Leap – Patron Services & Circulation

Polaris ILS 5.0 SP3 Training
Leap Overview

- What is Leap?
- What are some of the features that are available in Leap?
- Do we still need the Polaris Client?
- What needs to be set up in System Administration?
What is Leap?

• Leap is a web based platform that focuses on Polaris Patron Services and Circulation
• It allows staff to work from a mobile device or PC anywhere they have access to a browser
• No Polaris client software needs to be installed
• Leap works on top of the established Polaris database
Logging into Leap

- You will need your domain, Polaris user ID and password
- You will be asked which branch you would like to log into
- Select the workstation name from the list
Navigating Leap—initial screen

- View open records
- Scan patron and item barcodes; search for patrons and bibliographic records in quick search
- Access the Find tool
- Access the Check-In screen
- Create a new patron
- Print the page

- The initial screen allows staff to perform multiple functions
Navigating Leap—initial screen

- When clicking the dropdowns in the upper right of the screen:
  - Utilities gives access to Picklist Processing
  - Help gives access to keyboard shortcuts
**Navigating Leap--Settings**

**Hint:** Any user that forgets to log out of their session will be automatically logged off after 24 hours.

- Clicking the user gives you an option to log out.
- Select the user/Settings/Print Options to select receipts you would like to print.
- Click the green Save button and the print settings are saved on the workstation.
Navigating Leap--Settings

- Select Special Loan to apply a special loan period to all subsequent check outs until the user logs out or settings are cleared

- NOTE: You may still set a special loan period on a case by case basis when checking out to a patron
  - Apply to next item only or apply to all items for this patron
Navigating Leap—Settings

<table>
<thead>
<tr>
<th>Settings</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>📜 Print Options</td>
<td>☐ Special Loan</td>
</tr>
</tbody>
</table>

- Check in
  - Normal
  - Bulk
  - In House
  - Inventory

- Select Workform User Defaults to set a check in default
  - Normal
  - Bulk
Quick search

- The all-in-one Find Tool combines patron, bibliographic and item record searching
- A quick search can be done by using the ‘Scan or search’ box
- Items may only be searched by barcode in the quick search box
- The results list will automatically suggest bibliographic records separate from patrons
Quick search

- An ‘*’ may be used as a wildcard
- When initially searching, individual bib records and patrons are seen and one may be opened by clicking on it
- If you use the Enter key at the end of the search string, the lists are collapsed
- Click the blue link to retrieve bibs or items
Find Tool

- Click the Find Tool button next to the Quick Search box to perform an advanced search
- Find
  - Bibliographic records
  - Item record
  - Patron
- Search Modes
  - Basic Search
  - Browse
  - Power Search
  - SQL Search
- Search Types
  - Exact
  - Keyword (All)
  - Keyword (Any)
  - Phrase

Hint:
Notice that Exact match (implicitly truncated) is no longer an option. You must use and ‘*’ for truncation
Find Tool

- Staff can still save default search settings and add filters/limits

Options:
- Adjust column settings
- Adjust or add search filters
Find Tool

- Set your preferred database to search by clicking the dropdown of databases and double clicking the star next to your desired default
- Each database search (Patron, Bibliographic or Items) may also have their own individual search defaults by clicking the yellow star after setting up the search
Find Tool

- To set filters, click the Search Filter icon in the Find Tool.
- Begin by clicking the Add Condition button and then use the green ‘+’ to add additional filter criteria.
- Click the blue Apply button to re-perform the search with the filters.
- Filters remain until cleared or the Find Tool is closed.
- You will see that filters have been applied at the bottom of the results list.
• Staff may customize the columns that are displayed and the order they are in when searching patrons, bibs or items
• Click the options icon on the Find Tool to access Column Settings
• These settings are user ID specific
Find Tool

• Searches may be saved as Power Searches and are also user ID specific
• After creating the search, change the Search Mode to Power Search
• Click the Save icon to retain the search string for later use
• After naming the search, click the green Save button

Hint:
To retrieve previously saved searches, click the Unsaved dropdown when doing a Power Search
Patron records

- Use the Quick Search or the Find Tool to retrieve a patron
- This brings you to a screen where multiple functions may be done for that patron
- To see the patron registration record, click Registration
**Bibliographic records**

- Bib records can be found using a Quick Search or the Find Tool
- All editing of bibs must take place in the Polaris client
- Click the Results button to return to the Find Tool results list
Bibliographic records

- Multiple tabs of a bib record may be seen
  - Preview
  - Items
  - MARC
  - Double click an item on the Items page to link directly to it
Item records

