# Polaris Leap User Guide

POLARIS LEAP 1.0

INNOVATIVE INTERFACES, INC.

# About Leap Documentation

Copyright © 2014 by Innovative Interfaces, Inc.

This document is copyrighted. All rights are reserved. No part of this document may be photocopied or reproduced in any form without the prior written consent of Innovative Interfaces, Inc.

Innovative Interfaces
Box 4903
Syracuse, New York 13221-4903
www.iii.com

Trademarks

Microsoft® and Windows® are registered trademarks of Microsoft Corporation. Apple® and iPad® are registered trademarks of Apple Inc. Other brands and product names are trademarks of their respective owners.

Disclaimer

The information contained in this document is subject to change without notice. Innovative Interfaces, Inc. shall not be liable for technical or editorial omissions or mistakes in this document nor shall it be liable for incidental or consequential damages resulting from your use of the information contained in this document.

Wednesday, December 10, 2014

*This documentation is written for Polaris Leap 1.0. Doc. Rev. 3.*

# Contents

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

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

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

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

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

# Polaris Leap Overview

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

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

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

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

See also:


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




Innovative Interfaces, Inc. 2014

# Requirements

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

## Operating Systems / Web Browsers

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

## Polaris ILS Version

Polaris Integrated Library System version 5.0.

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

## Camera

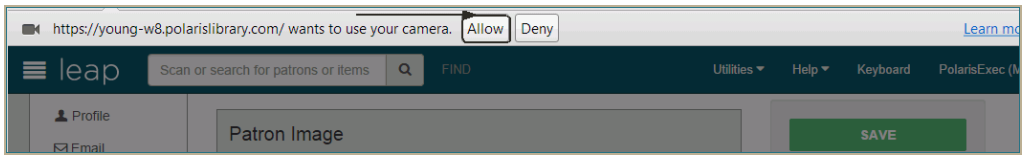
The camera is available to take patron photographs for the following:

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

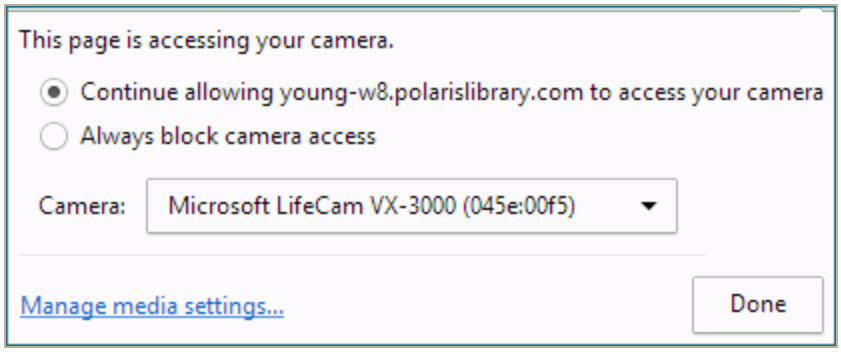
> **Note:**
> When using Chrome, you must select the **Allow** button in the address bar to permit Leap to use the camera.



Innovative Interfaces, Inc. 2014




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




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



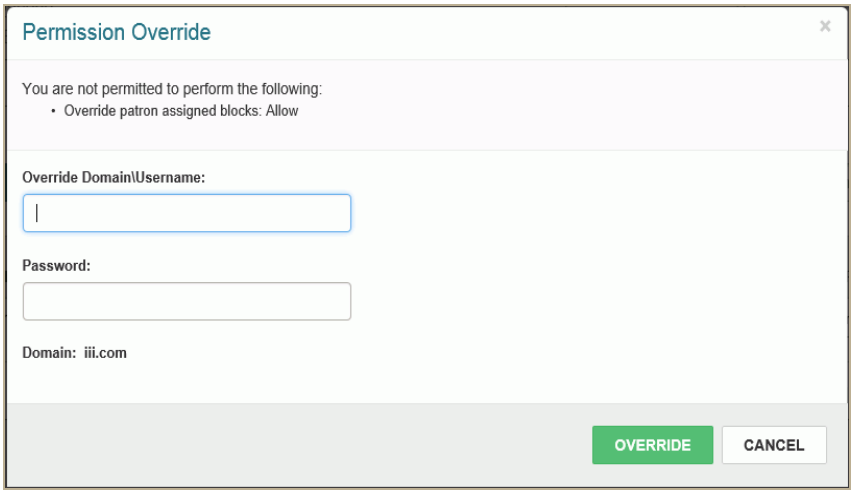
Innovative Interfaces, Inc. 2014

# Staff User Permissions in Leap

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

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

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




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

Innovative Interfaces, Inc. 2014

## Signing in to Polaris Leap

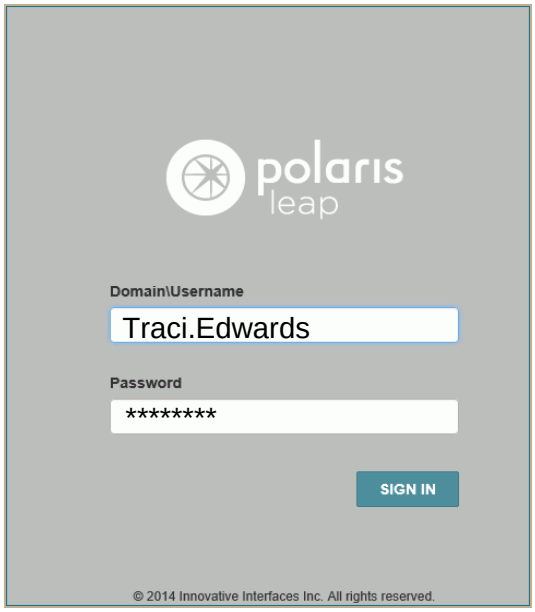
When you sign in to Leap the first time, you enter your user name and password. Another dialog box opens where you select your branch and workstation (LEAP-4-letter code). After signing in the first time, you only need to enter your username and password; your branch and workstation are selected automatically.

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

To sign in to Polaris Leap:

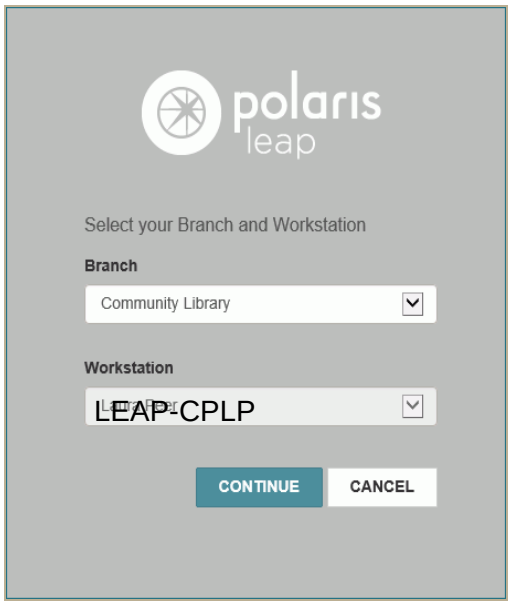
1. Select the Leap icon or shortcut.

   The sign in page opens.




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

   Another page opens where you select your branch and workstation.




5. Select your branch in the **Branch** drop-down list box.
6. Select your LEAP workstation in the **Workstation** drop-down list box--"LEAP-library 4-letter code".
7. Select **CONTINUE**.

   The Circulation page opens.

   The cursor is in the quick search box.

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



Innovative Interfaces, Inc. 2014

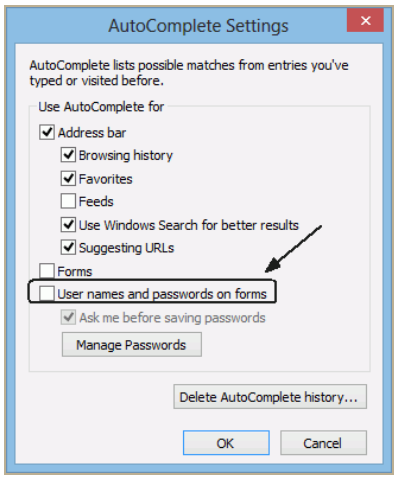
# Browser and Ipad® Issues

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

## Patron Password Validation in Internet Explorer 11

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

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



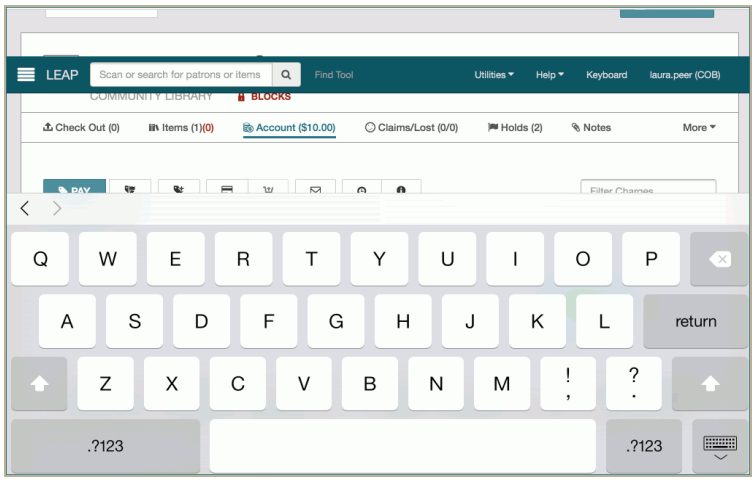

For more information on this issue, which Microsoft has identified as a known bug in IE 11, see:

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

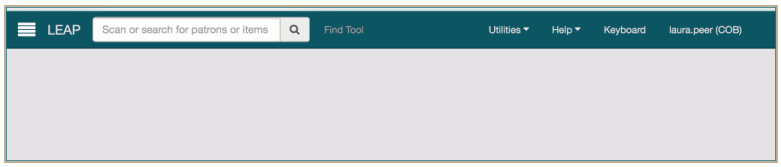
## iPad® Display

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

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




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






Innovative Interfaces, Inc. 2014

# Leap User Interface

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

## Leap Header

The Leap header is displayed when you log into Leap.

The Leap header contains the following elements:

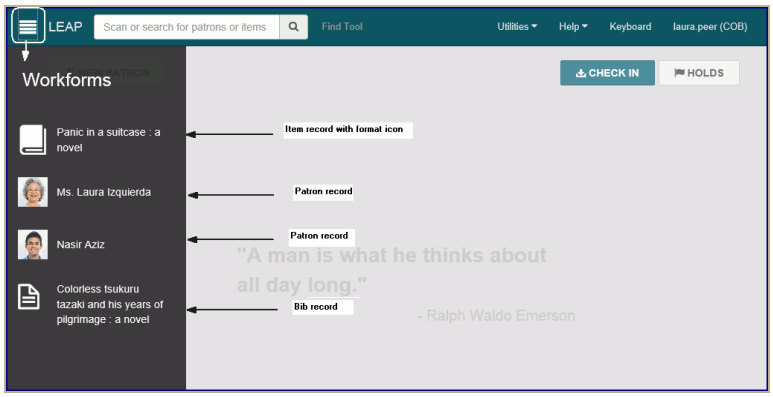
| Element | Description |
|---|---|
| | Select the slide-out button to access a menu. When you click-/tap this button in the Leap header, the Workforms menu opens.<br><br>See "Workforms Menu" on page 10. |
| | Enter search criteria to find patrons or titles (bibliographic records).<br><br>See "Search for Records in Leap" on page 18. |
| | Opens the Find Tool to search for patron, bibliographic, and item records.<br><br>See "The Leap Find Tool" on page 34 |
| Utilities | Select Utilities to access the Holds Picklist.<br><br>See "Holds Picklist " on page 159. |
| Help | Opens a menu with the options:<br>• **Leap Topics** - Select this option to open the Leap online Help.<br>• **Keyboard** - Select this option to see the list of key-board shortcuts.<br>• **About** - Select this option to see details about the Leap application.<br><br>See "Help Menu" on page 10. |
| Username (COB) | Select your username to access user settings or to log out of Leap.<br><br>See "Leap User Interface" on page 9. |



Innovative Interfaces, Inc. 2014

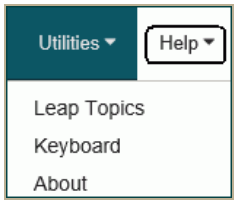
## Workforms Menu

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



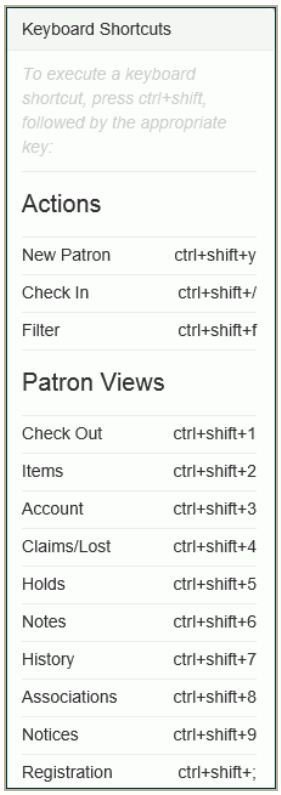

## Help Menu

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




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

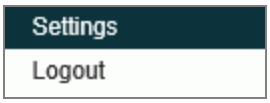
- Select **Keyboard** to see a list of keyboard shortcuts. The **Actions** shortcuts are used to create a new patron, check in an item, or position the cursor in the filter box on the current view. The **Patron Views** shortcuts go to a certain view in the patron's record.



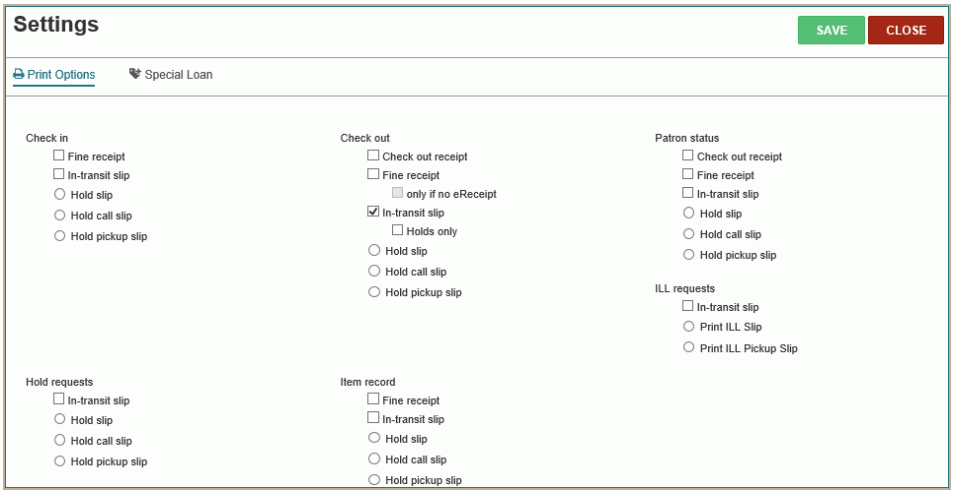

- Select **About** to see details about the Leap application and the logged-in user.

## User Options

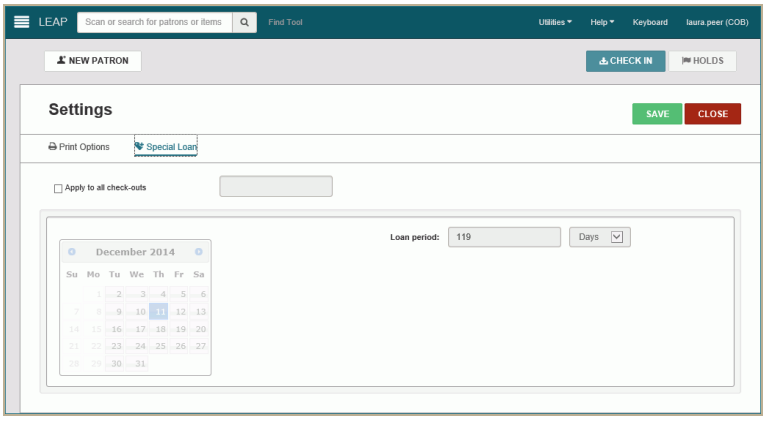
When you select your username in the Leap header, the following options are available: Settings and Logout




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




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




Select **Logout** to close Leap.

## Options Menus

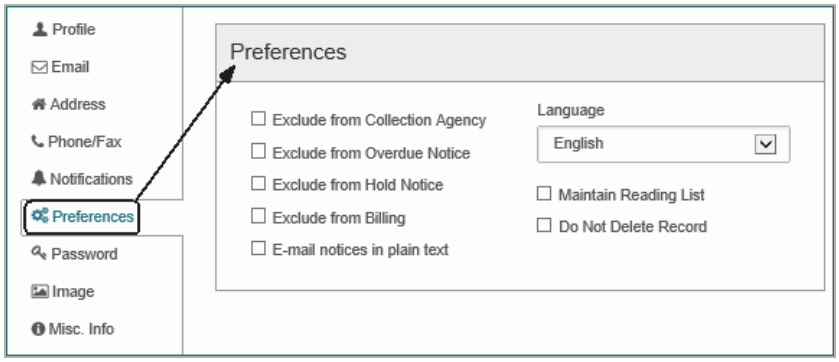
Options menus provide selections for additional functions, such as the column and filter options for the Find Tool.



Innovative Interfaces, Inc. 2014

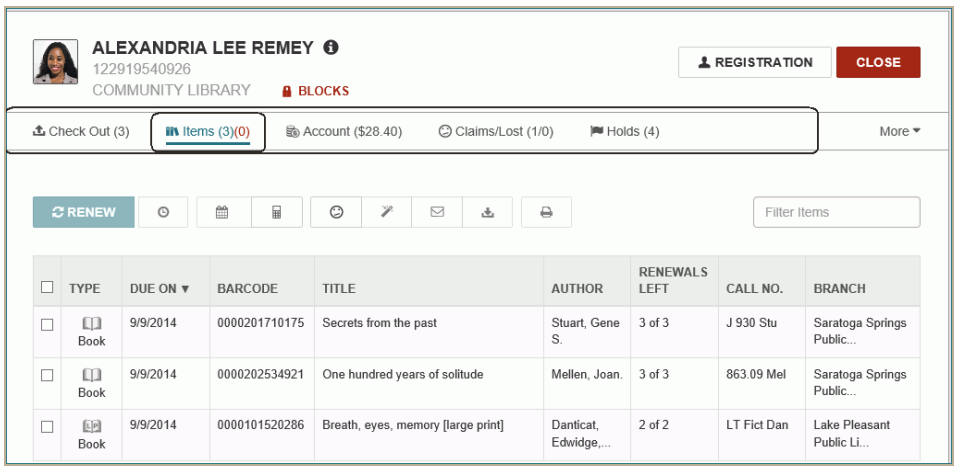
## Navigation Menus

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




## View Bars

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






Innovative Interfaces, Inc. 2014

## Button Toolbars

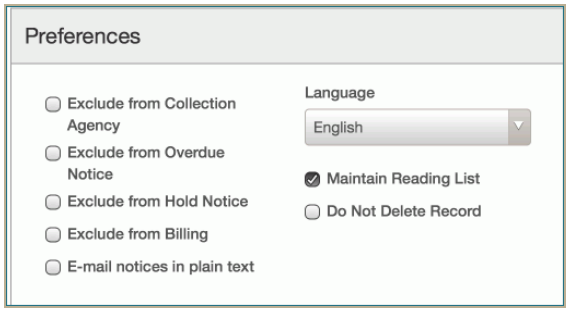
Button toolbars are displayed at the top of lists, such as the list of items out, and contain buttons for performing actions items in the list.

## Required Fields

Fields marked with an asterisk are required.

## Check Boxes

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




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

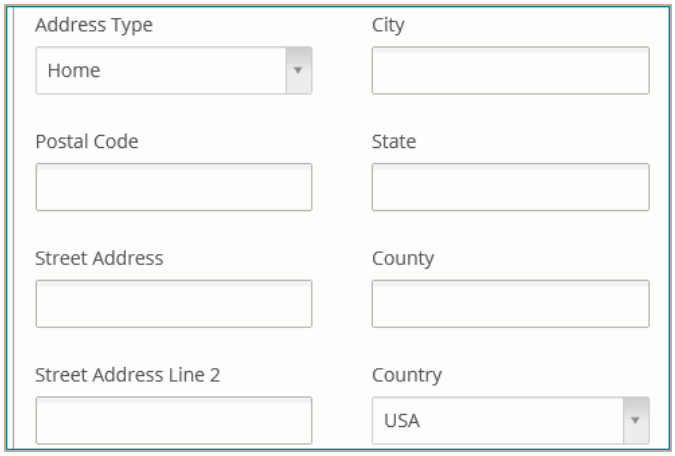
For example, select the check box next to a charge, and select the **Pay** button to pay the charge. When you select the line item, the command button becomes brighter, which indicates the function is available.

## Command Buttons

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

## Plus Buttons

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

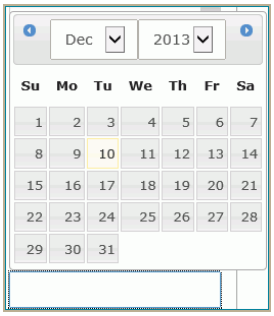



## Drop-Down List Boxes

Select an entry in a drop-down list box.

## Date Fields

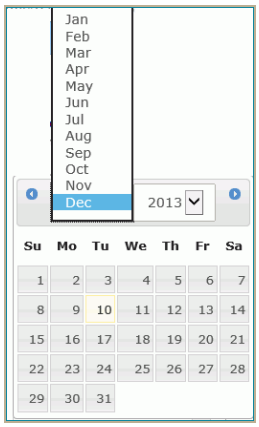
When you click or tap inside a date field, a calendar control appears. To locate and select a date, do the following:



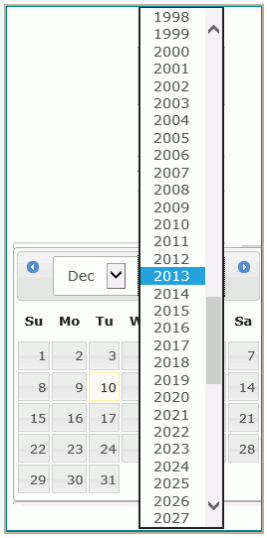

- Select the date in the current month.
- Select the left arrow to go to the previous month.
- Select the right arrow to go to the next month.
- Select the month at the top of the calendar to open the month list, and select the month.



Innovative Interfaces, Inc. 2014

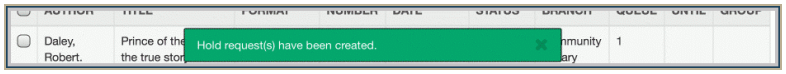



- Select the year at the top of the calendar to open the year list, and select the year.




## Message Boxes

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

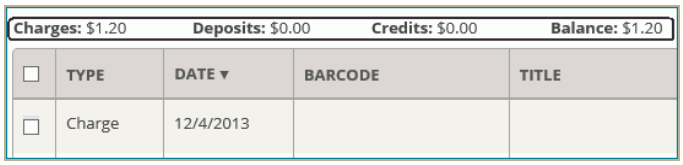



## Summary Bars

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

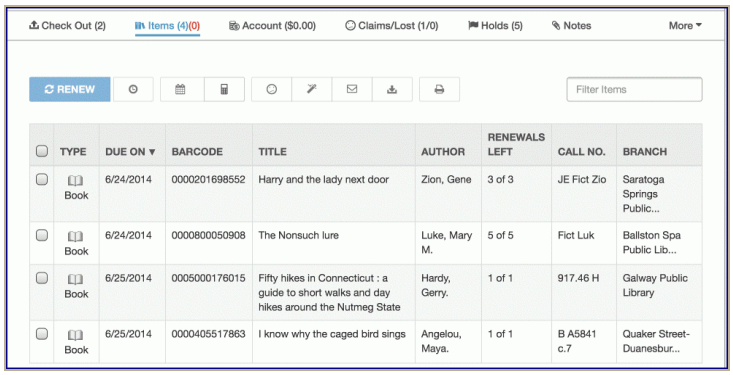


Innovative Interfaces, Inc. 2014



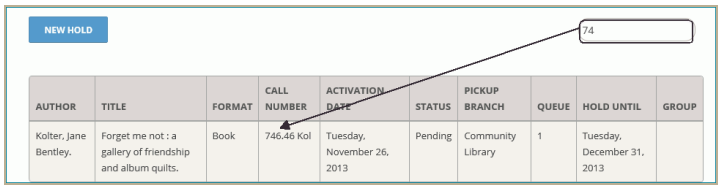

## List Views

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 perform actions on a line item, select the check box. To sort the line items, select a column header.




## 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.





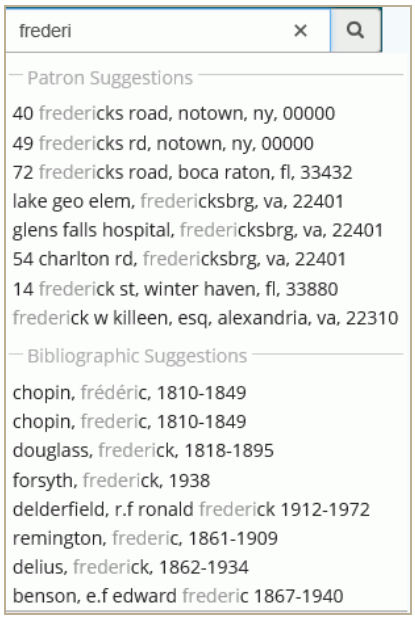

Innovative Interfaces, Inc. 2014

## Search for Records in Leap

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

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

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




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

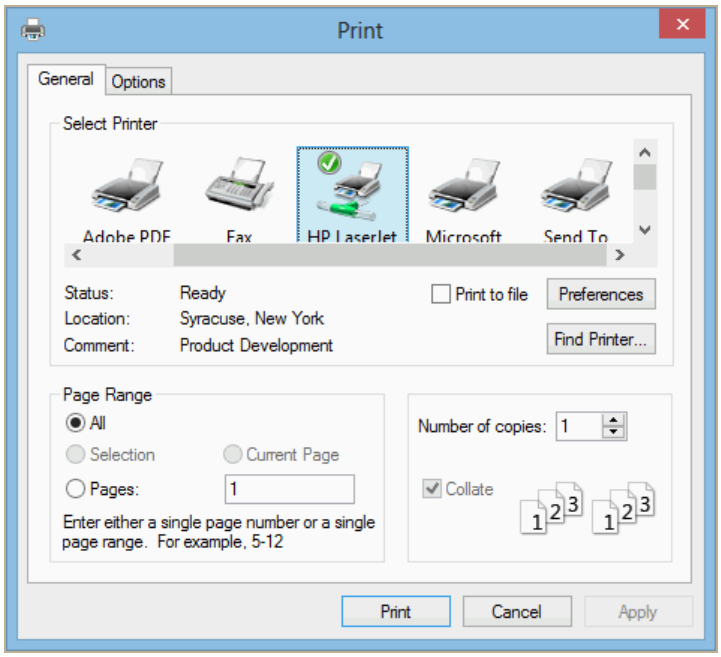
- Use the Find Tool, which is available by selecting **FIND** on the first page when you log in and in various pages throughout the application. See "The Leap Find Tool" on page 34



Innovative Interfaces, Inc. 2014

# Receipt Printing from Leap

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




### Polaris ILS Workform Print Options

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

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

See also:


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



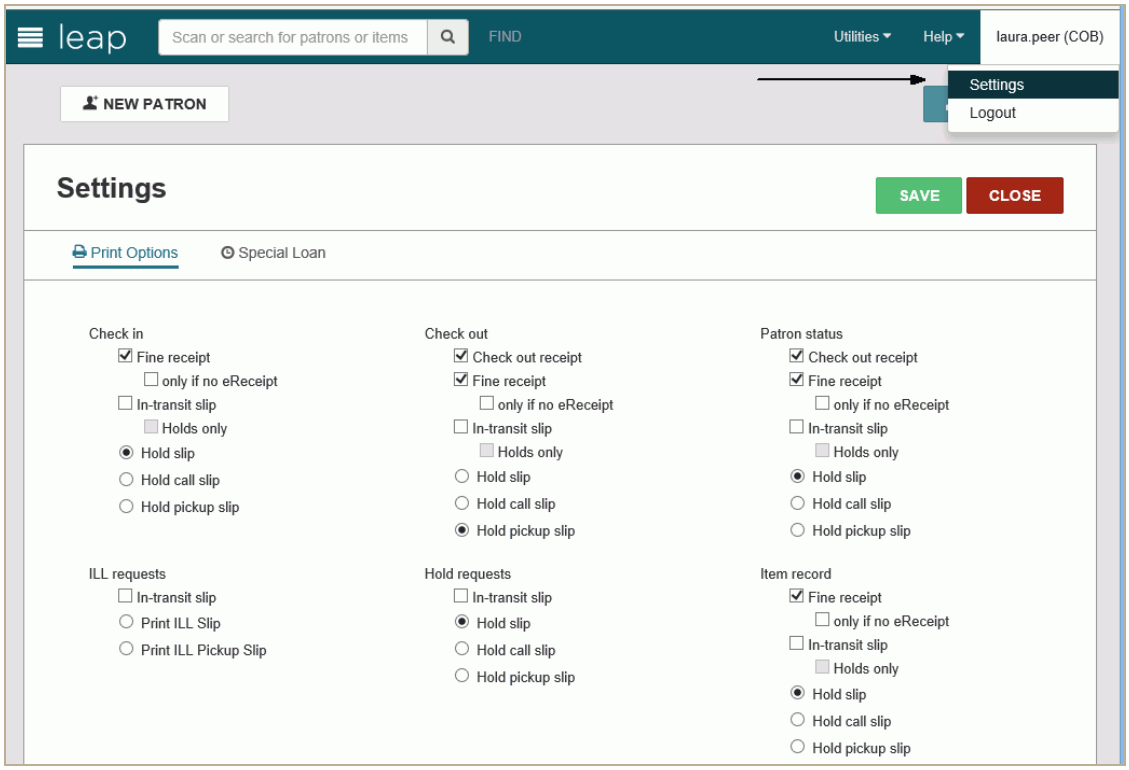

Innovative Interfaces, Inc. 2014

## Set user print options in Leap

To set the print options in Leap:

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

   The Settings page opens with the Print Options view displayed.




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

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



Innovative Interfaces, Inc. 2014

## 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)<br>Chrome, IE10, IE11 | | Star 3.0 Driver for Mac<br>Chrome, Safari |
| **Epson TM-T88IV** | Chrome, IE10, IE11 | EPSON TM-T88IV<br>ReceiptE4<br>Chrome, IE11 | |
| **Star TSP700** | | Star TSP700 (TSP743)<br>Chrome, IE11 | |

See also:


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




Innovative Interfaces, Inc. 2014

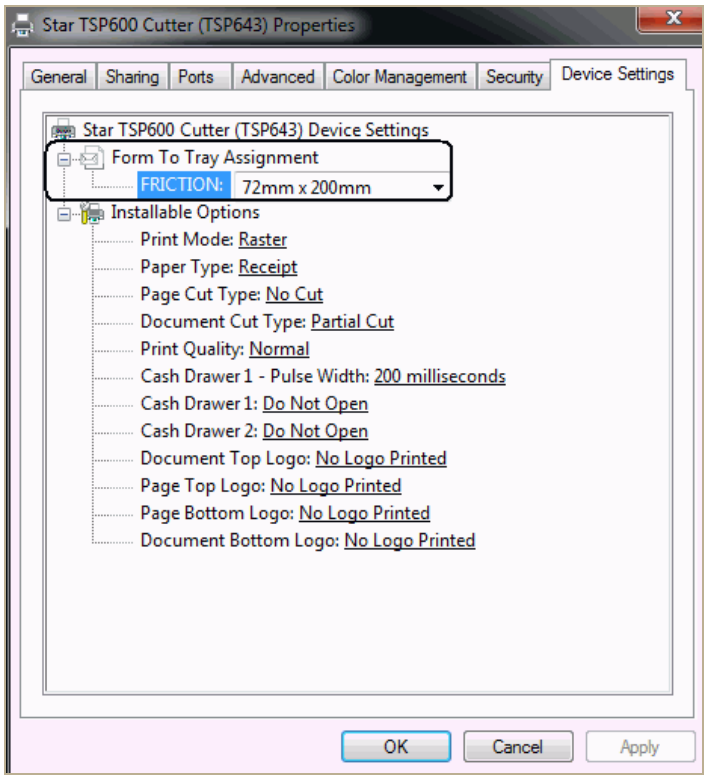
## Configure a receipt printer for IE10 or IE 11 on Windows 7 or 8.1

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

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

   The Properties window opens.

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



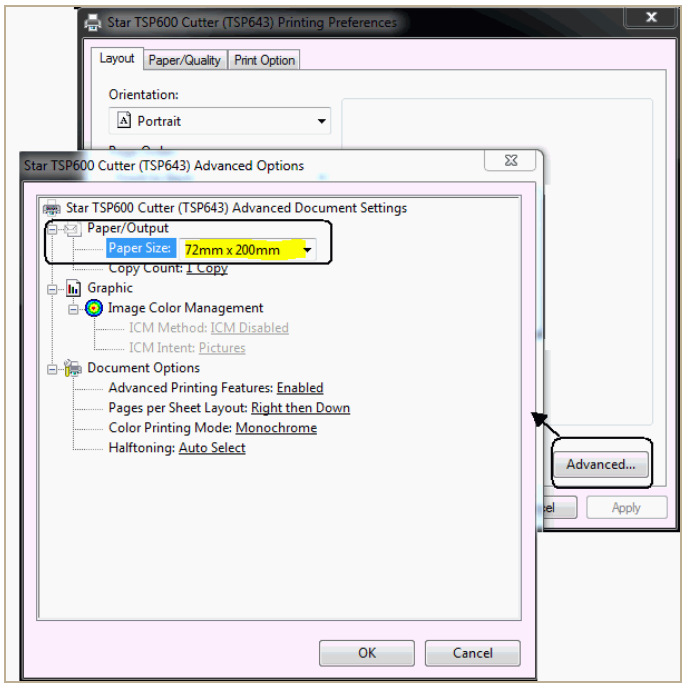

6. Click **OK**.
7. On the Devices and Printers window, right-click the printer, and select **Printing Preferences**.
8. Click **Advanced**.

   The Advanced Options window is displayed.

