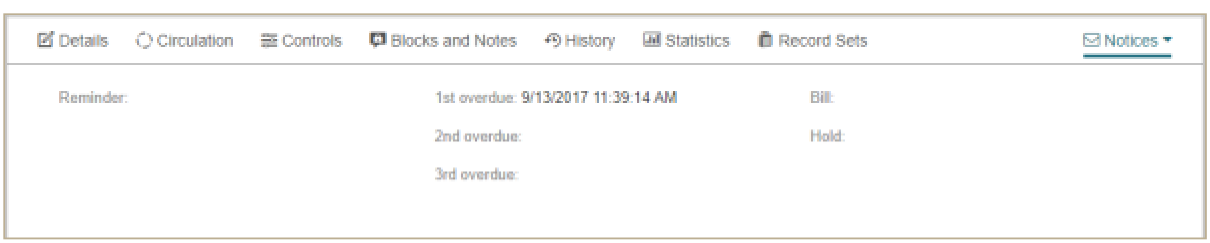
Item Record - Record Sets View

The Record Sets view displays a table listing all the record sets to which the item record belongs. You can click on a record set to open it in the Item Record Set workform. When you close the Item Record Set workform, you are returned to this view. If you do not have the required permissions for the record set, an error message appears.



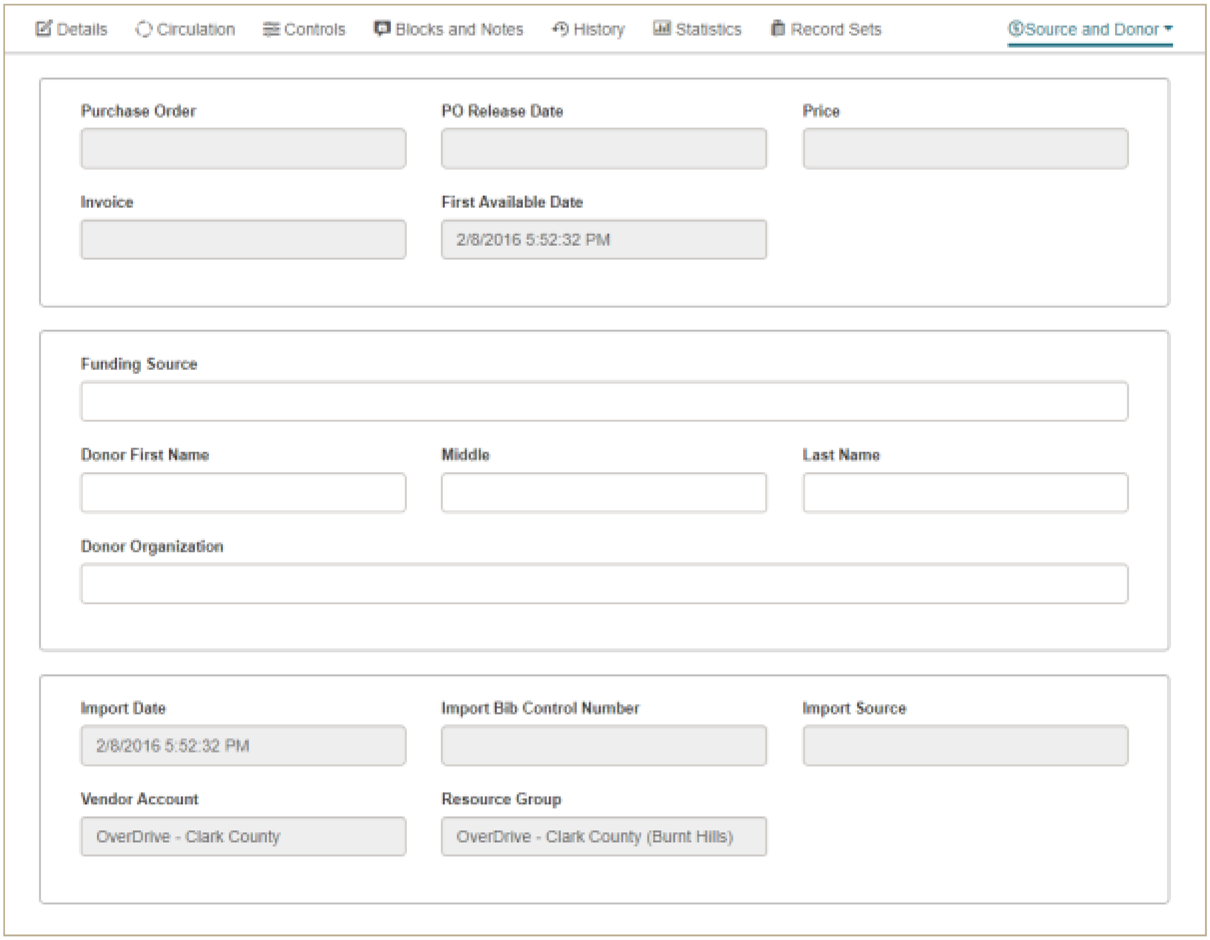
Item Record - Notices View

To view the notices associated with this item, select **More | Notices**. The Notices view displays the date and time for the notices sent regarding this item.



Item Record - Source and Donor View

To view source and donor information, including import information for eContent items, select **More | Source and Donor**.



Modify an Item Record

If you have the required Polaris staff client permissions to edit item records, you can modify item records in Leap.

You can edit the following fields on the Details view of the Item Record workform:

Note:
The following fields cannot be changed for electronic items: Non-circulating, Display in PAC, Barcode, Bib Control Number. The Find Tool is also disabled so you cannot search for and select a different bibliographic record.

- Barcode
- Collection
- Shelf Location
- Temporary Location
- Owning Branch
- Assigned Branch
- Price
- Circulation Status

Note:
If you change the item to an Unavailable status, and it is the last copy linked to that bib, you can uncheck the **Display in PAC** box on the Bibliographic Record workform.

- Bib Control Number - Type a different bib control number or click **FIND** to search for and select a different bibliographic records.
- Parent Item
- Display in PAC

You can edit the following fields on the Controls view of the Item Record workform:

- Material Type
- Loan Period
- Renewal Limit
- Statistical Code
- Home Branch
- Do not float
- Call Number Scheme
- Cutter
- Volume
- Prefix
- Suffix
- Copy
- Classification
- Name of Piece
- Loanable outside system

- Do not mail to patron
- Holdable
- To indicate limits on the holds, use the check boxes under Hold Limited To:
  - Pickup at this branch
  - Patron from this library and branches
  - Patrons from this branch only
  - Preferred borrowers

You can edit the following fields on the Blocks and Notes view of the Item Record workform:

- Library Assigned Block
- Free Text Block
- Public Note
- Non-Public Note
- Physical Condition
- Special Item Check-In

You can edit the following fields on the Source and Donor view of the Item Record workform if the item record was not created from a purchase order:

- Funding source
- Donor First Name
- Middle
- Last Name
- Donor Organization

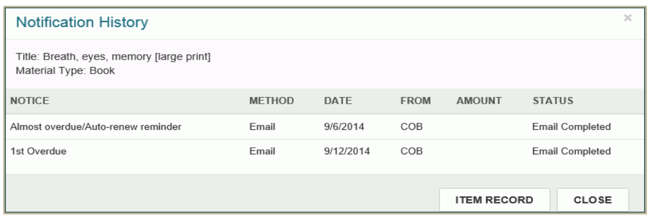
View an Item’s Notification History

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

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

   The Notices view is displayed.

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



View the Item Record from the Items Out List

To open the item record from the items out list:

1. Open the patron record.
2. Click the **Out/Overdue** tab.

   The patron's items out list appears.

3. Select an item in the list.

   The Item Record appears.

4. Click **CLOSE** to close the item record.

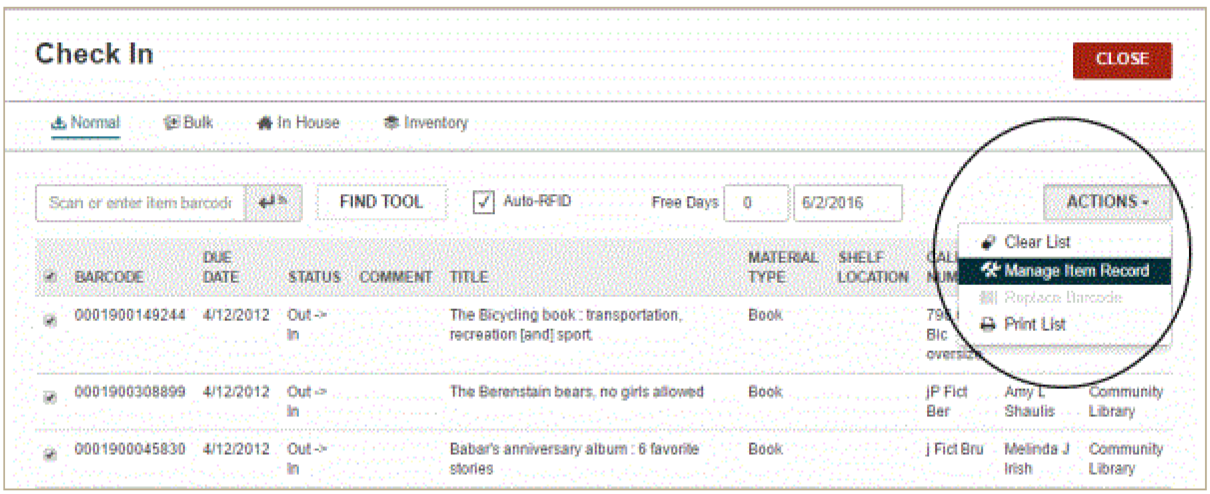
Change Item Information or Barcode During Check-In

When checking in items in Leap, staff members who have the appropriate **Manage item dialogs** Circulation permissions can edit specific fields for a single or multiple items, or replace the item barcode for a single item. These Circulation permissions allow staff members to modify certain fields at check in even if they do not have the Cataloging permissions necessary to modify all fields in item records.

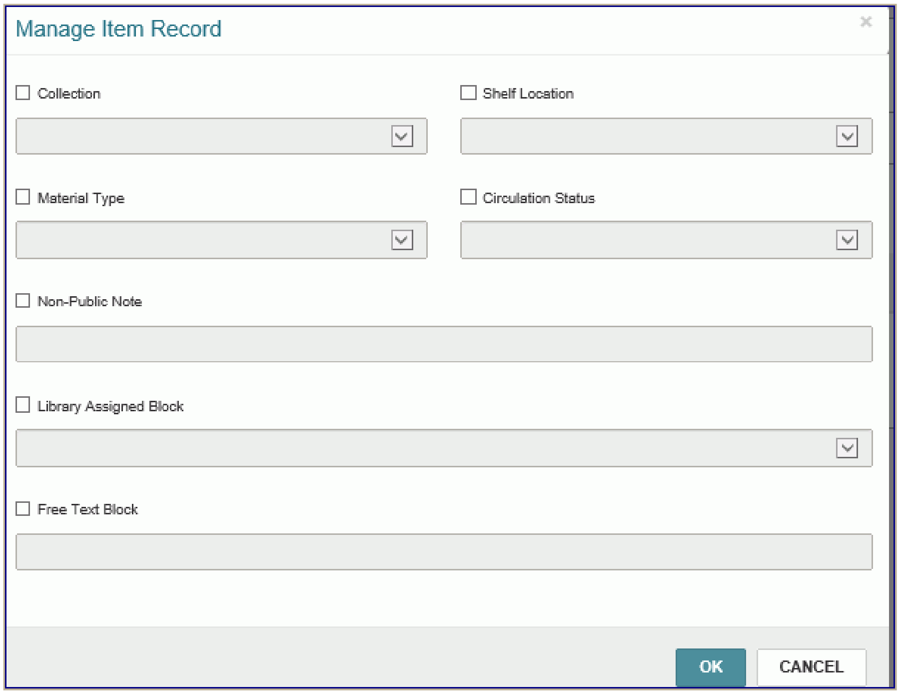
If you have the required permissions, you can select one or multiple items and use the **Manage Item Record** option to change the collection, shelf location, material type, circulation status, non-public note, library assigned block, or free text block. The **Replace Barcode** option is available only when a single item is selected. For more information on these Circulation permissions, see Polaris staff client Help.

To modify items at check-in:

1. Select **CHECK IN**.
2. Select the check boxes next to the items you want to modify.
3. Select **ACTIONS** and choose **Manage Item Record** in the drop-down list box.



The Manage Item Record dialog box opens.



4. Select the check box for the item record field to modify.
5. Select the new value in the drop-down list box.
6. Select **OK**.

   The message **Item record(s) updated successfully** appears if all the changes can be made to all the selected records. A transaction is added to the database for each changed item. In addition, the Item Record workform, History view displays a row for each change that was made to the item record, for example: **Assigned collection modified via Manage Item dialog from Check In.**

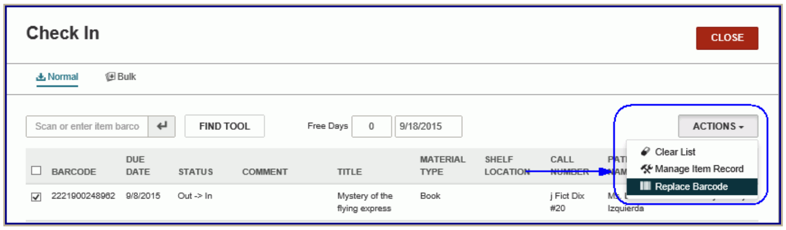
   If one or more of the selected records cannot be changed, the following types of messages appear:

   - **Locked item [barcode] cannot be modified from check-in**. This message appears if the item record is locked (open) in either the Polaris staff client or Leap.
   - **Item [barcode] must be in and from this branch**. This message appears if the item status has been updated to a status of other than In but the Check In workform displays an In status, or the item's assigned branch has been changed but it still displays as the logged-on branch in the Check In workform.
   - **Quick-circ item [barcode] cannot be modified from check-in**. This message appears if the item is a Quick-circ item.
   - **ILL item [barcode] cannot be modified from check-in**. This mes-sage appears if the item was created via Polaris ILL.

To replace the item barcode for a single item:

Note:
The Replace Barcode option appears only when a single item is selected.

1. Check In an item.
2. Select the checked-in item in the list.
3. Select **ACTIONS** and choose **Replace Barcode** in the drop-down list box.



The Replace barcode dialog box opens.

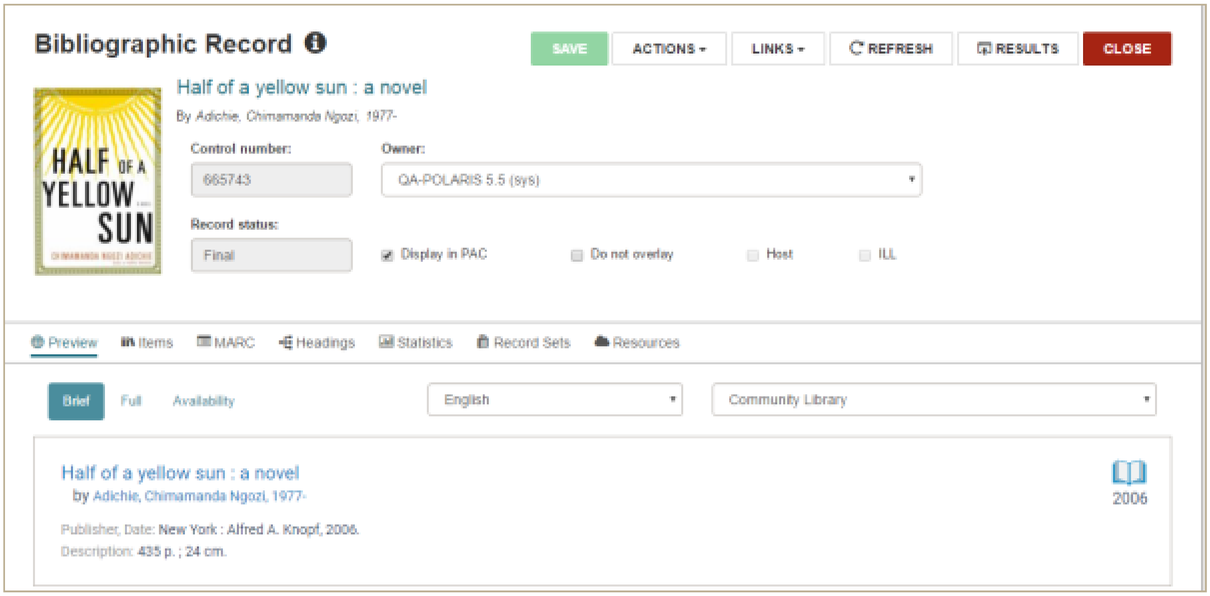
4. Type the new barcode in the box, and choose **OK**.

   The item's barcode is changed.

4. BIBLIOGRAPHIC RECORDS

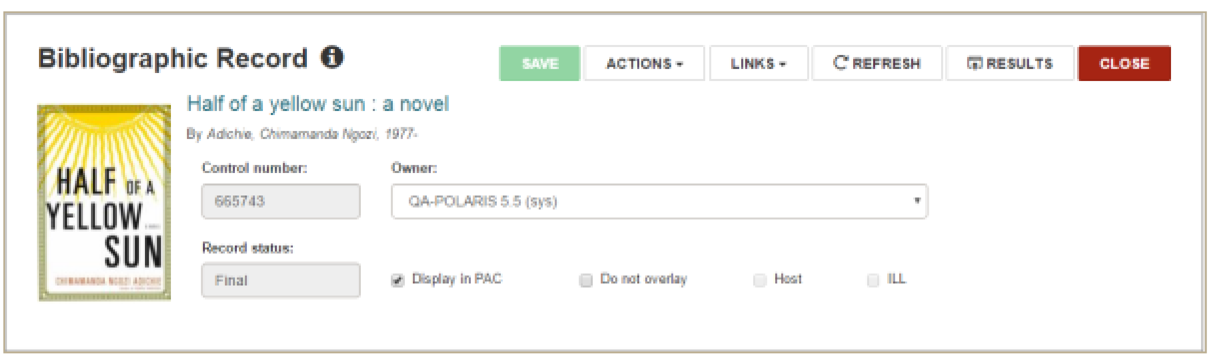
Bibliographic Record

If you have the required permissions in Polaris Administration, you can search for and access bibliographic records in Leap. When you open a bibliographic record, it is displayed in the Bibliographic Record workform.



Bibliographic Record Workform - Header

The top part of the Bibliographic Record workform displays the header information that identifies the bibliographic record.



You can hover the cursor over the information icon to open the Properties window and see information about the record. If you have the required permissions, you can edit the following elements in the header: **Owner**, **Display in PAC**, and **Do not overlay**. Then click **SAVE** to save your changes.