- If not searching by barcode, the Find Tool must be used to retrieve items.
- With the exception of modifying item records through check in, editing of items must take place in the Polaris client.
- Click the Results button to return to the Find Tool results list.
- Multiple tabs of an item record may be seen:
  - Circulation
  - Control
  - Blocks and Notes
  - History
  - Statistics
  - ILL
  - eContent
  - Non-circulating
  - Display in PAC
  - Bib control number: 144768
### Item records

- Circulation includes information such as date due, current and last borrower
- Link to a current, last borrower or who an item is held for by clicking the barcode link

<table>
<thead>
<tr>
<th>Circulation</th>
<th>Controls</th>
<th>Blocks and Notes</th>
<th>History</th>
<th>Statistics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due date: 2/12/2016 11:59:59 PM</td>
<td>Current borrower: done</td>
<td>Check-out date: 1/22/2016 11:51:53 AM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Renewals taken: 0</td>
<td>Loaning branch: WPL</td>
<td>Original due date: 2/12/2016 11:59:59 PM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Renewals limit: 2</td>
<td>Held for:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Renewal date:</td>
<td>Held at:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last location</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check-in at:</td>
<td>Last use</td>
<td>In-transit/Transformed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Click date:</td>
<td>Borrower:</td>
<td>From:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Withdrawn:</td>
<td>Loaning branch:</td>
<td>Sent:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Cc date: 1/22/2016 11:51:53 AM</td>
<td>To:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Received:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Controls include cataloging information such as loan period, fine code and if the item is holdable

<table>
<thead>
<tr>
<th>Circulation</th>
<th>Controls</th>
<th>Blocks and Notes</th>
<th>History</th>
<th>Statistics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loan period: 21 Day</td>
<td>Holdable</td>
<td>Hold limited to:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fine code: 0.105.0.001</td>
<td>Loanable outside system</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Statistical code:</td>
<td>Do not float</td>
<td>Patrons from this library and branches</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Home branch: BRPL</td>
<td></td>
<td>Patrons from this branch only</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Preferred borrowers</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Pickup at</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Item records**

- The Blocks and Notes tab give staff view only access.
- Every time an item is touched, it is logged on the History tab.
- Circulation statistics may be seen on the Statistics tab.
Working with multiple records

- Clicking the icon on the upper left side of the screen displays open records for easy navigation
- Records stay open until closed
- All records may be closed by clicking the Close All button
Leap Functionality

- Register a new patron
  - Profile
  - Attributes
  - Email
  - Address
  - Phone/Fax
  - Notifications
  - Preferences
  - Password
  - Image
- Copying and deleting a patron record
Register a new patron

- Begin by clicking the New Patron button
- Registering a patron in Leap is very similar to registering a patron in the client

Mouse or tab between section intake areas

Navigation menu makes it easy to move from section to section
Profile

- The profile section holds:
  - Barcode—current and former
  - Registered branch
  - Patron code
  - Name
  - Dates—registration, expiration and birth date
  - Statistical class
  - Gender
Attributes

• Attributes are called User Defined Fields (UDF) in the client
• If your library also uses Custom Data Fields, these fields and UDF’s are combined in the attributes area
Email & Addresses

- Email addresses are in their own section

- Click the Address button in the Addresses section to add an address
- Click the button again if additional addresses are needed
- Addresses may be edited or deleted
- The address check date is also set here
Phone/Fax & Notifications

- Enter up to three phone numbers and a fax number
- Check “Additional TXT message” to send a text in addition to the selected notification option
- Select desired phone and carrier for text messaging
- eReceipt Options are also set here
Preferences & Password

- Do not make any changes to Preferences
- Enter the password and retype it to confirm
After a patron has been saved, a Misc. info section appears that hold registration date, circulation counts, merging information, etc.
Copying and deleting a patron record

- To copy a patron record, click the Copy button on the registration record just right of the Profile area.
- To delete a patron record, click the Delete button on the registration record just below the Copy button.
Leap Functionality

- Edit a patron record
- Blocks
- Notes
- Check Out
- Out/Overdue
- Account
- Claims/Lost
- Holds
- More patron information
- Check In
Edit a patron record

- Search for the desired patron and click Registration to edit
- Once in the patron record, make your changes and click the green Save button
- A patron’s expiration date and address check day may both be updated by clicking on the Renew button
Blocks

- To view a patron’s blocks, click Blocks next to their name/assigned branch
- To add a block, click the blue New Block button
- After selecting a library assigned block or adding a free text block, click the green Save button
- Library assigned blocks can be deleted by selecting the block and using the Delete button
To view a patron’s notes, click Notes next to their name/assigned branch.