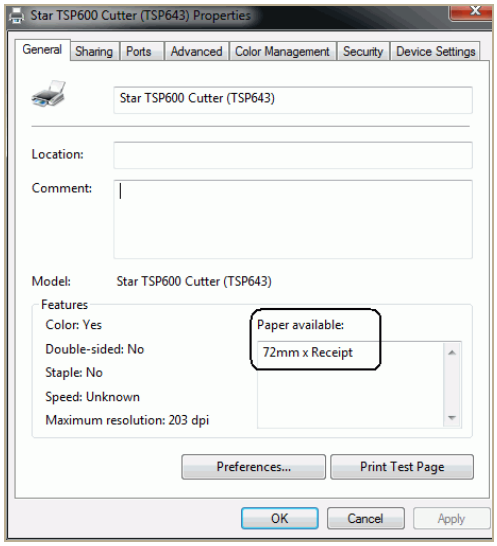
9. Select **Paper/Output**, and select **Paper Size: 72mm x 200mm.**



Innovative Interfaces, Inc. 2014




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




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



Innovative Interfaces, Inc. 2014

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

To create a custom paper size for IE:

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

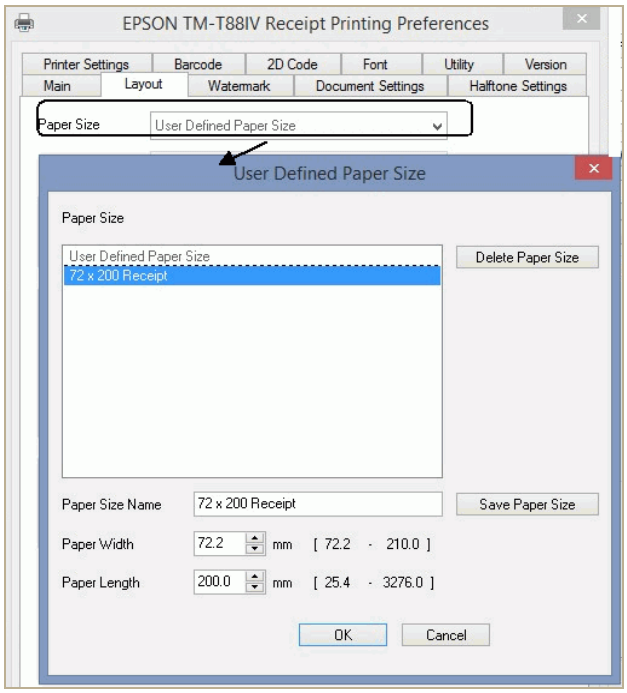
   The Printing Preferences window opens.

2. Click the Layout tab.

   The Layout tabbed page is displayed.

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

   The User Defined Paper Size dialog box opens.




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



Innovative Interfaces, Inc. 2014

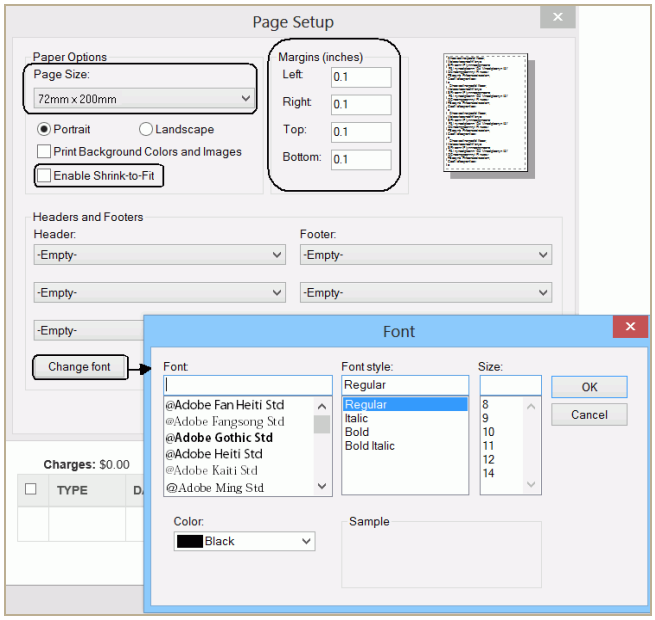
## Set up the receipt page in IE10 or IE11

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

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

   The Page Setup dialog box opens.

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




3. Select **OK**.



Innovative Interfaces, Inc. 2014

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

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

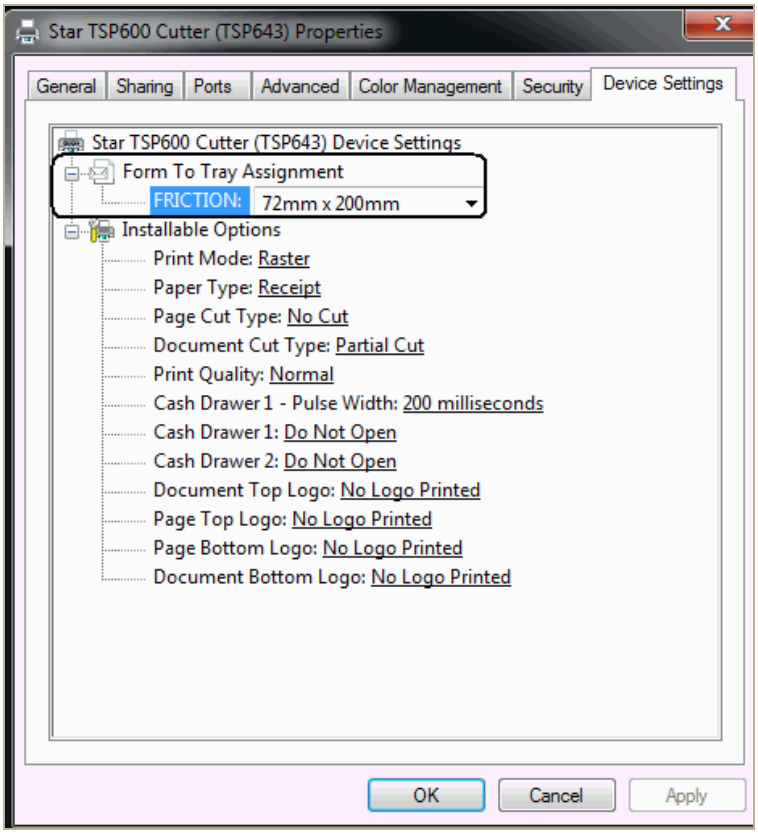
1. In the Control Panel, open the Devices and Printers window.
2. Right-click on the printer and select **Printer Properties**.

   The Properties window opens.

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

   The Device Settings tabbed page is displayed.

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



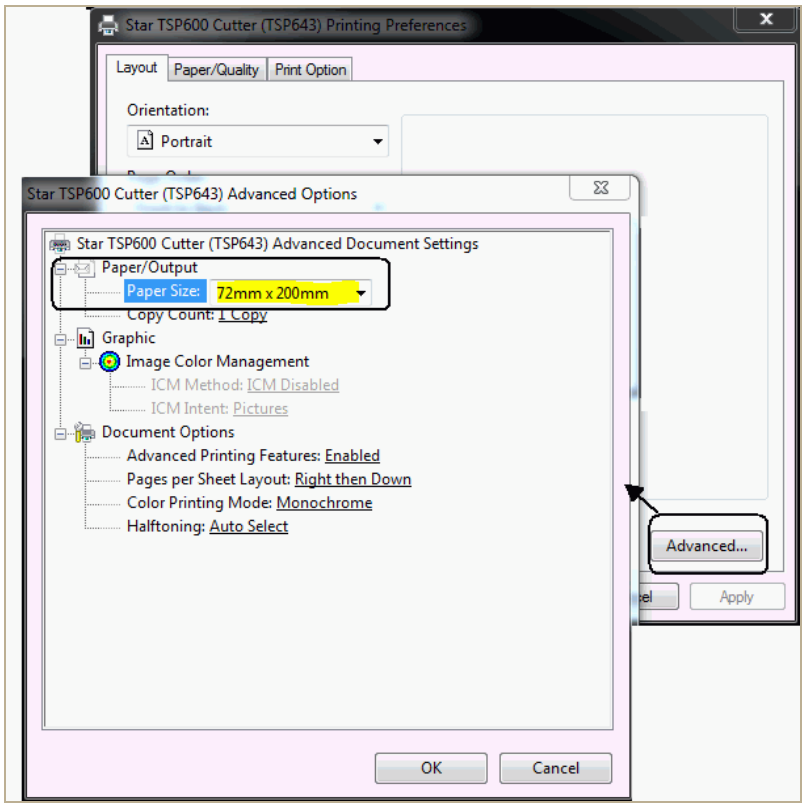

5. Click **OK**.
6. On the Devices and Printers window, right-click the printer, and select **Printing Preferences**.
7. Select **Advanced**.

   The Advanced Options window is displayed.

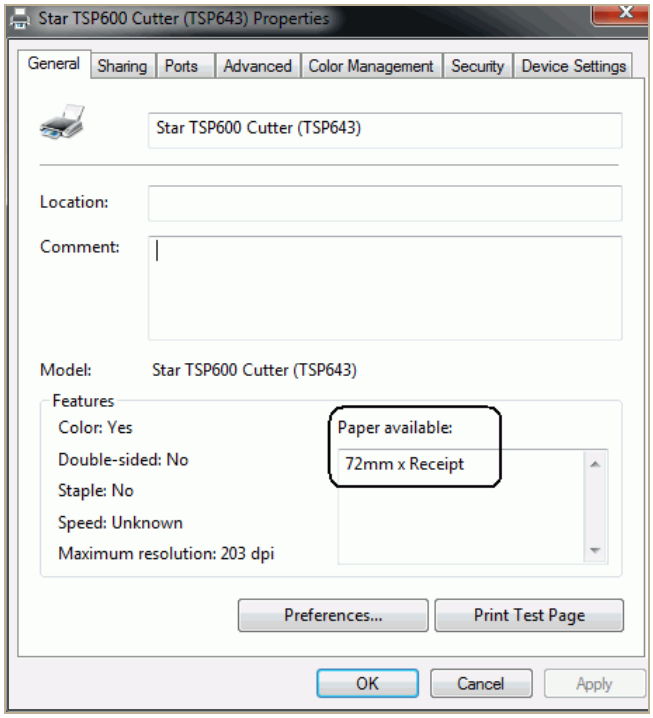
8. Select **Paper/Output**, and select **Paper Size: 72mm x 200mm.**



Innovative Interfaces, Inc. 2014




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



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

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

To create a custom paper size:

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

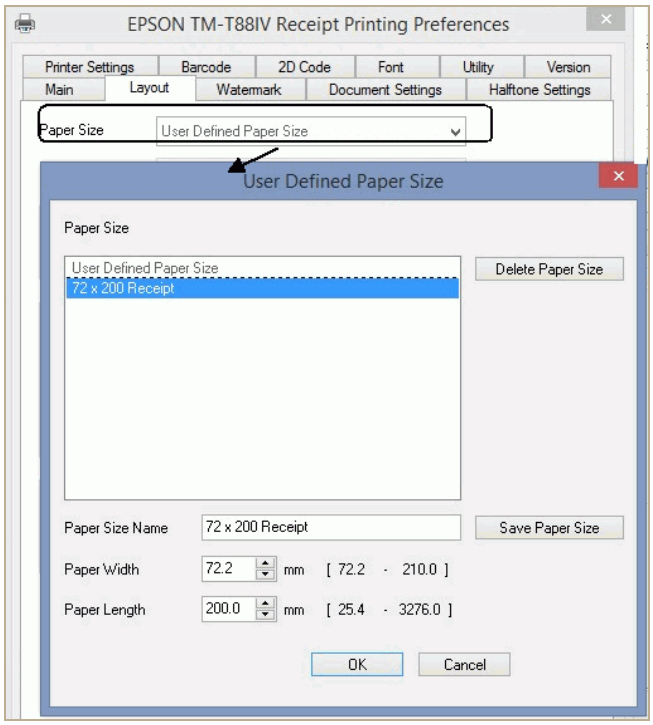
   The Printing Preferences window opens.

2. Click the Layout tab.

   The Layout tabbed page is displayed.

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

   The User Defined Paper Size dialog box opens.




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



Innovative Interfaces, Inc. 2014

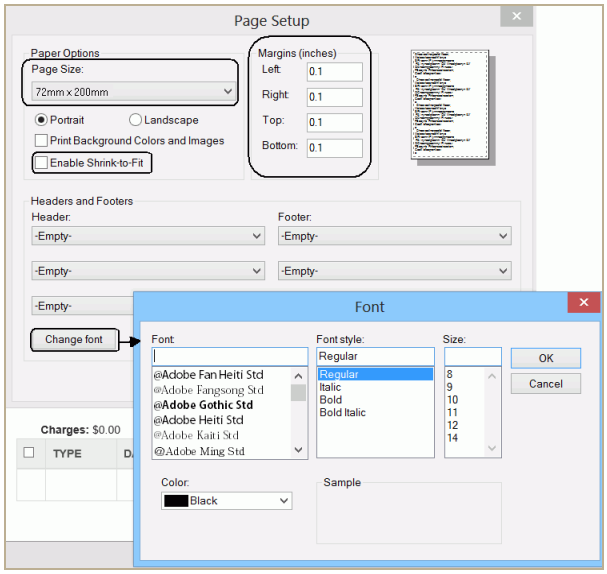
## Set up the receipt page in Chrome on Windows 7 or 8.1

To set up the page in Chrome:

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

   The Page Setup dialog box opens.

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




3. Select **OK**.



Innovative Interfaces, Inc. 2014

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

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

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

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



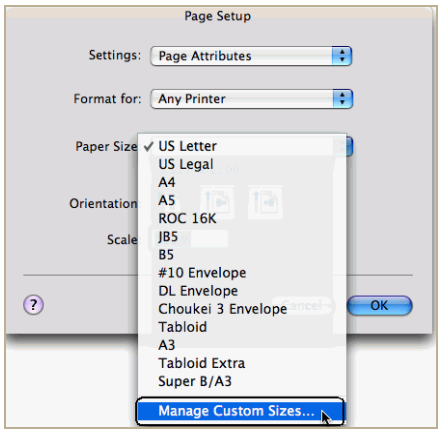
Innovative Interfaces, Inc. 2014

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

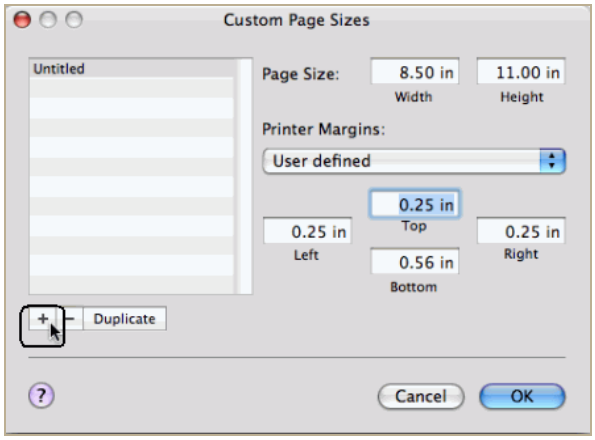
To create a custom page size for printing receipts from Chrome or Safari on Mac OS X:

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

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

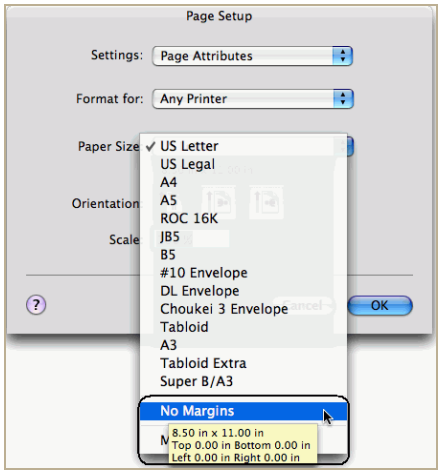



The Custom Page Sizes dialog box opens.




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

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




8. Select **OK**.



Innovative Interfaces, Inc. 2014

# The Leap Find Tool

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

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

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

## Count Only Option

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

Remote Database Searches

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

## Search Results List

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

## Find Tool Tabs

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

## Find Tool System Administration

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

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

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

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

See also:


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

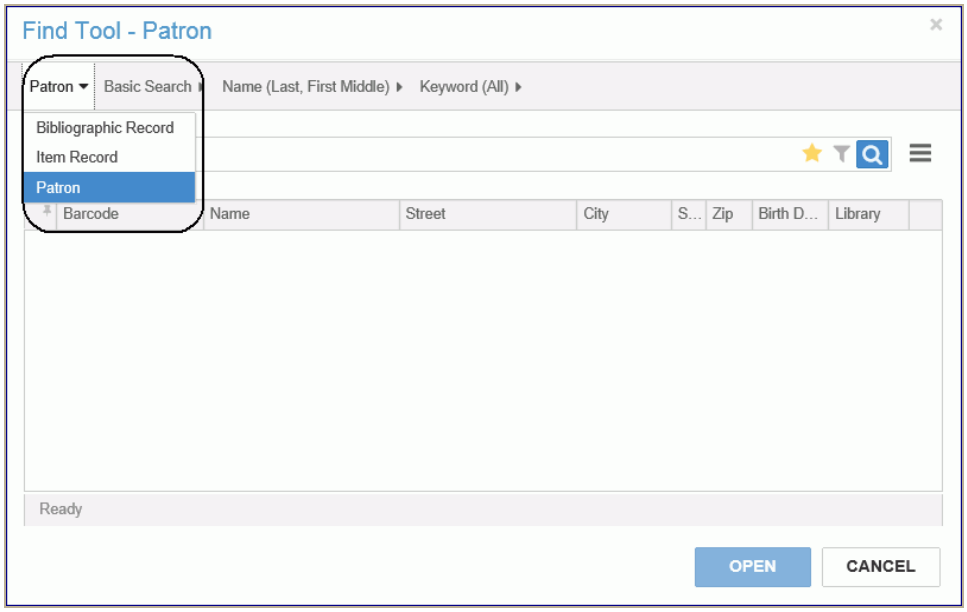



Innovative Interfaces, Inc. 2014

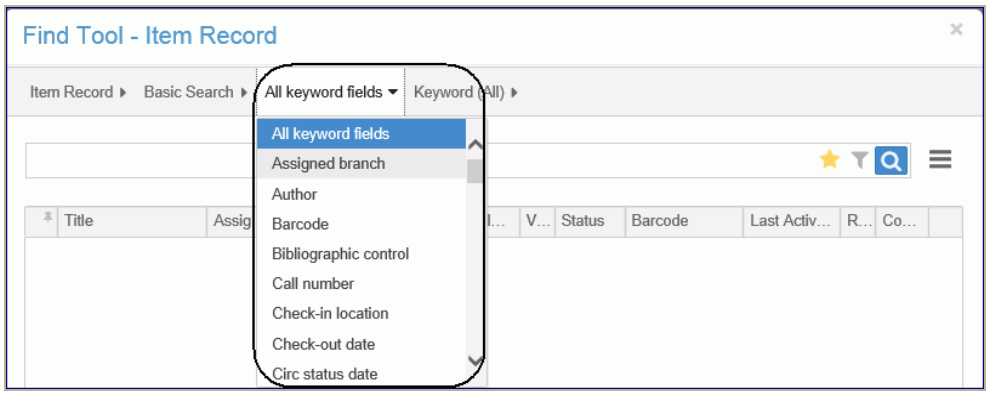
# Do a basic search for a patron, item, or bibliographic record

To search for patron, item, or bibliographic records:

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




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



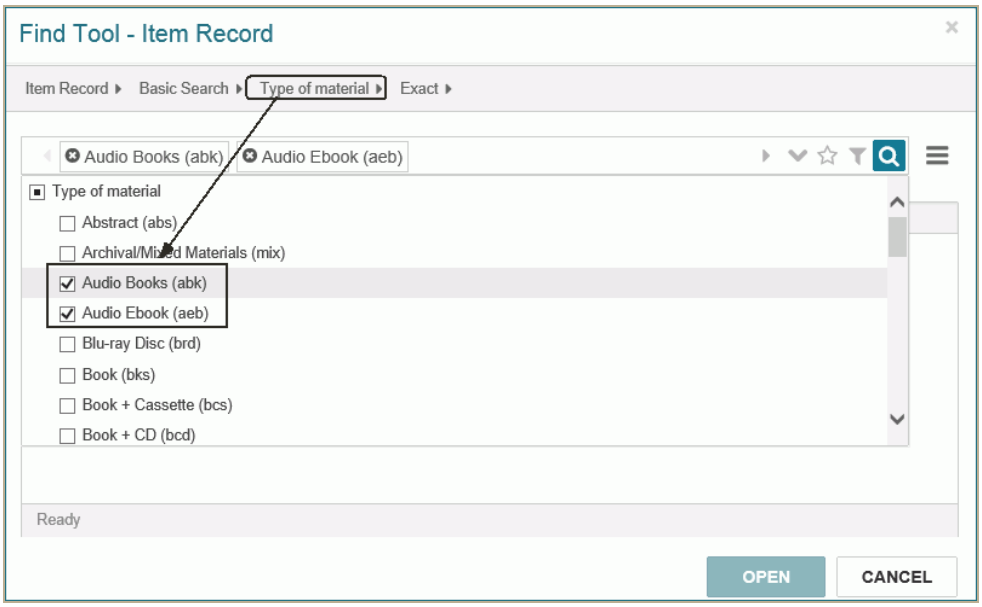

5. Select the relation option. The options depend on the selected search by access point or qualifier.

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



Innovative Interfaces, Inc. 2014

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

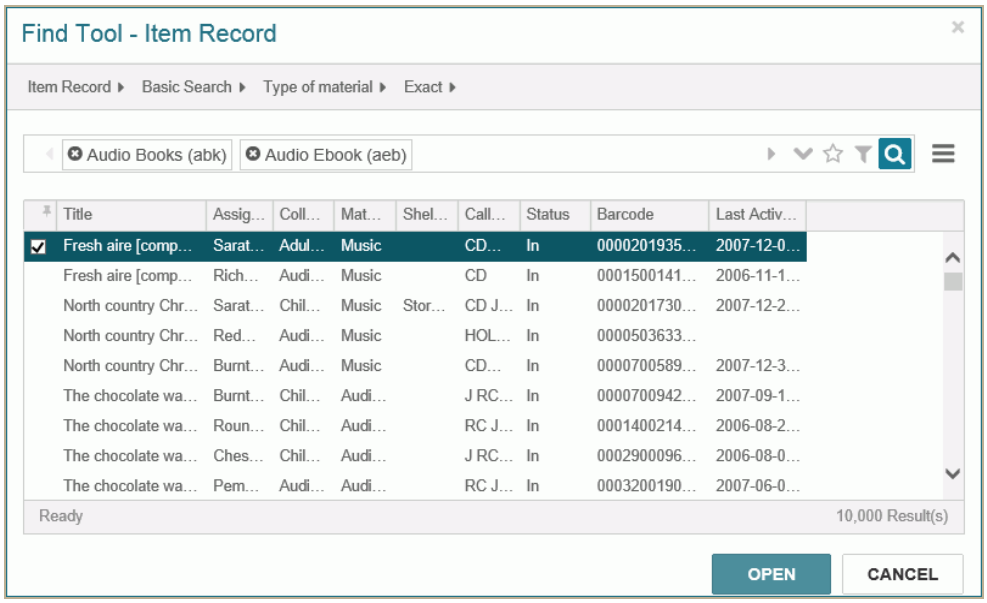



   .

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

7. Select the search button to start the search.

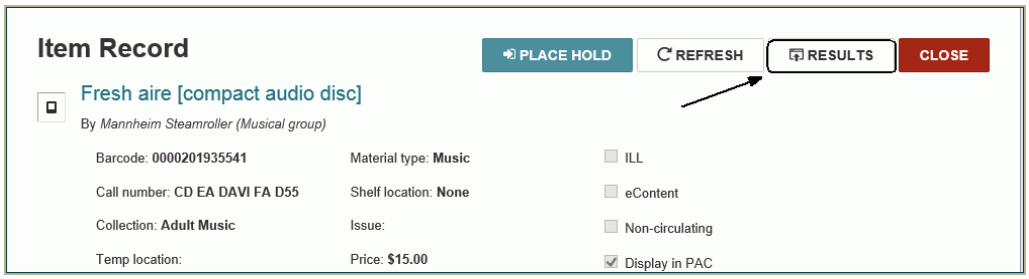
The search results list is displayed.




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

   The record opens.

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



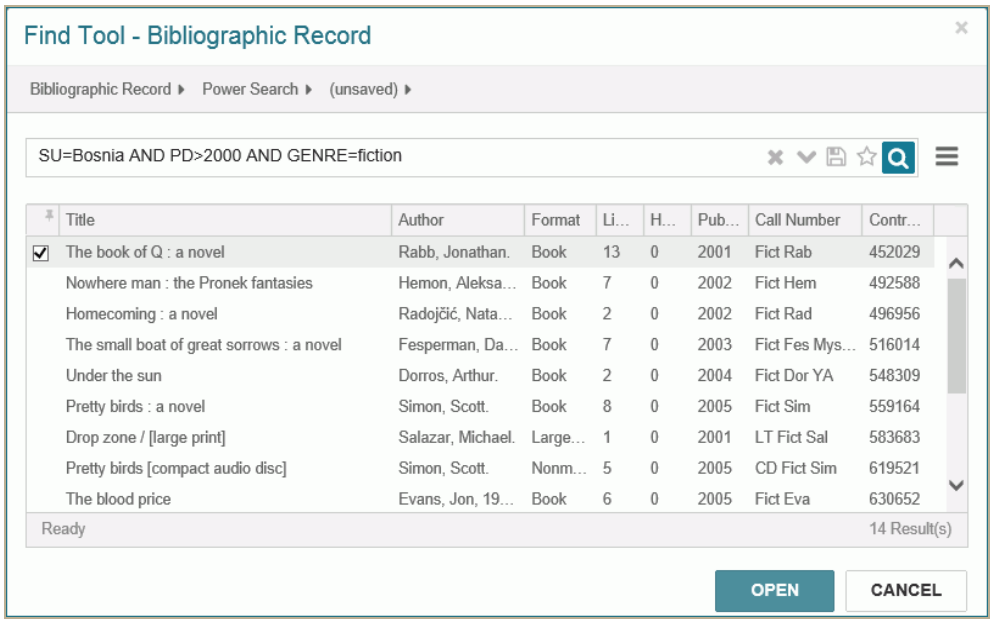
# Do a power search

To do a power search:

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

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

The search results are listed.




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



Innovative Interfaces, Inc. 2014

# Save a power search

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

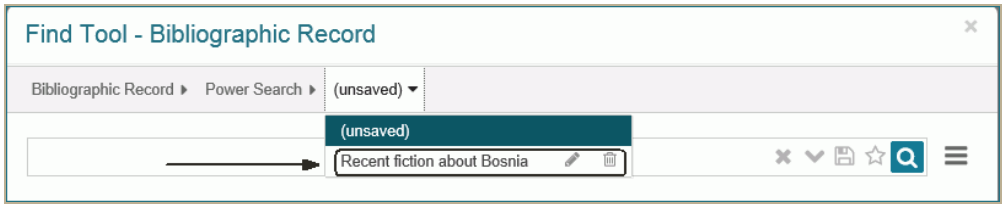
To save a power search:

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

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

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

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





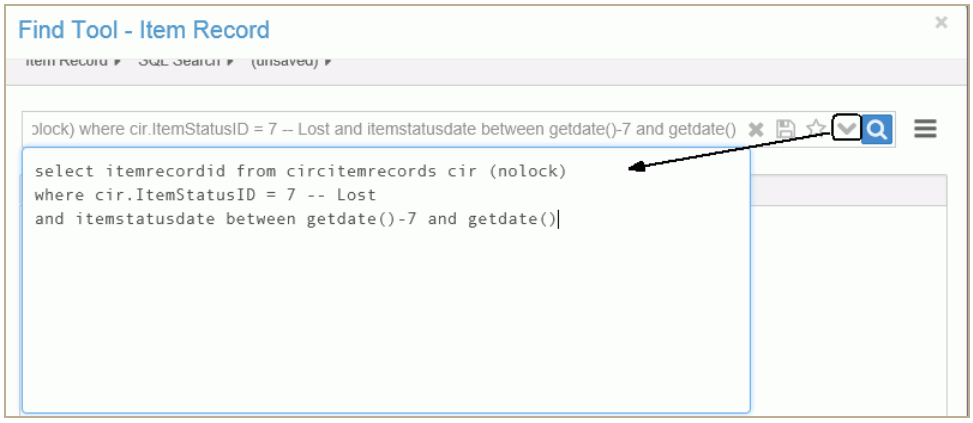

Innovative Interfaces, Inc. 2014

## Set up and save an SQL search

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

To set up and save an SQL search:

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




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

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

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



Innovative Interfaces, Inc. 2014

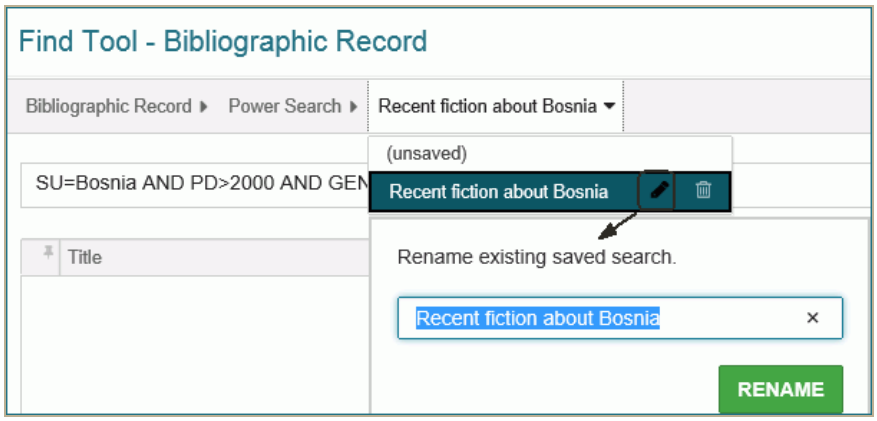
## Rename a saved search

To rename a saved search:

1. Select the saved search, and select the pencil icon.

   A dialog box opens.

2. Type another name for the saved search in the name box.
3. Select **RENAME**.




The saved search is listed with the new name.



Innovative Interfaces, Inc. 2014

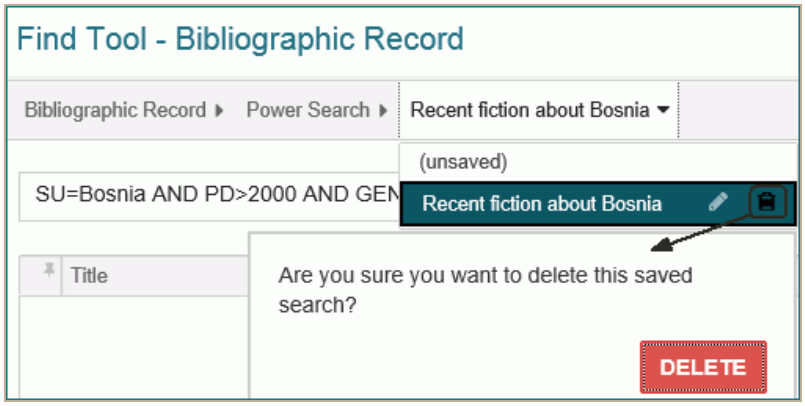
## Delete a saved search

To delete a saved search:

1. Select the saved search in the list, and select the trashcan icon.

   A message asks if you are sure you want to delete this saved search.

2. Select **DELETE**.




The saved power search is deleted from the list.



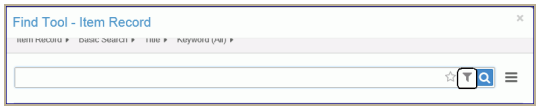
Innovative Interfaces, Inc. 2014

# Apply a filter to a Find Tool search

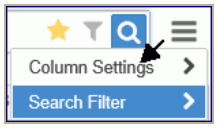
To apply a filter to limit search results:

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

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




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

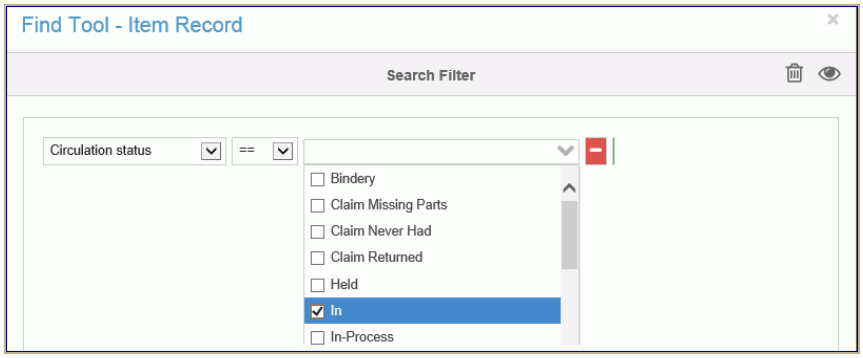



The Filter page opens.

4. Select **ADD CONDITION**.

.

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




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

The Search Filter view closes.



Innovative Interfaces, Inc. 2014

9. Select the search button.

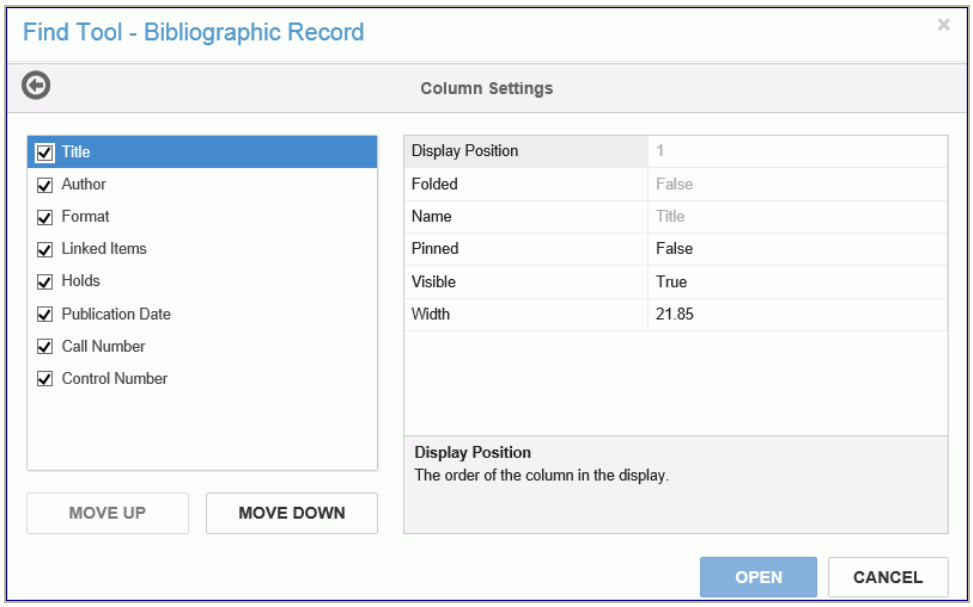
The search starts.