The **ACTIONS** menu includes the following options:

- Place Hold
- Create Item
- Delete

- Add to New Record Set
- Add to Existing Record Set

The **LINKS** menu provides links to:

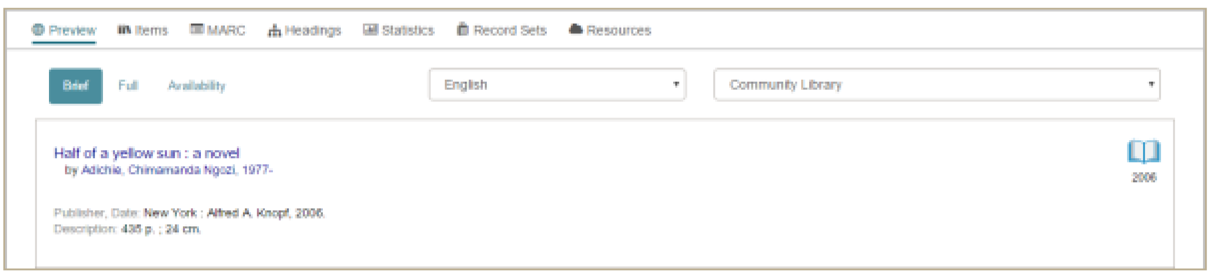
- Holds Queue
- **PAC** - The title is displayed in the Polaris PowerPAC. You can close the browser window to return to the Bibliographic Record workform.

The bottom of the page changes depending on the view selected. When the Bibliographic Record workform opens, **Preview** is selected.

> **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.

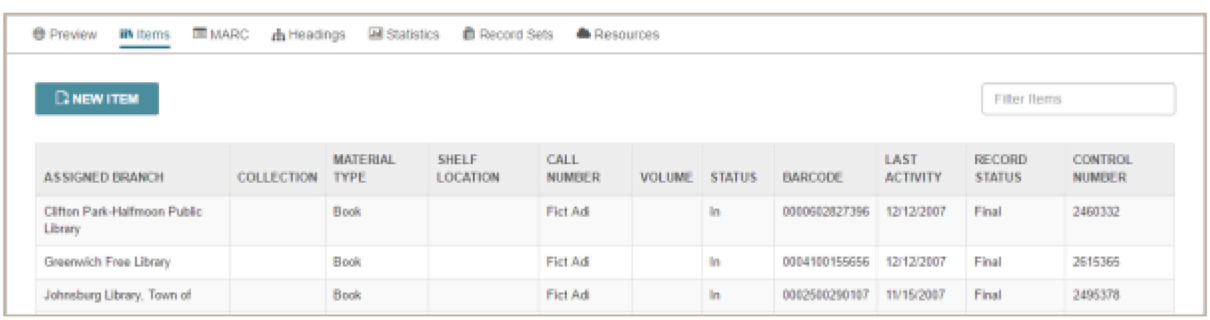
Bibliographic Record - Preview

This is a preview of the **Brief** display in the PAC. You can choose **Full** or **Availability** to change the PAC view.



Bibliographic Record - Items View

The items view displays information about the item records linked to the bibliographic record, including the due date (and time for hourly loan) in the Status column for items with a status of Out or Out-ILL. Select an item in the list to go to the item record. If you have the appropriate permissions, you can click **NEW ITEM** to add a new item linked to this bib.

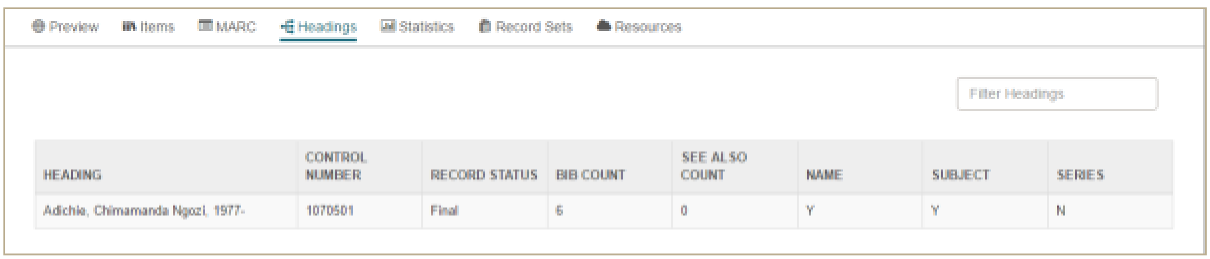


Bibliographic Record - MARC view

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

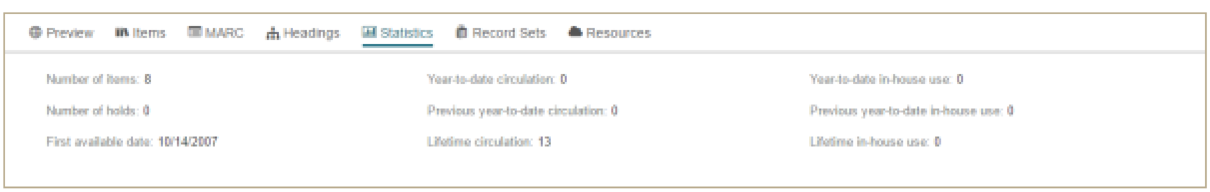
Bibliographic Record - Headings View

The Headings view displays the headings linked to the bibliographic record. If there are no headings linked to the bibliographic record, the following message appears: **No authority headings exist for this record**. You can click a heading to go to the authority record. When you close the authority record, you are returned to this view.



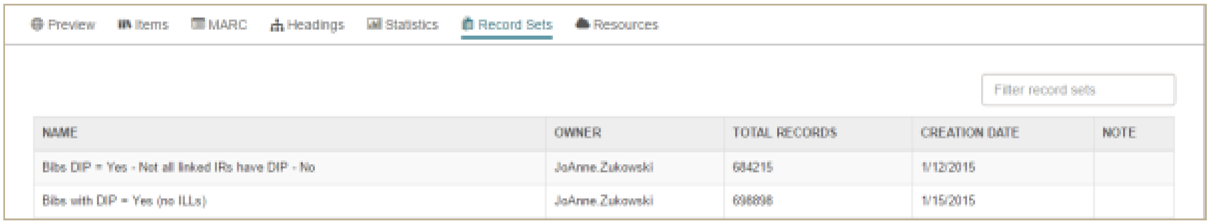
Bibliographic Record - Statistics View

The Statistics view displays circulation information about the hold requests and items linked to the bibliographic record:



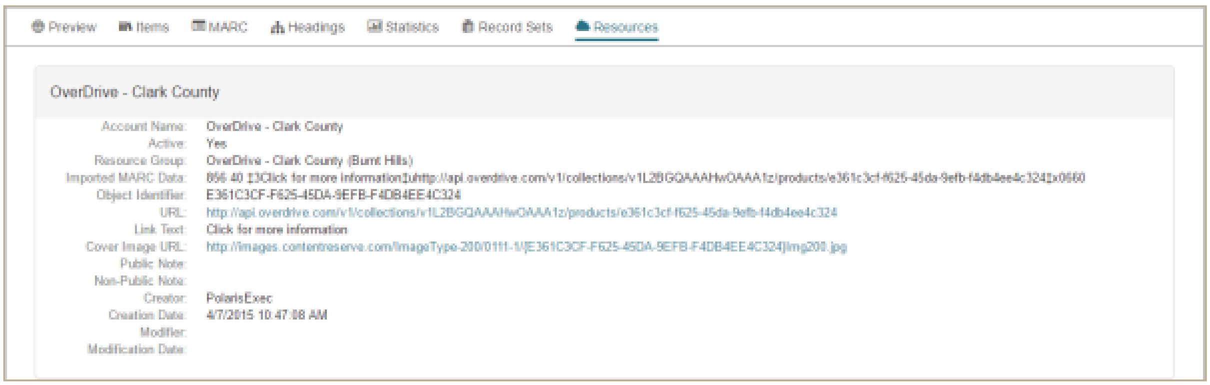
Bibliographic Record - Record Sets View

The Record Sets view displays a table view of the bibliographic record sets to which the bibliographic record belongs. All record sets that contain this record are displayed in this view regardless of record set ownership. You can click a record set to open it in the Bibliographic Record Set workform. However, if you do not have permission to access the record set, the following message appears: **You do not have ownership rights to open this record set**.



Bibliographic Record - Resources View

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



5. USING THE FIND TOOL

Using the Find Tool

The Leap Find Tool features and functions are similar to those available in the Polaris staff client Find Tool. However, you cannot search for all record types, search external Z39.50 targets, or perform certain functions from the Find Tool results list in Leap.

With the Leap Find Tool, you can do the following:

- Search for authority, bibliographic, hold request, ILL request, item, and patron records.
- Search for item, bibliographic, authority, or patron record sets.
- Do a basic search, a power search, or an SQL search.
- Specify the columns in the Find Tool results list and the order in which they appear.
- Add filters to narrow your search.
- Save search and column settings as your user default when searching for records.
- Get a quick count of the records that meet your search criteria without returning the results list.
- Send all Find Tool results to a new record set.
- Select records in the Find Tool results list and put them in a new or existing record set.

Find Tool System Administration Settings Applied to Leap

Polaris Find Tool permissions, such as those for setting up and saving SQL searches, are checked in the Leap application. In addition, if your library has set the **Find Tool: Filter search results by permission** Staff Client profile to **Yes** in Polaris Administration, Find Tool results are filtered by the user's permissions.

When you create a record set in Leap from all Find Tool results or from another record set, a warning message may appear depending on the number of records being added to the record set and the setting in the Polaris Administration Staff Client profile **Find Tool/record-set-to-record-set creation: Record set size warning**.

The following Polaris Administration Staff Client profile settings do not apply to the Leap Find Tool:

- **Find Tool: Default number of records to return in a result set**
- **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. In addition, Leap has its own automatic suggestions and does not use the Cataloging parameter **Auto-suggest feature enabled**.

See also:

- Do a Basic Search for Records or Record Sets
- Search for Records and Get a Count
- Do a Power Search
- Save a Power Search
- Browse Search for Bibliographic Records
- Set Up and Save an SQL Search

- Rename a Saved Search
- Delete a Saved Search
- Apply a Filter to a Find Tool Search
- Specify Columns for Search Results
- Save a Set of Find Tool Search Options as Your User Default
- Sort Find Tool Search Results List

Use the Find Tool to Search for a Patron

To search for a patron using the Find Tool:

1. Sign in to Polaris Leap.

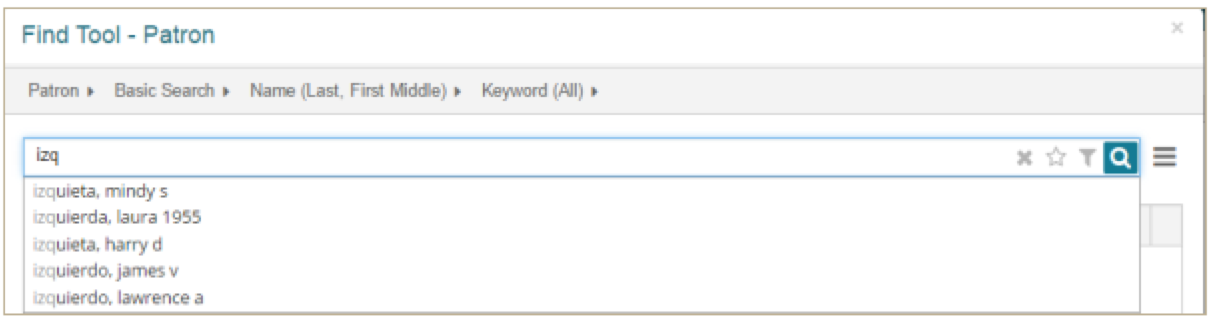
   The Circulation page opens.

2. Click **FIND.**

   The Find Tool opens with **Bibliographic Record** selected as the search database.

3. Select **Patron** to change the search database.
4. Enter the search criteria.

   As you type, automatic suggestions appear.

5. Open the patron record:
   - If the patron is listed in the automatic suggestions list, select the patron, and click **OPEN**.
   - If the patron is not listed in the automatic suggestions, click  to search, then select the patron in the search results and click **OPEN**.

   The patron's record opens.

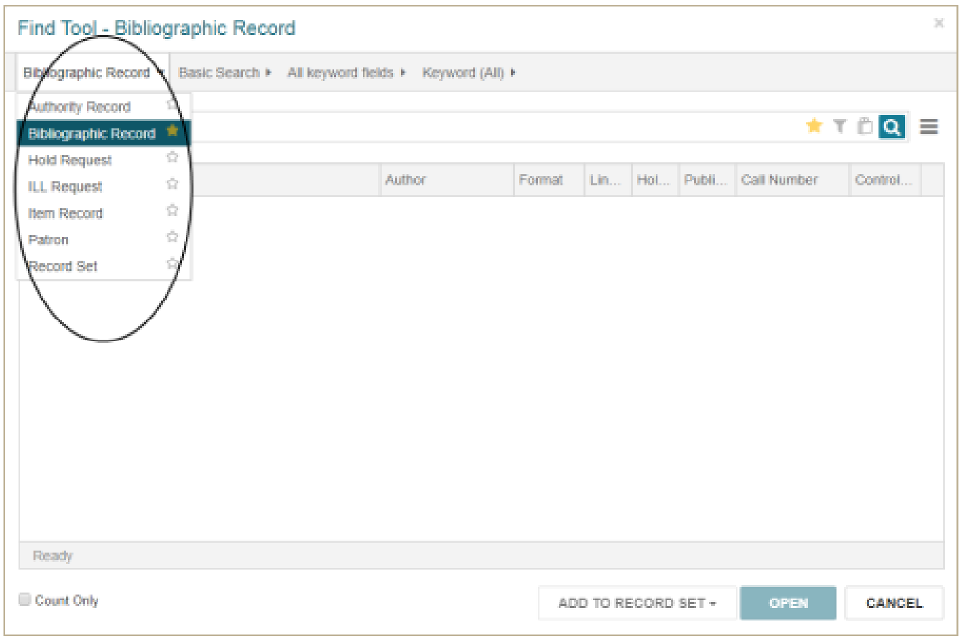
You are here: Using the Find Tool > Do a Basic Search for Records or Record sets

Do a Basic Search for Records or Record Sets

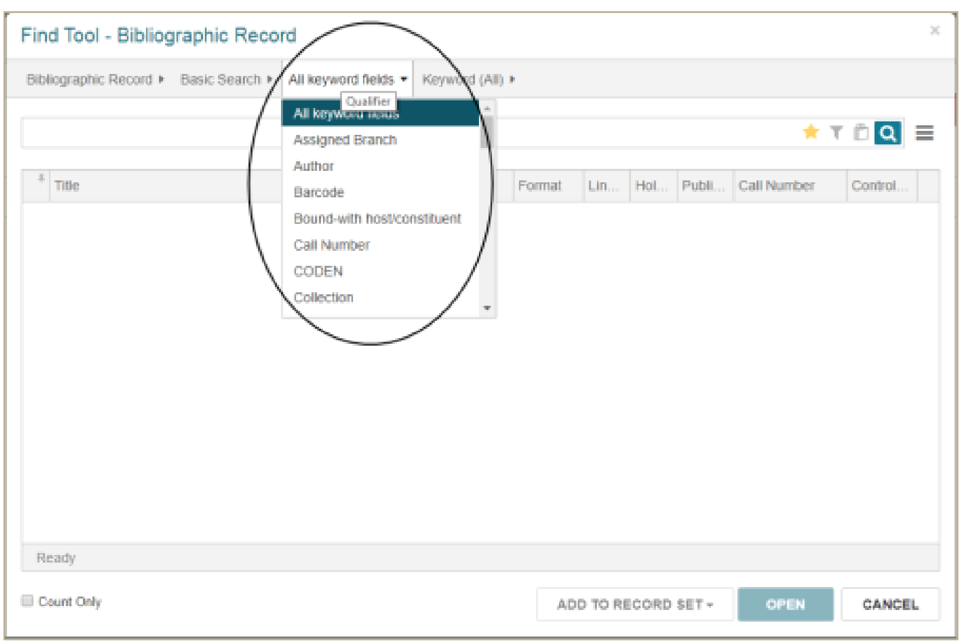
Note:
You can set and save your own user defaults for the Find Tool.

To search for a patron, item, bibliographic, authority, hold request record or ILL request record, or a record set:

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

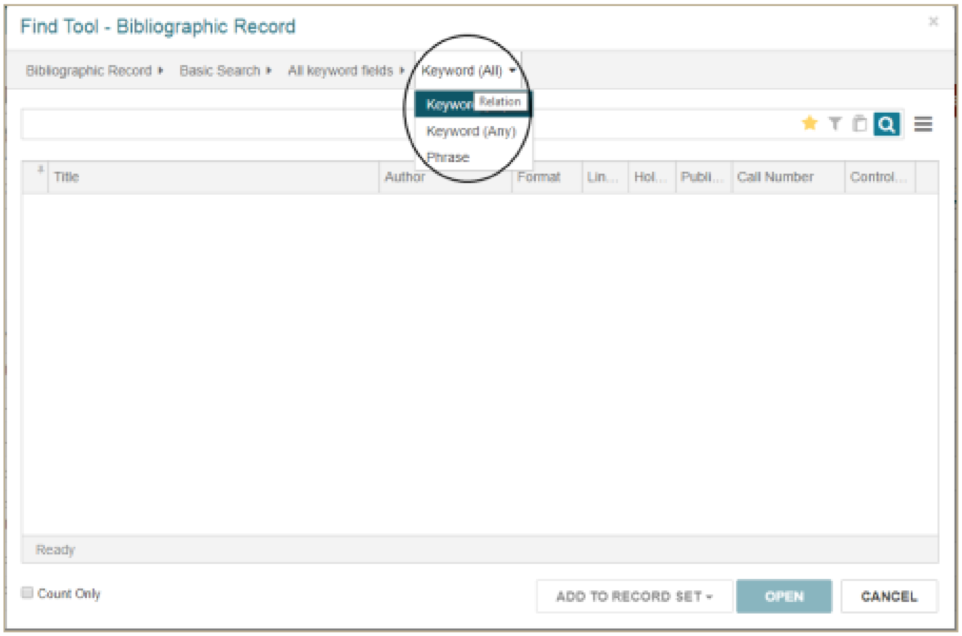


3. Select **Basic Search**.
4. Select the search by access point or qualifier.

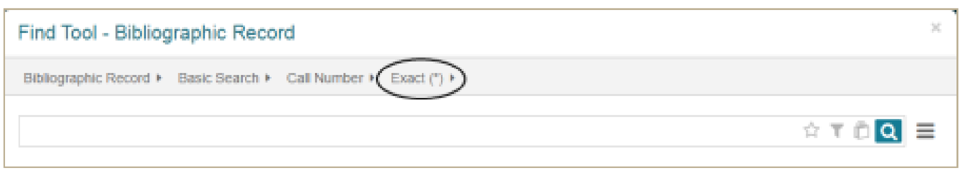


5. Select the relation option. The options depend on the selected search by access point or qualifier.

   For example, if **All keyword fields**is selected as the access point, the selections are**Keyword (All)**, **Keyword (Any)**, and **Phrase**.