After entering non-blocking or blocking notes, click the green Update Notes button.
Check Out

Functions available on the Check Out tab:
- Check out
- Find Tool
- Reset a date due
- Assign a special loan
You must begin with the patron to perform check out
Search for and retrieve the desired patron
On the Check Out page, scan or type in barcodes
You can also search for the item using the Find Tool button next to the barcode box
To finish the check out transaction, click the Complete button
Check out

- A setting in System Administration can allow a prompt to appear when checking out items to a patron whose eReceipt option is set to None
- The prompt will appear when the Complete button is clicked
- Click Continue to set up eReceipts
Out/Overdue

- Functions available on the Out/Overdue tab:
  - Renew
  - Special renew
  - Reset due date
  - Estimate fines
  - Make a claim
  - Declare lost
  - Under More
    - Notification history
    - Check-in
    - Print list
Out/Overdue--renewing

- You must pull up the patron to renew items
- Under Out/Overdue, select the items you wish to renew and click the blue Renew button
- You can select all items by clicking the check box next to Type at the column head
- Selecting an item enables the Special Renew and Reset Date Due buttons
- Items may also be checked out to the patron again to renew
• Functions available on the Account tab:
  – Pay
  – Waive Charge
  – Add charge
  – Notification history
  – Under More
    • History
    • Properties
Account—paying fines

- Search for and retrieve the desired patron
- On Account, select the item you wish to pay and click the blue Pay button
- Enter the amount to pay and click the green Pay button
- To pay multiple fines, select multiple lines and click the blue Pay button
Account—transaction history

- To view a patron’s transaction history, click Account Summary and select Transaction Summary.
- From the transaction history you may
  - View history of a fine
  - See properties
• Functions available on the Claims/Lost tab:
  – View claimed items
  – View lost items
  – Notification history
  – Declare Lost
On the Out/Overdue tab, select the item you wish to claim or declare lost

Click the Make A Claim or Declare Lost button
Claims/Lost---Claiming and declaring items lost

- Choose a claim status—Claim Returned or Claim Never Had
- Click the green Claim button to complete the claim
- The title now displays on the Claims/Lost page
- Claimed items here may also be declared lost
Claims/Lost--Claiming and declaring items lost

- When declaring items lost, select the appropriate actions in the dialog box and payment method.
- Click the blue OK button.
- The lost item is also moved to the Claims/Lost tab if it has not been paid.
Holds

- Functions available on the Holds tab:
  - New hold
  - Ask Me Later
  - Cancel
  - Reactivate
  - Delete
  - Return

- Under More
  - Fill now
  - Add to Group
  - Remove from Group
  - Multiple Holds
Holds—placing holds

- Holds may be placed from a patron, bib or item
- On the Holds page of a patron, click the blue New Hold button
- Search for the desired title by typing in the Title box—a Find Tool will appear
Holds--placing holds

- When the title has been selected, review the pickup location and click the green Place Hold button
- The hold will now appear on the Holds tab
Holds—placing holds

- Holds may be placed from bib or item records as well.
- Check the record type you are using to place the correct level hold—bibs and items look similar in Leap.
Holds—placing multiple holds for one patron

- Begin on the Holds tab of a patron
- From More, select Multiple Holds
- Click the Add Titles button as many times as needed
- Click the Place Hold button when done adding titles
More patron information

- Hovering over the ‘I’ icon next to the patron’s name displays additional information
- The following patron information may be accessed by clicking the More button:
  - Reading History
  - Associations
  - Notices
  - ILL
  - Messages
  - Blocks
  - Notes
- Notice history may be viewed and, by double clicking on a notice, the complete history is retrieved.
More patron information

- ILL requests may be viewed, however they must still be created and managed through the client
- Messages may be created and maintained here
More patron information

• Library assigned blocks may be managed here
• Notes may be viewed and maintained
Check In

- Items may be checked in using Normal or Bulk check in
- A check in default may be set under your user ID/Settings/Workform User Defaults
- To check items in, click the blue Check In button at the top left of the screen
- Barcodes can be scanned or items searched for with an item Find Tool
- Free days may be set by entering the number of days or choosing a date from a calendar
Normal check in allows you to deal with fines immediately.
As each fine appears, choose to Continue check in, Waive, Charge Account or Cancel the transaction.
Click the Resolve Charges button and choose to Manage All Fines, Charge New, Waive New or Pay New when check in for that patron is complete.
Check In