## Specify columns for search results

To specify the columns to display in search results:

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

4. The Column Settings dialog box opens.




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

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

The column settings are as follows:

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



Innovative Interfaces, Inc. 2014

or MOVE DOWN button.

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

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

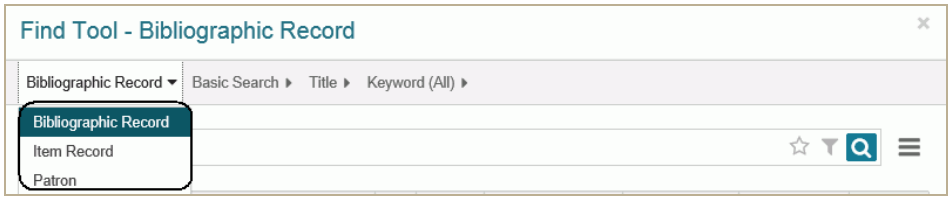
## Save a set of Find Tool search options as your user default

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

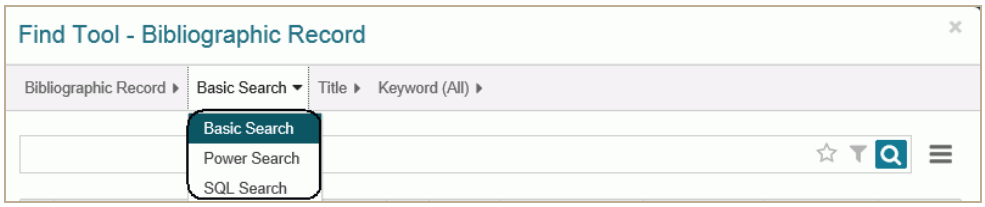
- Database (record type) - Patron, Item, or Bibliographic
- Mode - Basic, Power, SQL
- Qualifier - Name, Title, Author etc.
- Columns in search results display
- Order of the columns in search results display.

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

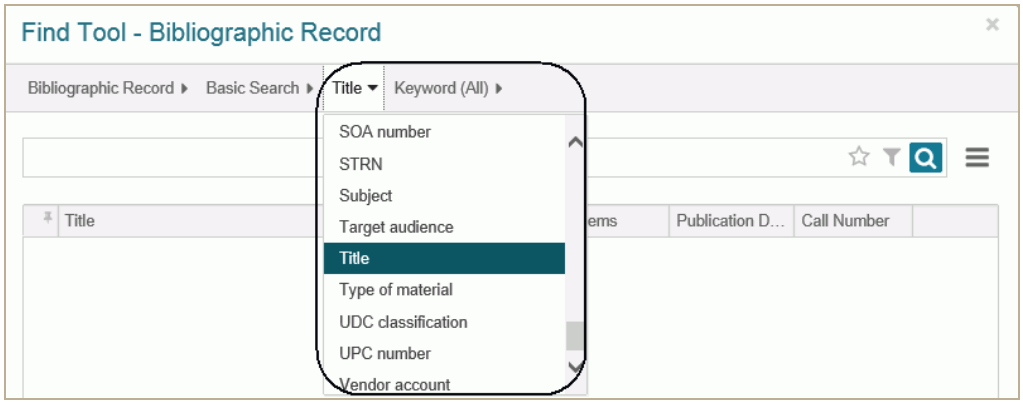
1. Open the Find Tool.
2. Select the record type: **Bibliographic Record**, **Item Record**, **Patron**.




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



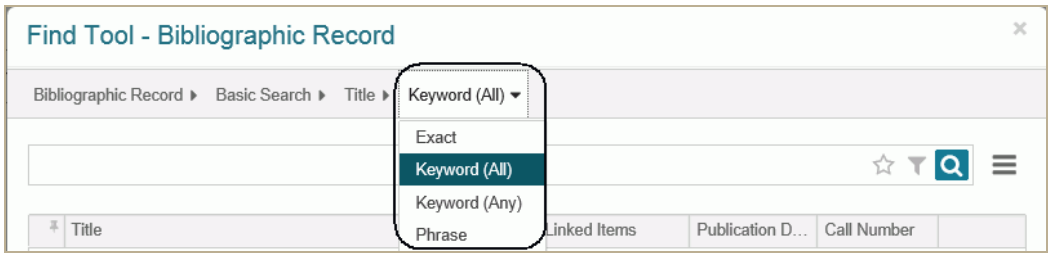

4. Select the search qualifier (access point or search by) option: **Title**, **Author**, **Type of material** etc.





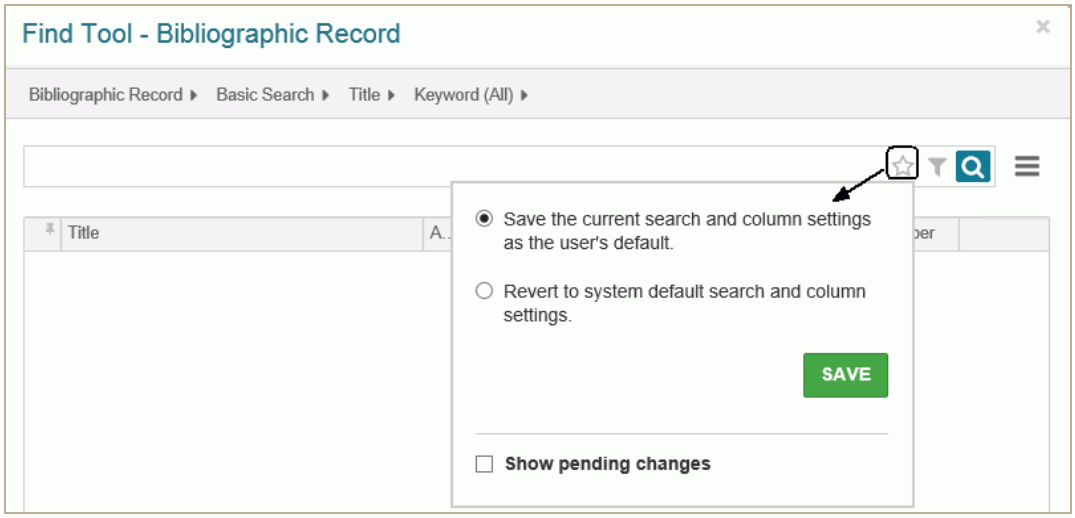

Innovative Interfaces, Inc. 2014

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



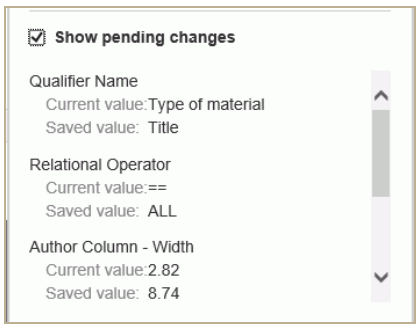

6. To include specific columns for search results in your user default, set up the columns. See "Specify columns for search results" on page 46.
7. Select the star icon.

   A dialog box opens.




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

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



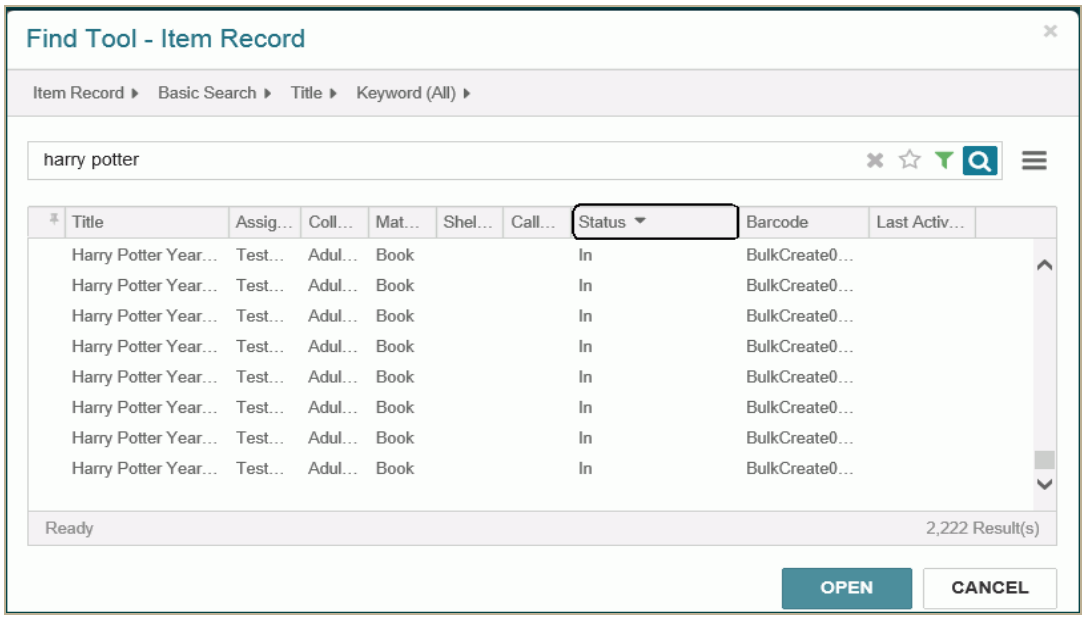
9. Select **SAVE**.

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

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

## Sort Find Tool search results list

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






Innovative Interfaces, Inc. 2014

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

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

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

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

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

See also:


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

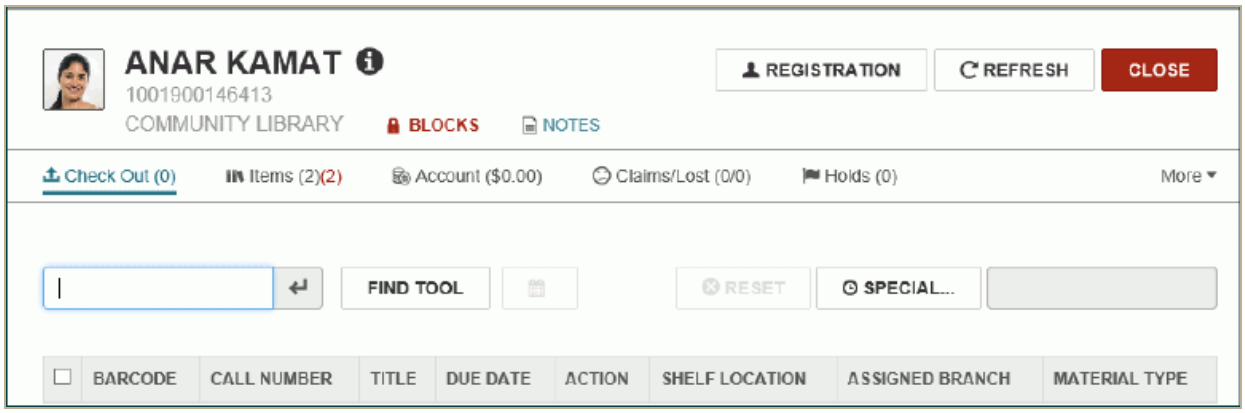



Innovative Interfaces, Inc. 2014

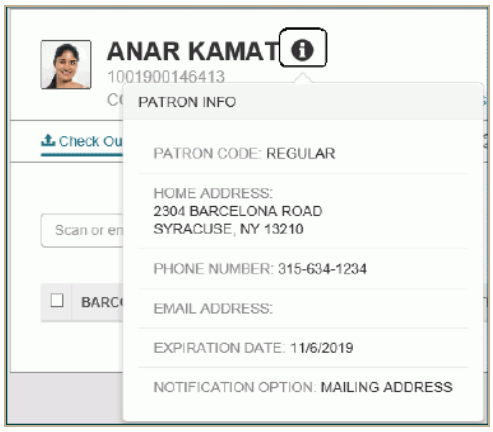
# Patron Record

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

## Patron Record - Library Account view




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

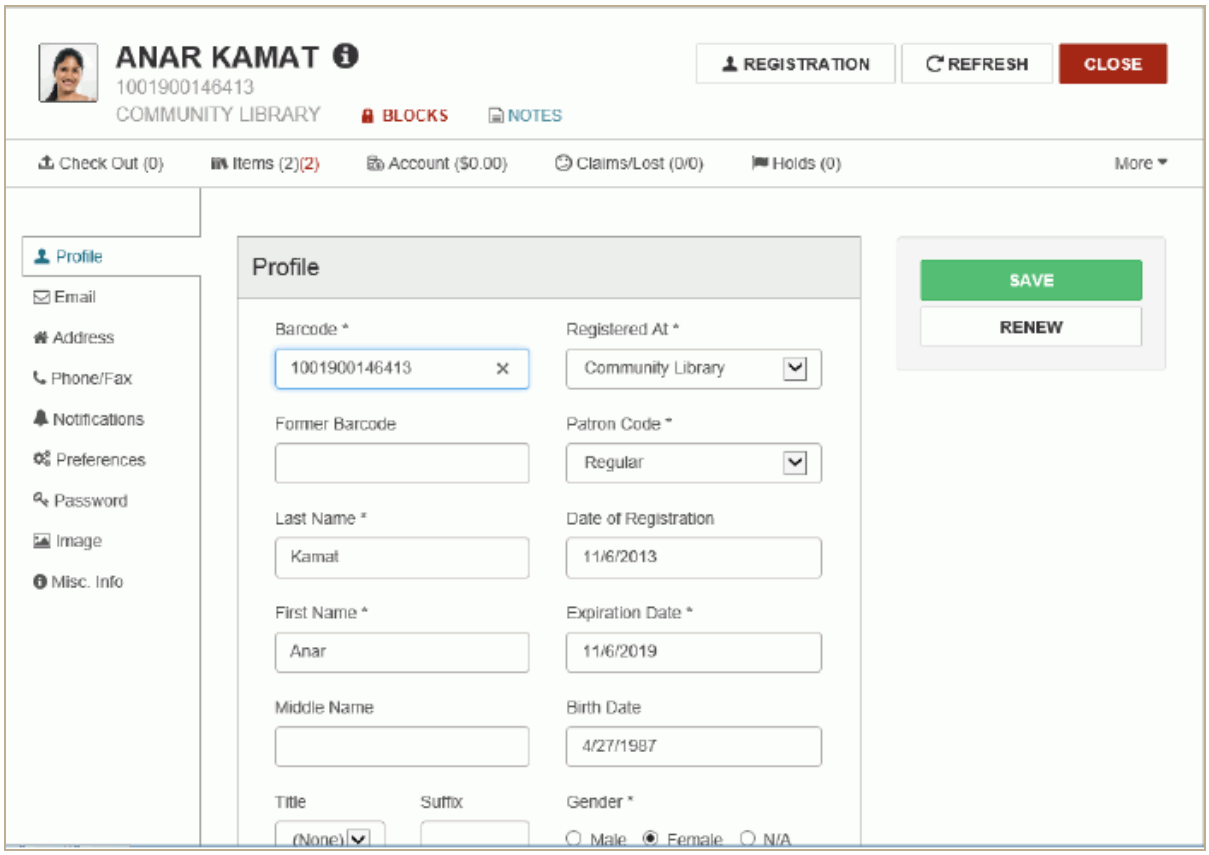





Innovative Interfaces, Inc. 2014

## Patron Record - Registration View

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






Innovative Interfaces, Inc. 2014

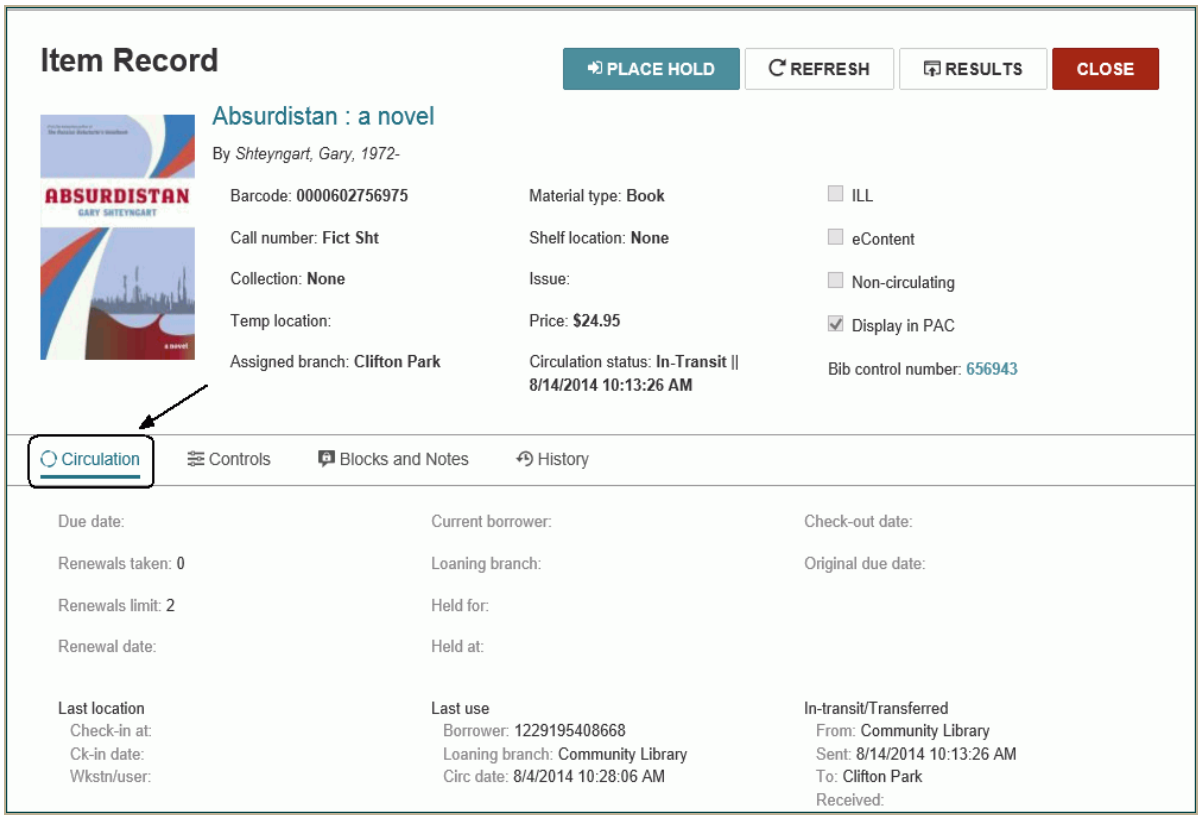
# Item Record

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

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

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

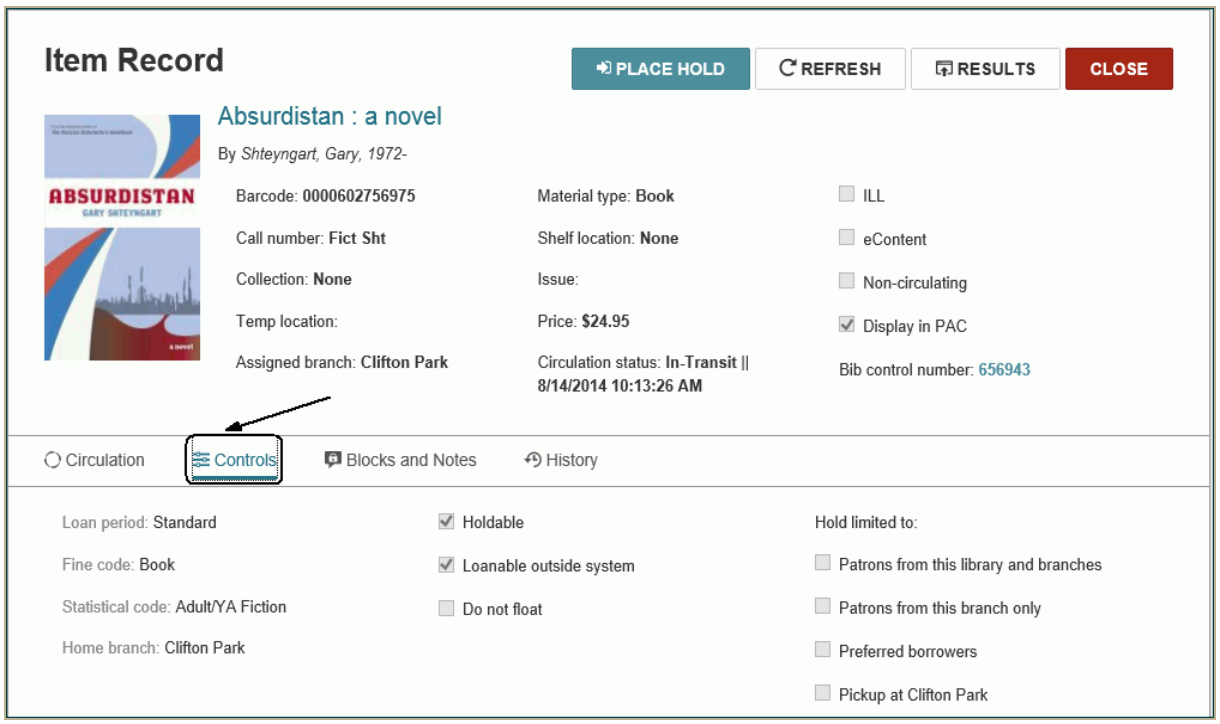
## Item Record - Circulation view






Innovative Interfaces, Inc. 2014

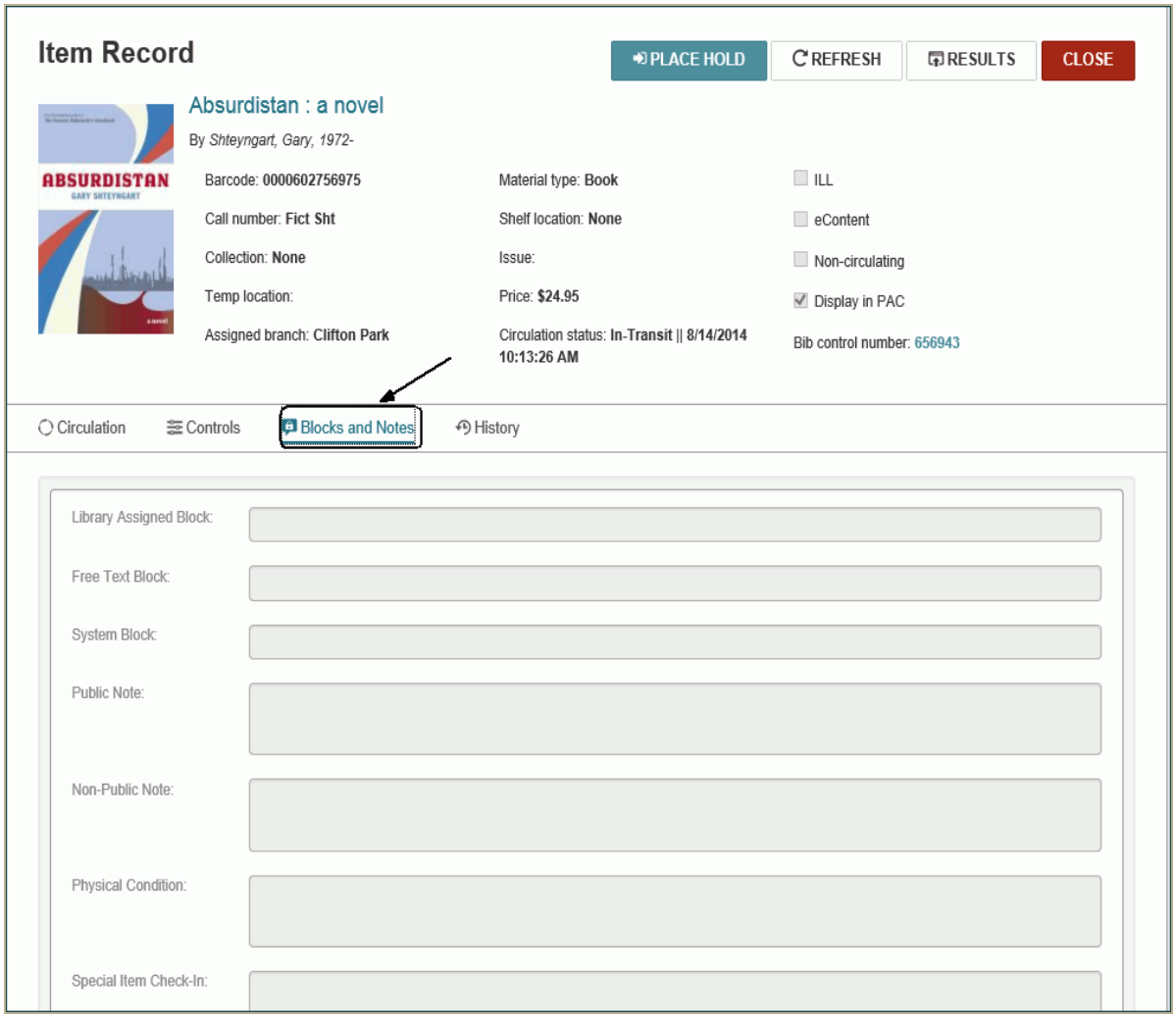
## Item Record - Controls view



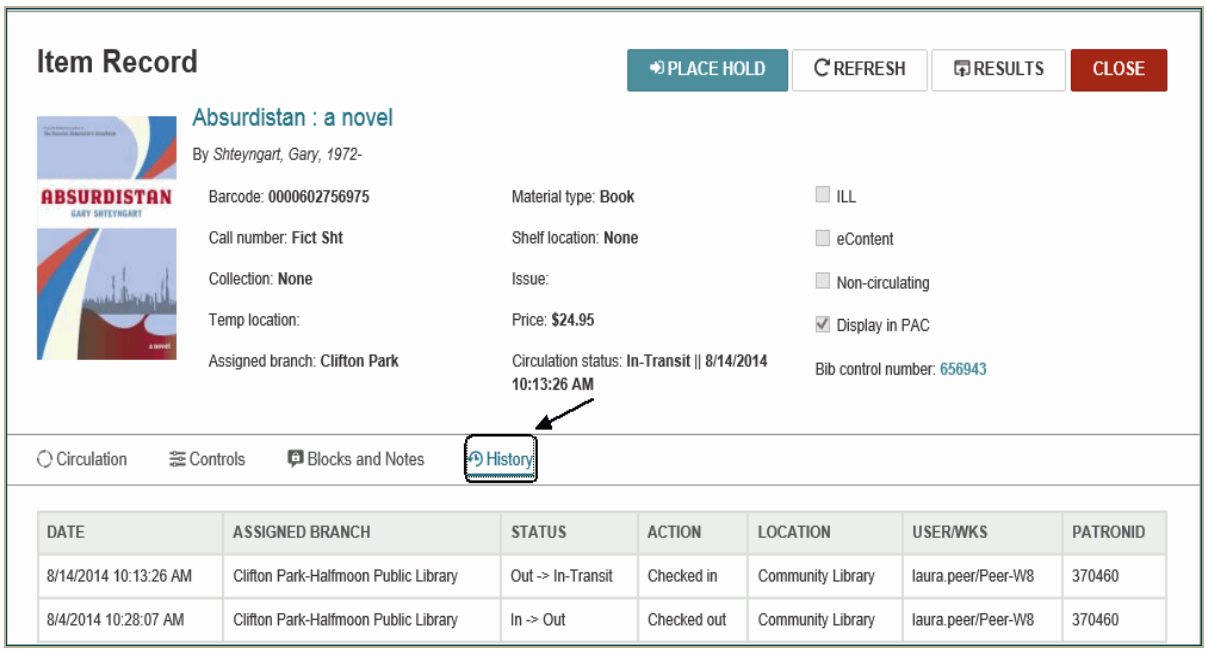



Innovative Interfaces, Inc. 2014

## Item Blocks and Notes view

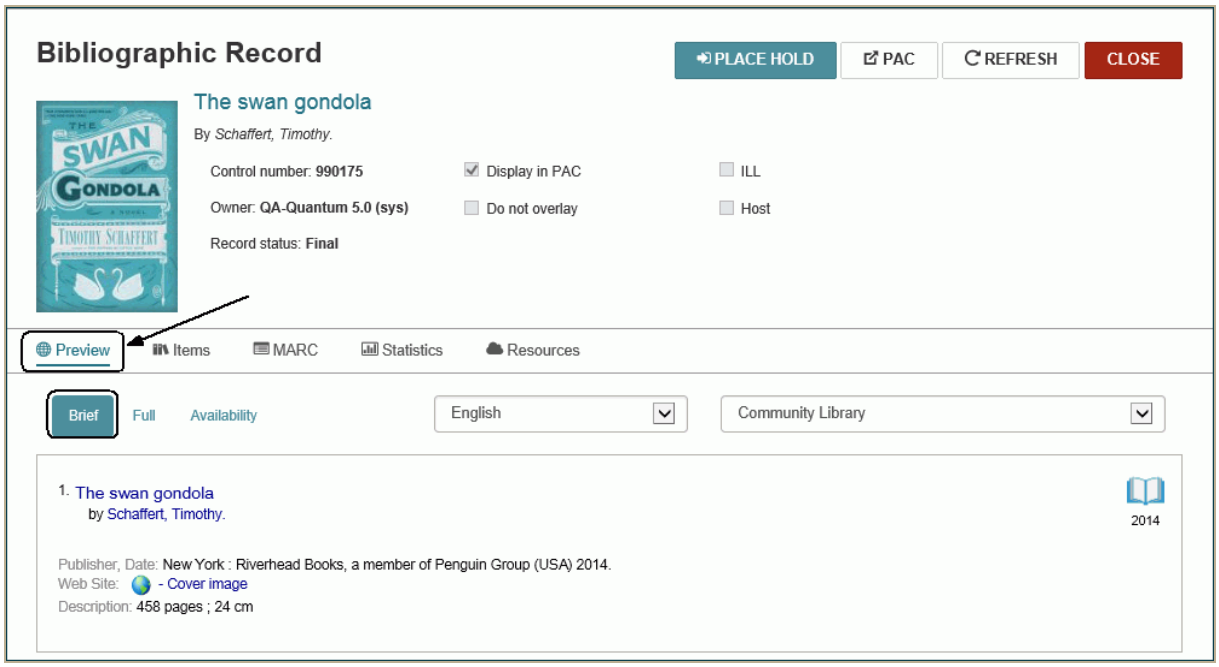


## Item History view



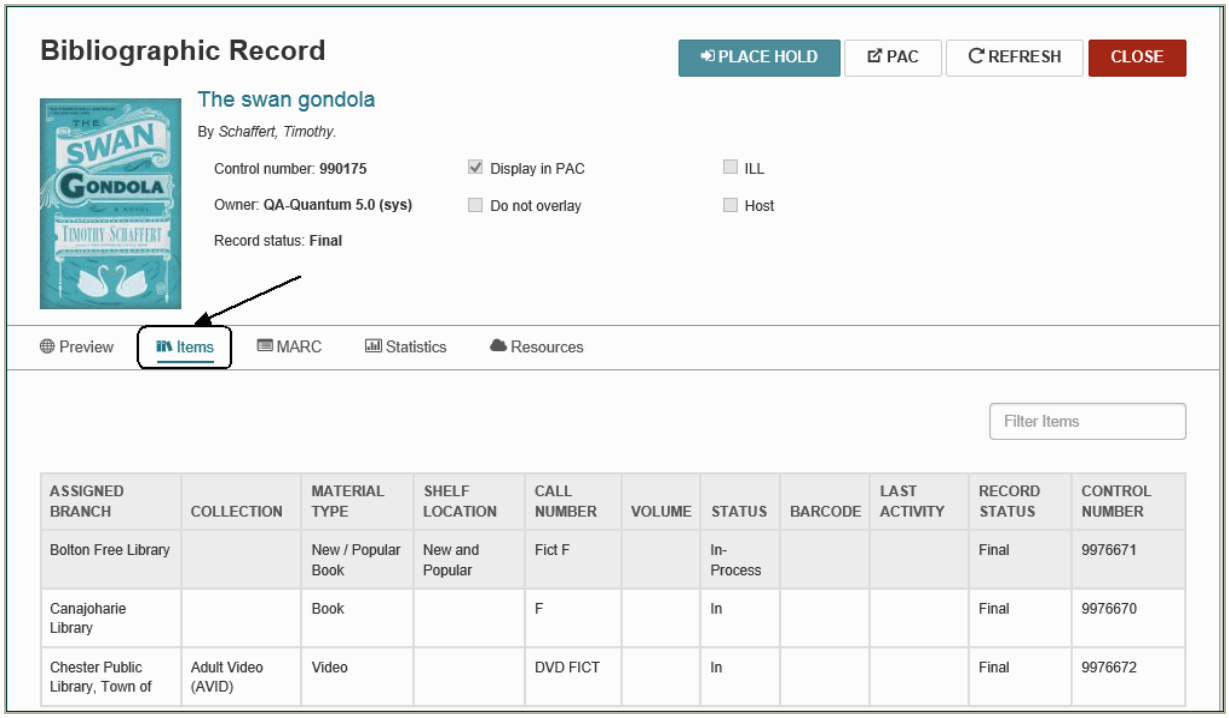
## Bibliographic Record

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



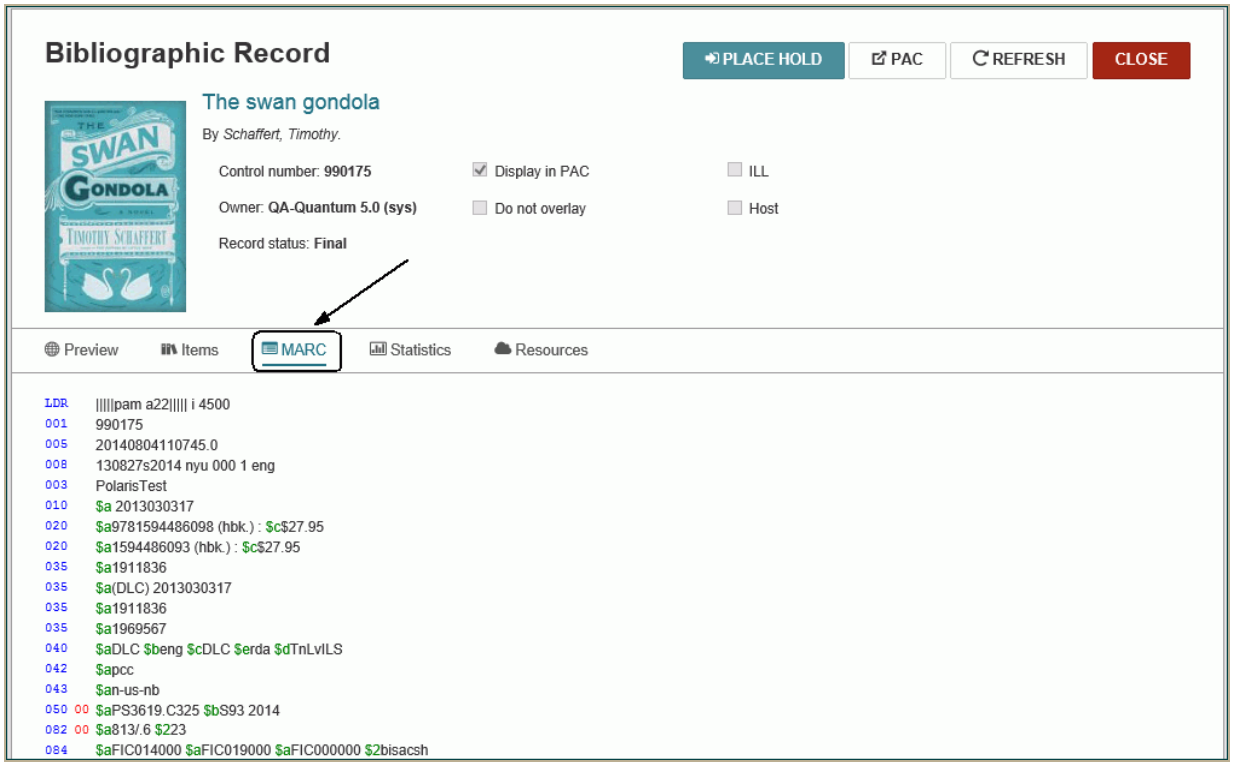
## Bibliographic Record - Items View

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

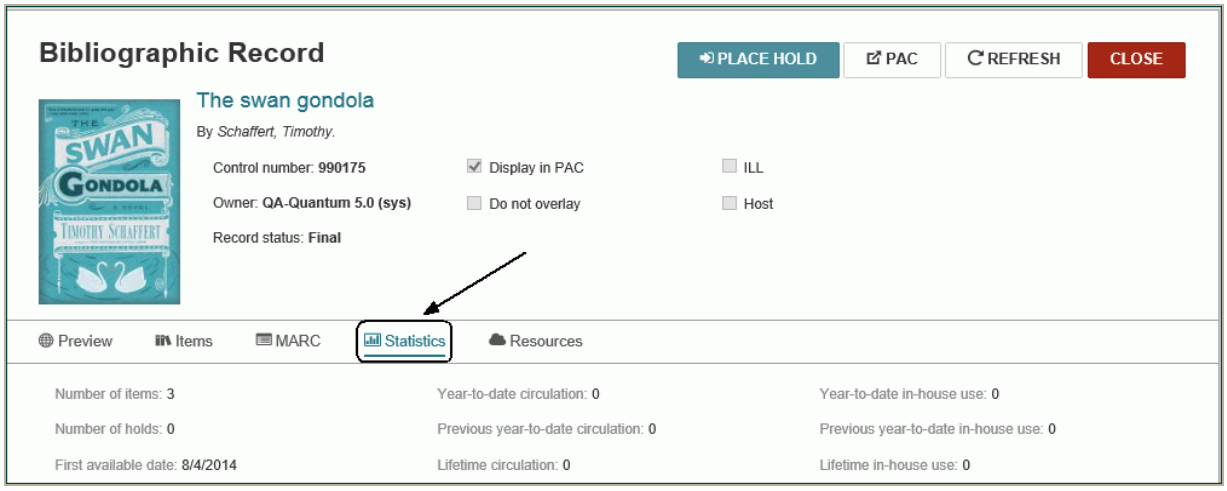


## Bibliographic MARC view

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

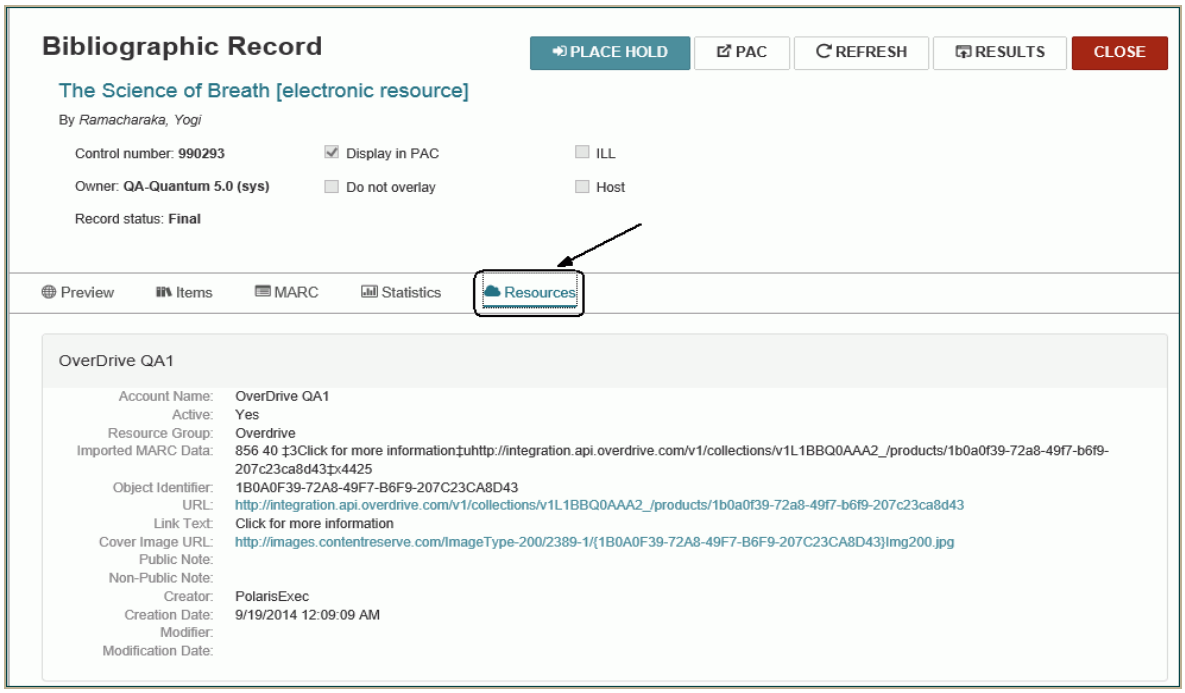



## Bibliographic Record - Statistics view



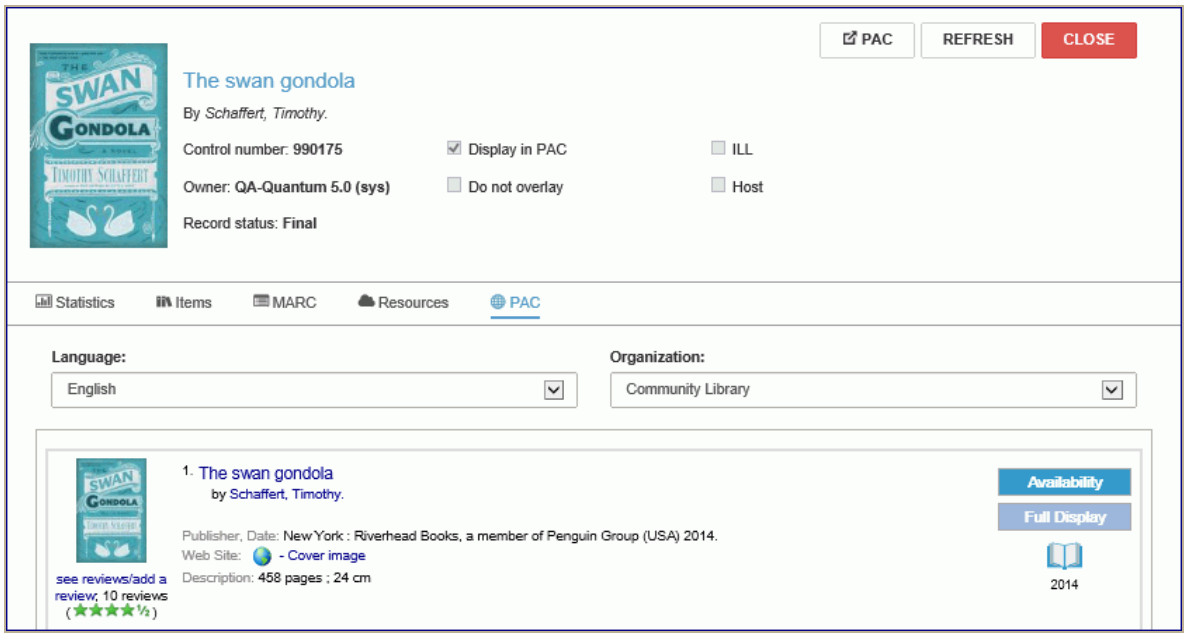

## Bibliographic Resources view

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



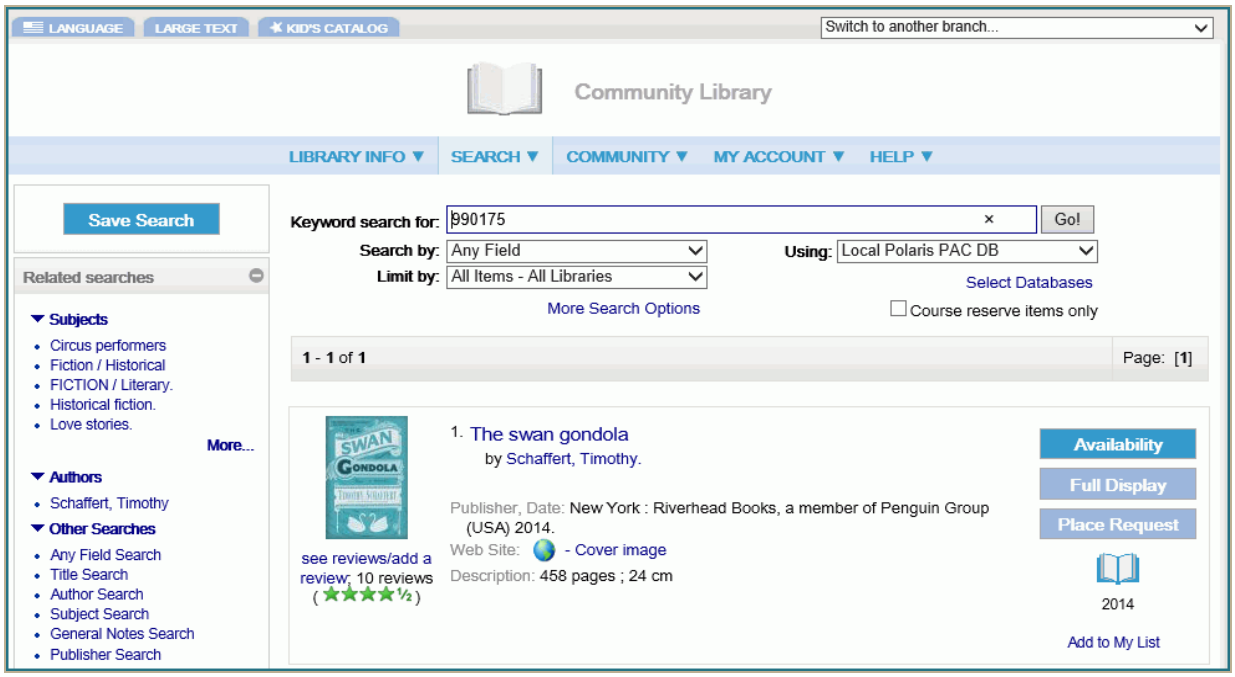

## Bibliographic Preview view

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




## Go to the Title in the PAC

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




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

# Patron Record - Registration

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

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

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

See also:


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

## Do a quick search for an existing patron

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

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

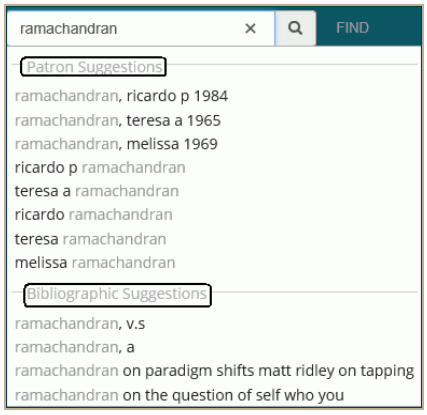
1. Sign in to Polaris Leap.

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

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

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

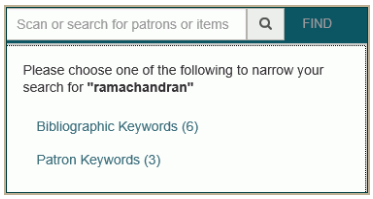
- Start entering search criteria in the box. As you type, automatic suggestions are displayed that may include both patron and bibliographic records. If only one patron record matches the entry, it opens immediately. You can select a patron from the list of automatic suggestions or press **Enter** or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




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

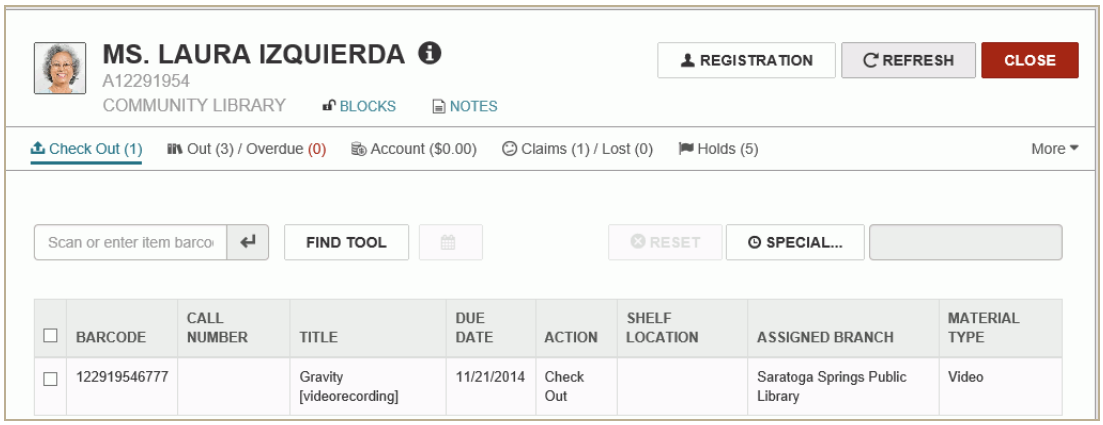


Innovative Interfaces, Inc. 2014




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

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



# Use the Find Tool to search for a patron

To search for a patron using the Find Tool:

1. Sign in to Polaris Leap.

   The Circulation page opens.

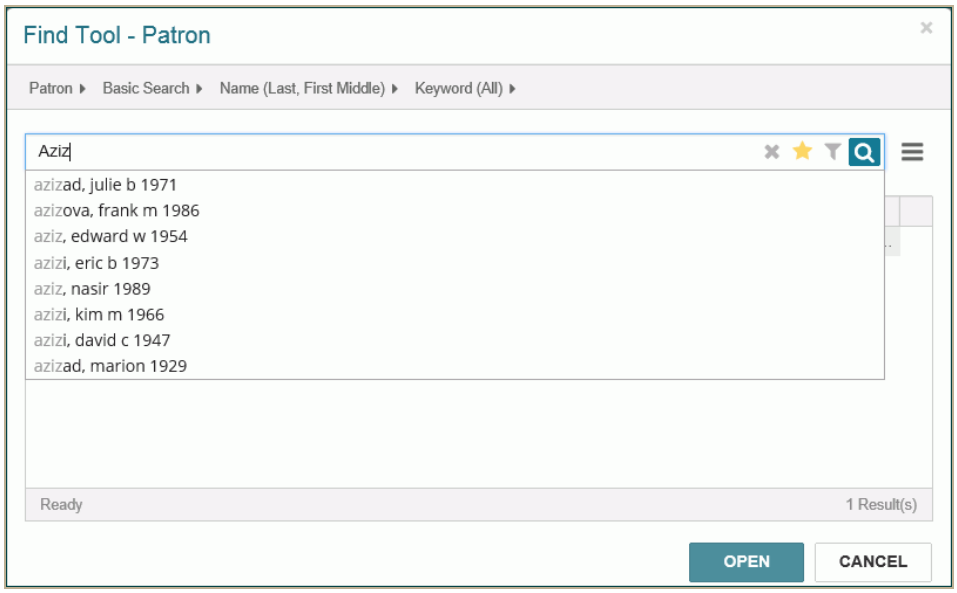
2. Select **FIND.**

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

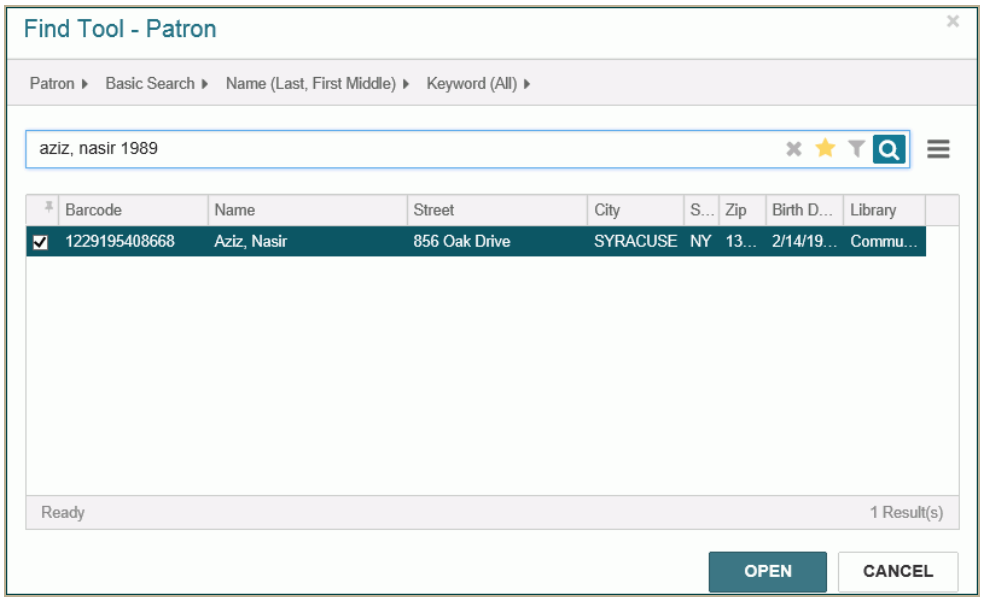
3. Enter the search criteria.

   As you type, automatic suggestions are displayed.

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

   The patron's record opens.



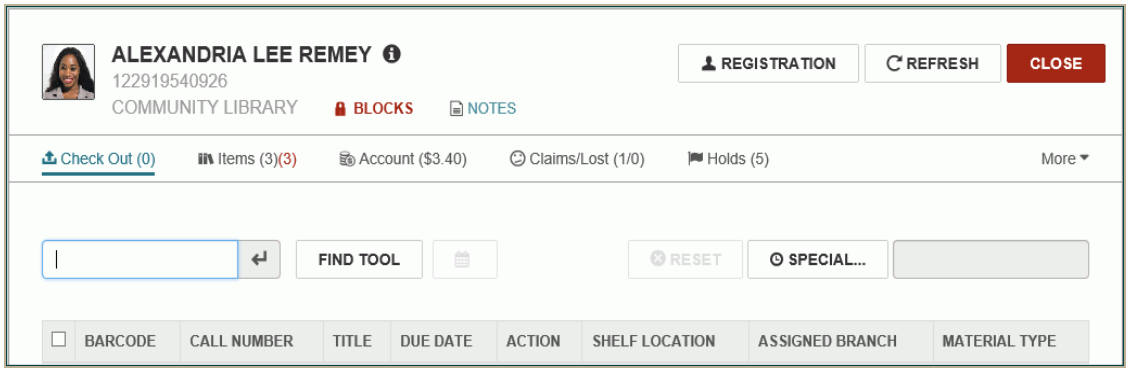

For more information, see "The Leap Find Tool" on page 34.

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

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

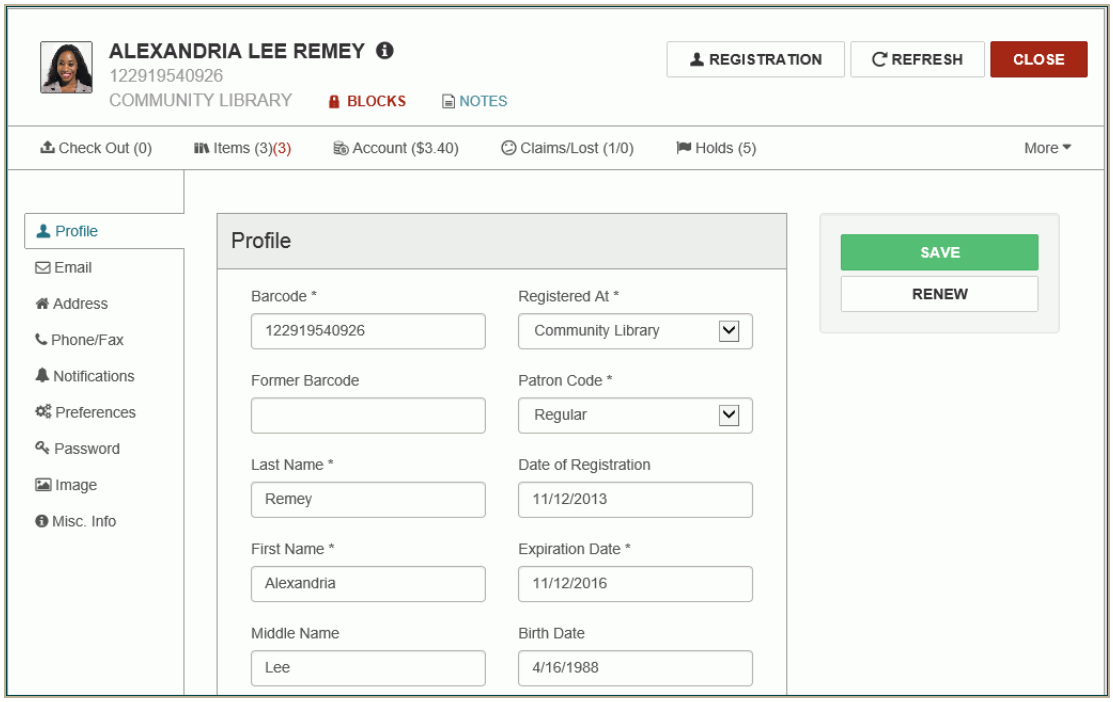
1. Scan a patron's barcode or search for the patron.

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




2. Select **REGISTRATION**.

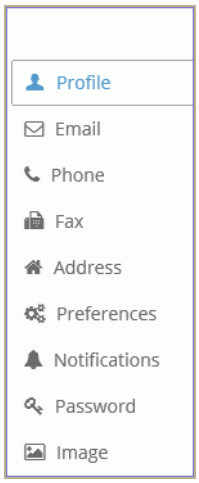
   The page displays the patron's registration information.




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



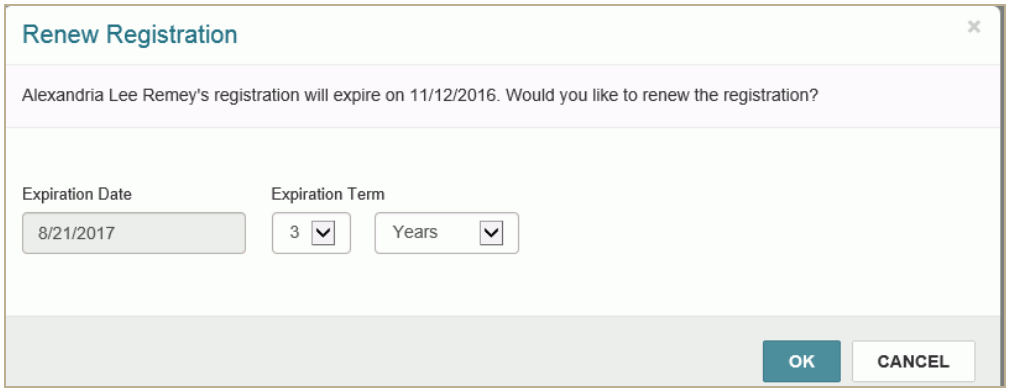
Innovative Interfaces, Inc. 2014




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

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

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




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

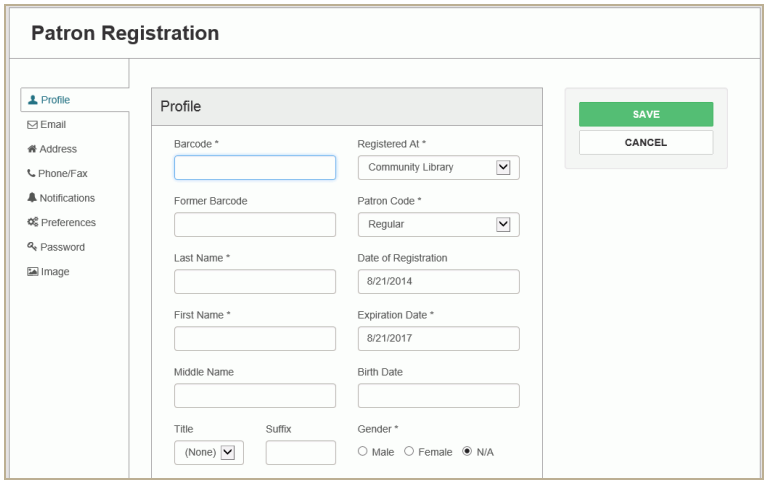
# Register a new patron

To register a new patron:

1. Select **NEW PATRON**.

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

**Note:**
Required fields are marked with an asterisk.




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

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

3. Enter the patron's name as follows:
   - Type the patron's last name (at least one character) in the **Last name** box.

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

   - Type the first name in the **First Name** box.
4. To enter optional name information, follow these steps:
   - Type the middle name in the Middle Name box.
   - Select the patron's title in the Title box.
   - Type the patron's suffix (such as Sr., Jr., II, or Ph.D.) in the Suffix box.

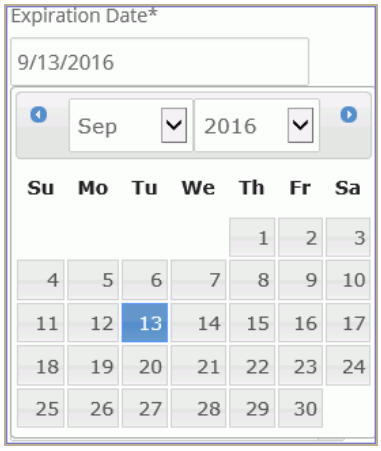


Innovative Interfaces, Inc. 2014

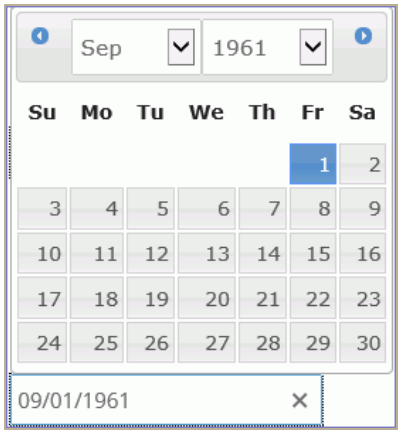
5. Select the patron's registration location in the Registered At box.
6. Select the patron's code in the Patron Code box.

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

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

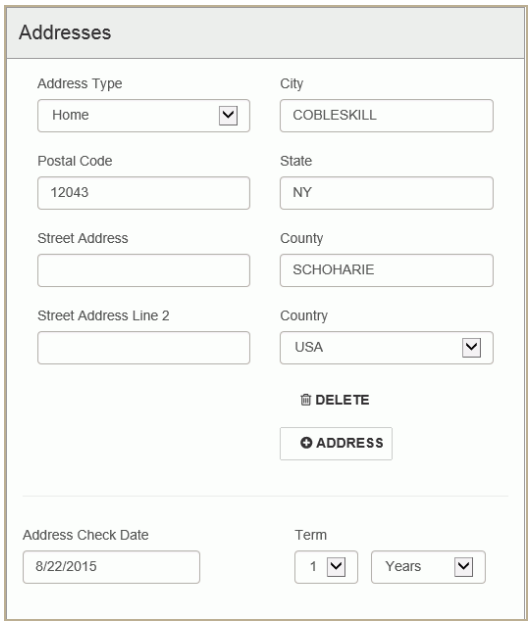



8. Click/tap in the Birth Date box to open a calendar, and select the patron's birth date.

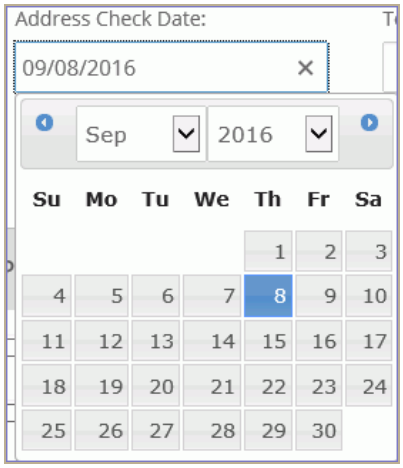



9. Select **Male**, **Female**, or **N/A** under Gender.
10. Select a statistical class for the patron
11. If applicable, enter additional information in the user-defined fields that your library has set up.
12. In the Email section, type the patron's email address and the alternate email address (if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

    The Address section expands.




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




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



Innovative Interfaces, Inc. 2014

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

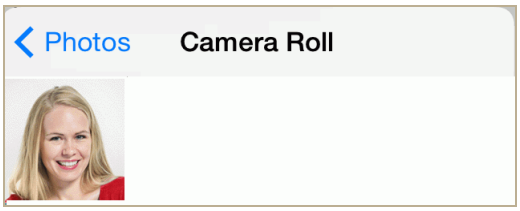
    If the passwords do not match, the Password (Confirm) box has a red border.
19. To save a patron's picture in the record, go to the Patron Image section, and do the following steps:

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

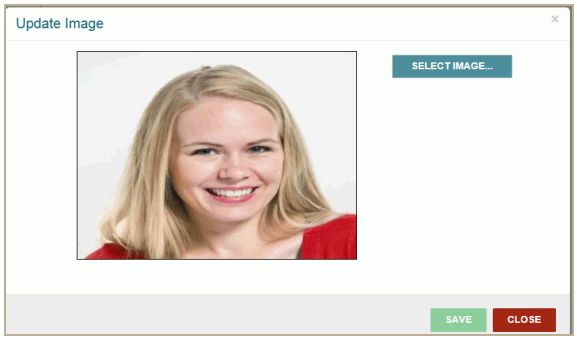
    a. Select **UPDATE IMAGE**.
    b. Click/tap **SELECT IMAGE** and select one of the following options:
        - **TAKE PHOTO** - The camera opens. Take the patron's photo and select Use Photo to use the image as it was captured. You can select Retake to take a new photograph.
        - **CHOOSE EXISTING**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



Innovative Interfaces, Inc. 2014




The picture is displayed in the Update Image view.




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

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

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

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

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

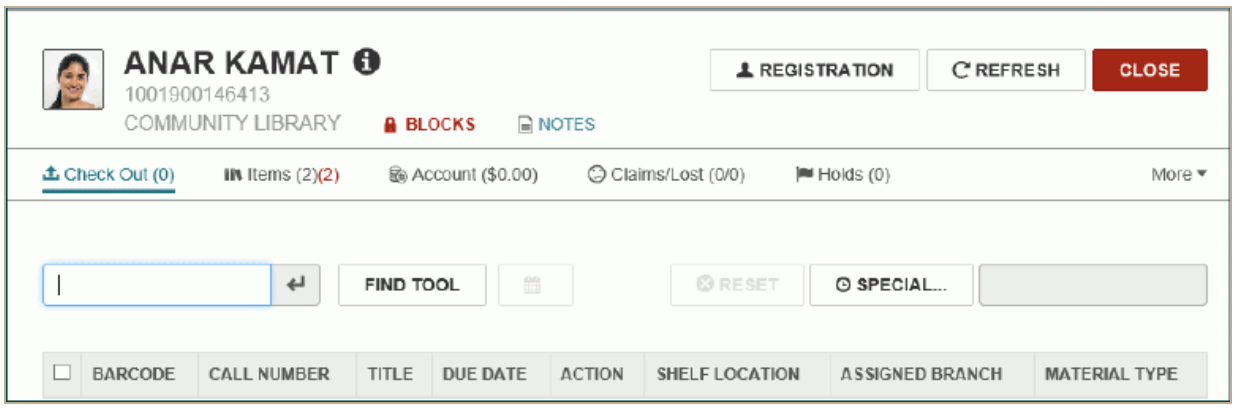
    **Note:**
    You can update the photo by replacing it, or if you want to delete the photo, select it and select **DELETE**.

# Patron Record - Library Account

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

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

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




See also:


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



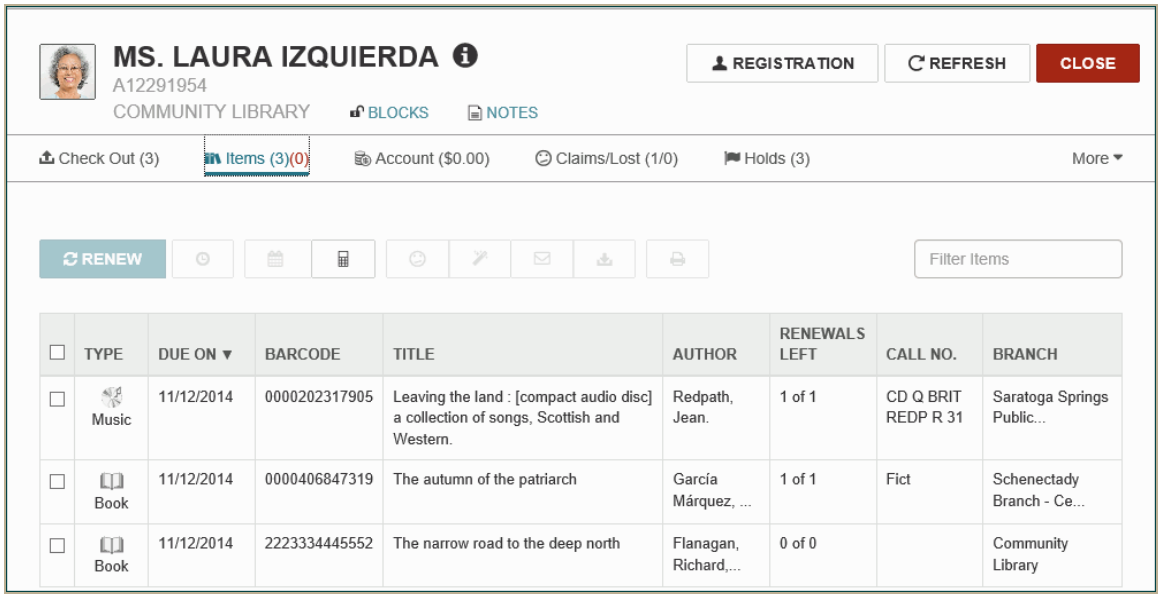

Innovative Interfaces, Inc. 2014

# Items Out List

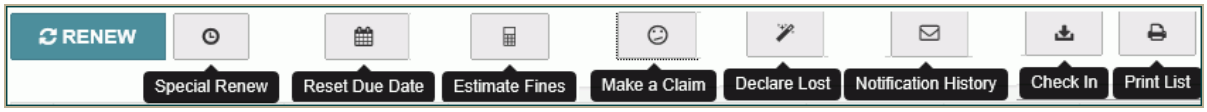
The patron's items out list is displayed when you select the **Items** button. The button indicates the number of items out to the patron (in blue) and the number of overdue items (in red).