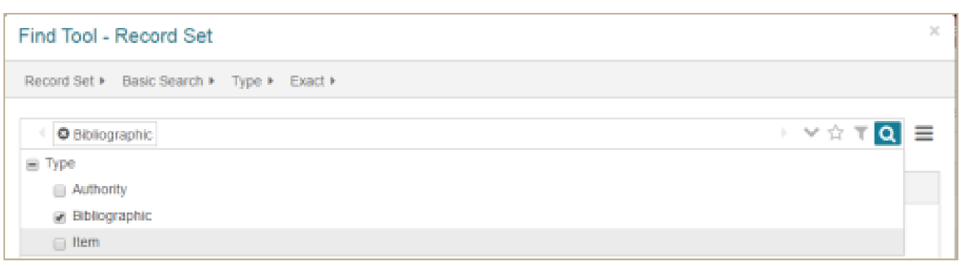
   If the search type supports implicit truncation, **Exact (*)** is selected by default.



6. Enter the search term or choose the search option (qualifier):

   - If the search access point does not have an associated list, type the search term. For example, if you search for a bibliographic record by **Author**, type the author's name.
   - If a list is displayed, click the appropriate check boxes. For example, if you are searching for record sets and select **Type**, you can select the record set type.

     Note:
     When multiple check boxes are selected, an OR is implied between the selections.



7. (Optional) Apply additional filters.
8. Click  to start the search.

   The search results list is displayed.

9. Select the record in the list, and click **OPEN**.

The record or record set workform opens.

10. To return to the Find Tool results list, click 
.

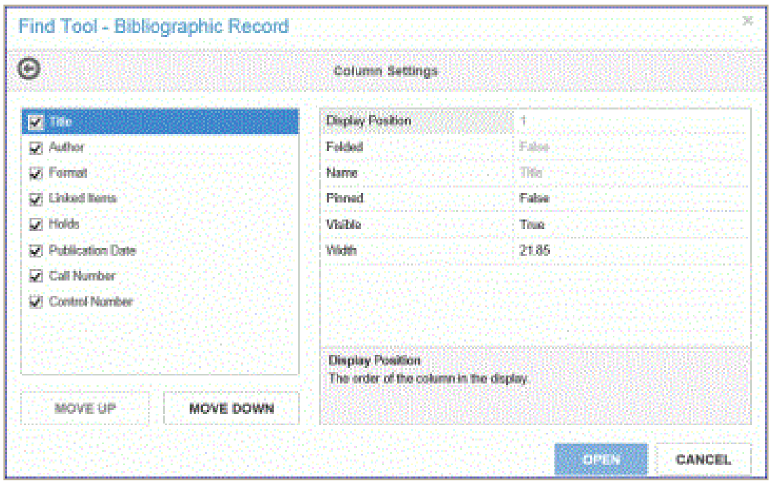
> **Note:**
> Only the icon appears on this button when displayed on a narrower screen or window.

You are here: Using the Find Tool > Specify Columns for Search Results

Specify Columns for Search Results

To specify the columns to display in search results:

1. Open the Find Tool.
2. Go to the options menu.
3. Select **Column Settings**.
4. The Column Settings dialog box opens.



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

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

The column settings are as follows:

- **Display Position**: The order in which the columns display from left to right, with 1 being the first column on the left. To change the display position, select the MOVE UP or MOVE DOWN button.
- **Folded**: Indicates whether a column will be “folded” to a secondary line. When set to True, the column is folded; False is not folded.
- **Pinned**: Indicates whether a column will move when scrolling the results list horizontally. When set to True, the column is pinned; False is not pinned.
- **Visible**: Indicates whether a column will be visible. When set to True, the column is visible; False is not visible.
- **Width**: The width of the column in characters. The minimum setting is 2, and the maximum setting is 255.

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

Apply a Filter to a Find Tool Search

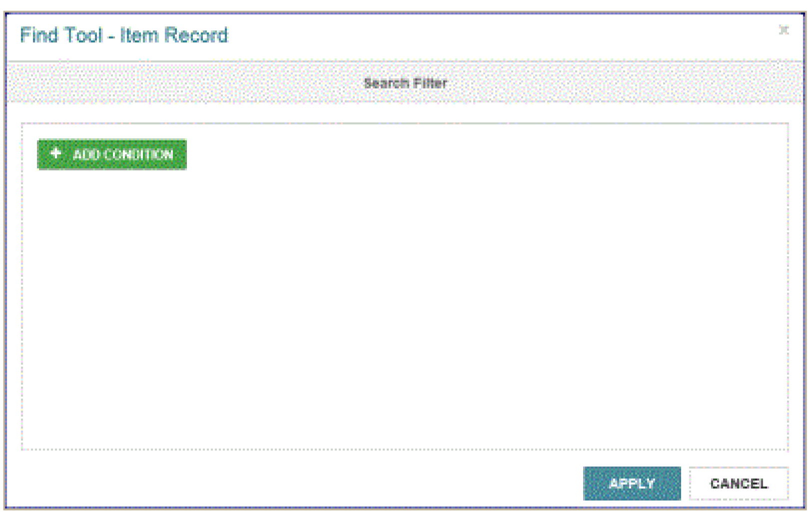
To apply a filter to limit search results:

Note:
You can apply filters and save them in your user defaults.

1. Select **FIND** in the Leap header, or select the **FIND TOOL** button to open the Find Tool.
2. Set up the search criteria.
3. To open the Search Filter view:
   - Select the filter icon.

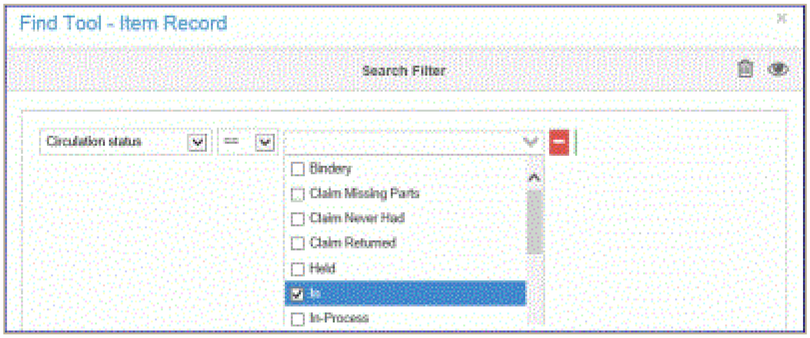
   - Or, choose the slide-out button and choose **Search Filter**.

4. On the Search Filter view, select **ADD CONDITION**.

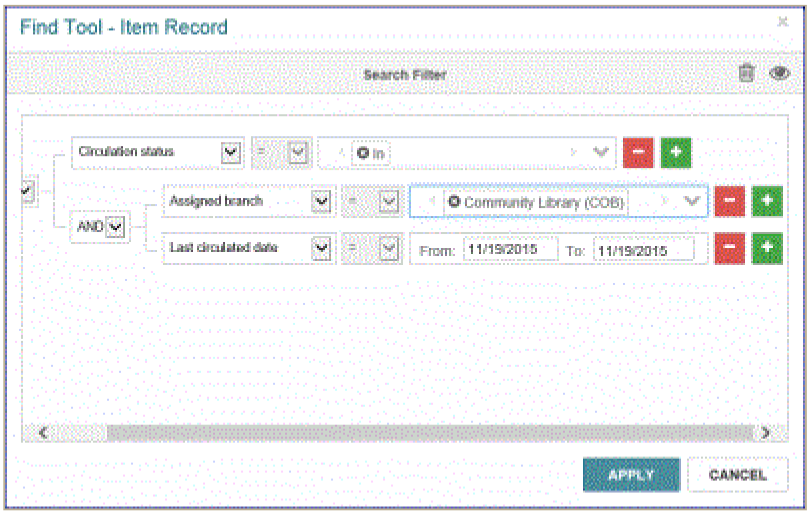


   The search filter options appear.

5. Select the access point. For example, **Circulation status**.
6. Select the qualifier. For example, **=**.



7. (Optional) To add another filter, select the plus button.



Note:
To see the Contextual Query Language (CQL) that composes the query, select the Preview Query button  .

8. When you have added all the filters for the search, select **APPLY**.

   The Search Filter view closes.

9. Select the search button .

   The search is initiated with the filter applied.

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.

You can save the following search options as a user default.

- Database (record type) - Patron, Item, 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 or record set.
3. Select the search mode.
4. Select the search qualifier (access point or search by) option.
5. Select the search relation.
6. To include specific columns for search results in your user default, set up the columns. See Specify Columns for Search Results.
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**.

6. HOLDS

You are here: Records and Record Sets Displayed in Leap Workforms > Hold Request

Hold Request

To access a Hold Request record, you can search for the hold request using the Find Tool, or you can link to a hold request from the Holds Queue, the Patron Record workform, or the Item Record workform. The Hold Request workform includes a header and the following views: Details, Notes, Satisfied By, History and All Hold Requests.

Hold Request Workform - Header

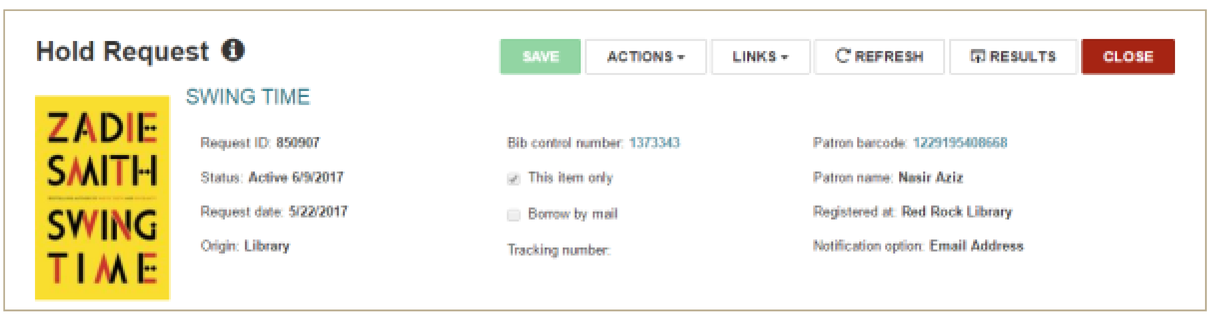
The Hold Request workform header includes general information about the hold request, including a **Bib control number** link to the bibliographic record and a **Patron barcode** link to the patron record. The header information does not change when you select another workform view.

To perform an action on the hold request, select **ACTIONS** and choose an action from the list:

> **Note:**
> The list of available actions depends on the status of the hold request.

- **Cancel** - Cancel the hold request
- **Reactivate** - Reactivate the hold request
- **Delete** - Delete the hold request
- **Fill Now** - Scan an item barcode to fill the hold request.

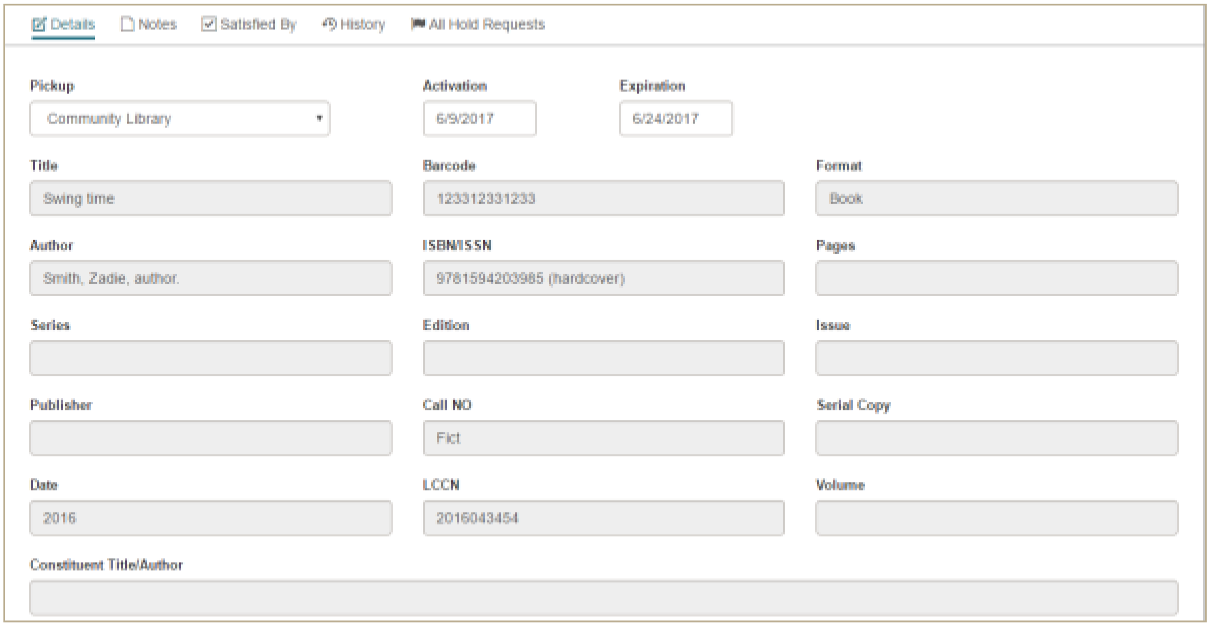
To go to the Holds Queue, select **Links | Holds Queue**



When you open a hold request that another staff member has open in either Leap or the Polaris staff client, the following message appears: The record is being modified by [username]. In addition, a red key icon indicates the record is locked. You cannot make any modifications to a locked hold request, but you can still click a link to go to another record. Click the key icon to see information regarding the object lock.

Hold Request Workform - Details View

The Details view of the Hold Request workform appears when you first open the workform. It includes the pickup branch, the activation date, expiration date, bibliographic information, item information (if the hold is item-specific), and constituent/title information if the hold request is placed on a Bound-With title.

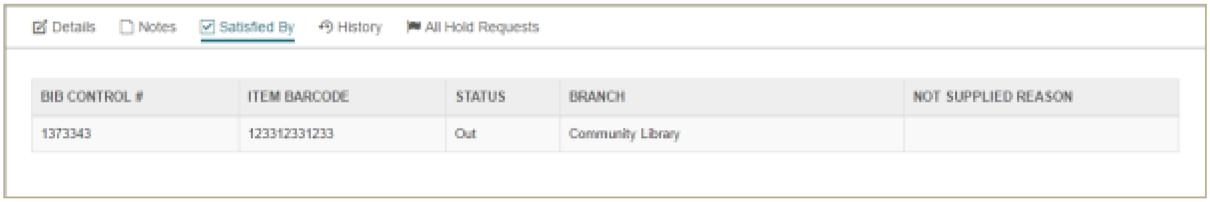


Hold Request Workform - Notes View

The **Notes** view displays any notes that may have been entered for a hold request. You can enter notes in the Staff Display Notes, Non-public Notes, and PAC Display Notes fields.

Hold Request Workform - Satisfied By View

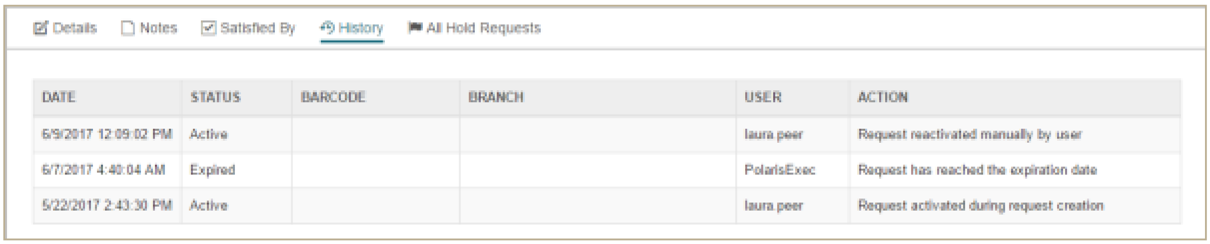
The **Satisfied By** view lists all the items that can fill the hold request. You can select an item in the list to open the Item Record workform.



BIB CONTROL #	ITEM BARCODE	STATUS	BRANCH	NOT SUPPLIED REASON
1373343	123312331233	Out	Community Library	

Hold Request Workform - History View

The **History** view displays the history for this hold request.

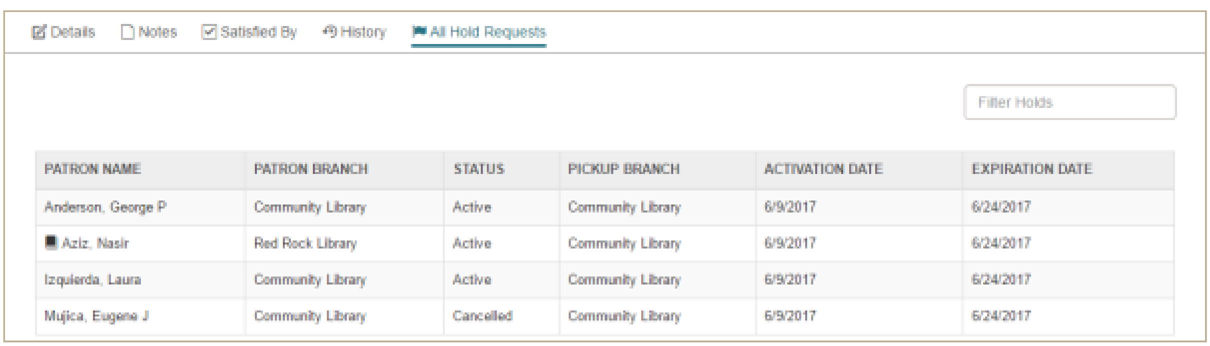


DATE	STATUS	BARCODE	BRANCH	USER	ACTION
6/9/2017 12:09:02 PM	Active			laura peer	Request reactivated manually by user
6/7/2017 4:40:04 AM	Expired			PolarisExec	Request has reached the expiration date
5/22/2017 2:43:30 PM	Active			laura peer	Request activated during request creation

Hold Request Workform - All Hold Requests View

The **All Hold Requests** view displays all hold requests for the bibliographic record, including requests with an Inactive, Cancelled, Expired, Unclaimed, or Out to Patron status.

> **Note:**
> The default sort order for this view is by patron, but you can click any column header to change the sort.