- When using Bulk check in, fines are immediately applied to the patron’s account
- To clear check in windows, click the Close button or go to Actions/Clear List
**Check In**

**Item Record**

<table>
<thead>
<tr>
<th>Harry Potter and the goblet of fire</th>
</tr>
</thead>
<tbody>
<tr>
<td>By J. K. Rowling</td>
</tr>
<tr>
<td>Barcode: 31111121511907</td>
</tr>
<tr>
<td>Call number: J K Rowling</td>
</tr>
<tr>
<td>Collection: Fiction</td>
</tr>
<tr>
<td>Temp location:</td>
</tr>
<tr>
<td>Assigned branch: DOPL</td>
</tr>
<tr>
<td>Material type: Book</td>
</tr>
<tr>
<td>Shelf location: None</td>
</tr>
<tr>
<td>Issue:</td>
</tr>
<tr>
<td>Price: $21.95</td>
</tr>
<tr>
<td>Circulation status: Out 12/21/2015</td>
</tr>
</tbody>
</table>

**Check in item**

This item will be checked in.

- Items may also be checked in from an item record by clicking the Check In button.
- Link to the current or last borrower by clicking on the patron’s barcode in the Circulation tab.
Picklist processing

- Picklist
  - Pending list
  - Located list
  - Other processing options
- Viewing hold requests from the Picklist
- Generating other lists
  - Unclaimed
  - Holds to Transfer
### Picklist—Pending list

The Picklist is generated by going to Utilities/Picklist processing.

- Columns may be sorted and sub-sorted by clicking the column header.
- To exit the Picklist, use the red Close button in the upper right corner.

<table>
<thead>
<tr>
<th>Collection</th>
<th>Shelf Location</th>
<th>Call Number</th>
<th>Author</th>
<th>Title</th>
<th>Material Type</th>
<th>Pickup Branch</th>
<th>Item Barcode</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nonfiction</td>
<td>598 OS</td>
<td>Cottam, Charlton, 1911-1969.</td>
<td>The adventure of birds</td>
<td>Book</td>
<td>WPL</td>
<td>31111000207862</td>
<td></td>
</tr>
<tr>
<td>Nonfiction</td>
<td>795 JA</td>
<td>Jacoby, Oswald, 1902-1964.</td>
<td>The backgammon book</td>
<td>Book</td>
<td>WPL</td>
<td>31111000428730</td>
<td></td>
</tr>
<tr>
<td>Children's Nonfiction</td>
<td>J 569.91 ST</td>
<td>Stone, Lynn M</td>
<td>Birds of prey</td>
<td>Book</td>
<td>WPL</td>
<td>31111000387742</td>
<td></td>
</tr>
</tbody>
</table>
Picklist—Pending list

- A book icon next to the Collection reflects an item level hold
- The Picklist may also be filtered by using the Filter requests box—a keyword search on all columns
- Double clicking on the item barcode will open the item record
Picklist—Located list

- When an item or items has been pulled from the shelf, check the box next to the hold and click the blue Located button.
- The item or items is moved from the Pending list to the Located list.
Picklist—Located list

- If an item has been marked Located in error, it may be returned to the Pending list by selecting it and clicking the blue Return button.
- Located items are then checked in through circulation to trap the hold or be transferred for hold.
- Items do not have to be marked with a status of Located in order to be trapped.
Picklist—other processing options

- Other options on the Pending list include:
  - Missing—when an item is marked missing, it is immediately removed from the Pending list
Viewing hold requests from the Picklist

- Double click on a hold request in the Picklist to open the hold
- A hold is only accessible by clicking on a hold request from the Picklist
- Click the Action button where you can Cancel, Reactivate, Delete or Fill Now depending on the status of the hold
Viewing hold requests from the Picklist

• Tabs on the hold request offer more information about the hold
  – Details—Pick Up location, activation and expiration dates can be edited
  – Notes—Notes can be added or edited here
  – Satisfy By—Shows eligible items that may fill the hold
  – History—Shows the history of this holds process
Generating other lists--Unclaimed

- The Unclaimed list displays holds that still have not been picked up and the ‘held until’ date has passed
- From the Unclaimed list, you can click the patron’s name to go to the patron record
Generating other lists--Holds to Transfer

- The Holds to Transfer list displays holds that need to be transferred to a new branch because the pickup location has changed.
- From the Holds to Transfer list, you may select the patron name to go to the patron record.
- Setting in System Administration must be turned on to enable this functionality.