> **Note:**
> Some screen captures show the updated button without the word **Items**
>
> Out (4) / Overdue (0)

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




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



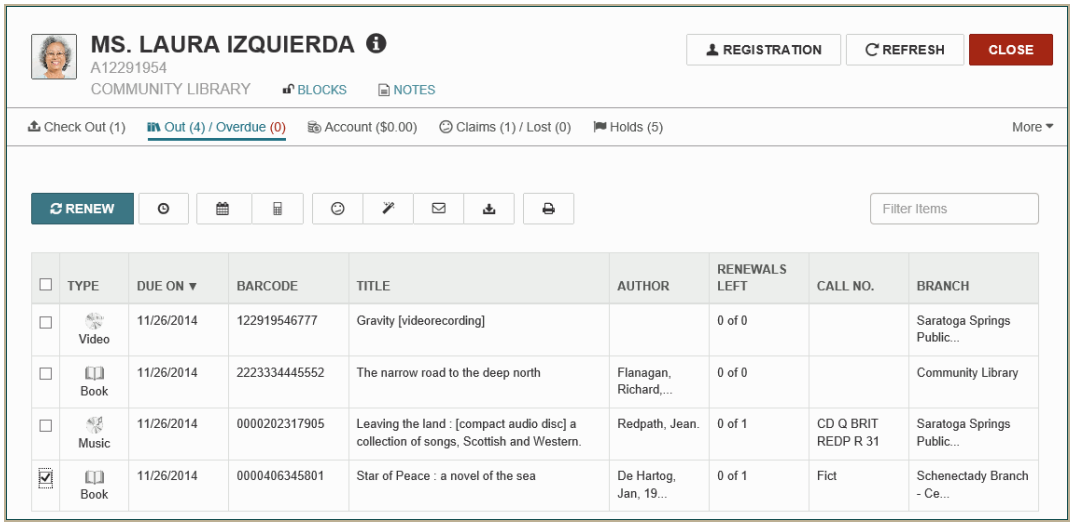
See also:


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

## Renew items from the items out list

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

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




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

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

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

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

## Reset the due date from the items out list

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

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

   A calendar control is displayed.

3. Select the new due date from the calendar.

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



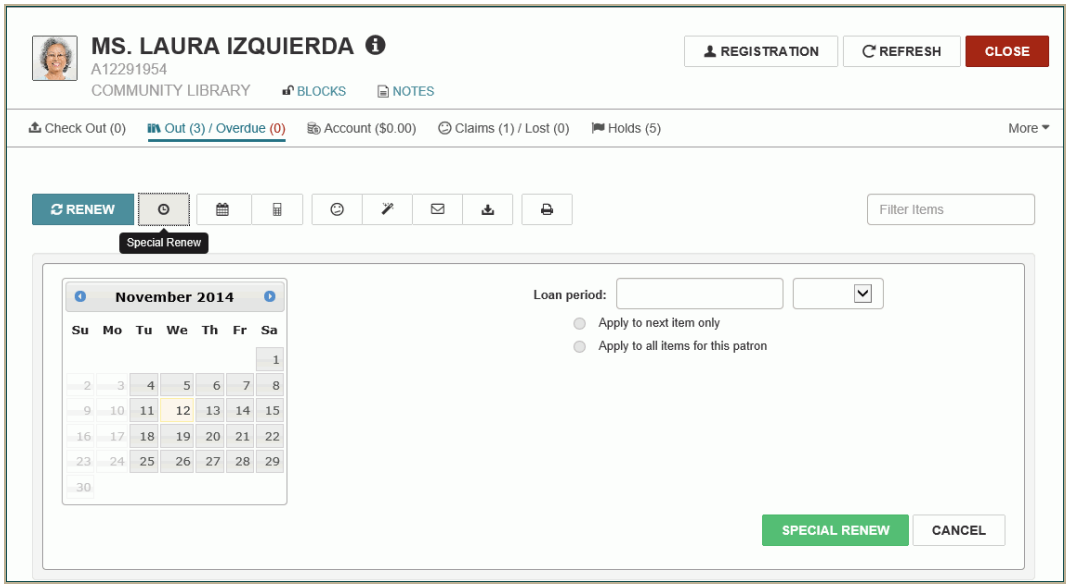
Innovative Interfaces, Inc. 2014

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

To set a special renew date or renewal loan period:

1. Open the patron's record.
2. Select the items view.
3. Select an item in the list, and select the special renew button.

   The area below the button bar expands.




4. Do one of these steps to set the special renewal:
   - Select a specific due date from the calendar.
   - Specify the duration of the loan in the **Loan period** boxes by typing a number and selecting **Days**, **Hours**, or **Minutes** from the drop-down list box.
5. (Optional) If you want the loan period to apply to other items for this patron, select **Apply to next item only** or **Apply to all items for this patron**.



Innovative Interfaces, Inc. 2014

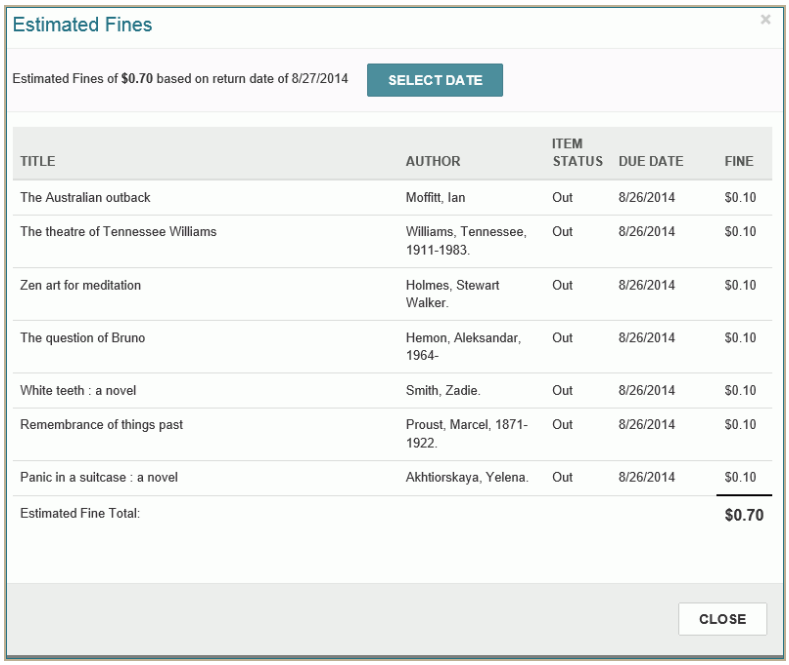
## Estimate fines from the items out list

To estimate fines for items in the items out view:

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

.

The estimated fines are displayed.




| TITLE | AUTHOR | ITEM STATUS | DUE DATE | FINE |
|---|---|---|---|---|
| The Australian outback | Moffitt, Ian | Out | 8/26/2014 | $0.10 |
| The theatre of Tennessee Williams | Williams, Tennessee, 1911-1983. | Out | 8/26/2014 | $0.10 |
| Zen art for meditation | Holmes, Stewart Walker. | Out | 8/26/2014 | $0.10 |
| The question of Bruno | Hemon, Aleksandar, 1964- | Out | 8/26/2014 | $0.10 |
| White teeth : a novel | Smith, Zadie. | Out | 8/26/2014 | $0.10 |
| Remembrance of things past | Proust, Marcel, 1871-1922. | Out | 8/26/2014 | $0.10 |
| Panic in a suitcase : a novel | Akhtiorskaya, Yelena. | Out | 8/26/2014 | $0.10 |
| Estimated Fine Total: | | | | **$0.70** |

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

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



Innovative Interfaces, Inc. 2014

## Claim an item from the items out list

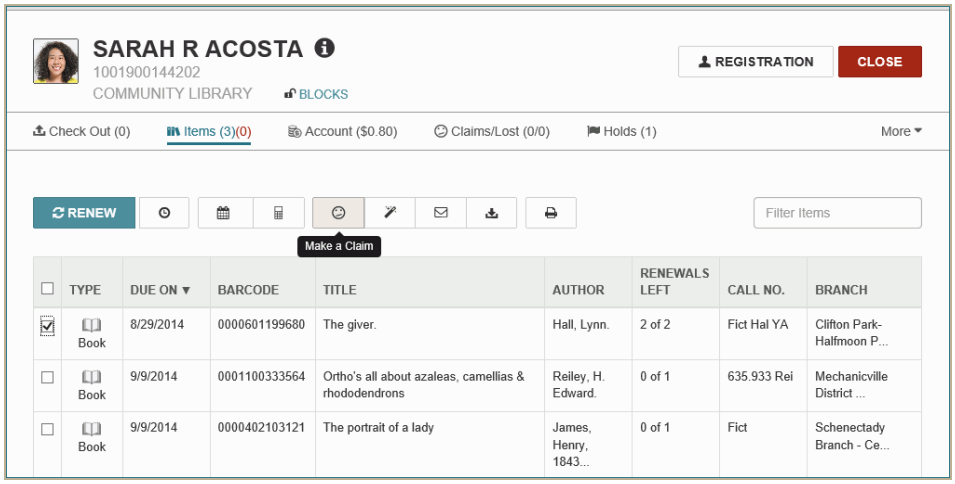
When an item is listed as checked out to the patron, but the patron claims she never checked out the item or has already returned it, you can assign a claim status to the item.

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

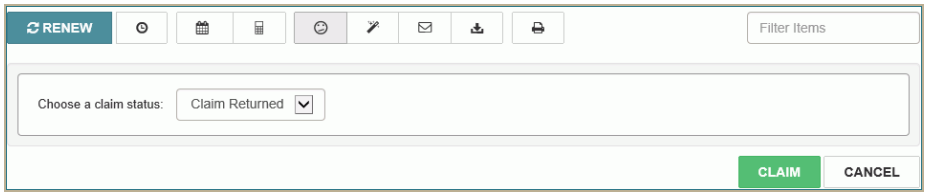
1. Open the patron's record and select Items.

   The patron's items out list view opens.

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




   The area below the button expands.




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

   The item is claimed.



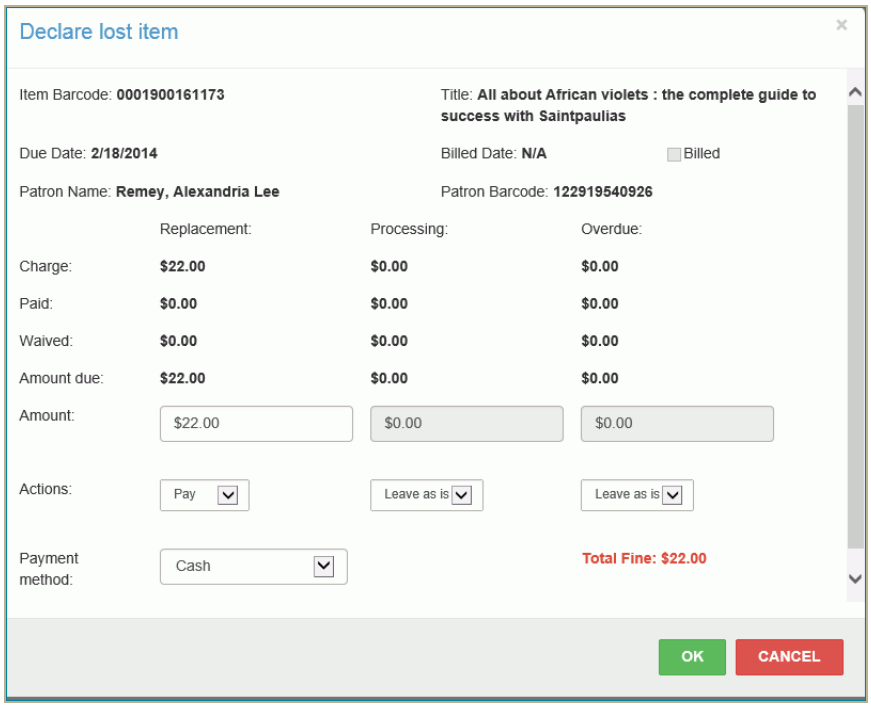
Innovative Interfaces, Inc. 2014

## Declare an item lost from the items out view

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

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

The Declare Lost dialog box opens.




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

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

6. Select **OK**.



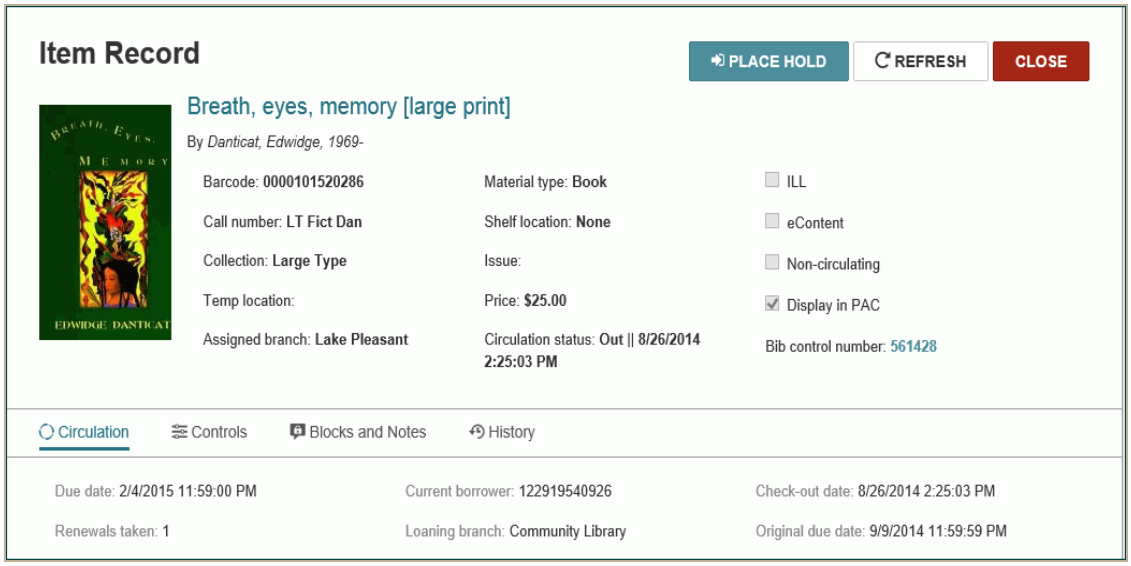
Innovative Interfaces, Inc. 2014

## View the item record from the items out list

To view the item details from the items out list:

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

   The item record's details are displayed.



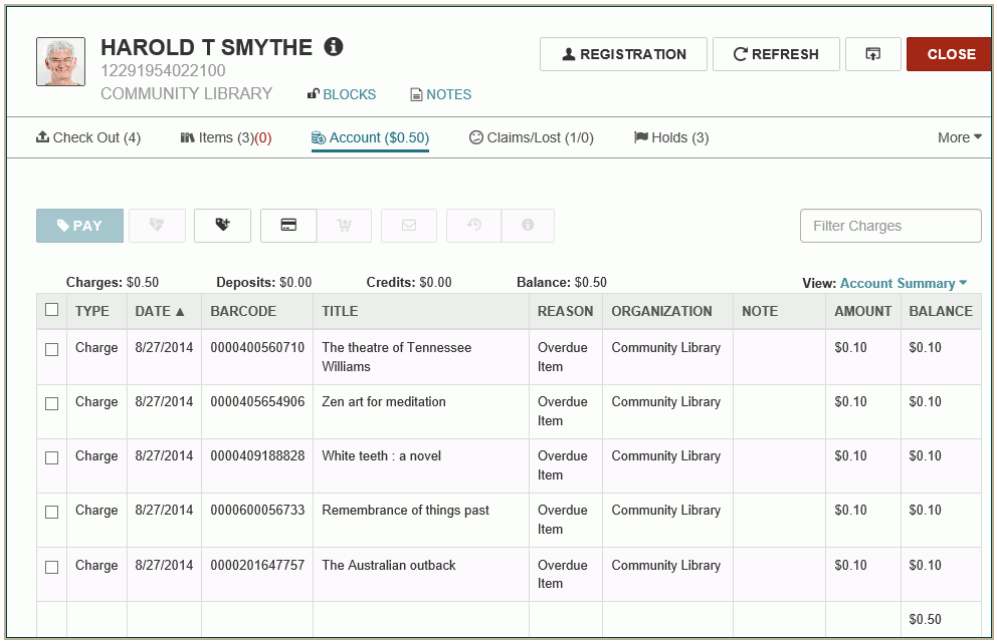

3. Select **CLOSE** to close the item record details box.



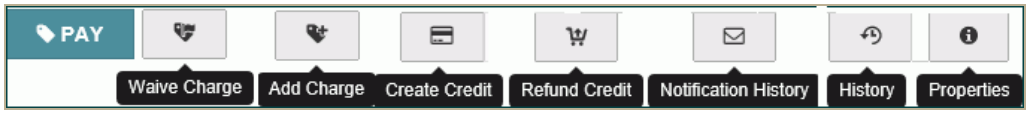
Innovative Interfaces, Inc. 2014

# Patron's Financial Account

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




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




See also:

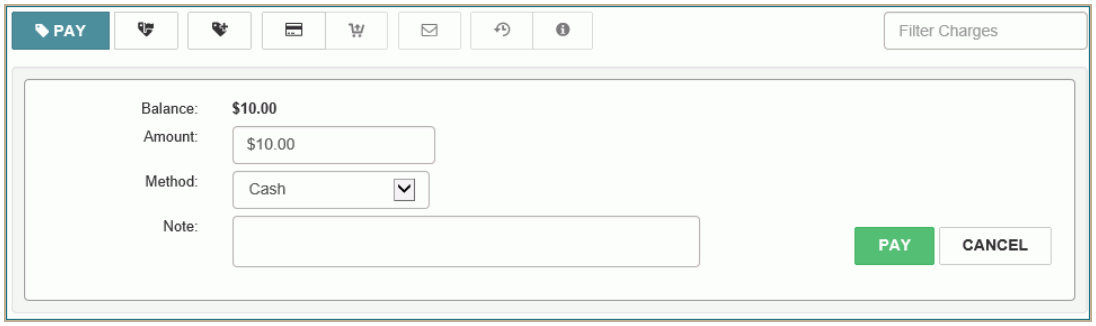

- "Add a charge to a patron's account" on page 90
- "Pay patron charges" on page 87
- "Waive charges" on page 88
- "Add a credit to a patron’s account" on page 92

## Pay patron charges

To select charges and pay them:

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

   The area below the button expands.




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

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

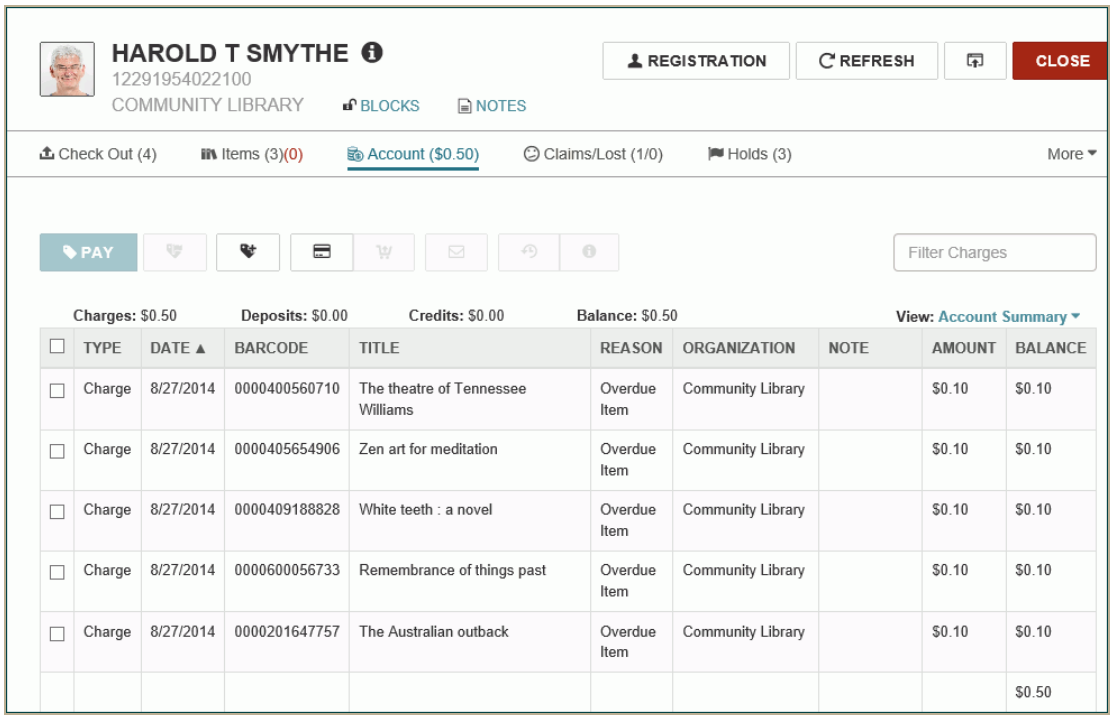


Innovative Interfaces, Inc. 2014

## Waive charges

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

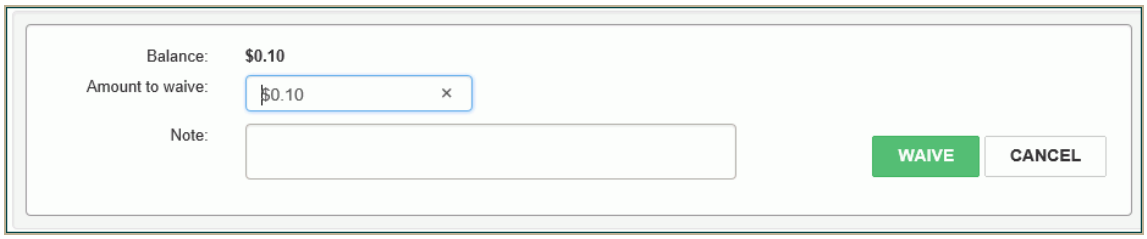
1. Open the patron's record and select **Account** to go to the account view.




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

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

The area below the toolbar buttons expands.



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

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

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

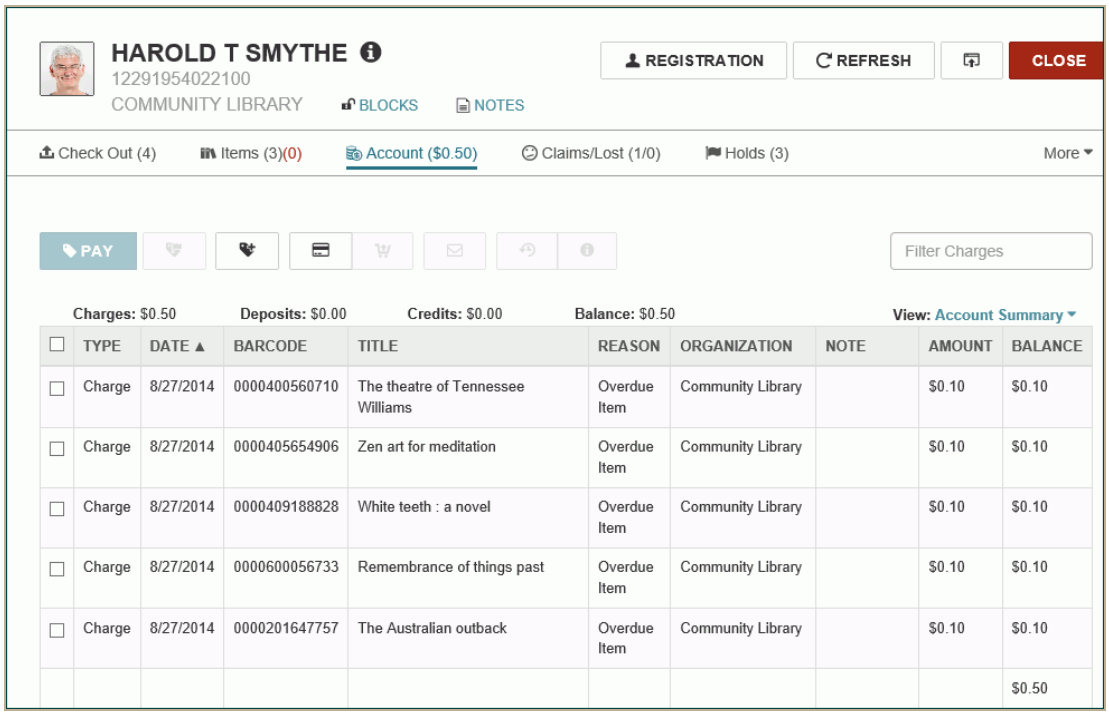
6. To enter an optional note, type it in the **Note** box.
7. Select **WAIVE** at the bottom of the dialog box to waive the charge or charges, or select **CANCEL** if you choose not to waive the charge.

   A message indicates the charge was waived successfully.

## Add a charge to a patron's account

To add a charge to a patron's account:

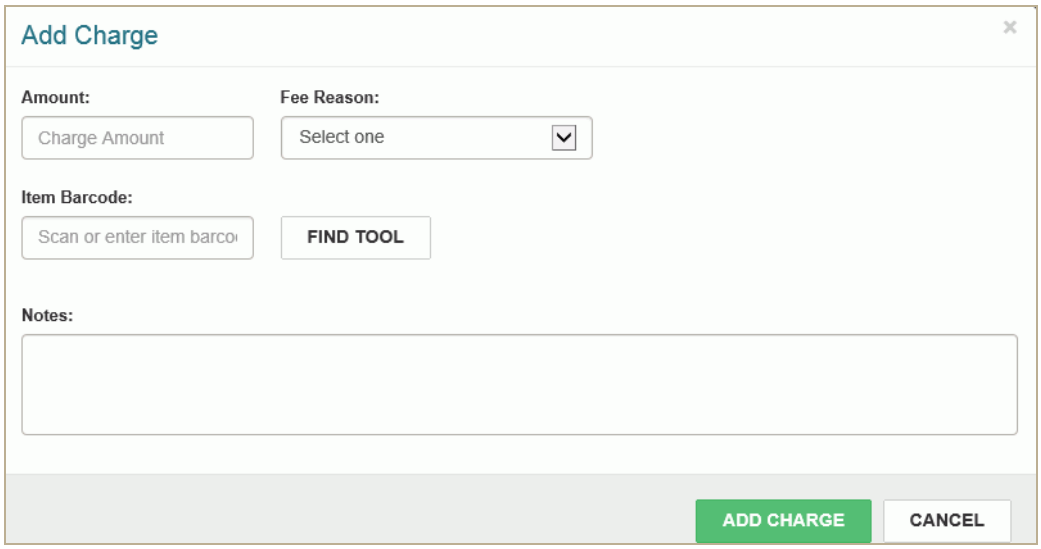
1. Open the patron's record and select **Account** to go to the account view.




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

2. Select **Add Charge**.

The Add Charge dialog box opens.

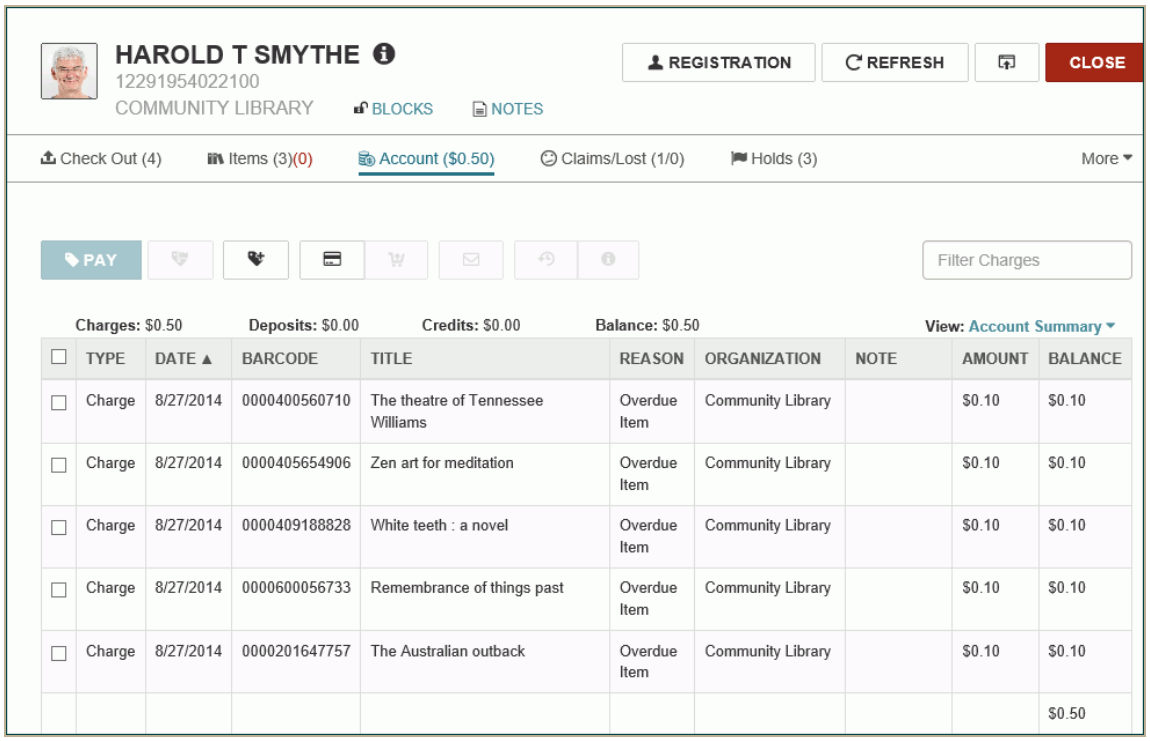



3. Type the amount of the charge in the **Amount** box.
4. Select the reason for the charge in the **Fee Reason** box.
5. If the charge is related to an item, scan or type the barcode in the box. Or, if the item is not in hand, select **FIND TOOL** to open the Find Tool, and search for the item.
6. To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

## Add a credit to a patron's account

To add a credit to a patron's account:

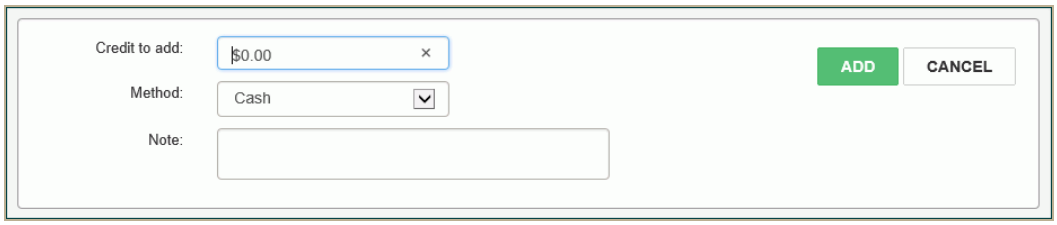
1. Open the patron's record and select **Account** to go to the account view.




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

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

The area below the button toolbar expands.




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



Innovative Interfaces, Inc. 2014

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

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

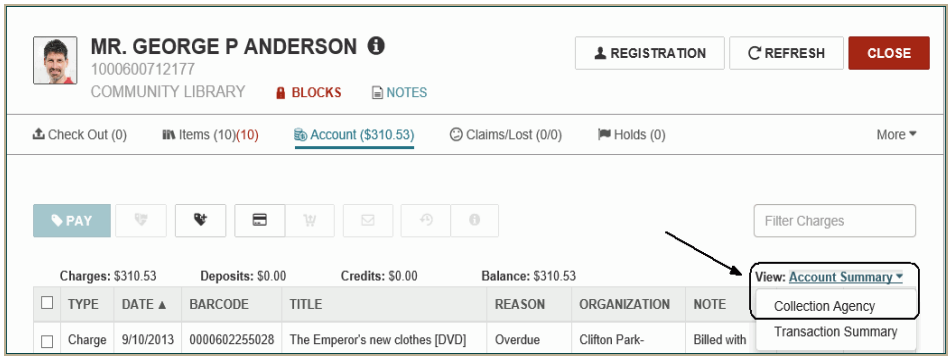
## View a patron's collection summary

To view a patron's collection summary and history:

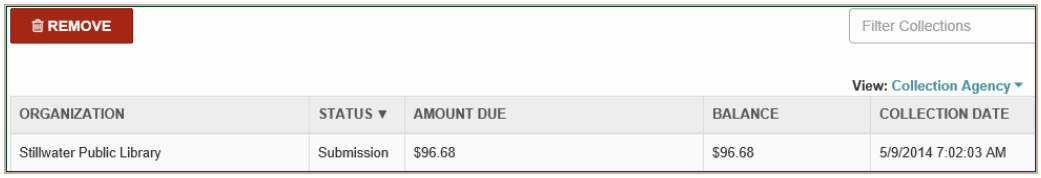
1. Select **Account** in the patron's summary toolbar.

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

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




The Collection Agency view is displayed.