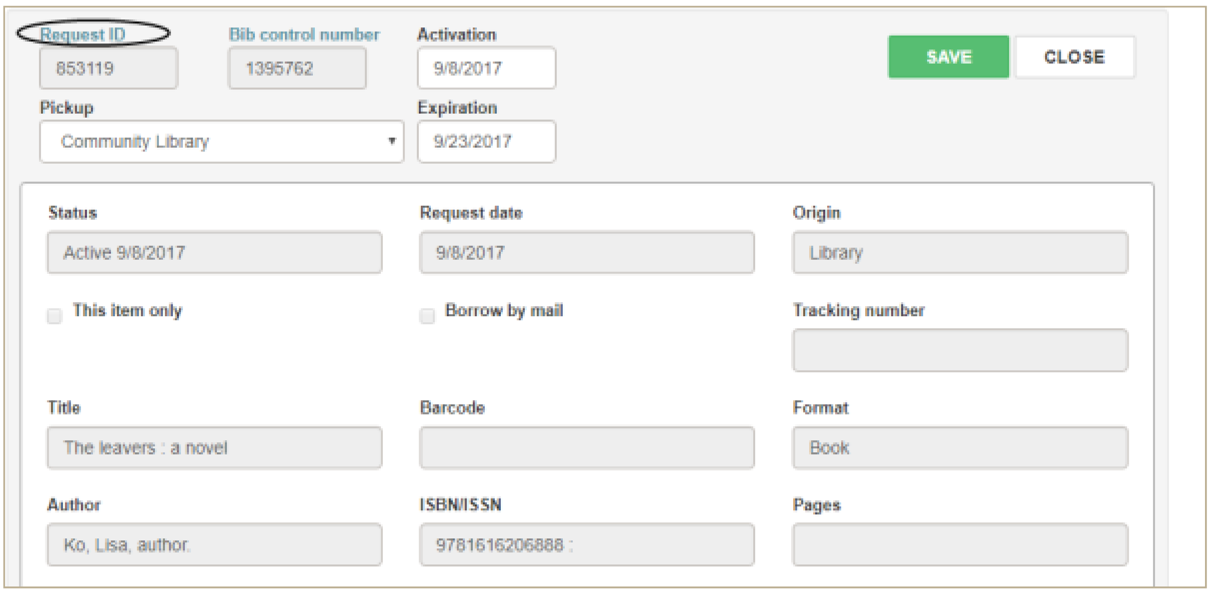
PATRON NAME	PATRON BRANCH	STATUS	PICKUP BRANCH	ACTIVATION DATE	EXPIRATION DATE
Anderson, George P	Community Library	Active	Community Library	6/9/2017	6/24/2017
Aziz, Nasir	Red Rock Library	Active	Community Library	6/9/2017	6/24/2017
Izquierda, Laura	Community Library	Active	Community Library	6/9/2017	6/24/2017
Mujica, Eugene J	Community Library	Cancelled	Community Library	6/9/2017	6/24/2017

View a Hold Request's Details and History

To view a hold request's details and history:

1. Go to the Patron record | Holds view.
2. Select a hold in the list to open it.

   The held title's details are displayed.
3. To view notes, go to the bottom of the hold details view, and select the arrow next to **Notes** to expand the area.
4. To go to the Hold Request workform, click the **Request ID** link.



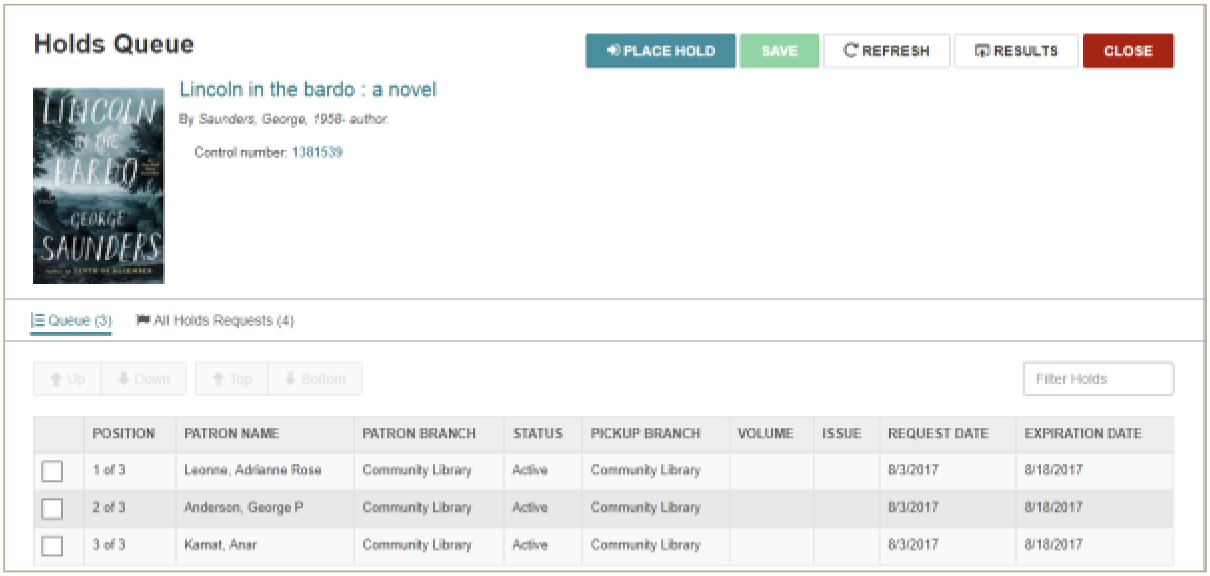
5. To view the request history, select the arrow next to **Request History** to expand the area.

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

Holds Queue

From the Holds Queue, you can view hold requests for a specific title or item; change the order in which requests are filled; and place new hold requests.

To go to the Holds Queue workform, select **Utilities | Holds Queue**. Then search for the title (bibliographic record) for which you want to see the hold requests.



The Holds Queue has two views: the Holds Queue view, which displays the Active holds associated with this bibliographic record, and the All Holds Requests view, which displays all linked hold requests, including those with a status of Inactive, Cancelled, Expired, Held, Unclaimed, or Out to Patron.

On either view, you can filter the list by typing in the **Filter Holds** box. The list immediately responds displaying the rows that have text matching the characters entered.

> **Example:**
> If you type **Ship** in the **Filter holds** box, the list displays the rows with a Shipped status.

You can click on a row in either view to open the Hold Request workform.

See also:

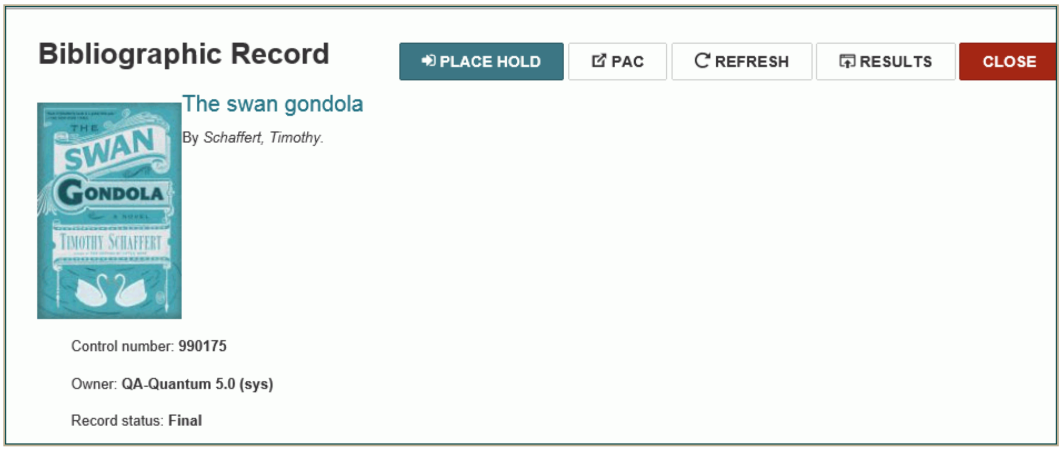
- View and Reorder Hold Requests in the Holds Queue
- Place a Hold Request from the Holds Queue

You are here: Placing and Managing Hold Requests > Place a Hold Request from the Bibliographic Record

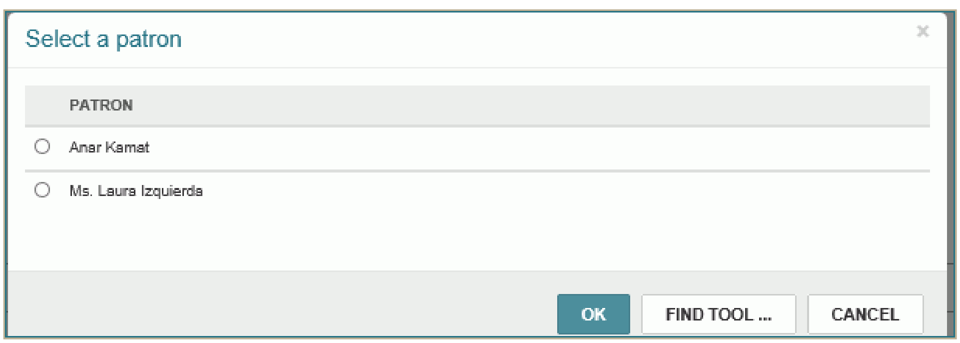
Place a Hold Request from the Bibliographic Record

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

1. Open the bibliographic record.
2. Select **PLACE HOLD**.

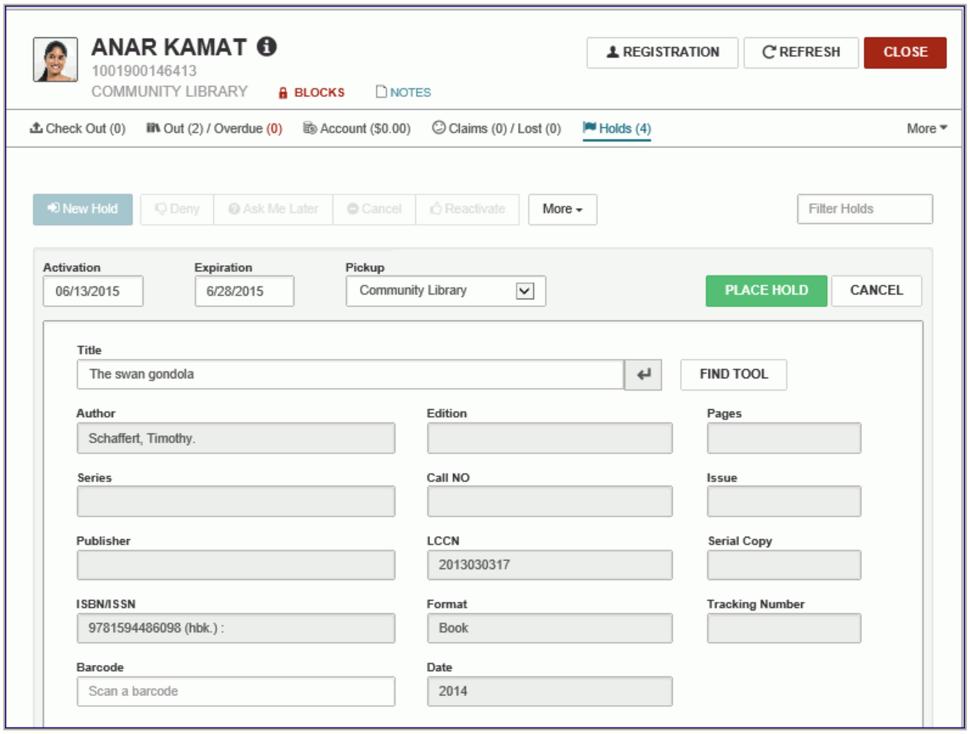


If patron records are open, the **Select a patron** box opens, and you can select the patron if he or she is placing the hold.



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

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



3. Review the information and select **PLACE HOLD**. For more details, see Place a Single Title-Level or Item-Level Hold Request for a Patron

Place Multiple Hold Requests for the Same Patron

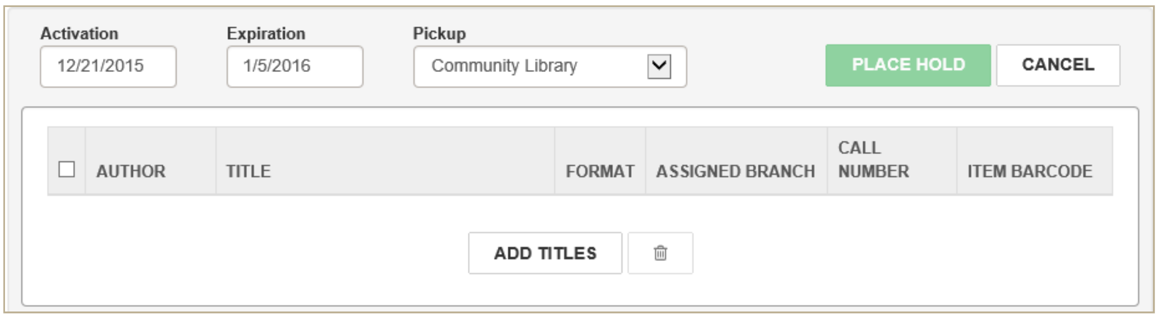
To place multiple holds at once for the same patron:

1. Go to the Patron record | Holds view.

   The patron's holds list is displayed.

2. Select **More | Multiple Holds**.

   The area below the button bar expands.

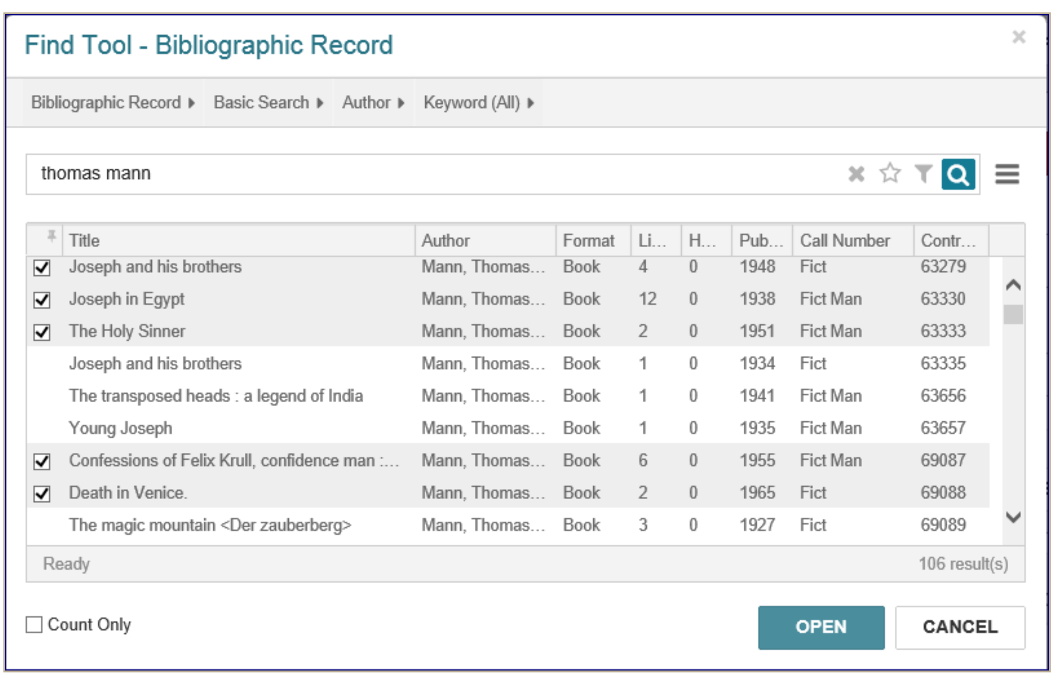


3. Select **ADD TITLES** to open the Find Tool.
4. Search for the titles that the patron wants to request.

   The search results are displayed.

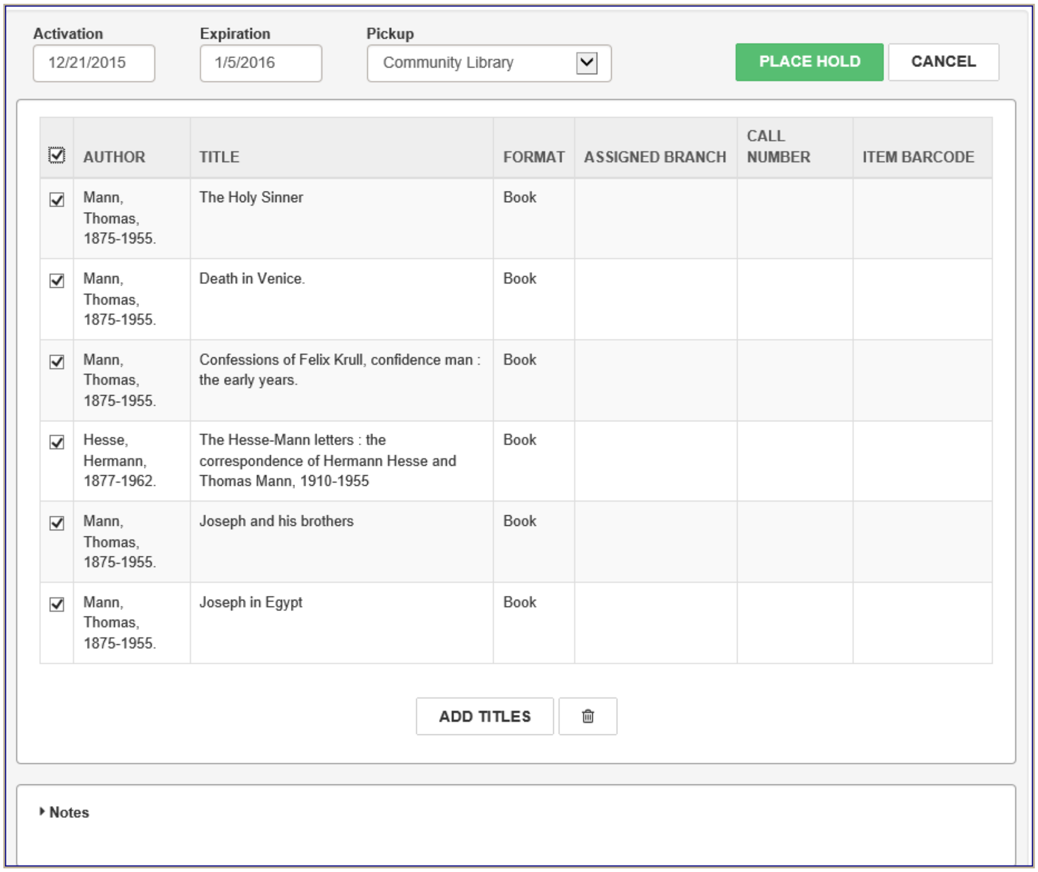
5. Select one or more check boxes next to the titles on which the patron wants to place a hold.

Note:
You may be able to search for and select multiple titles at once and select them in the Find Tool results. For example, if the patron wants to place holds on multiple titles with the same author, you can search by author and select the titles in the Find Tool results list.



6. Select **OPEN**.

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



7. To add more titles, select **ADD TITLES**, and search for and select the additional titles.
8. 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.
9. If you want to enter notes regarding this hold request, select **Notes** to expand the area and type the notes.
10. Select **PLACE HOLD**.

    The hold requests are placed on all the selected titles.