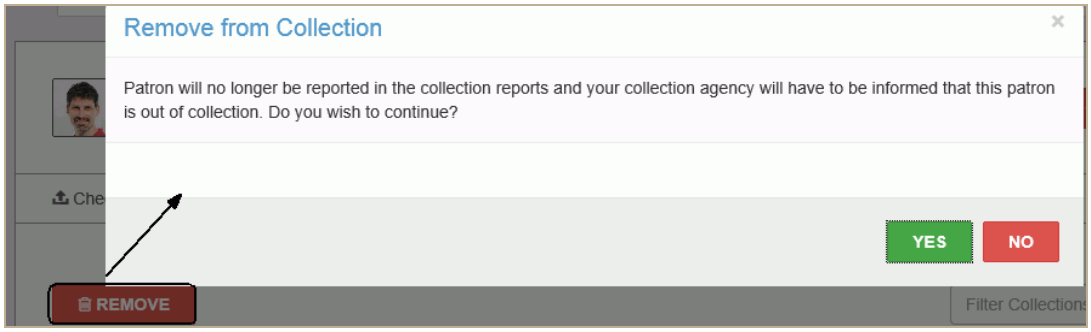

Innovative Interfaces, Inc. 2014

## Remove a patron account from collections

To remove a patron account from collections:

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

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




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



Innovative Interfaces, Inc. 2014

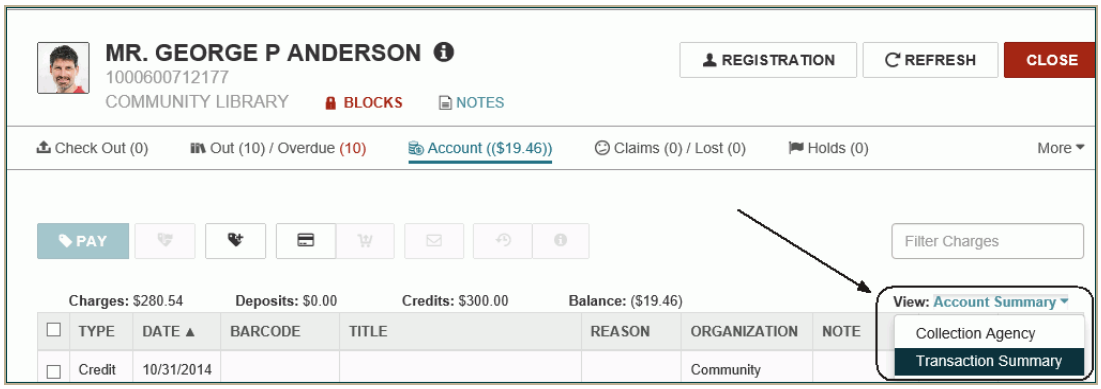
## View a patron's transaction summary

To view the patron's account transaction summary:

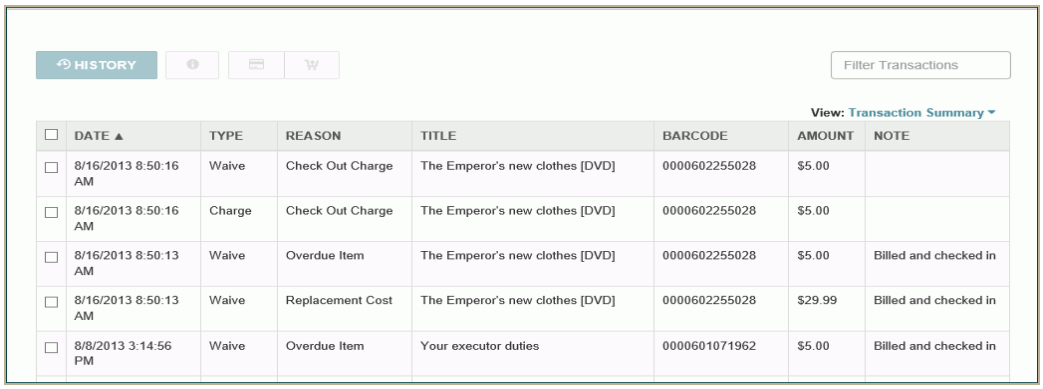
1. Open the patron record.
2. Select **Account**.

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

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




The Transaction Summary view opens.




The patron's transaction history is displayed.

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

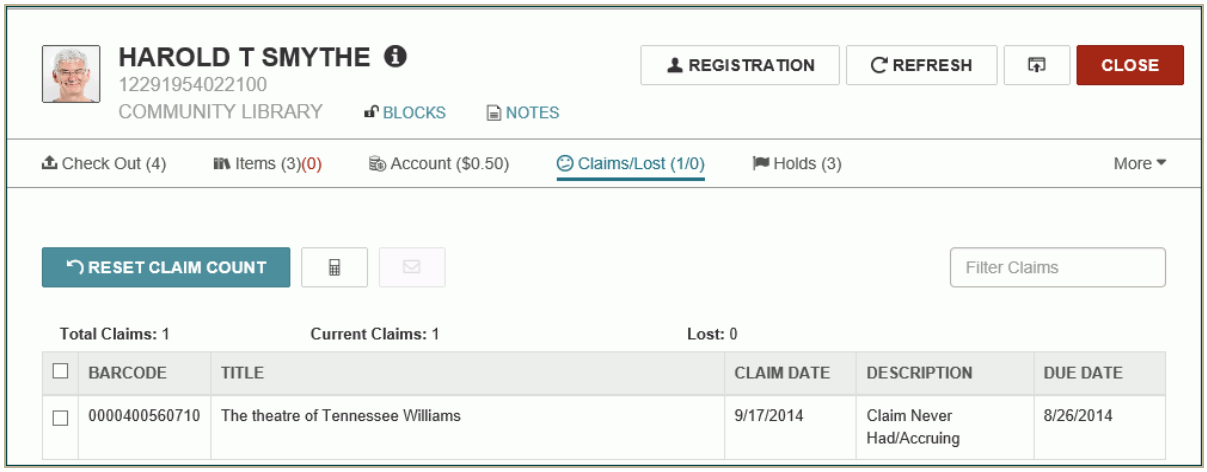


Innovative Interfaces, Inc. 2014

## Claimed and Lost Items

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

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




See also:

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



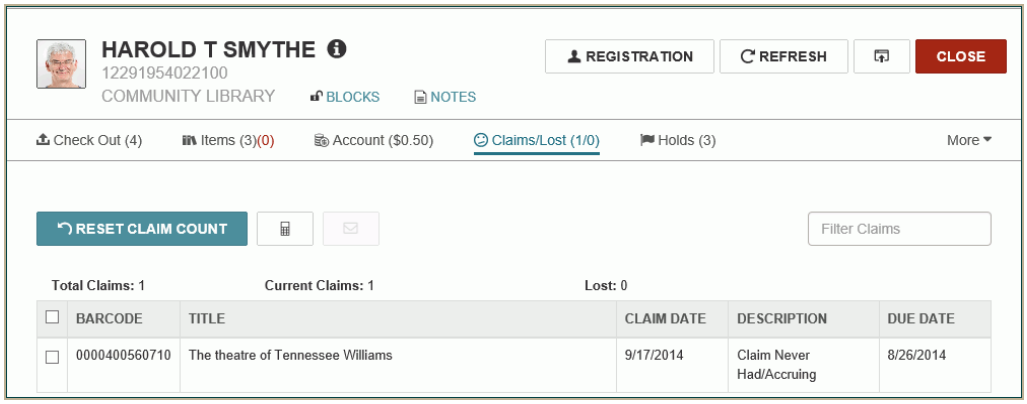
Innovative Interfaces, Inc. 2014

## View estimated fines for claimed and lost items

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

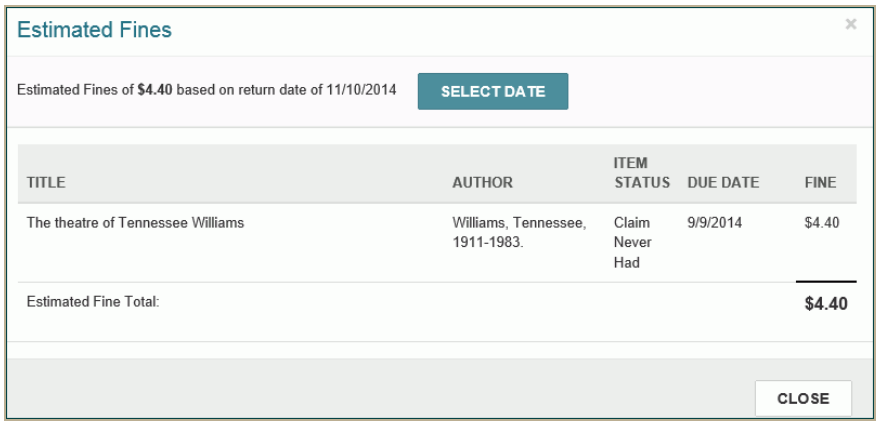
1. Open the patron's record.
2. Select **Claims/Lost** in the patron record's summary bar.

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




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

   The Estimate Fines dialog box opens.




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

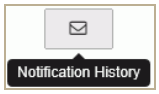


Innovative Interfaces, Inc. 2014

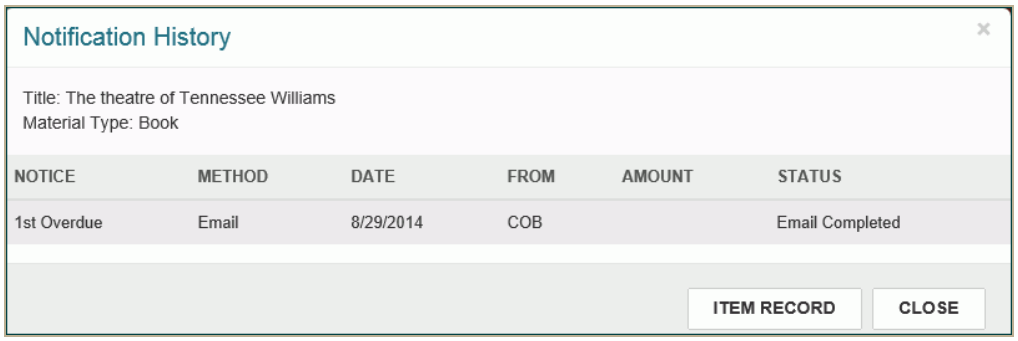
## View notices for claimed or lost items

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.



Innovative Interfaces, Inc. 2014

### Reset the claim count

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

To reset the count of claimed items for a patron:

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

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

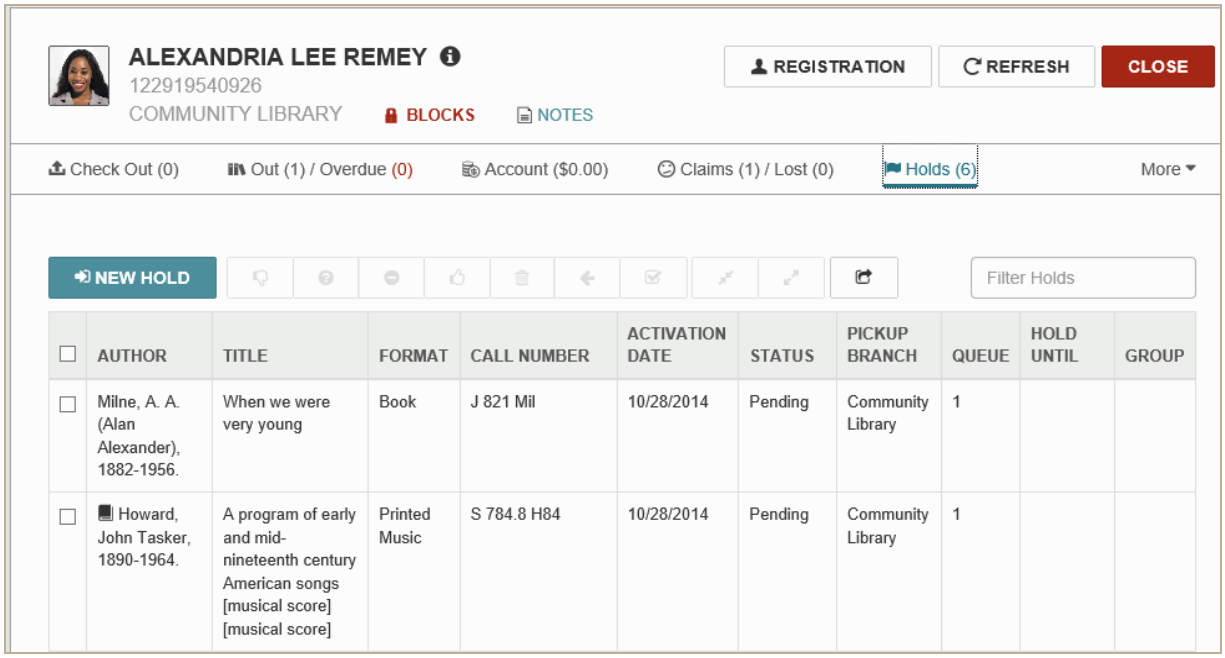


Innovative Interfaces, Inc. 2014

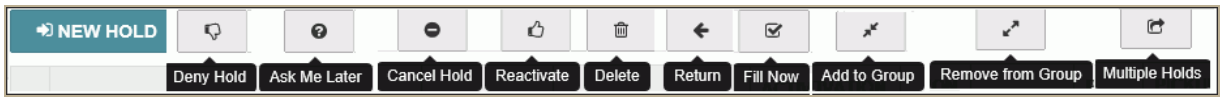
# Hold Requests

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

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




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




See also:


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

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


### Messages or blocks when placing holds

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

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

## Place a single hold request for a patron

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

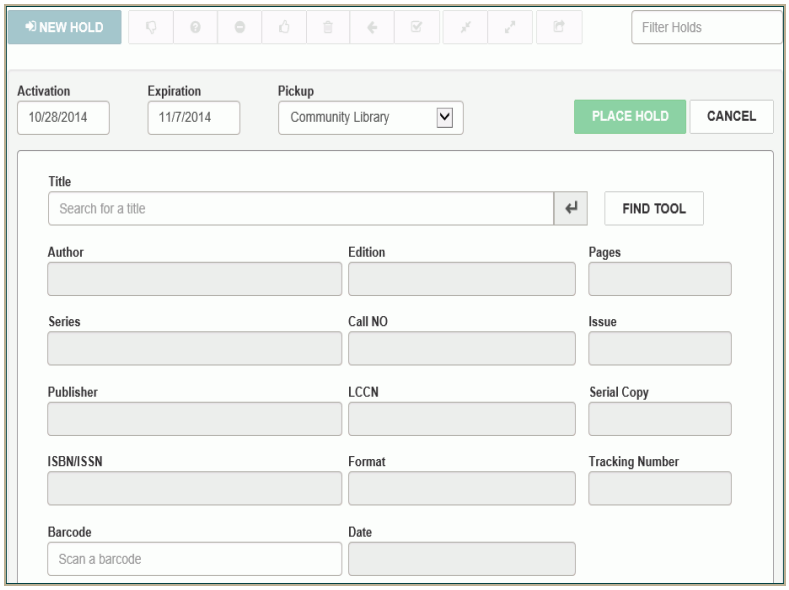
To place a hold from a patron record:

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

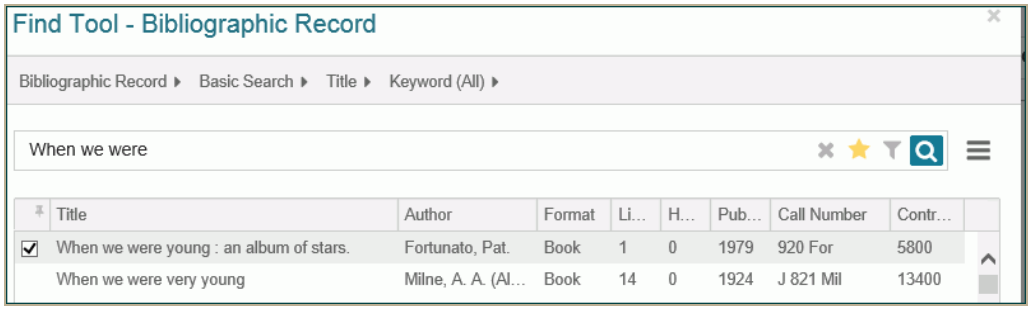
   The patron's holds are displayed.

3. Select **NEW HOLD**.

   The area below the button expands.




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




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

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

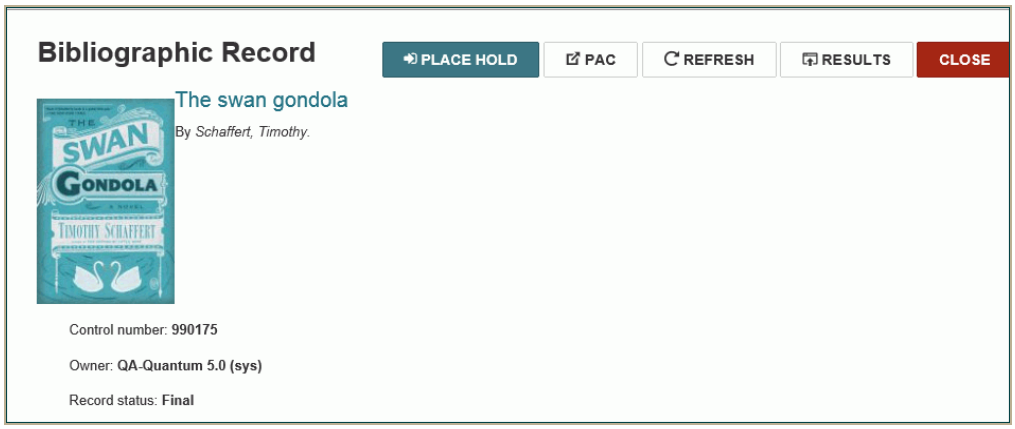
5. Select the title to place a hold.
6. To change the duration of the hold request, select the **Activation** and **Expiration** boxes to open the calendar control and select new dates.Select **PLACE HOLD**.

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

## Place a hold request from the bibliographic record

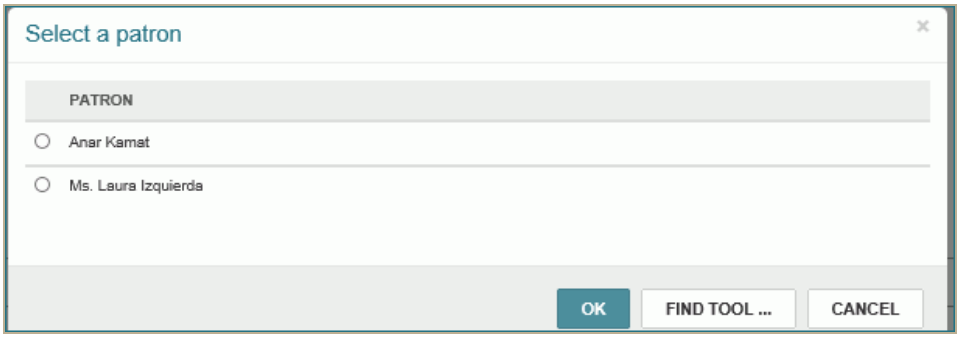
To place a hold request on a single title from the bibliographic record:

1. Open the bibliographic record.



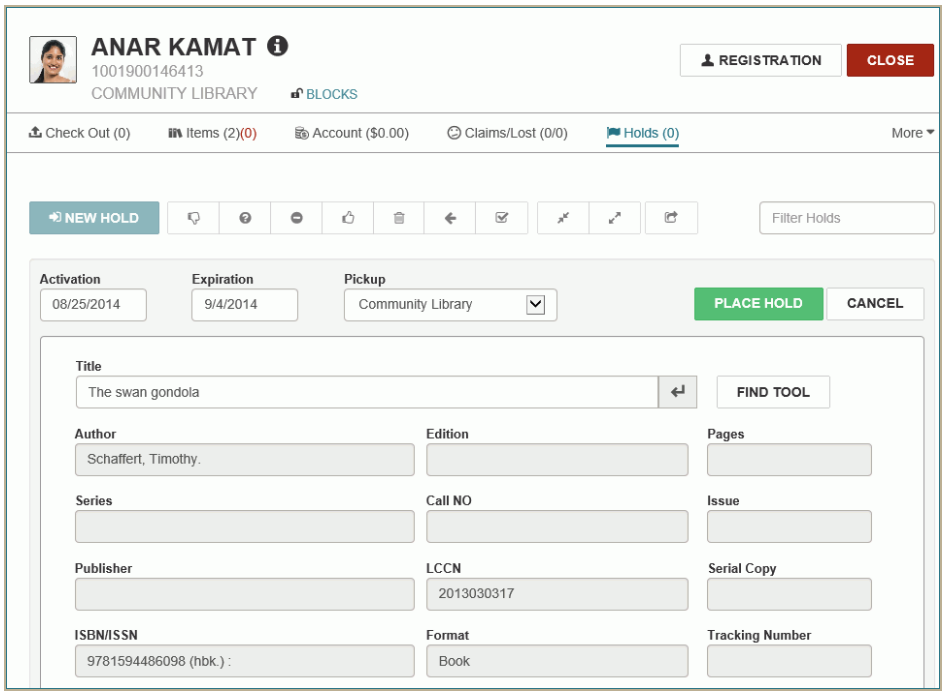

2. Select **PLACE HOLD**.

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




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

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

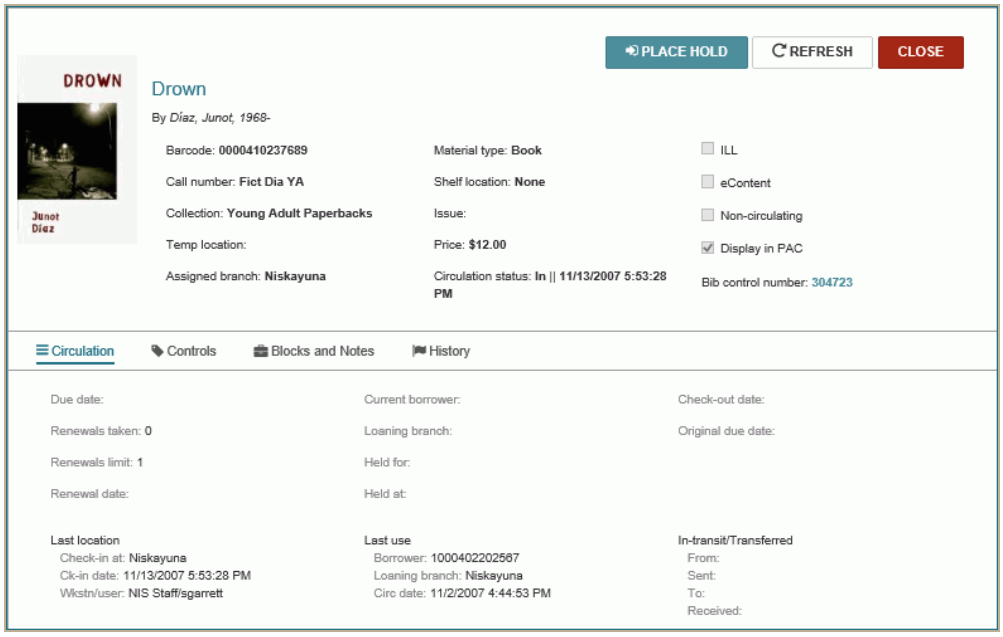



3. Review the information and select **PLACE HOLD**. For more details, see "Place a single hold request for a patron" on page 103

## Place a hold request from the item record

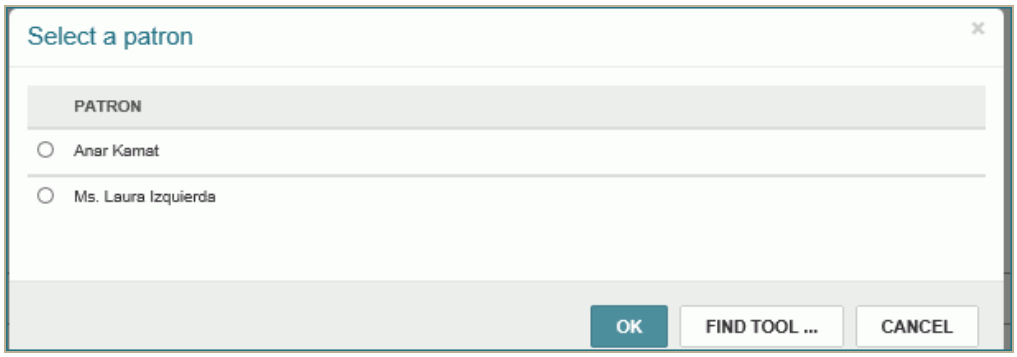
To place a hold request from the item record:

1. Open the item record.




2. Select **PLACE HOLD**.

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

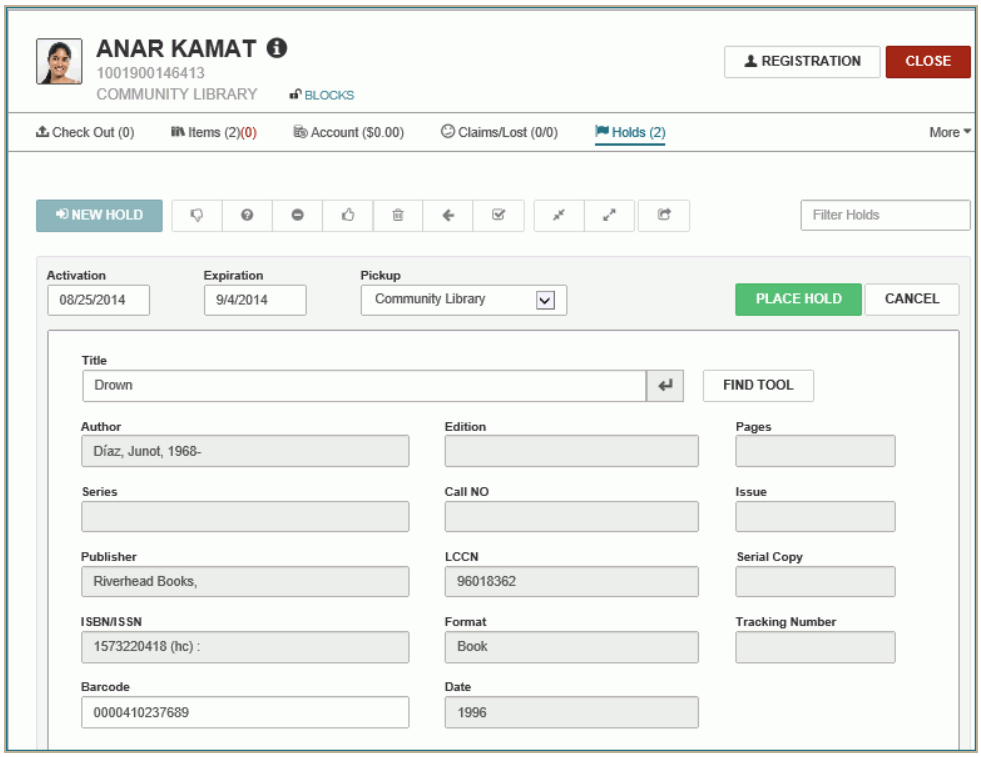



   If no patron records are open, the Find Tool opens. Search for and select the patron record.

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



Innovative Interfaces, Inc. 2014




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

## Place multiple holds for the same patron

To place multiple holds at once for the same patron:

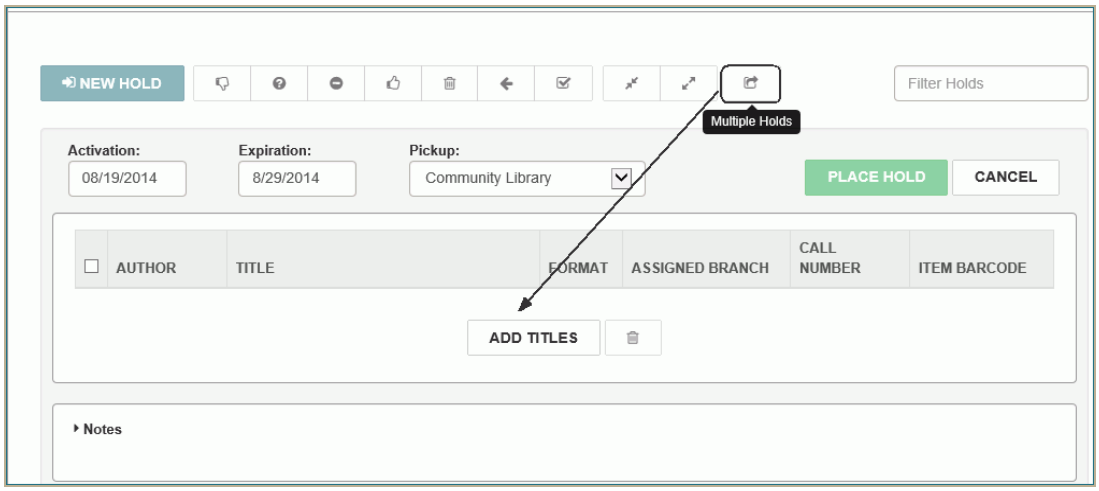
1. Open the patron's record.
2. Select **HOLDS**.

   The patron's holds list is displayed.

3. Select the multiple holds button.

   The area below the multiple holds button expands.

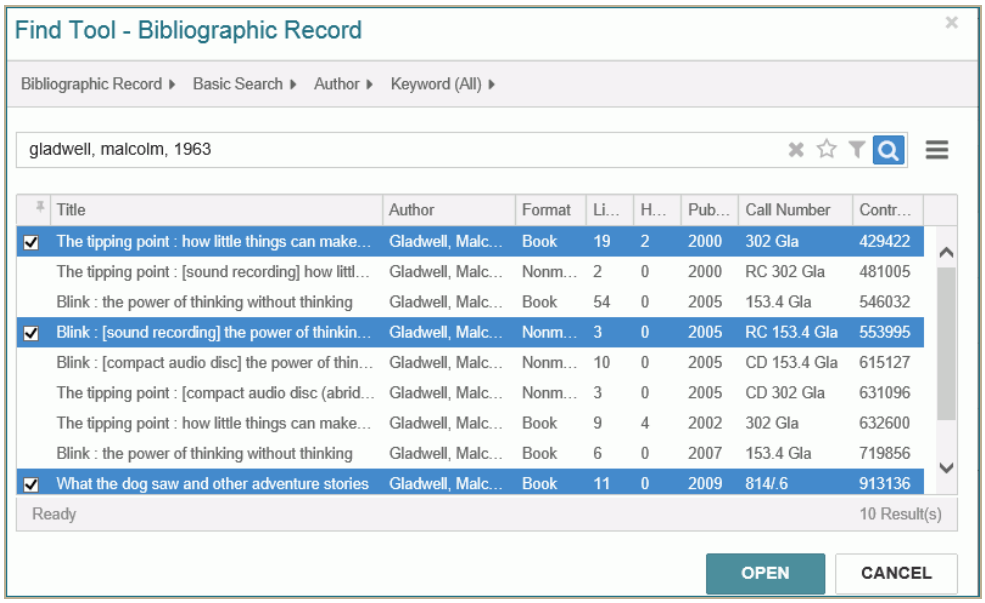
4. Select **ADD TITLES** to open the Find Tool.
5. Search for the titles that the patron wants to request.

   The search results are displayed.

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



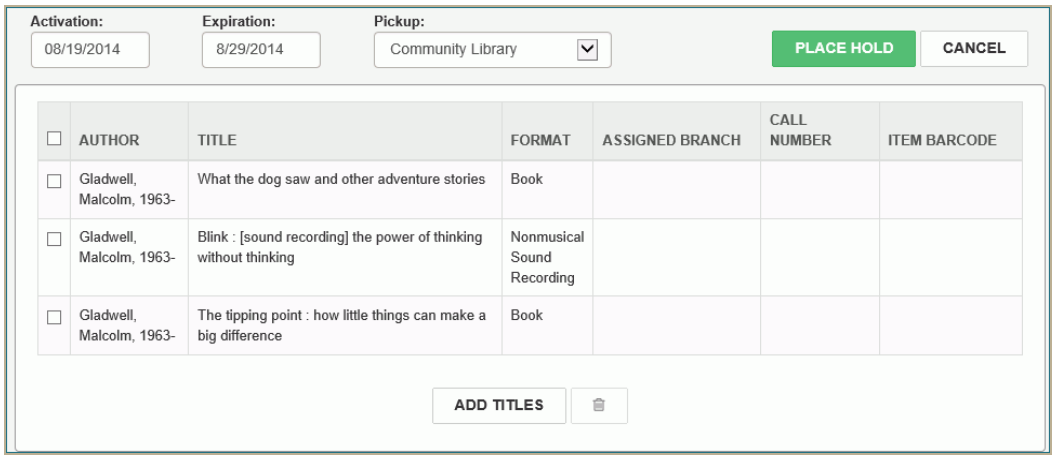
Innovative Interfaces, Inc. 2014




7. Select **OPEN**.

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

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




10. Select **PLACE HOLD**.

    The hold requests are placed on all the selected titles.

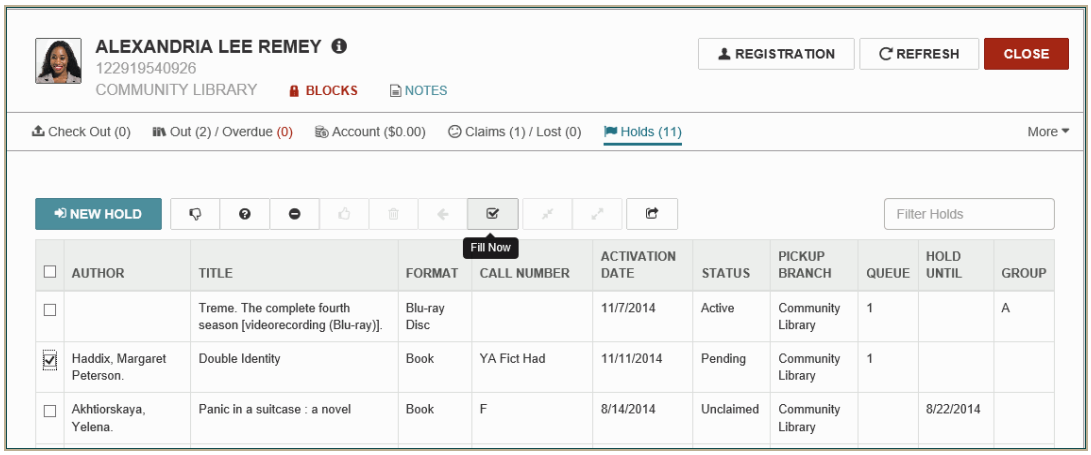
## Fill a hold now

To fill a hold now:

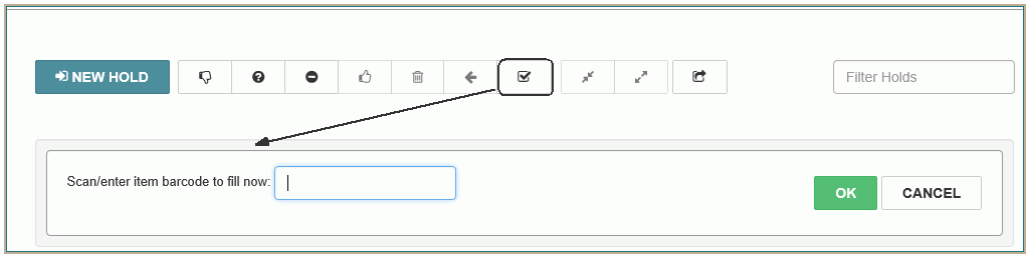
1. Open the patron's record.
2. Select **Holds**.