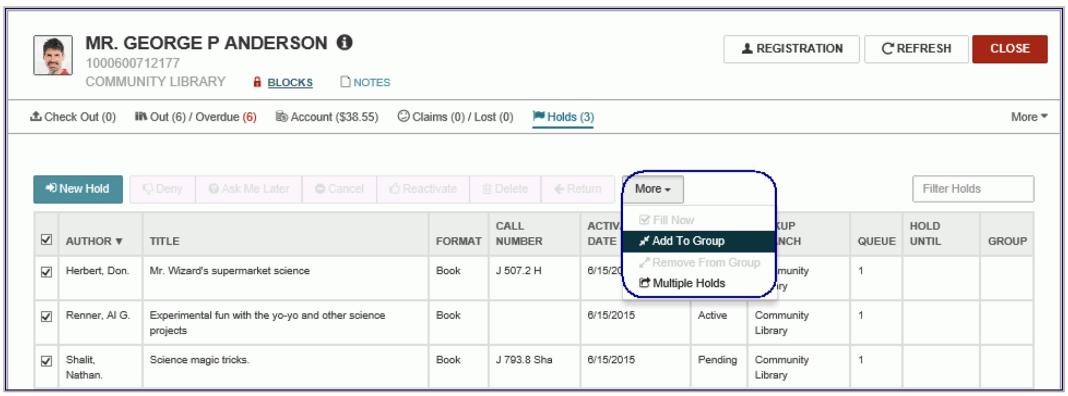
Group Multiple Holds

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

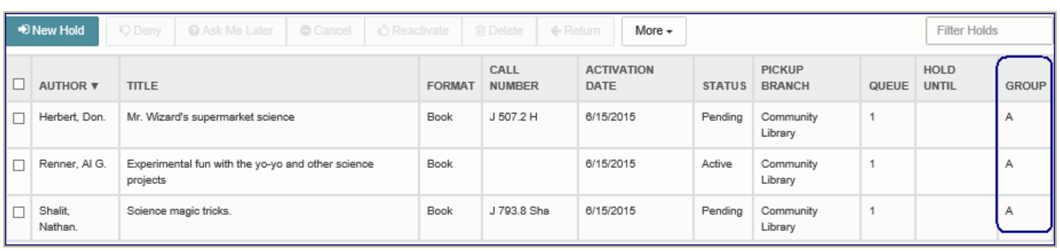
To group multiple holds:

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

   The patron’s hold list is displayed.
3. Select the holds to group.
4. Select **More | Add to Group**.



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



Note:
To remove titles from the grouped holds, choose the check box next to the title and choose 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.

Viewing and Managing a Patron's Hold Requests

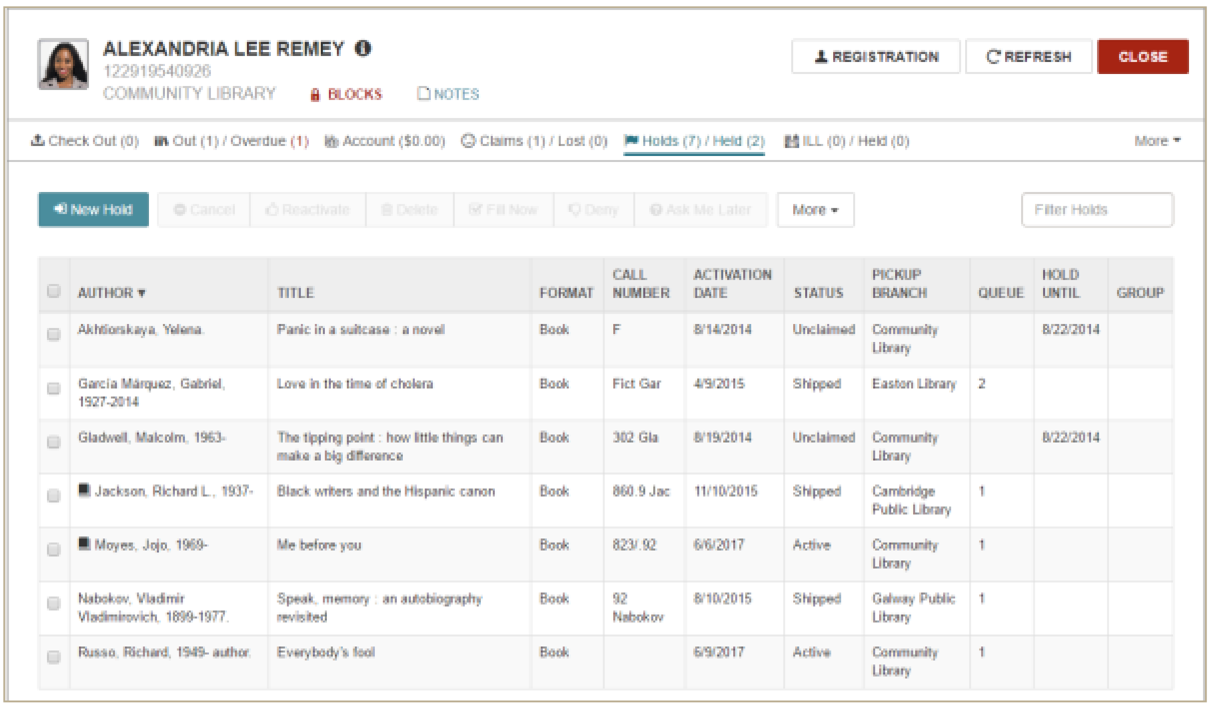
The patron’s holds list is displayed when you select the **Holds** tab on the Patron workform. The tab indicates the total number of holds and the number of held items.

When you select an item in the list, you can perform the following actions if the button or option is available: **Cancel**, **Reactivate**, **Delete**, **Fill Now**, **Deny**, or **Ask Me Later**. You can also select the following options (if available for the selected hold requests) from the **More** menu: **Return**, **Addto Group**, **Remove from Group**, and **Multiple Holds**.

> **Note:**
> Depending on the width of the application view, some action buttons may appear under the **More** menu instead of in the button bar.

When you access a locked hold request, a message indicates the record is being modified by another user. You can click the **LOCKED** indicator to display the locked information.

You can place a single or multiple hold requests from this view by clicking **New Hold**.



See also:

- Modify a Hold
- Fill a Hold Now
- Group Multiple Holds
- Cancel a Hold
- Deny a Hold
- Reactivate a Hold
- Change the Pickup Branch for a Held or Shipped Hold Request
- Set a Hold Request to Ask me later

- View a Hold Request’s Details and History
- Delete a Hold
- Rerouting and Transfer Messages for Held Items with Changed Pickup Branch

You are here: Viewing and Managing a Patron's Hold Requests > Modify a Hold

Modify a Hold

To modify a patron’s hold request:

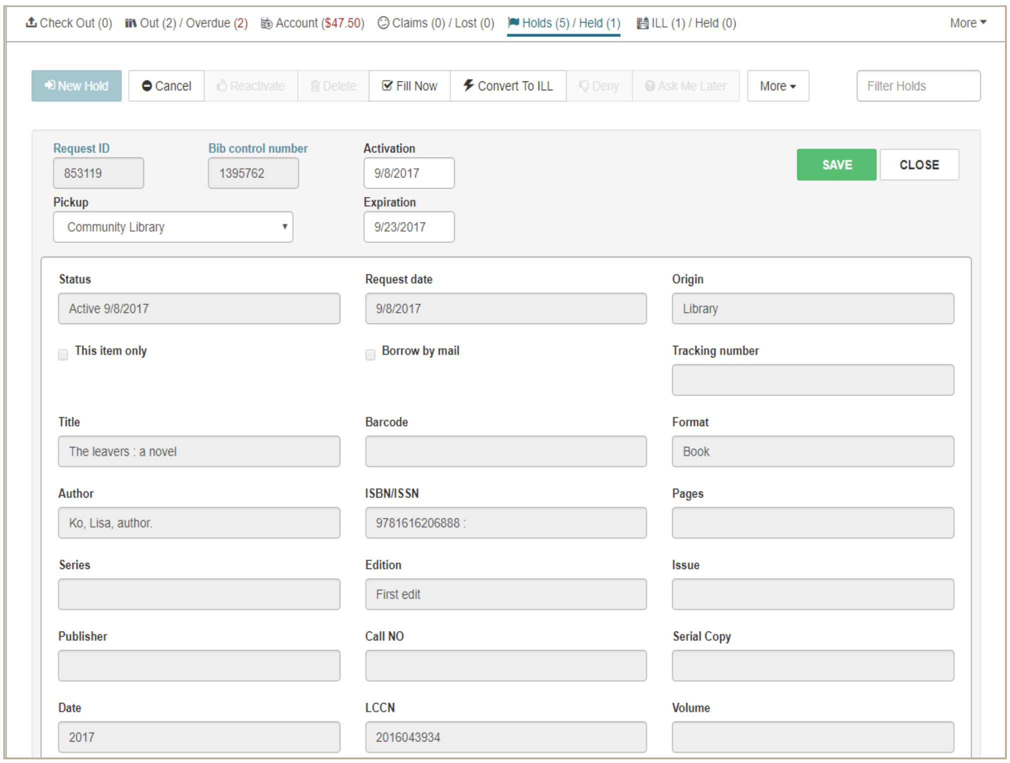
1. Go to the Patron record | Holds view.

   The patron’s holds list is displayed.

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

   The hold details are displayed.

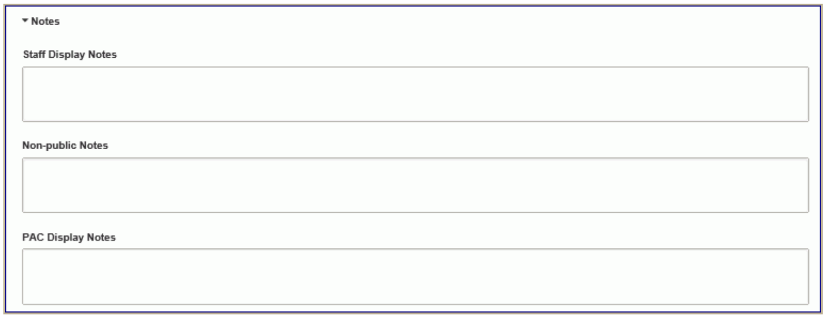
   Note:
   To go to the Hold Request workform, click the **Request ID** link.



3. Modify the hold as follows:

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

- To change the notes that display with the hold request, choose the arrow next to **Notes** to expand the Notes area, and enter or edit the notes.



4. When you are finished editing the hold request, choose **SAVE**.

   The hold request is modified.

Cancel a Hold

To cancel a hold:

1. Go to the Patron record | Holds view.

   The patron’s hold list is displayed.

2. Select the check box next to the hold you want to cancel, and choose **Cancel**.

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

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. Go to the Patron record | Holds view.

   The patron’s holds list is displayed.

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

   The hold request is reactivated.

Delete a Hold

To delete a hold:

1. Go to the Patron record | Holds view.

   The patron’s hold list is displayed.

2. Select the check box next to the hold you want to delete, and choose **Delete**.

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

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

Change the Pickup Branch for a Held or Shipped Hold Request

To change the pickup branch for a hold request with a status of **Held** or **Shipped**:

> **Note**:
> The pickup branch list in Leap excludes branches (if any) selected in the Request parameter: **Hold options | Pickup | Exclude selected branches in staff client**.

1. Go to the Patron record | Holds view.
2. Select a hold with a status of **Held** or **Shipped**.

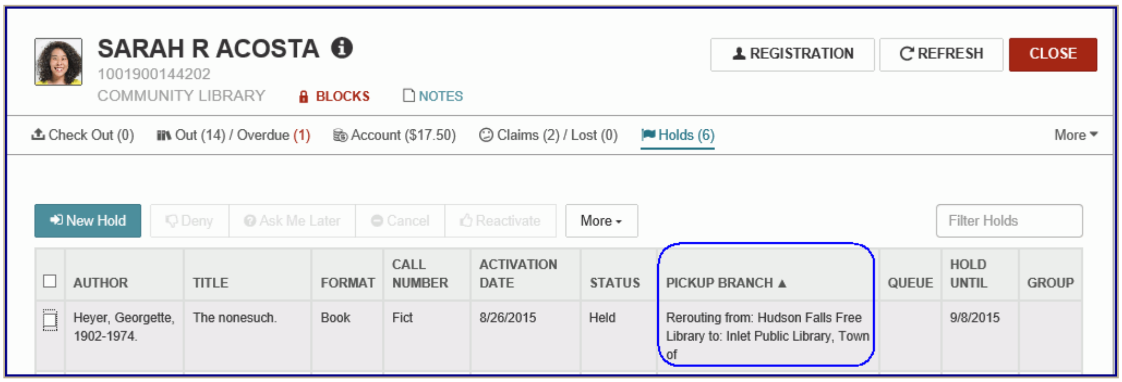
   The Hold Request page opens.
3. Select a different pickup branch in the **Pickup** drop-down list box.
4. Select **SAVE**.

   A message informs you that the hold was modified, and the pickup branch is changed in the holds list.

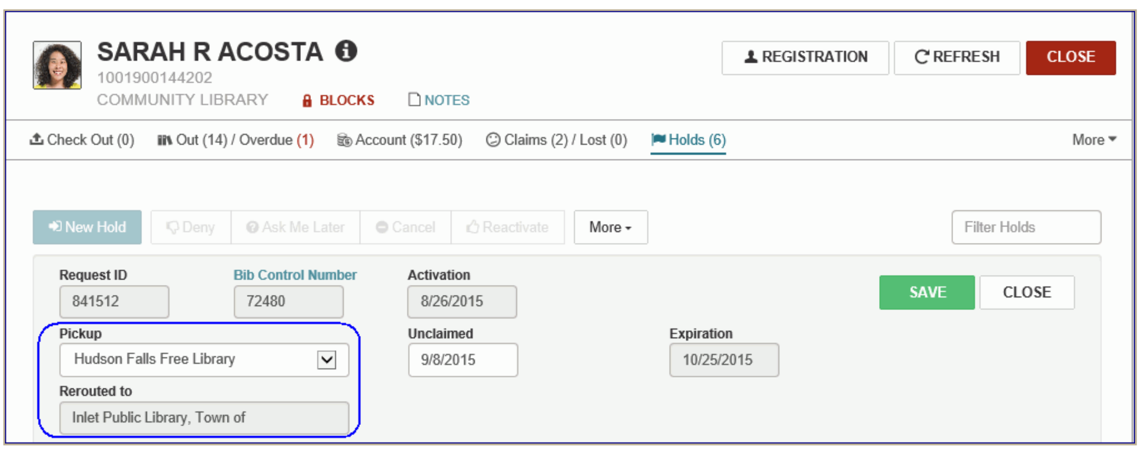
   > **Note:**
   > When a hold request pickup branch is changed for an item held at another branch, a message alerts staff members at the other branch that the pickup branch was changed so that they can ship the item to the new pickup location. Leap also indicates if the pickup branch for a held or shipped item was changed in PowerPAC, Mobile PAC, Leap, or the Polaris staff client. See Rerouting and Transfer Messages for Held Items with Changed Pickup Branch.

Rerouting and Transfer Messages for Held Items with Changed Pickup Branch

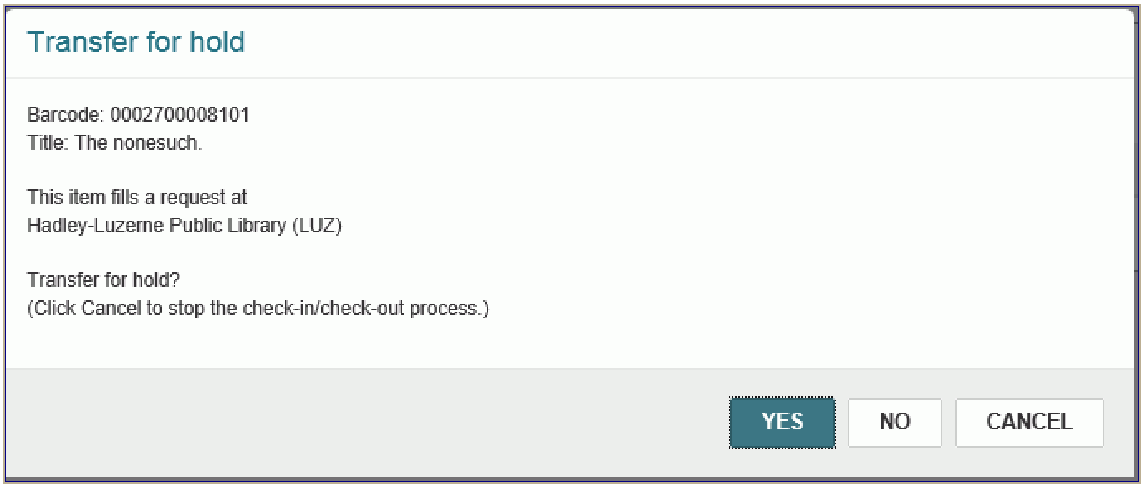
If the pickup branch is changed (from PowerPAC, Mobile PAC, the Polaris staff client, or Leap) for a hold request with a status of **Held**, and that item is being held at a branch other than your logged-in branch, the following message displays in the **PICKUP BRANCH** column of the Holds view: **Rerouting from:** ***original pickup branch*** **to:** ***new pickup branch***.



When you open the hold request, the original pickup branch is selected in the **Pickup** drop-down list box, and the new pickup branch is selected in the **Rerouted to** drop-down list box.



When you check in an item that can fill a hold request for which the pickup location has been changed, the **Transfer for hold** message box displays the new pickup branch. You can select **YES** to transfer the checked-in item to the new pickup location, **NO** to check the item in but cancel the hold, or **CANCEL** to cancel the check in.


Transfer for hold
Barcode: 0002700008101
Title: The nonesuch.
This item fills a request at
Hadley-Luzerne Public Library (LUZ)
Transfer for hold?
(Click Cancel to stop the check-in/check-out process.)
YES
NO
CANCEL

7. CHECK OUT

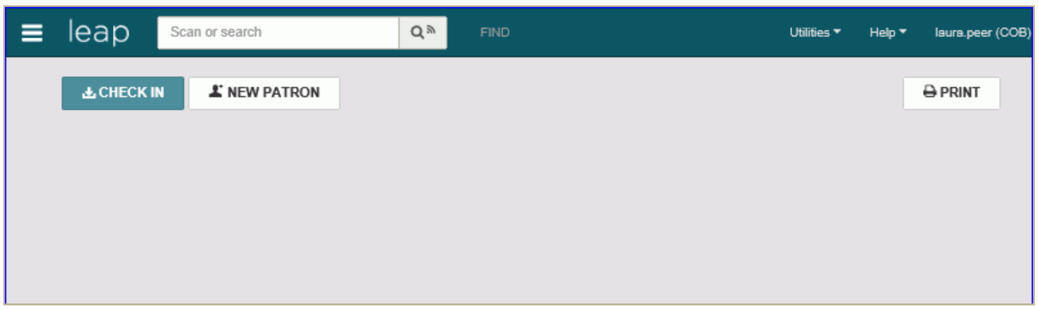
Do a Quick Search for an Existing Patron

You can do a quick search by scanning a patron barcode or entering search criteria in the search box. Or, you can use the Find Tool.

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

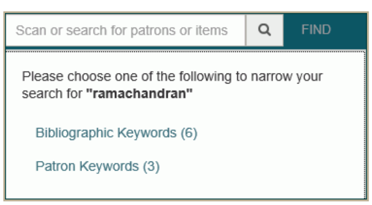
1. Sign in to Polaris Leap.

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



2. Do one of the following steps:

   - Scan the patron's barcode.
   - 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 choose a patron from the list of automatic suggestions or press **Enter** or tap **Go**. If the search criteria match 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.

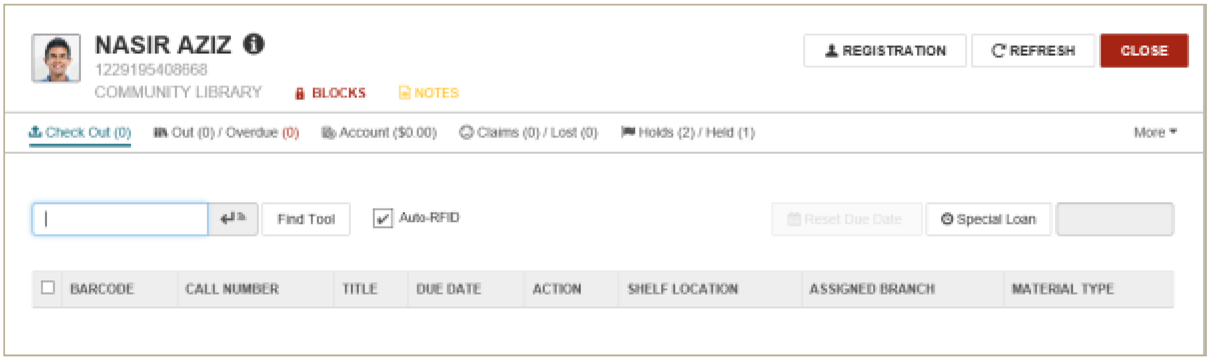


The patron's record opens to the patron's library account view. Select **REGISTRATION** to go to the existing patron's registration view.

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

Checking Out Items to a Patron

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. To renew an item already checked out to a patron, go to the patron's items out 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 staff client 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
- Check Out Items
- Set a Special Due Date/Loan Period During Check Out
- Reset the Due Date/Loan Period
- Manage Charges for Check-outs/Renewals
- Resolve Charges for Renewal and Overdue Fine
- Check Out an Item Held for an Associated Patron
- Circulate Quick Circ Items

Viewing, Renewing, and Modifying Items Out to a Patron

The patron's items out list is displayed when you choose the **Out (#)/Overdue (#)** tab on the Patron workform. The tab 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. If the item can fill a hold request, a **Yes** appears in the Fills Hold column.

When you select an item in the list, you can perform the following actions if the button or option is available: renew an item; set a special renew period; reset the due date; estimate fines; make a claim; or declare the item lost.

Depending on the width of the application view, some action buttons may appear under the **More** menu instead of in the button bar. You can also choose **More** to go to the patron's notification history view; check in an item; or print the items out list.

See also:

- Renew Items from the Items Out List
- Reset the Due Date from the Items Out List
- Set a Special Renew Date or Loan Period from the Items Out List
- Estimate Fines from the Items Out List
- Claim an Item from the Items Out List
- Declare an Item Lost from the Items Out List
- View the Item Record from the Items Out List

Renew Items from the Items Out List

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

1. Open the patron record.
2. Click the **Out/Overdue** tab.

   The patron's items out list appears.

3. Select the item or items in the list and select **RENEW**.

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

   A message appears if the renewal exceeds the limit.

   If the item is overdue, the Overdue Fine dialog box opens. From this dialog box, you can pay, waive, charge the patron's account, or cancel.

   If your library prints receipts for renewals, the print dialog box opens. See also: Setting Up Receipt Printing for Leap.

Reset the Due Date/Loan Period

To reset the due date for an item:

1. Open the patron’s record, and select the items out view.
2. Select the item, and select **Reset Due Date**.

   The calendar opens.

3. Select a new due date.

   The due date is changed.

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:

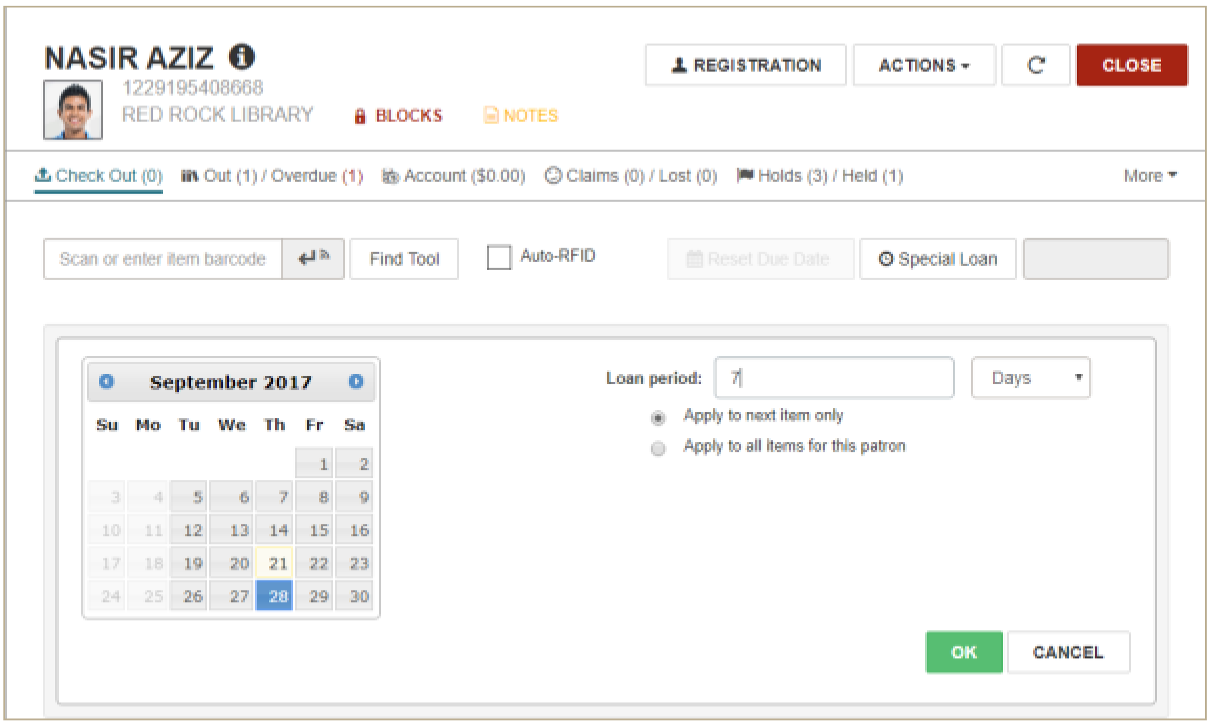
Note:
You can also select **Settings** under your username to specify a special loan period for all items checked out during your logged-in session. See Leap User Interface.

Open the patron's record.

The Check Out view is displayed.

1. Click **SPECIAL LOAN**.

   The area below the button expands.



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

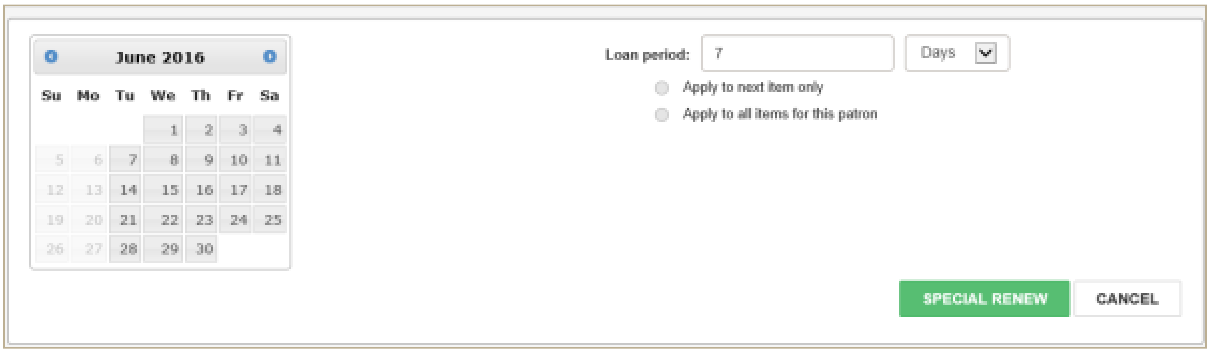
Set a Special Renew Date or Loan Period from the Items Out List

To set a special renew date or renewal loan period:

1. Open the patron record.
2. Click the **Out/Overdue** tab.

   The patron's items out list appears.
3. Select an item in the list, and select the special renew button.

   The area below the button bar expands.

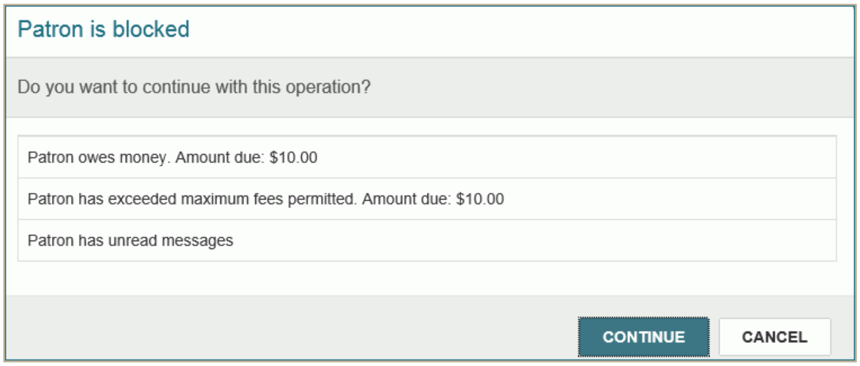


4. Do one of these steps to set the special renewal:
   - Select a specific due date from the calendar.
   - Specify a loan period other than the default setting of **7 Days** by typing a different number in the **Loan period** box and selecting **Days**, **Hours**, or **Minutes** from the drop-down 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**.
6. Click **SPECIAL RENEW**.

   The item is renewed for the period specified.

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.



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

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

Check Out an Item Held for an Associated Patron

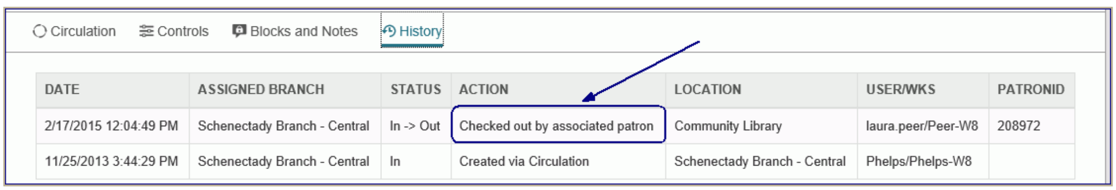
If the primary patron is allowed to pick up held items for an associated patron, the primary patron can pick up and check out held items for the associated patron.

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

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

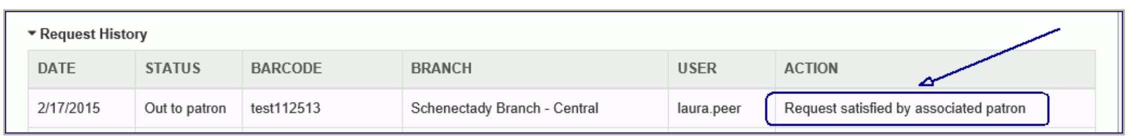
   The item is checked out to the primary patron and the history view is updated for the item and the hold request.

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



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, the text **Request satisfied by associated patron** is displayed.



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

8. CHECK IN

Set Workform User Defaults

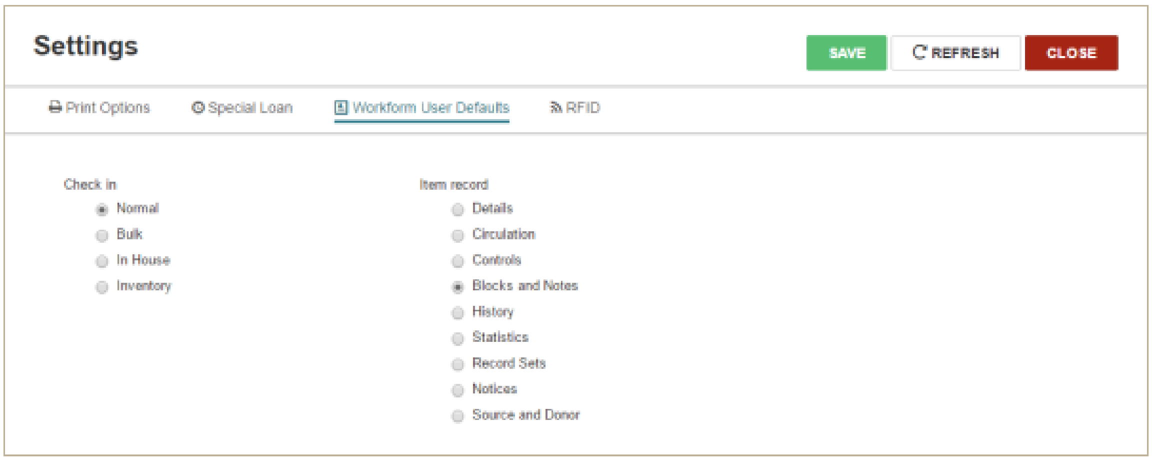
To specify your preferred opening view for the Check in or Item Record workform:

Note:
Your library can also set an opening view for the Leap Item Record workform using the Polaris Administration Staff Client profile **Web App: Default view selected when item record opened**.

1. Select your username, and choose **Settings**.

   The Settings page opens.

2. Select the **Workform User Defaults** tab.



3. Select one of the radio buttons below Check in to specify the opening view of the Check In workform, or select one of the radio buttons below Item record to specify the opening view of the Item Record workform.

Check In Items in Normal mode

To check in items in Normal mode:

> **Note:**
> To use the bulk check-in mode in Leap, see Check in Items in Bulk Mode.

1. Click **CHECK IN**.

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

2. If the view is set to another mode, choose **Normal**.
3. (Optional) To change the number of free days, type the number in the **Free Days** box. The date changes accordingly.
4. Scan the item barcodes. Or, if you are using Leap on a library workstation for which RFID has been enabled, you can place items on the pad, and choose the return button to read the tag and check the items in. If RFID has been enabled, the return button displays the RFID icon.

   > **Note:**
   > You can also choose **FIND TOOL** and search for an item to check in. See Check In from the Item Record .

   The items are checked in. If you want to print a check-in receipt, see Print Check-in Receipts.

Check in Items in Bulk Mode

You can quickly check in multiple items in bulk mode. With bulk check-in, most blocks and dialog boxes do not appear. Users who have selected the bulk view as the default check-in view in Leap or in the Polaris staff client will automatically go to the bulk view when checking in items using Leap.

The default view for the Leap Check In workform can be set in Leap on the **Workform User Defaults** view of the **Settings** page. See Set Workform User Defaults.

In the Polaris staff client, the default view is set using the **View** menu on the Check In workform.

If the user's default is set to **In House** or **Inventory** mode in the staff client, the Leap Check In workform opens in the Normal view.

The Leap Bulk Check In view uses the same display settings as the Bulk Check In mode in the Polaris staff client. The displayed columns are determined by the settings in the **Check in list view options** parameter in Polaris Administration. For more information on bulk check in, see the Polaris staff client online Help.

To check in items in bulk using Leap:

1. Select **CHECK IN**.

   The Check In page opens in the default check-in mode setting.

2. If the **Normal** check-in mode is displayed, choose **Bulk** to change to the Bulk check-in mode.

3. If you want to change the free days, enter the number of days in the **Free Days** box or choose a date from the calendar. Free days are set according to the **Free days (bulk)**Patron Services parameter in Polaris Administration.
4. Scan the item barcodes to check the items in.

   As items are checked in, they display at the top of the list, the status in the Status column indicates the status change: from > to. For example: **Out > In**.

   The item barcode, due date, status, comments, and fine charged to the borrowing patron, if applicable, appear in columns in the list of items checked in. Your library may also choose to display the item’s title, material type, and/or the borrower’s name. The Comment column displays conditions such as **Quick circ item** for a Quick Circ item or **To *Branch name*** for an item that is in-transit.

5. Continue to scan item barcodes until you have checked in all the items.

   When an item is checked in, a transaction is logged with the type: Checkin Leap Bulk.

Bulk Check-in - Messages and prompts

When you check in items using bulk check in, you may encounter messages, dialog boxes, or prompts for the following types of items:

- **Items belonging to other branches**

  If you scan an item that does not belong to your branch, a prompt displays if the **Patron Services parameter Check-in: Prompt for in-transit in bulk mode** is set to **Yes**. If the parameter is set to **No**, items that belong to other branches are set to In-transit without a prompt. When the item is checked in, the Status column displays I**n-Transit** and the Comment column displays **To *Branch***

name. If you set Polaris for in-transit slip printing at the Check In workform, an in-transit slip is printed.

- **Items that have been billed**

  If the patron has been billed for an item, the Resolve billed item dialog box appears. Select an action for each billed amount and choose **CONTINUE.**

- **Items with blocks**

  If an item has a free-text or manually-assigned block, a dialog box displays the text and offers the option to check in or cancel.

- **Items that satisfy hold requests**

  When you scan an item that will fill a hold request where the pickup branch is also the check-in branch, the item is trapped for the request, and the status becomes Held. The Comment field displays “For [patron name]”. If the pickup branch is a different branch, the item status becomes Transferred to pickup branch, and the Comment field displays “To [branch]”

  If the item is already held, the item status changes to In, In-transit, or Held for the next patron. The Comment field displays the action taken.

- **Items from other library systems (ILL items)**

  If you check in an ILL item from another library system, a message indicates the item is an ILL and prompts you to continue or stop the check in. If you continue with the check in, the ILL item will be processed in the same way as in the Polaris staff client.

- **Quick Circ items**

  If you check in a quick circ item in bulk mode, the Comment column displays **Quick-circ item**.

- **Claimed items**

  If you check in an item with a Claimed status, the status column displays Claim Returned, Claim Never Had, or Claim Missing Part.

- **Items in floating collections**

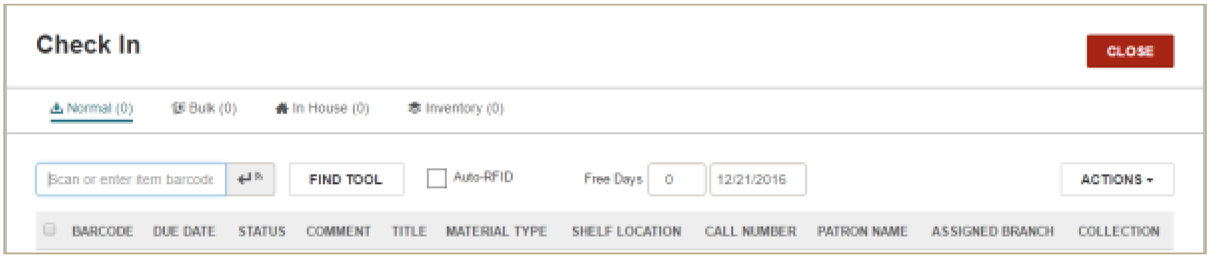
  When you check in items in the bulk view, items float (or not) according to the library's policy. If the option "Prompt for additional floating items" is set to yes for the check-in branch, the prompt displays. The floating limits set in Polaris administration are respected.