   The patron's holds list is displayed.

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




The area below the button bar expands.




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

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



Innovative Interfaces, Inc. 2014

## Modify a hold

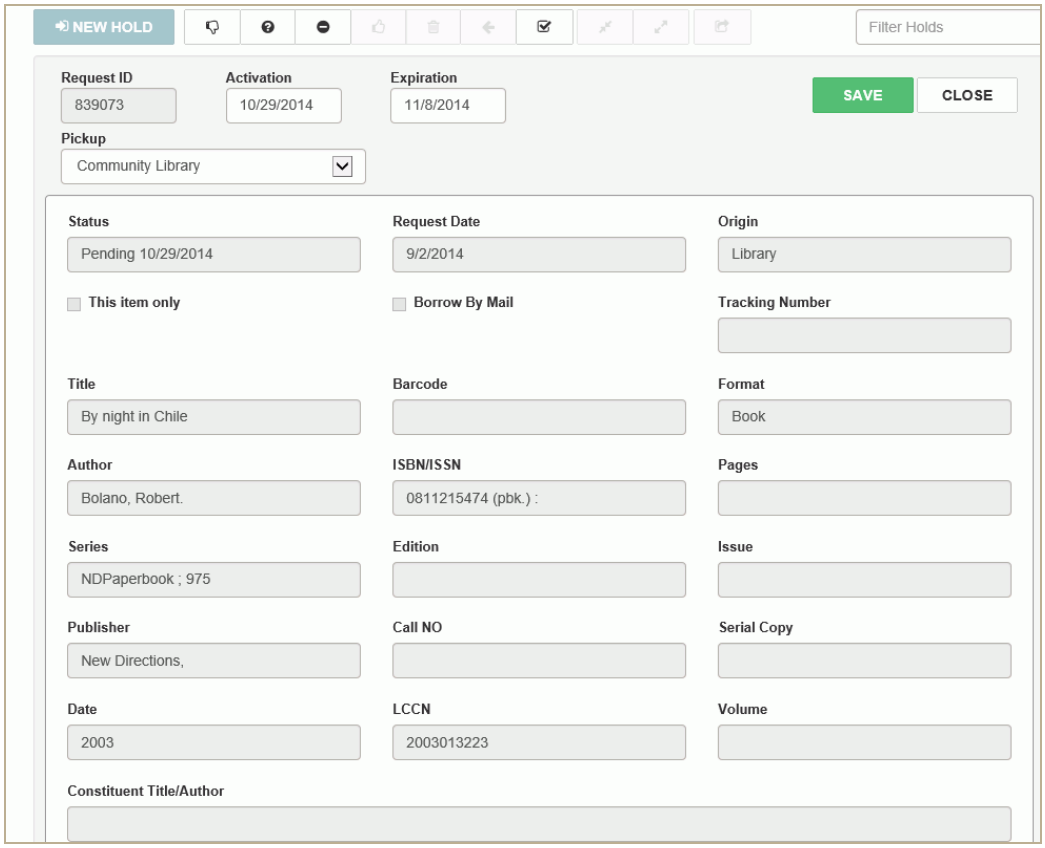
To modify a patron's hold request:

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

   The patron's holds list is displayed.

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

   The hold details are displayed.




4. Modify the hold as follows:

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



Innovative Interfaces, Inc. 2014

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

5. When you are finished editing the hold request, select **SAVE**.

   The hold request is modified.



Innovative Interfaces, Inc. 2014

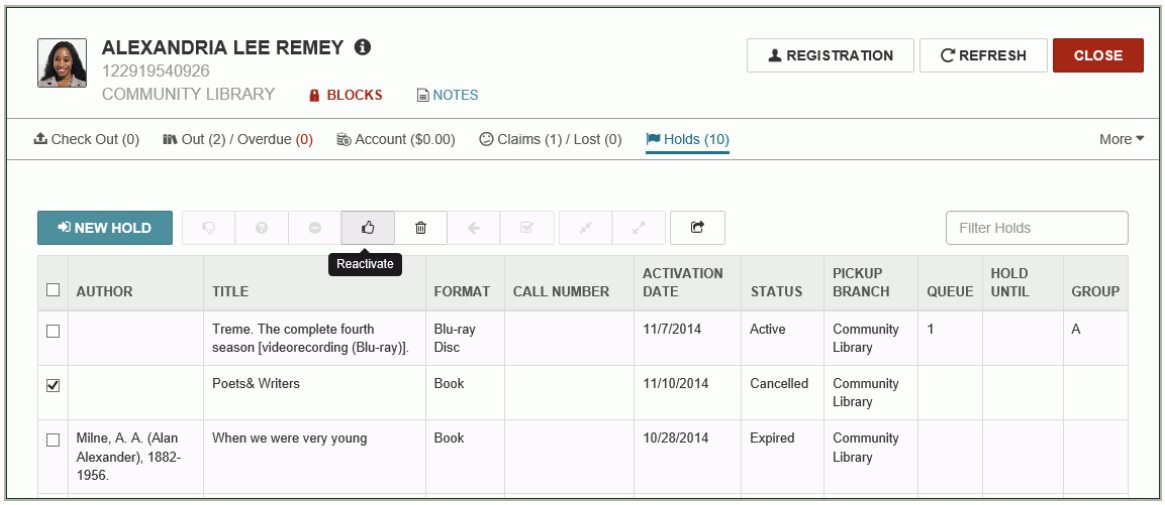
## Reactivate a hold

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

To reactivate a hold:

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

   The patron's holds list is displayed.




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

   The hold request is reactivated.



Innovative Interfaces, Inc. 2014

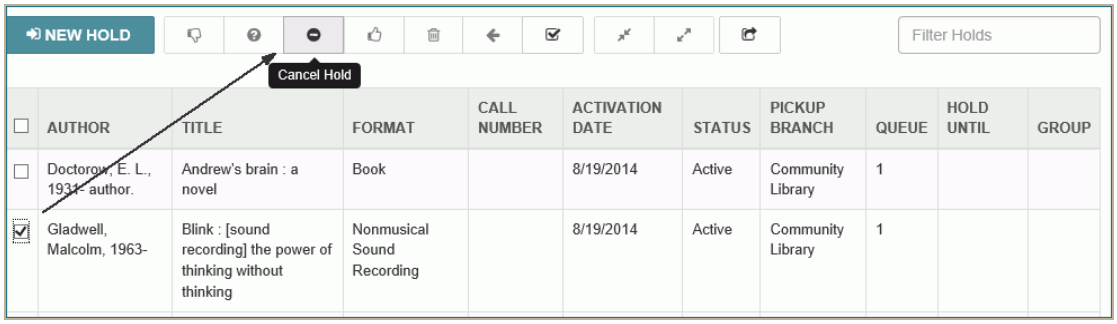
## Cancel a hold

To cancel a hold:

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

   The patron's hold list is displayed.

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




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



Innovative Interfaces, Inc. 2014

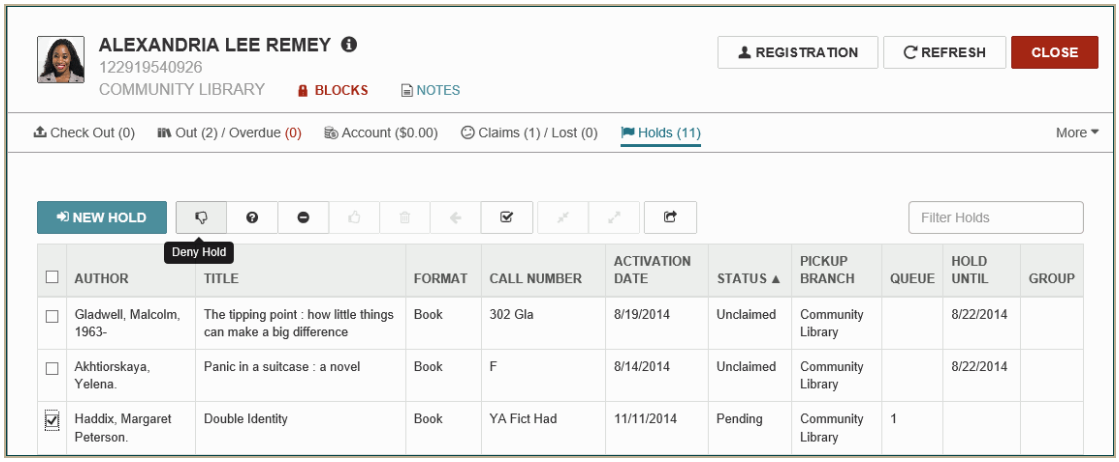
## Deny a hold

To deny a hold:

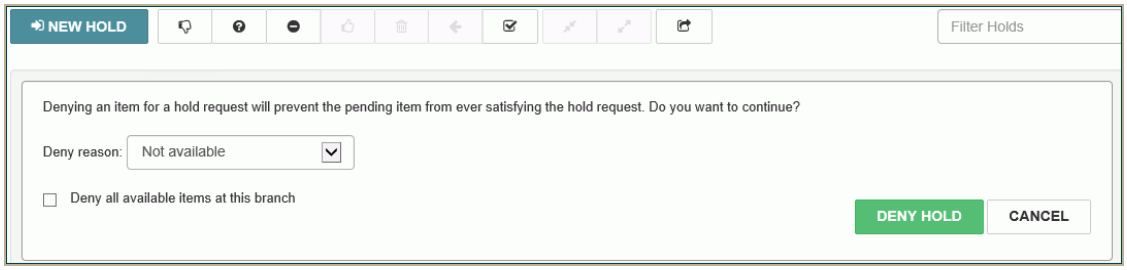
1. Open the patron's record.
2. Select **Holds**.

   The patron's hold list is displayed.

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




The area below the button bar expands.




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

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

Select **DENY HOLD**.



Innovative Interfaces, Inc. 2014

## Group multiple holds

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

To group multiple holds:

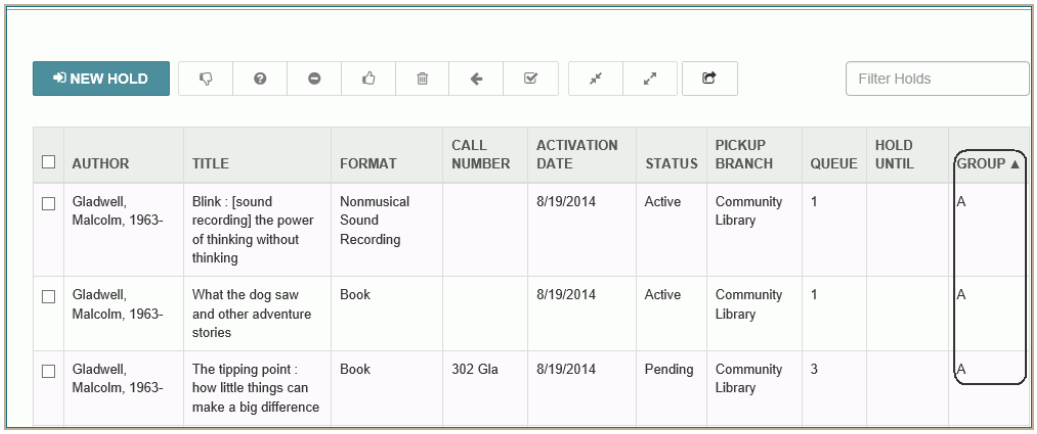
1. Open the patron's record.
2. Select **Holds**.

   The patron's hold list is displayed.

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

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

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




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

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

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



Innovative Interfaces, Inc. 2014

NEW HOLD

Filter Holds

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

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

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

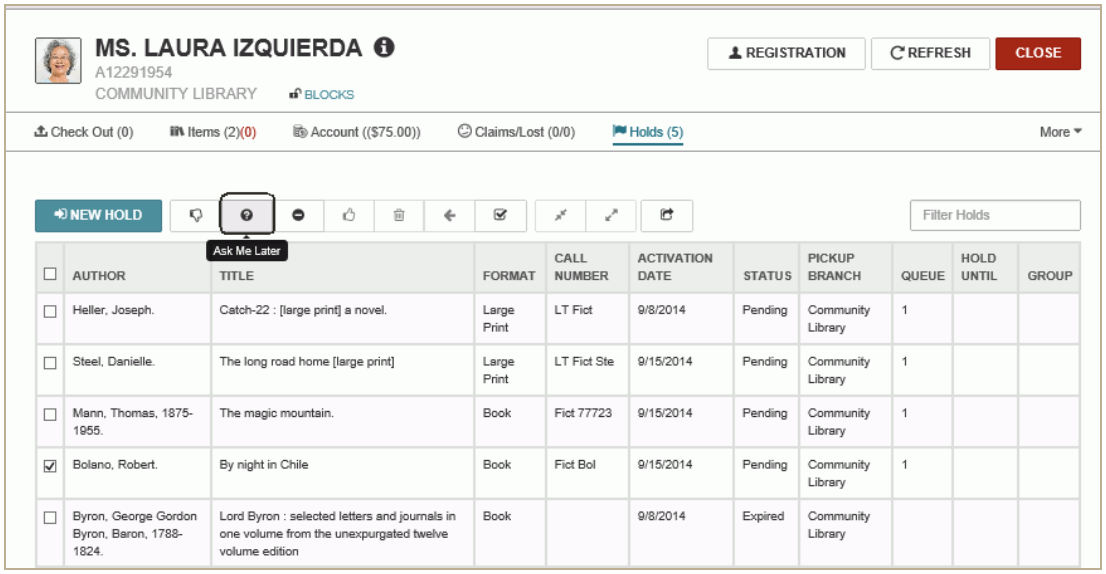
To set a hold request to *Ask me later*:

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

.

The patron's holds list is displayed.

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




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

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



Innovative Interfaces, Inc. 2014

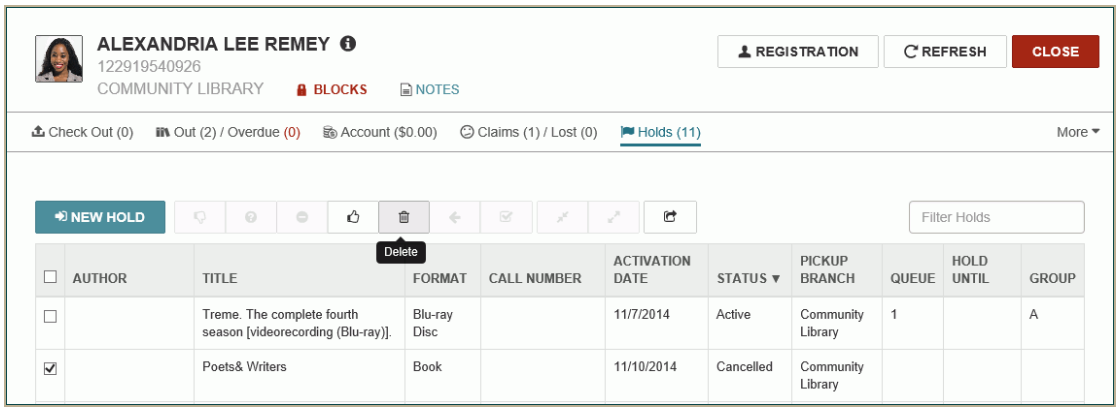
## Delete a hold

To delete a hold:

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

   The patron's hold list is displayed.

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




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



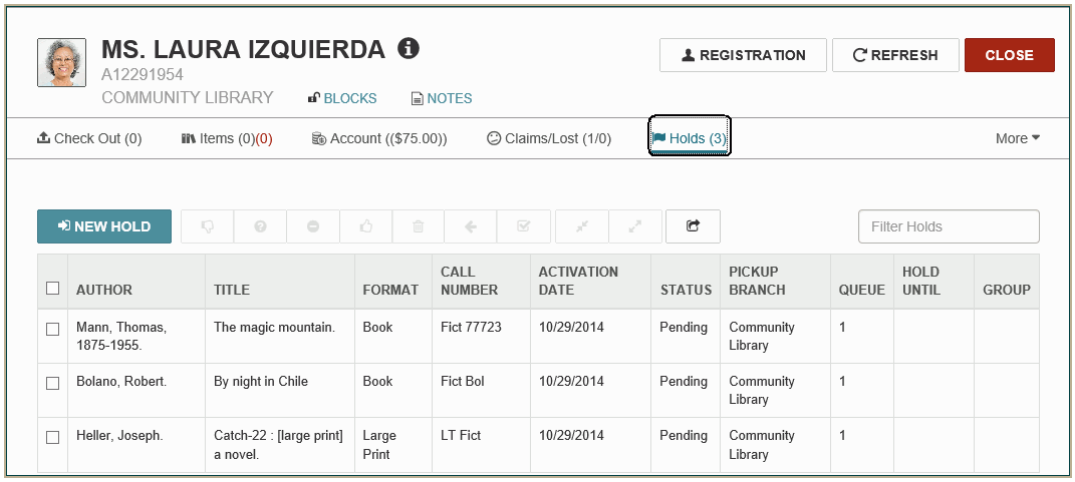
Innovative Interfaces, Inc. 2014

## View a hold's details and history

To view a hold request's details and history:

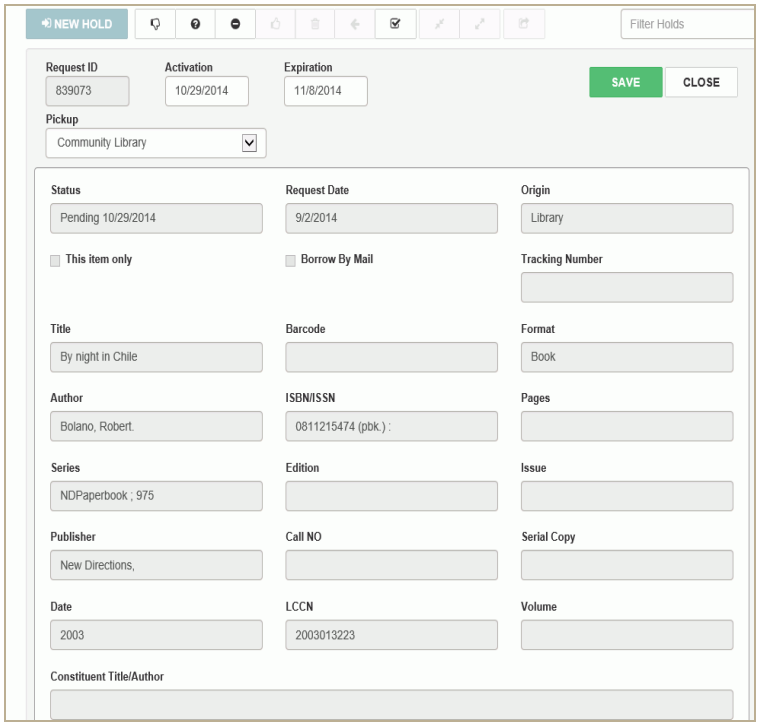
1. Open the patron's record.
2. Select **Holds**.

   The patron's hold list is displayed.




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

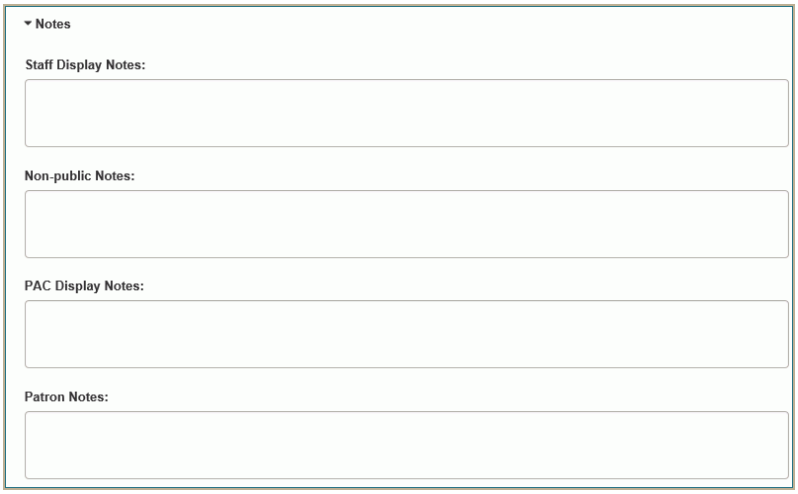
   The held title's details are displayed.






Innovative Interfaces, Inc. 2014

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




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

Request Satisfied By

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

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

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

Request History

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

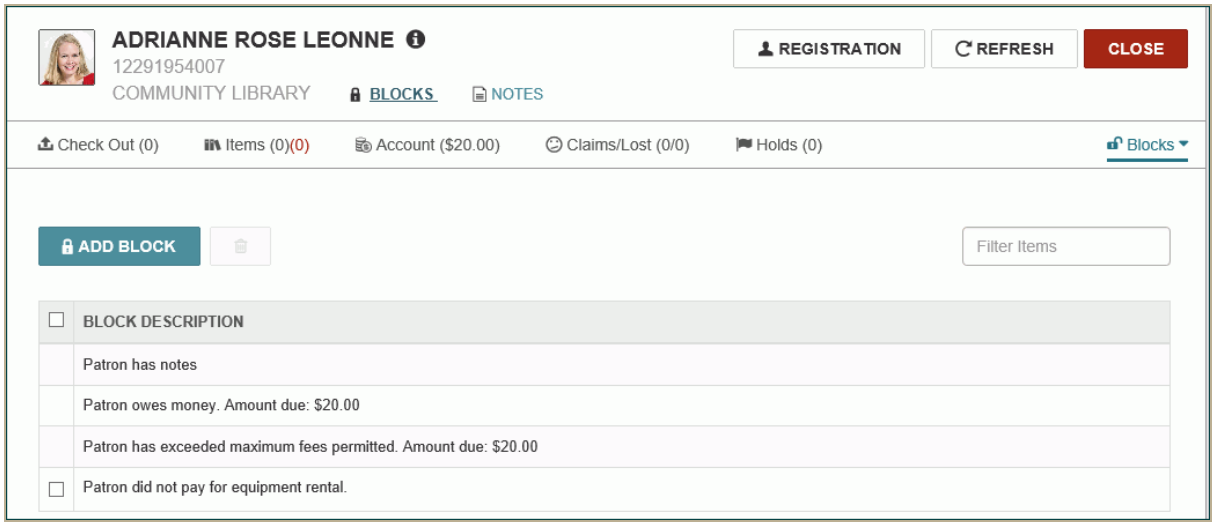


Innovative Interfaces, Inc. 2014

# Patron Blocks

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

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




See also:


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




Innovative Interfaces, Inc. 2014

## Add a patron block

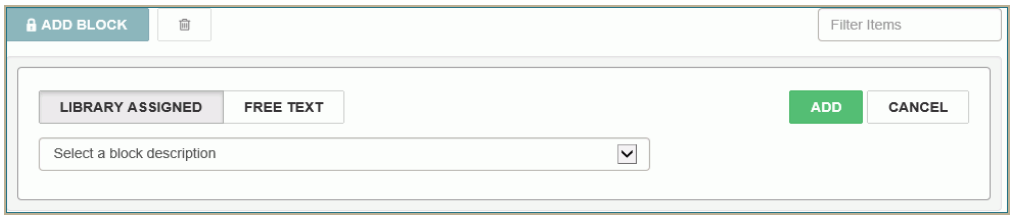
To add a patron block:

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

   The list of blocks (if any) is displayed.

3. Select **ADD BLOCK**.

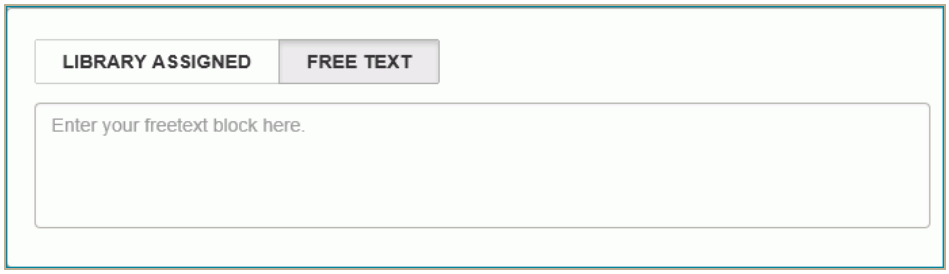
   The area under the button expands to display the blocks options.




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

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

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






Innovative Interfaces, Inc. 2014

## Delete patron blocks

To delete a patron block:

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

   The blocks list is displayed.

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

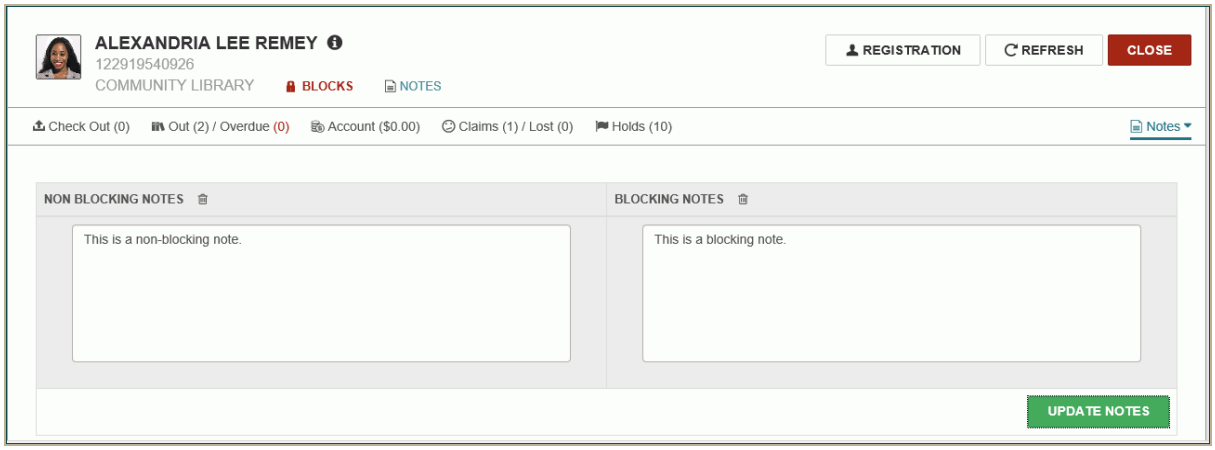
   The selected patron blocks are deleted.



Innovative Interfaces, Inc. 2014

# Patron Notes

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




See also:

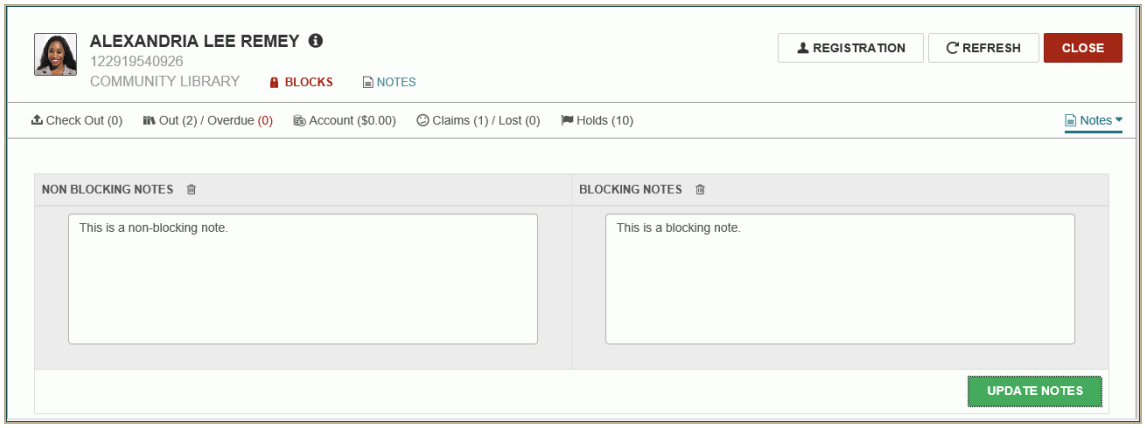

- "Add a patron note" on page 127
- "Delete a patron note" on page 128

## Add a patron note

To add a patron note:

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

   The Notes view opens.




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

   The notes are updated.

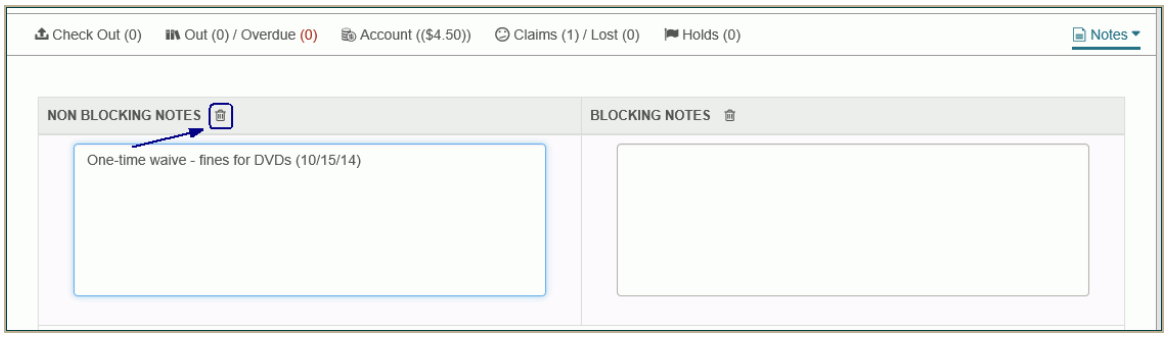
## Delete a patron note

To delete a patron note:

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

   The Notes view opens.

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




The note is deleted.

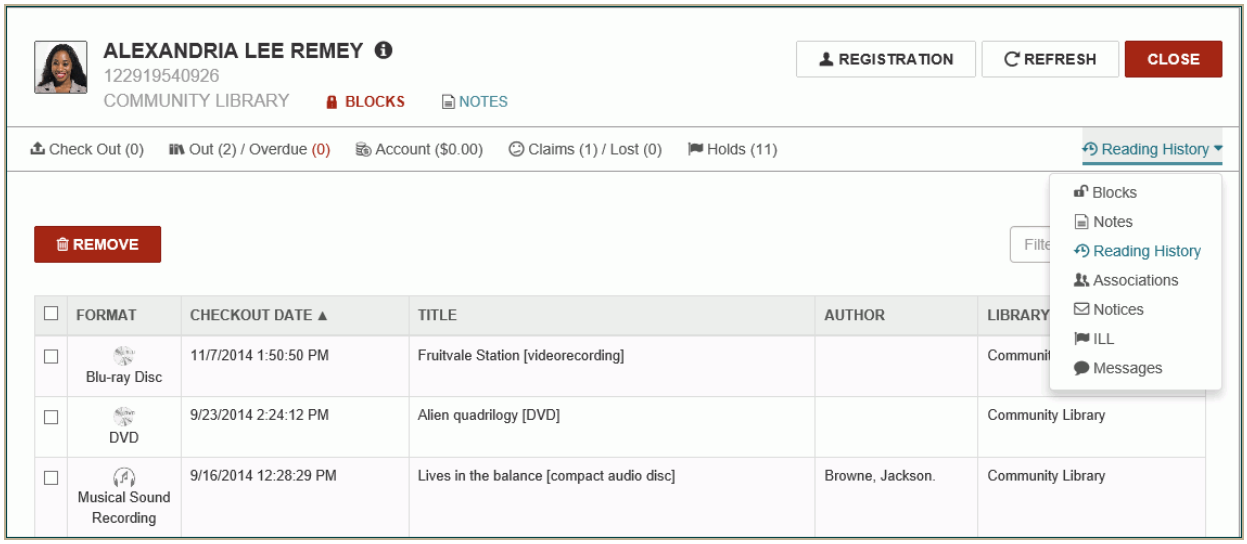


Innovative Interfaces, Inc. 2014

# Reading History

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

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




See also:

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



Innovative Interfaces, Inc. 2014

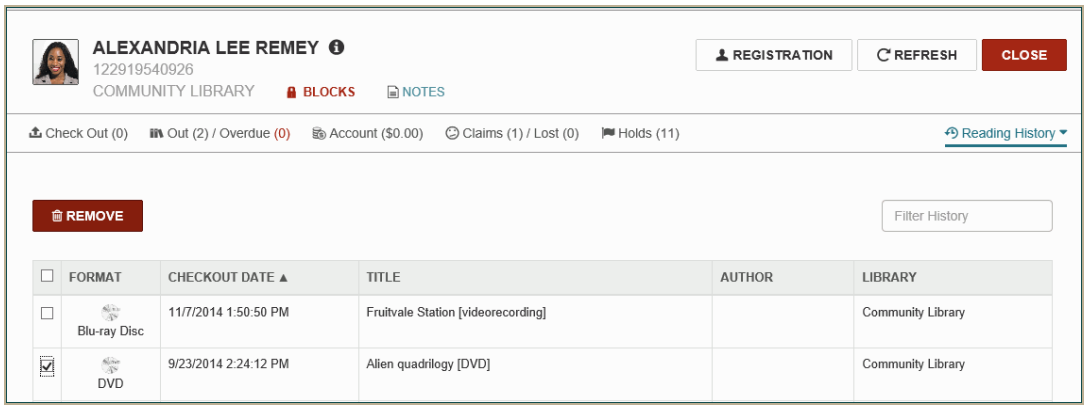
## Remove an item from a patron's reading history

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

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

   The patron's reading history is displayed.