- **Items with fines**

  If items that you are checking in have fines, they are charged to the patrons’ accounts automatically as the items are checked in and no messaging displays. The amount is displayed in the Fine Charged column.

Checking In Items and Managing Fines

The Check In workform opens to the view selected in your user settings in Leap or the Check-In workform setting in the Polaris staff client (**Check-In workform | View | Save Current View as Default View**). The columns displayed on the Leap Check In page are determined by the settings in the **Check in list view options** parameter in Polaris Administration. For more information, see Polaris online Help.



When you check in items, 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.

As you check in items, the count of checked-in items is updated.

If your library is set up to print check-in receipts, you can print receipts either in Normal or Bulk mode.

See also:

- Check In Items in Normal mode
- Check in Items in Bulk Mode
- Check In Items in In House mode
- Check In Items in Inventory Mode
- Check In from the Item Record
- Manage Fines During Check In
- Resolve Billed Items During Check In
- Change Item Information or Barcode During Check-In
- Print Check-in Receipts

Check In from the Item Record

To check in an item from the Item Record workform:

1. Open the item in the Item Record workform.
2. Select **ACTIONS** | **Check In**.

   A message box informs you the item will be checked in.

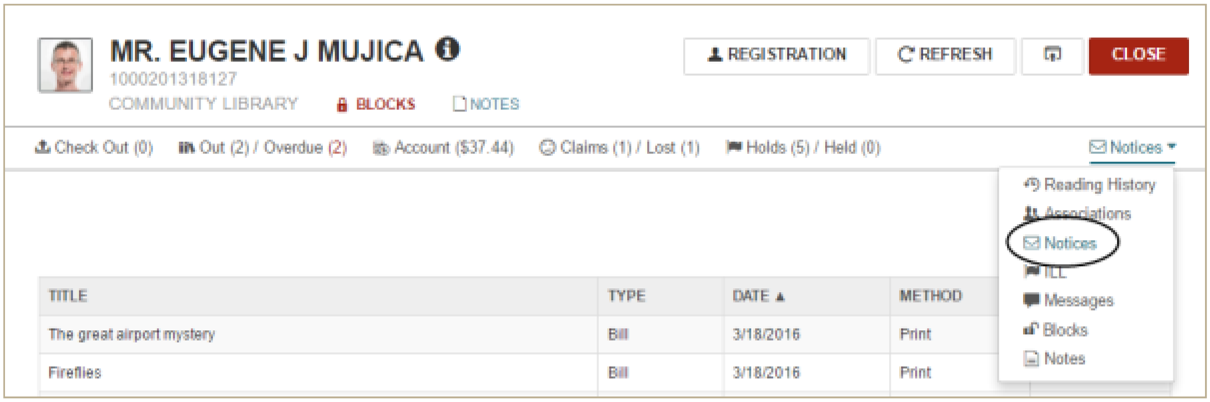
3. Click **CONTINUE** to continue checking in the item.

   Note:
   Leap uses the same checks for permissions and blocking conditions as are used in the Polaris staff client.

9. NOTICES

Viewing Patron Notices and Associated Items

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. To open the Notices view of the patron record, select **More | Notices**.



See also:

- View an Item's Notification History
- Open the Item Record Associated with a Notice

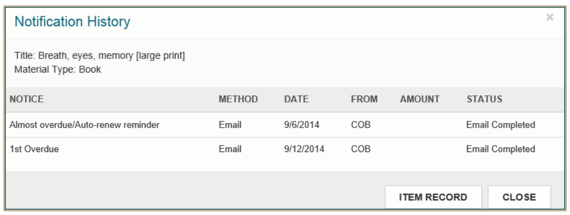
Open the Item Record Associated with a Notice

To open the item record associated with a patron notice:

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

   The patron’s notification history is displayed.
3. Select a notice in the list.

   The Notification History for the item is displayed.

4. Select **ITEM RECORD**.

   The Item record opens.

10. CLAIMS and LOST

Viewing and Modifying a Patron's 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** list, 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.

See also:

- View Estimated Fines for Claimed and Lost Items
- View Notices for Claimed or Lost Items
- Reset the Claim Count
- Change a Claimed Item to a Status of Lost

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 record.
2. Click the Out/Overdue tab.

   The patron's items out list appears.

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

   The area below the button bar expands.

4. Select the claim status, and click **CLAIM**.

   The item is claimed and appears on the Claims view of the Patron Record.

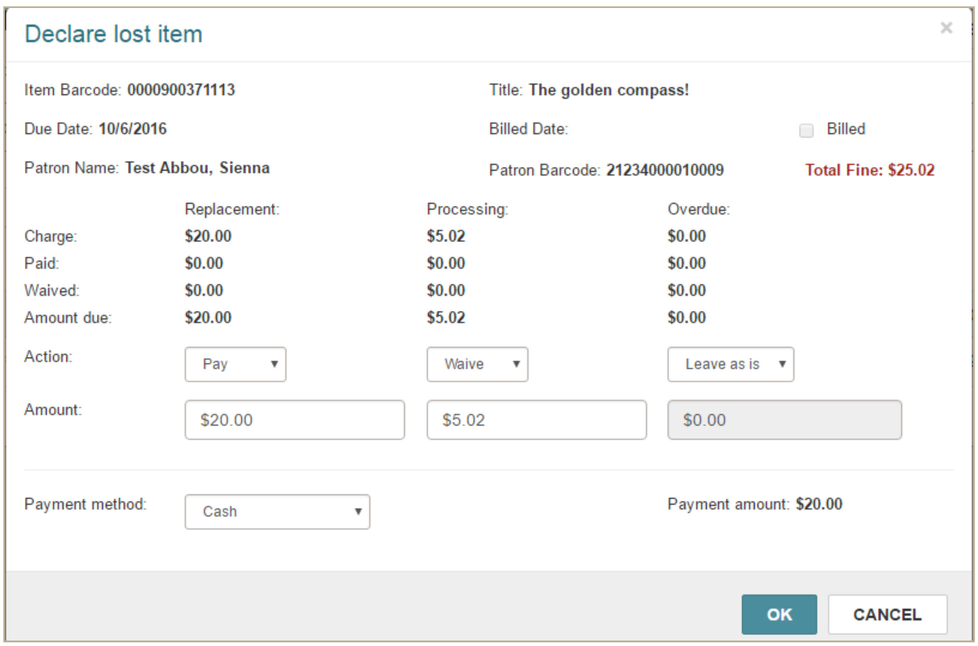
Change a Claimed Item to a Status of Lost

You can change a claimed item to a status of Lost from the Claimed/Lost view of the patron's record.

To change a claimed item (Claim Never Had, Claim Returned/Accruing, Claim Missing Part) to a status of Lost:

1. Open the patron's record.
2. Go to the **Claims/Lost** list.
3. Select a claimed item in the list.
4. Select the **Declare Lost** button.

   The Declare Lost dialog box opens.



5. Specify the action to take for each charge.
6. Select **OK**.

   Depending on your selections in the dialog box, the Claims/Lost view displays the description **Lost/Unpaid** or **Lost/Accruing**.

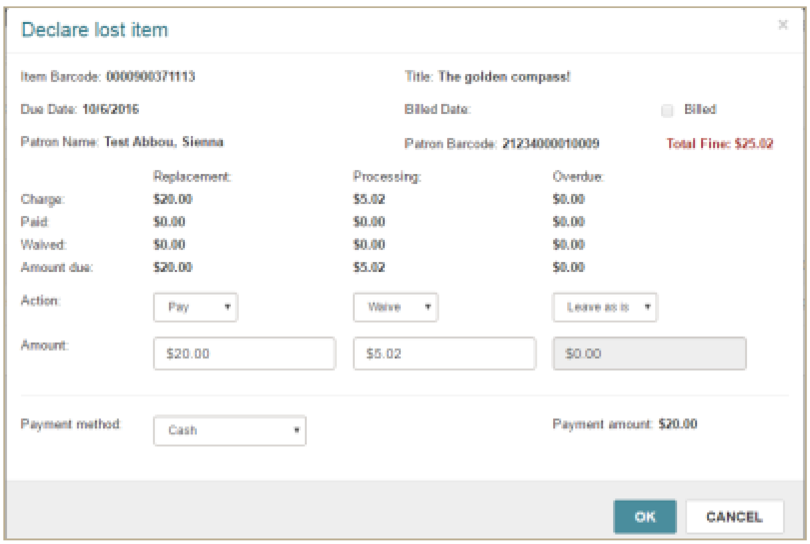
Declare an Item Lost from the Items Out List

To declare an item lost:

1. Open a patron record.
2. Click the **Out/Overdue** tab.

   The patron's items out list appears.
3. Select the check box in the column to the left of the item that you want to declare lost, and choose the **Declare Lost** button.

   The Declare lost item dialog box opens.



4. For each charge type, select the appropriate action in the **Actions** box.
5. Select the method of payment in the **Payment method** box.

   Note:
   Integrated credit card payments are not available in this version of Leap.
6. Click **OK**.

View Notices for Claimed or Lost Items

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

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

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

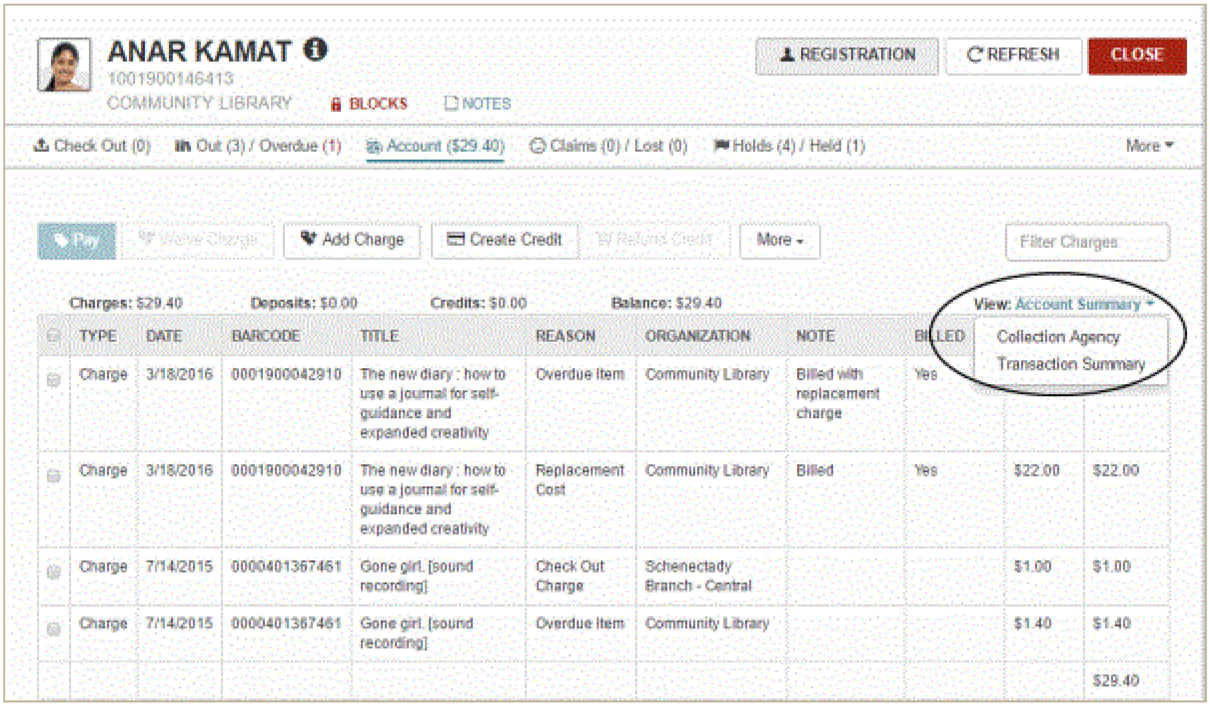
4. To see the claimed or lost item record, select **ITEM RECORD.**

   The item record is displayed.

11. MANAGING FINES

Viewing and Managing a Patron's Financial Account

To view the patron's financial account with your library, open the patron record, and select **Account**. The patron's Account Summary list appears. To change the view, select **Collection Agency** or **Transaction Summary**.



The columns in the Account list 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 choose a specific line in the **Account** list, the applicable task buttons are active. For example, when you choose a credit, the refund credit button is active.

See also:

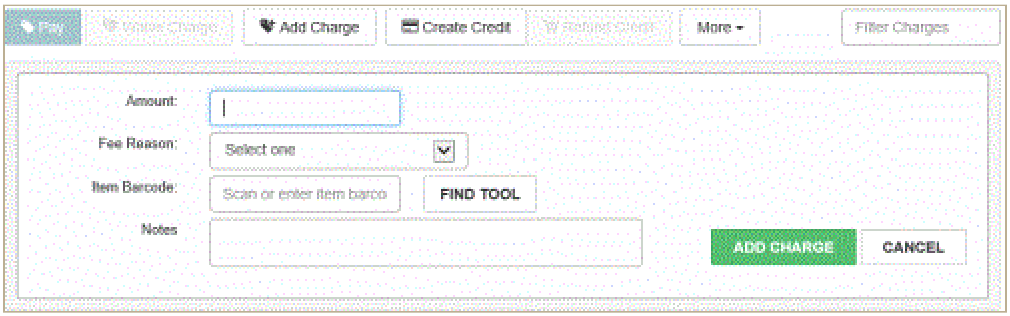
- Add a Charge to a Patron's Account
- Pay Patron Charges
- Waive Patron Charges
- Add a Credit to a Patron’s Account
- View a Patron’s Collection Summary
- Remove a Patron Account from Collections
- View a Patron’s Transactions, Refund or Credit Payments, and Reprint Receipts
- Secure and Release Patron Records

Add a Charge to a Patron's Account

To add a charge to a patron's account:

1. Open the patron's record.
2. Click **Account** to go to the account view.
3. Click **Add Charge**.

   The area below the button toolbar expands.



4. Type the amount of the charge in the **Amount** box.
5. Select the reason for the charge in the **Fee Reason** box.
6. Do one of the following steps:
   - If the charge is related to an item, scan or type the barcode in the box.
   - If the item is not in hand, click **FIND TOOL** to open the Find Tool, search for the item and select it.
7. To enter notes regarding this charge, type them in the **Notes**box.
8. Click **ADD CHARGE**button at the bottom of the dialog box to add the charge.

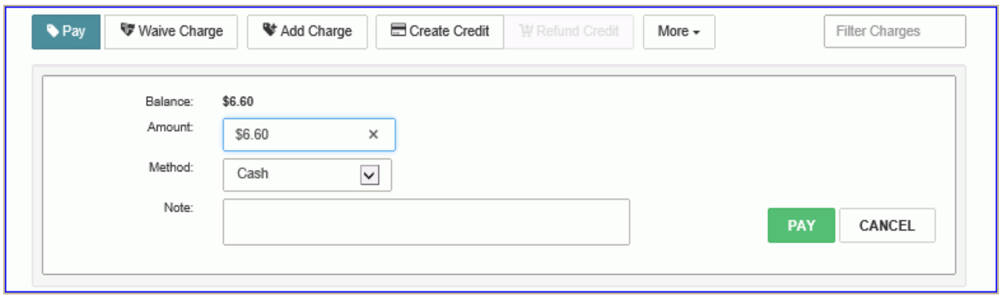
   The charge is added to the patron’s account.

Pay Patron Charges

To select charges and pay them:

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

   The area below the button expands.

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

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

Waive Patron Charges

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

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

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

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

   The area below the toolbar buttons expands.

4. (Optional) Enter a note regarding the waived amount.
5. Select **WAIVE** to waive the amount displayed, or:
   - Enter an amount less than the total amount of the charge, enter it in the **Amount to waive** box, and select **WAIVE**.
   - If you selected multiple charges and want the waived amount to be distributed among the selected charges, select **Distributed waive**, enter an amount in the **Amount to waive** box, and select **WAIVE**.

   A message indicates the charge was waived successfully.

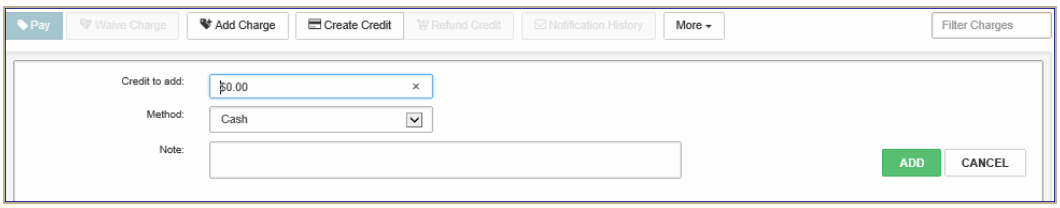
Add a Credit to a Patron’s Account

To add a credit to a patron’s account:

1. Open the patron's record.
2. Click **Account**.

   The Account list appears with totals at the top of the list for Charges, Deposits, Credits, and the total balance on the account.
3. Click **Create Credit**.

   The area below the button toolbar expands.

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

   Note:
   Integrated credit card payments are not available in this Leap version.
6. To enter an optional note, type it in the **Note** box.
7. Click **ADD** to add the credit amount to the patron’s account.

View a Patron’s Transactions, Refund or Credit Payments, and Reprint Receipts

You can view patron account transactions, go to the item record associated with the transaction, or print past receipts from the Transaction Summary view.

To view the patron’s account transactions and reprint receipts:

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

   The Account Summary view appears.
3. Select **View |Transaction Summary**.

   The Transaction Summary view displays the patron's transaction history.

   Note:
   You can select an item in the list to display the item details view.
4. Do one of the following:
   - Select a payment transaction, and select **Credit** to credit the patron's account.
   - Select a payment transaction, and select **Refund** to refund the payment.
   - Select one or more transactions, and select **Print List** to reprint the receipts.

Estimate Fines from the Items Out List

To estimate fines for items in the items out view:

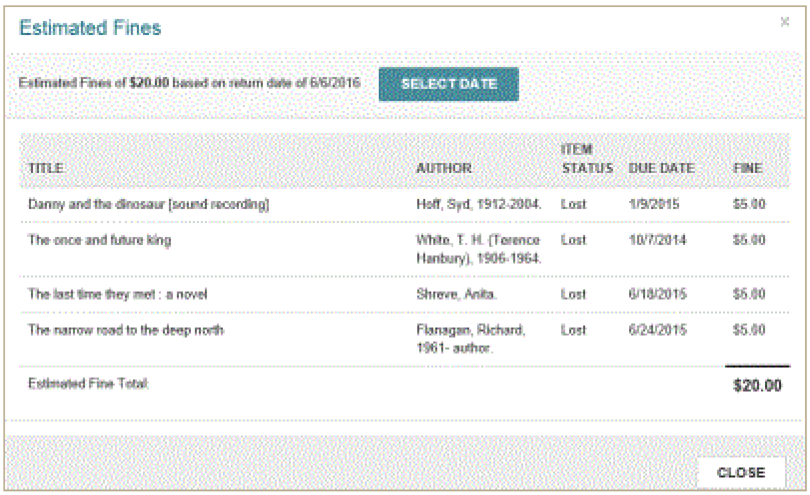
1. Open the patron record.
2. Click the **Out/Overdue** tab.

   The patron's items out list appears.

3. Select the item or items in the items out list, and choose **Estimate Fines**.

   The estimated fines appear.

   Note:
   The Estimated Fines dialog box displays the amount owed for all items, not just the selected items.



4. To change the due date, choose **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.

Resolve Charges for Renewal and Overdue Fine

If your library charges for renewals and prompts for the renewal charge, a single dialog box appears when you renew an item for which overdue fines are owed. You can then resolve both the renewal charge an the overdue charge in one step. The options to charge for renewals and prompt for the charge are set using the **Check-Out: Charge Options** Patron Services parameter in Polaris Administration.

> **Note:**
> If your library charges for renewals but has not selected the **Prompt in the Staff Client** check box on the Check-Out: Charge Options dialog box, the overdue fine dialog box appears and the renewal amount is applied to the patron's account.

To resolve charges for a renewal and overdue fines:

1. Renew the item.

   The Renew chargeable overdue item dialog box appears.

2. For the **Checkout (renewal) charge** and the **Overdue Fine**, select an action in the **Action** box.
3. Enter an amount for each charge in the **Amount** box.
4. Select the payment type in the **Payment method** box.

   > **Example:**
   > Select **Pay** from the **Actions** drop-down list for each charge and enter an amount equal to or less than the charge in the **Amount** box.

   > **Note:**
   > If you enter an amount less than the total charge, the amount is added to the patron's account.

5. Click **CONTINUE**.

   If you selected **Pay** in the **Actions** drop-down list, the payment is recorded in the patron's account, and a receipt is printed. The receipt includes the **Checkout Charge/Overdue** in the **Reason** field, the total charges, the total amount paid, and the patron's remaining account balance..

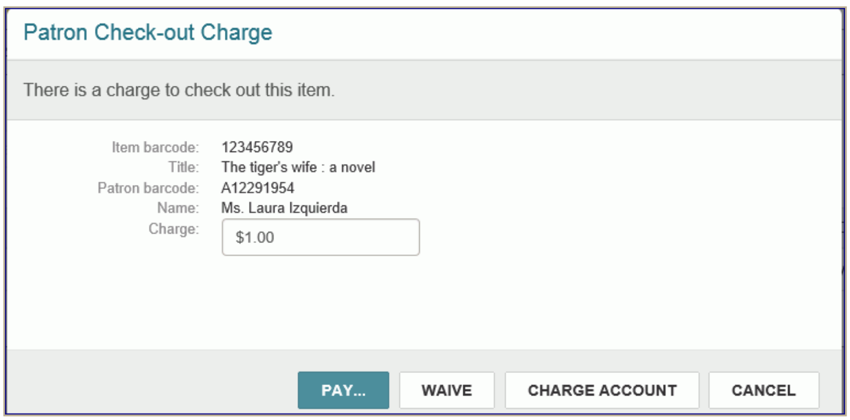
Manage Charges for Check-outs/Renewals

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

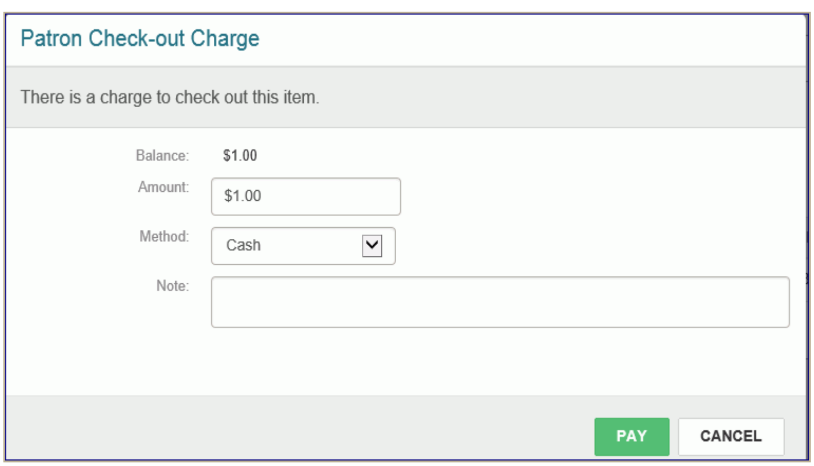
Note:
If your library charges for renewals, and you are renewing an item for which overdue fines are charged, you can resolve both the renewal charge and the overdue fine.

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.



2. If you want to change the amount that is paid, waived, or charged, modify the amount in the **Charge** box.
3. Click one of the following buttons:
   - **PAY -** The area below the charge expands. 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. Then, click **PAY**.



   - **WAIVE** - The charge is waived and the item is checked out.

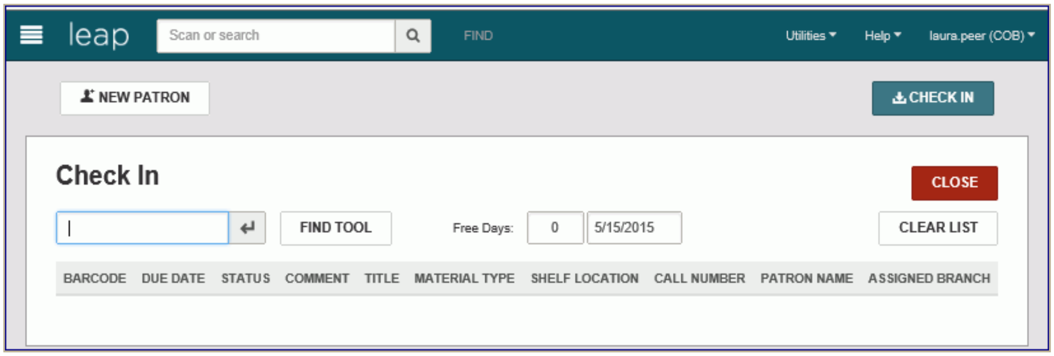
- **CHARGE ACCOUNT** - the charge is added to the patron's account, and the item is checked out.

Manage Fines During Check In

To check in multiple items and manage fines:

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

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

2. Scan each item's barcode.

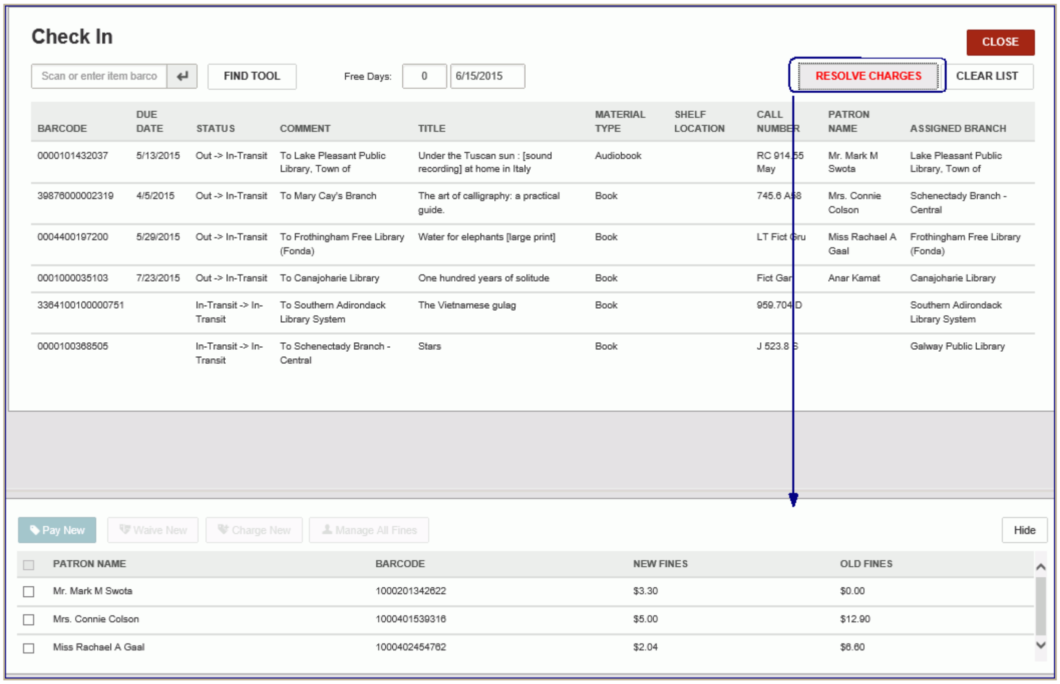
   If the patron has been billed, the Resolve billed item dialog box opens. See Resolve Billed Items During Check In.

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

   If you choose **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.

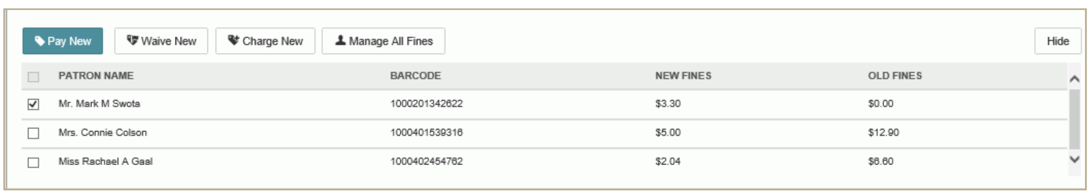
3. To view and resolve the fines, choose **RESOLVE CHARGES**.

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



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

   The action buttons to manage charges become active.



5. Select the appropriate action button. If you choose **Manage all Fines**, you can go to the patron's account and manage all the patron's charges. See Viewing and Managing a Patron's Financial Account .

Resolve Billed Items During Check In

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

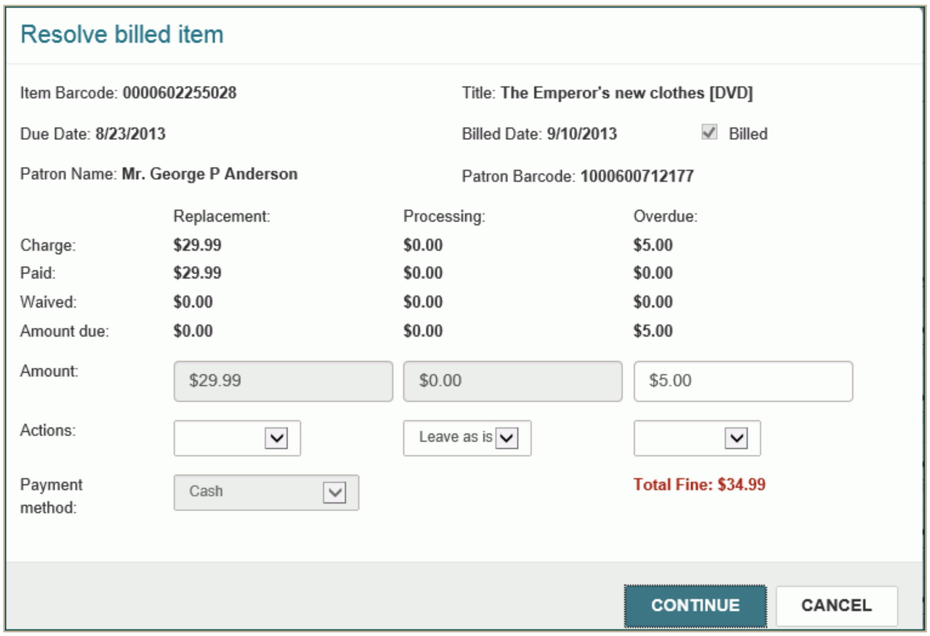
To resolve a billed item during check in:

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

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

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

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

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

3. To resolve a charge during check in, select one of the following options in the **Action** box:

   - **Waive**
   - **Leave as is**
   - **Pay**
   - **Charge**

4. Select **CONTINUE** to check in the item and perform the selected action on the charges.

12. HOLDS PICKLIST

(REQUEST MANAGER)

Using the Holds Picklist

When you open the Picklist, the Pending requests are listed for the branch you selected when logging into Leap. You can choose a different branch from the drop-down list box at the top of the Picklist. To view holds with other statuses, select another tab. The totals are displayed for each view for the selected branch, and these totals are updated as the hold requests change statuses.

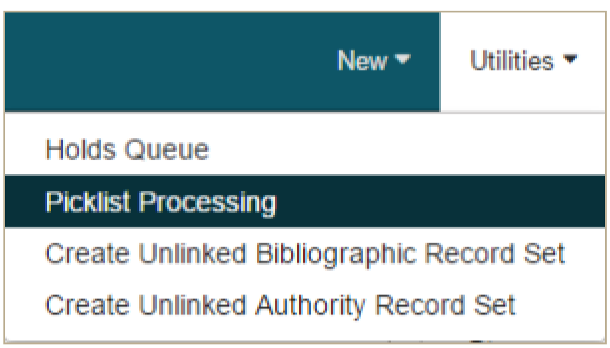
> **Note:**
> If a hold request is for a serial, the call number includes the volume and copy, and the title includes the serial title and designation.

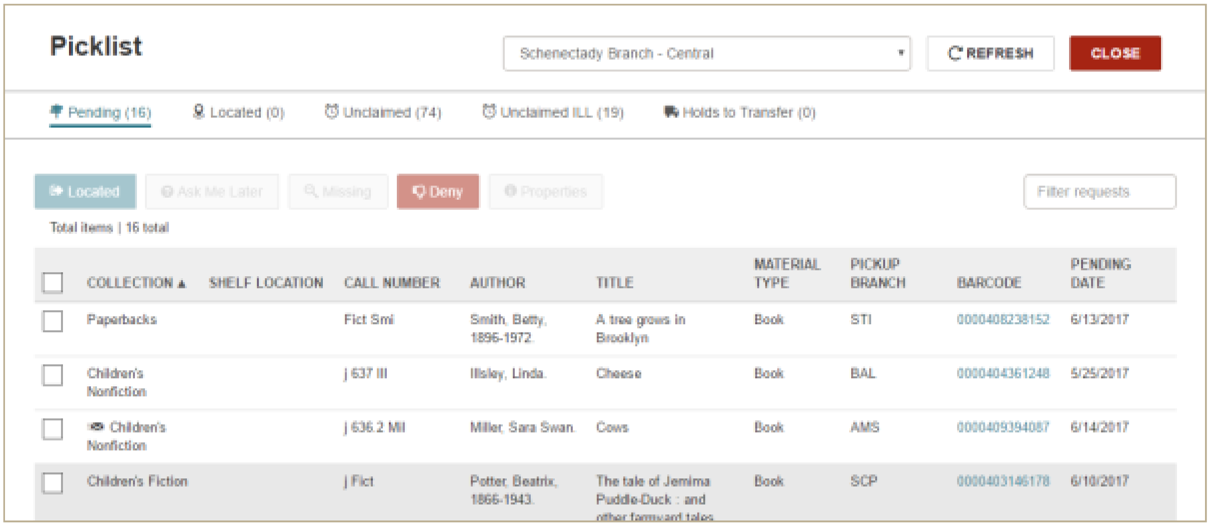
For information on INN-Reach requests, see Circulate Items Requested via INN-Reach.

You can take a tablet into the library stacks, and do the following for selected hold requests in the Picklist:

- Indicate the item was located
- Indicate an item was not claimed (picked up)
- Set a hold request to "Ask me later" - This removes the hold request from the pending list, and moves it to the next step in the Request to Fill (RTF) process.
- Deny a hold request
- View the held items that need to be transferred to another pickup branch
- Open the Hold Request workform
- Link to the item record
- Link to the patron record

To open the holds Picklist, choose **Utilities | Picklist Processing**.





- Select a hold request and choose **Properties** to open the Properties dialog box.

The Hold Properties dialog box displays the following information on the Hold Request, Item, and About tabbed views:

- **Hold Request** view:
  - Hold Status
  - Status Date
  - Activation Date
  - Expiration Date
  - Patron - The patron name is a link to the patron record.
  - Registered At
  - Pickup Branch
- **Item** view:
  - Title
  - Barcode - The barcode is a link to the item record.
  - Assigned Branch
  - Material Type
  - Routing Sequence
- **About** view:
  - Request ID
  - Created by
  - Date created
  - Modified by
  - Date modified

The Picklist has the following views:

- **Pending** - Click the **Pending** tab to list the hold requests with a Pending status for the selected branch.
- **Located** - Click the **Located** tab to list the holds that have been set to Located for the selected branch.
- **Unclaimed** - Click the **Unclaimed** tab to list the holds with an Unclaimed status for the selected branch.
- **Unclaimed ILL** - Click the Unclaimed ILL tab to list the ILL requests for the selected pickup branch that have a status of received-held and an unclaimed date earlier than the current date. You can click a row in this view to open the ILL Request workform.
- **Holds to Transfer** - Choose the **Holds to Transfer** tab to list the held items that need to be transferred to a changed pickup branch.

To perform an action on hold requests in the Picklist, select the check box to the left of each hold request you want to change. When a hold request is selected, the applicable action buttons are activated. To select all the requests, choose the check box in the column header.

To modify the circulation status from the Picklist, you must have the **Picklist application: Modify circulation status** permission set in Polaris Administration.

Then, choose an action button to change the pending hold request.

Note:
The **REFRESH** button refreshes the list.

Action Button	Action
Located	Indicates that the item has been selected and is on the way to a processing location where it will become held for the patron or go in-transit. The pending request moves to the Located list, which you can view by selecting **Located** at the top of the page.
Ask Me Later	The hold request is removed from the pending list, and it moves to the next step in the Request to Fill (RTF) process.
Missing	The item is set to Missing. When an item is declared missing from the Picklist in Leap, the item history is updated with the following: **Circulation status modified via Picklist processing.**
Deny	The hold request is denied, and it is removed from the pending list.
Properties	Opens the Hold Properties box that contains information about the hold request and links to the patron and item records.

See also:

- Sort and Filter the Picklist
- Indicate an Item Was Located
- Mark a Hold Request with Ask Me Later
- Return a Located Item to the Pending List

Sort and Filter the Picklist

You can do the following to sort or filter the Picklist:

- Select a branch from the drop-down list at the top of the Picklist.
- Click a column header to sort the list.
- Start typing in the Filter requests box. For example, start typing the call number to locate all items in the same library location.

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. You can choose a different branch by selecting it in the drop-down list box.

   Tip:
   To filter the hold requests by a category, such as a collection, that corresponds with the location of items in the library, start typing the filter term in the **Filter requests**box.

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

   The following occurs for each hold request marked as Located:

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

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