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




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

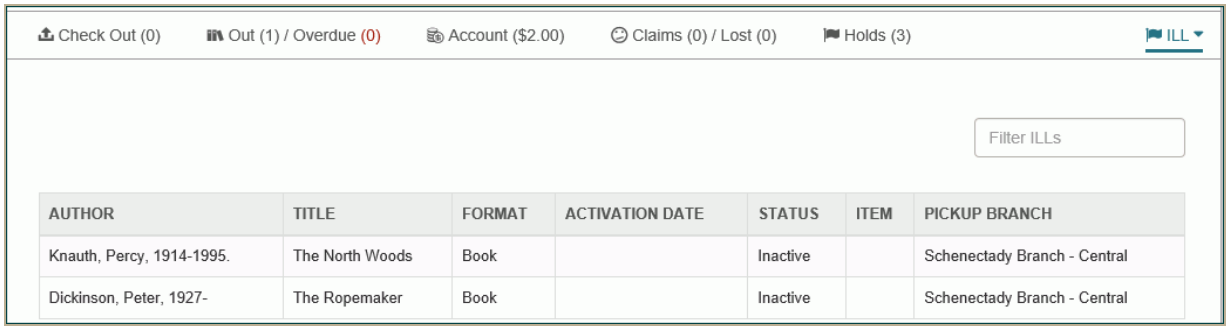


Innovative Interfaces, Inc. 2014

# Patron's Interlibrary Loans

You cannot place interlibrary loan requests from Leap, but you can view a patron's ILL loan requests on the ILL view of the patron's library account. To view a patron's interlibrary loans, open the patron's record and select **More | ILL**.

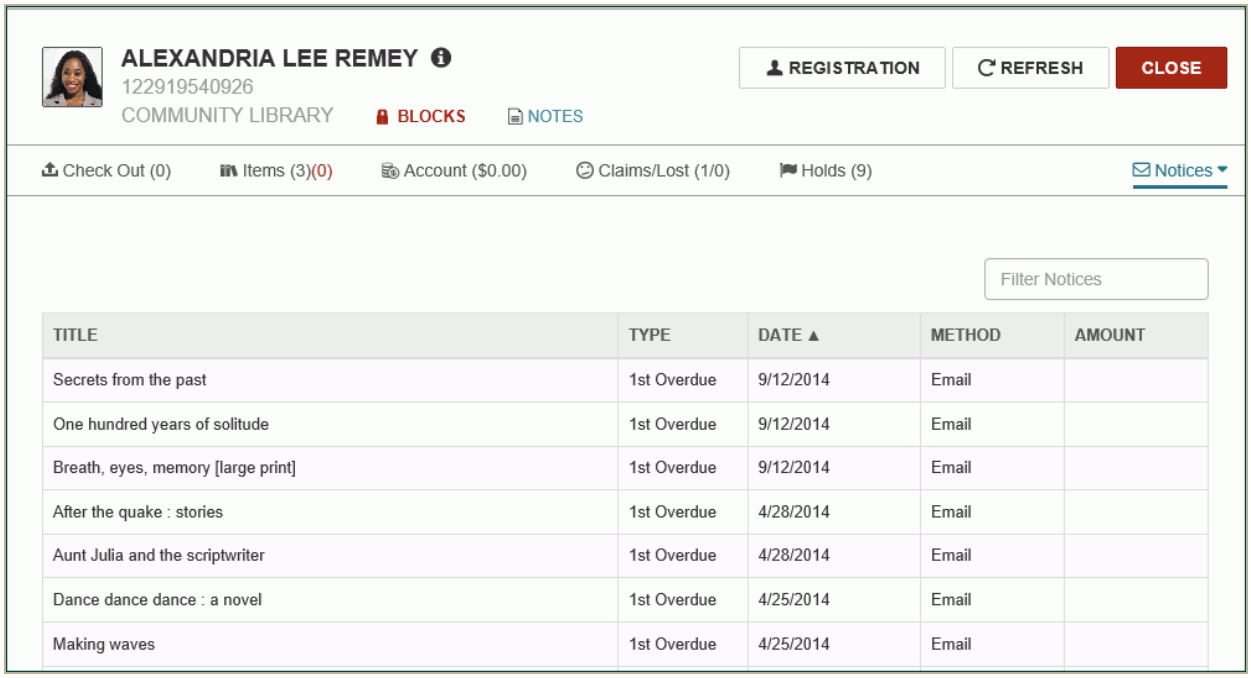
The patron's interlibrary loans are listed.




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

# Notices

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




See also:

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

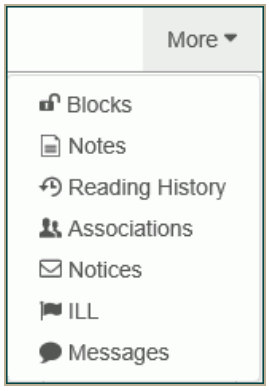


Innovative Interfaces, Inc. 2014

## View an item's notification history

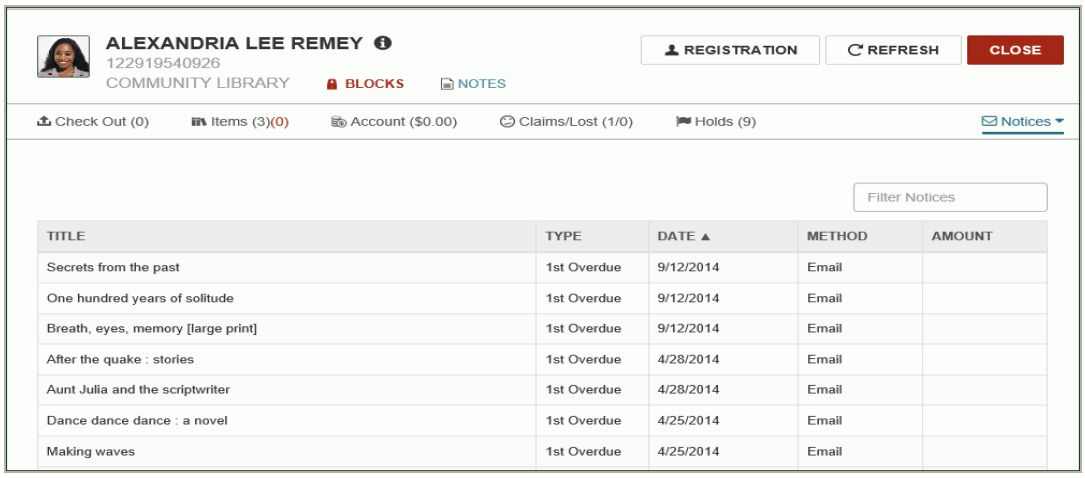
To view the notice history for a specific item in the patron's Notices list:

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




3. Select **Notices**.

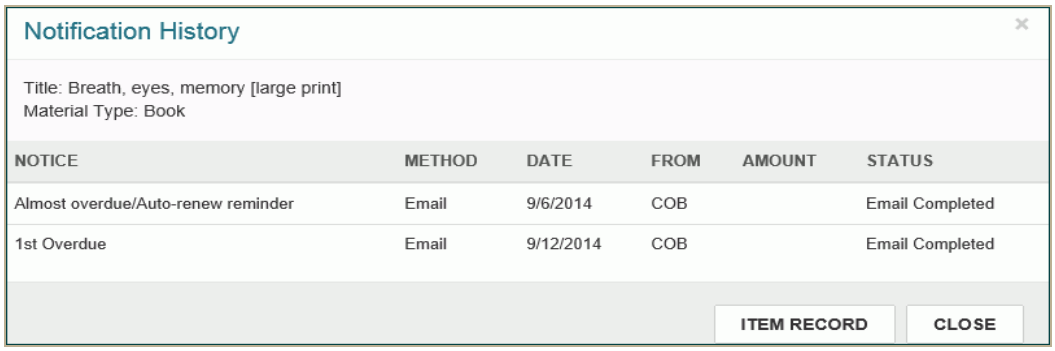
   The Notices view is displayed.




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



Innovative Interfaces, Inc. 2014



Notification History

Title: Breath, eyes, memory [large print]
Material Type: Book

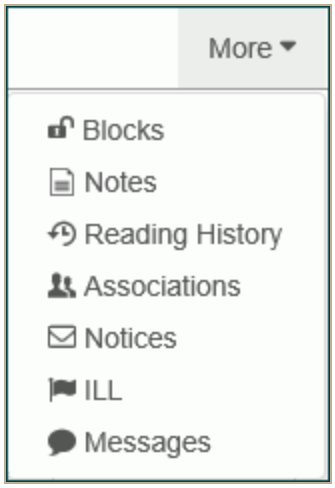
| NOTICE | METHOD | DATE | FROM | AMOUNT | STATUS |
|---|---|---|---|---|---|
| Almost overdue/Auto-renew reminder | Email | 9/6/2014 | COB | | Email Completed |
| 1st Overdue | Email | 9/12/2014 | COB | | Email Completed |

ITEM RECORD CLOSE

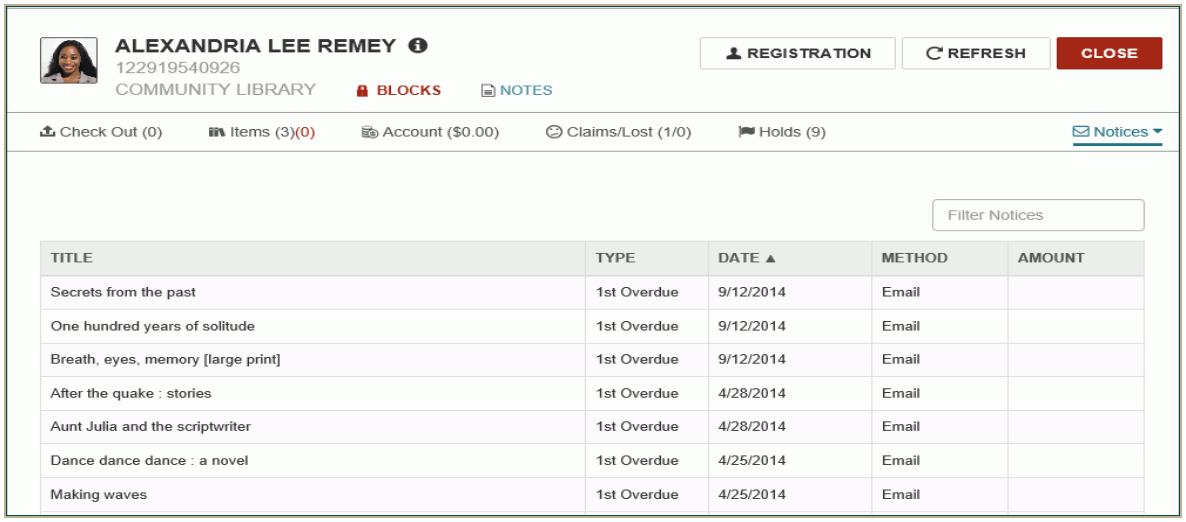
## Open the item record associated with a notice

To open the item record associated with a patron notice:

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

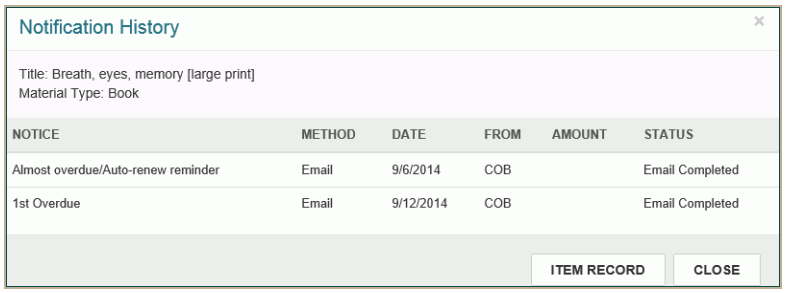



The patron's notification history is displayed.




3. Select a notice in the list.

   The Notification History for the item is displayed.




4. Select **ITEM RECORD**.

   The Item record opens.



Innovative Interfaces, Inc. 2014

# Patron Messages

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

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

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

.

See also:

- "Add a patron message " on page 138

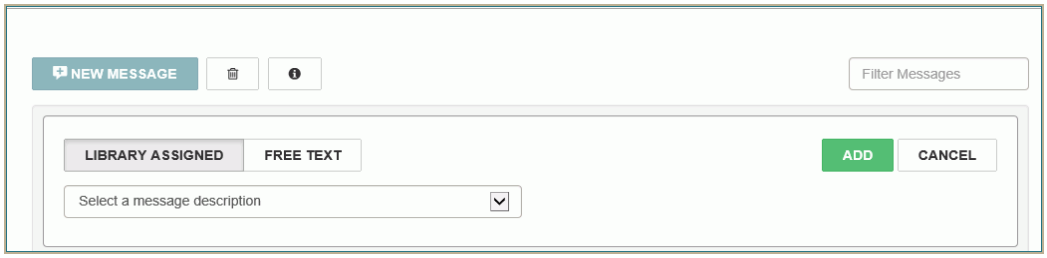
## Add a patron message

To add a patron message:

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

4. Select **NEW MESSAGE**.

   The area below the button expands.




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

   The message is added to the list.



Innovative Interfaces, Inc. 2014

## Delete a patron message

To add a patron message:

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

   The patron's messages are displayed.

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

   The patron message is deleted.

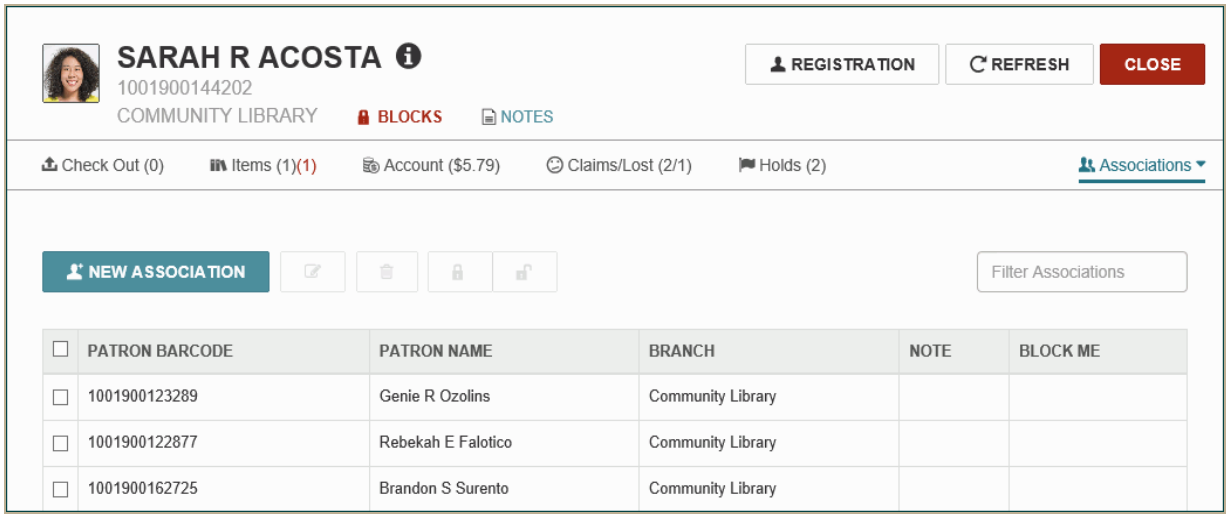


Innovative Interfaces, Inc. 2014

# Patron Associations

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

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




See also:


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

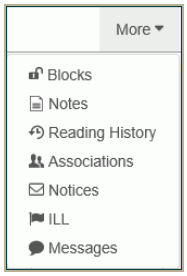



Innovative Interfaces, Inc. 2014

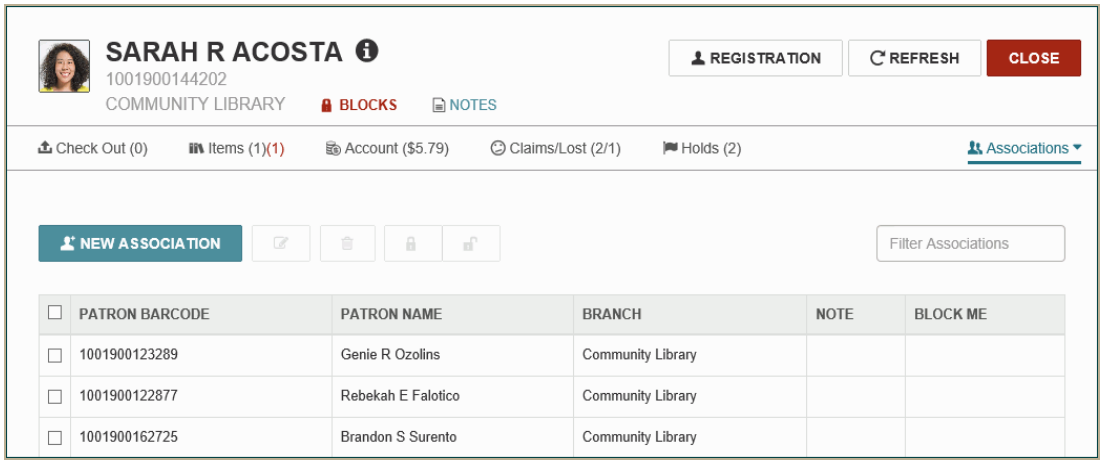
## Add a new associated patron

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

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

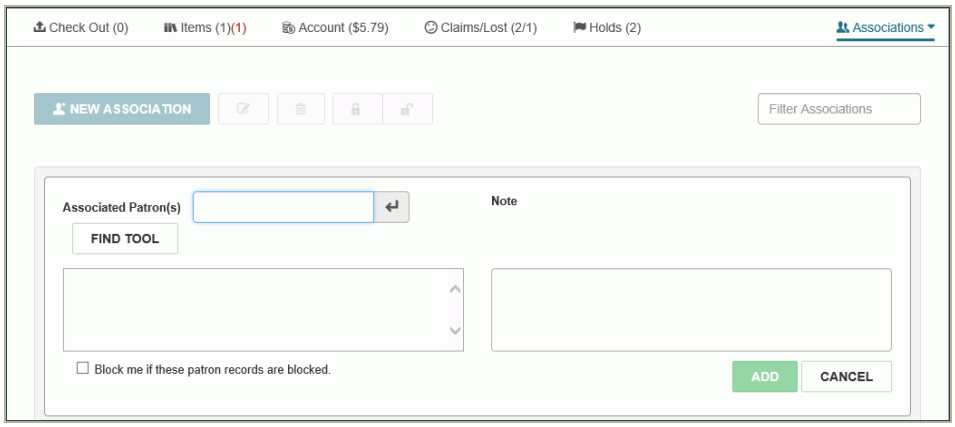



The Associations view opens.




3. Select **NEW ASSOCIATION**.

   The area below the button expands.






Innovative Interfaces, Inc. 2014

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

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

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

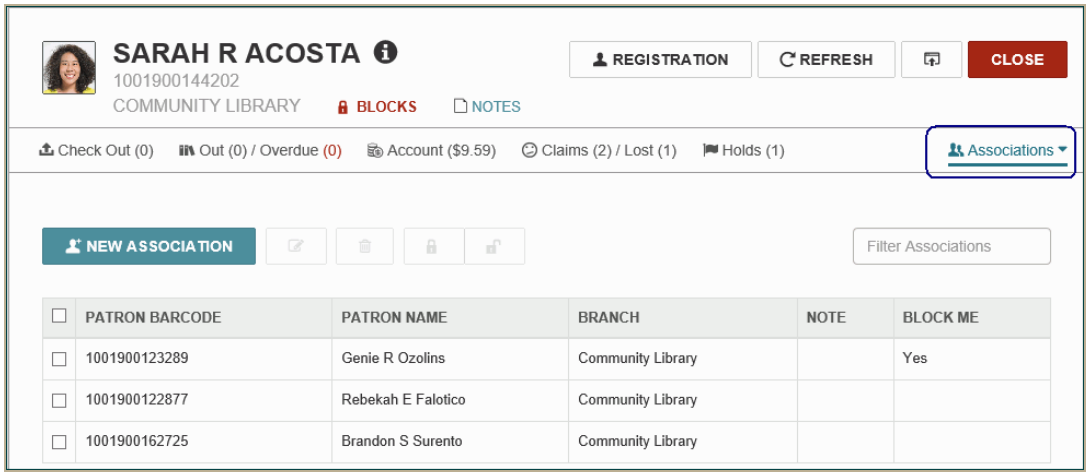
   The new associated patron(s) is displayed in the associations list.

## Edit a patron association

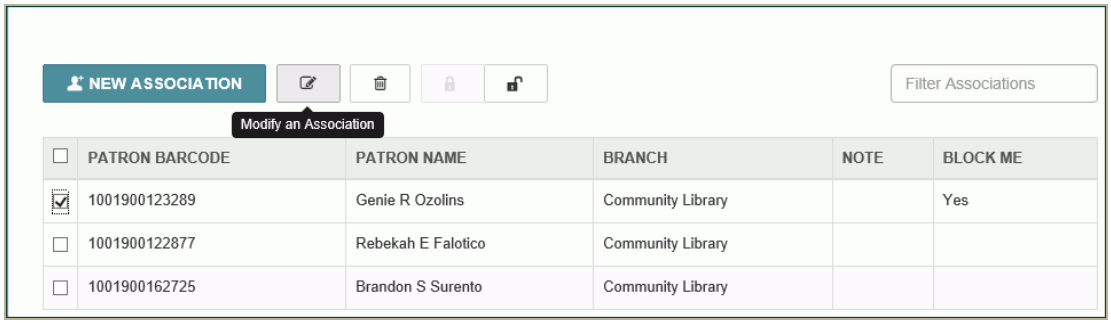
To edit a patron association:

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

   The Associations view is displayed.



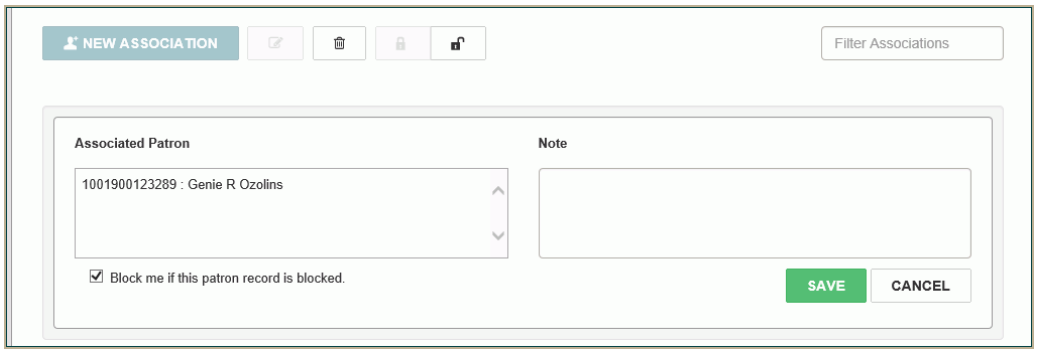

3. Select the check box next to the associated patron you want to modify and select **MODIFY ASSOCIATION**.




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



Innovative Interfaces, Inc. 2014




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

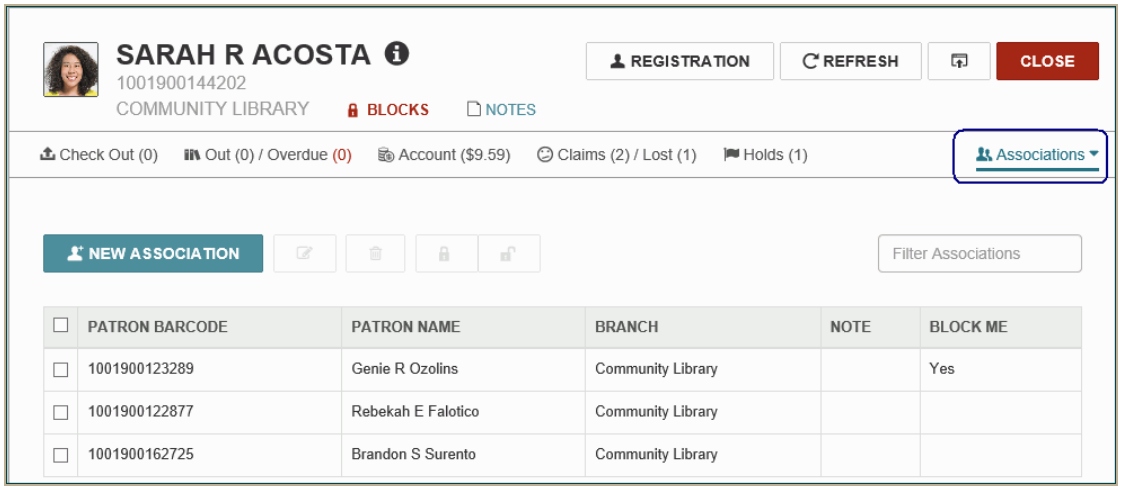
   The patron association is modified.

## Delete a patron association

To edit a patron association:

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

   The Associations view is displayed.

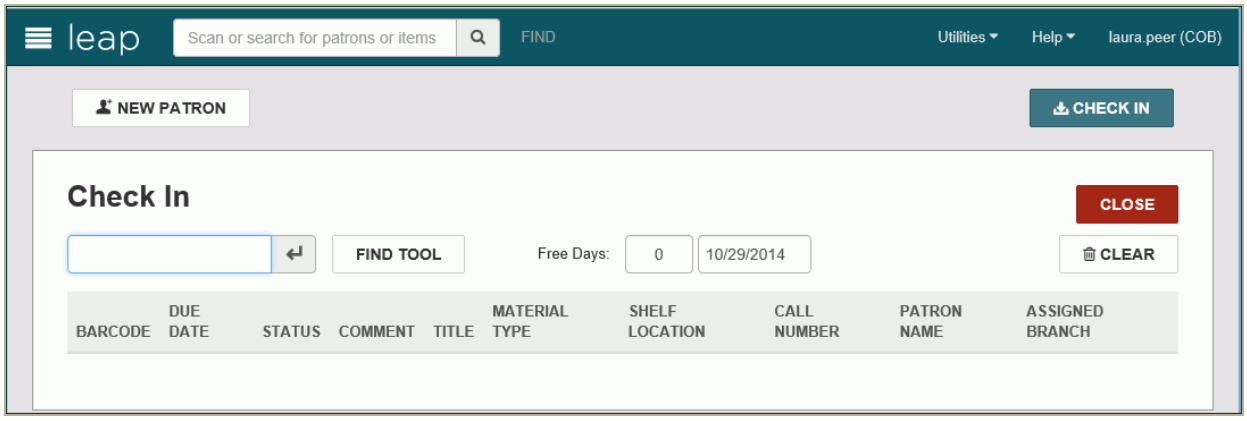



3. Select the check box next to the associated patron you want to delete and select the delete associations button

# Checking In Items and Managing Fines

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

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




**Note:**
Bulk check-in is not available in Leap 1.0.

See also:


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



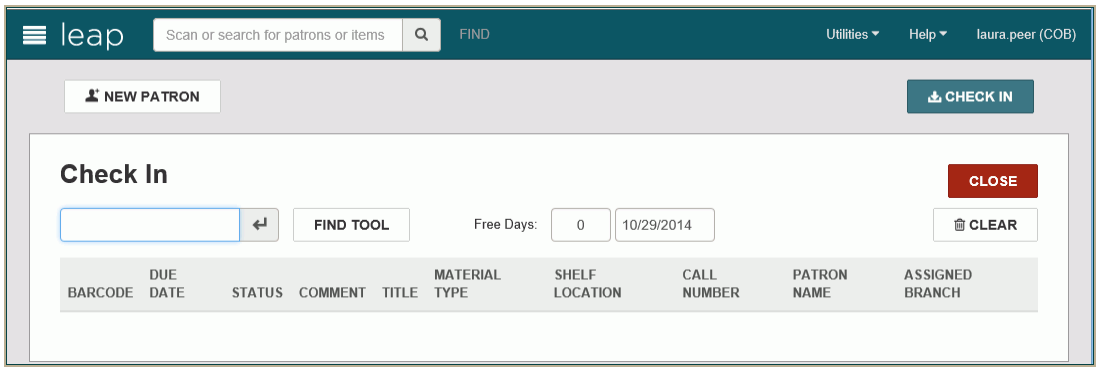

Innovative Interfaces, Inc. 2014

# Check in items

To check in items:

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

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




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

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



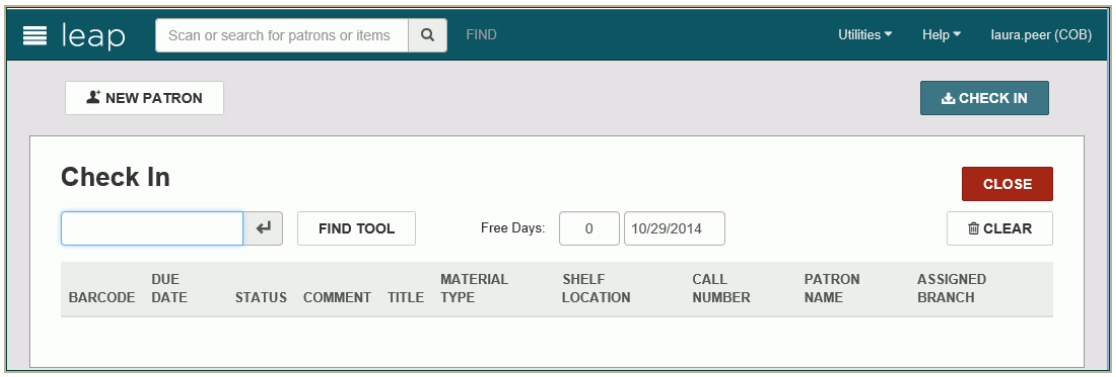
Innovative Interfaces, Inc. 2014

## Manage fines during check in

To check in multiple items and manage fines:

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

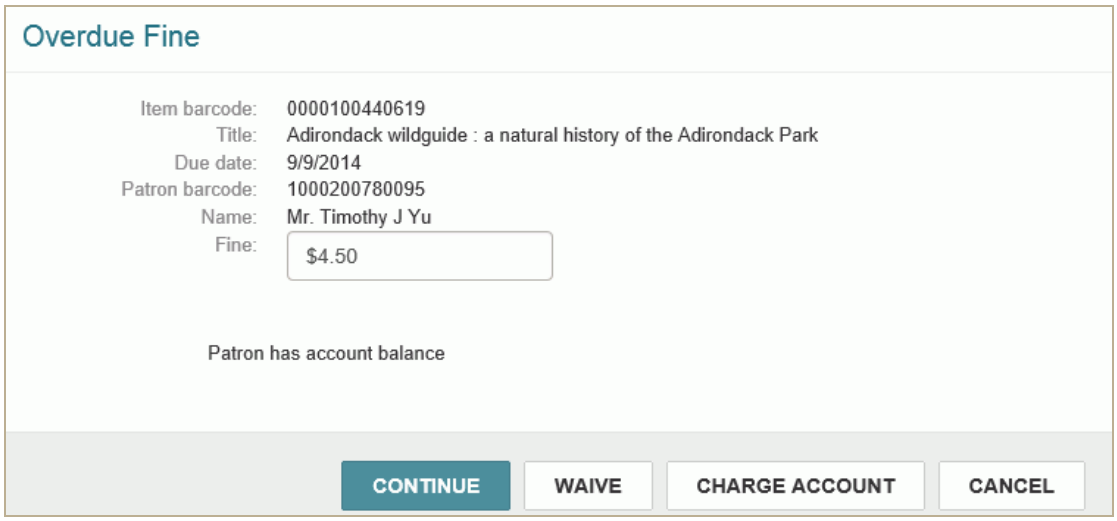
   The Check In page opens with the cursor in the barcode box.




2. Scan each item's barcode.

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

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




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

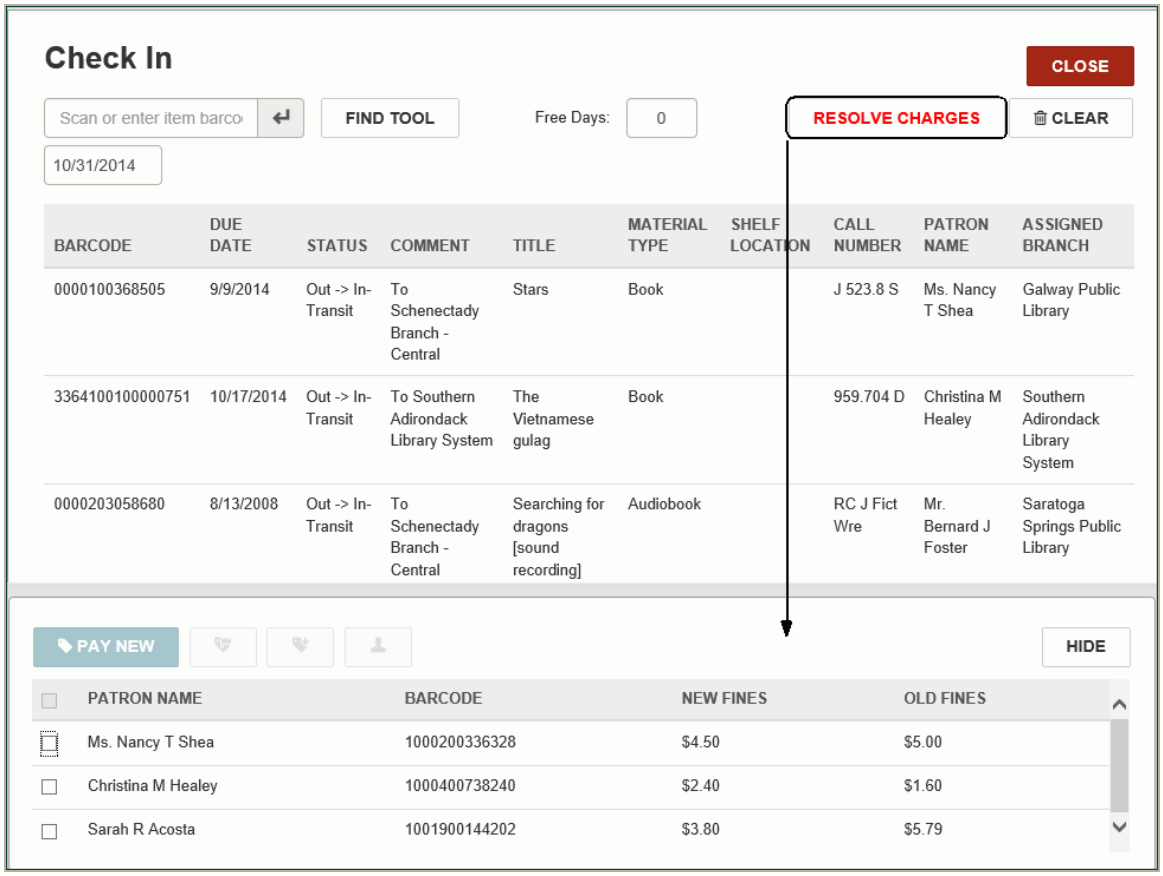


Innovative Interfaces, Inc. 2014

in all the items.

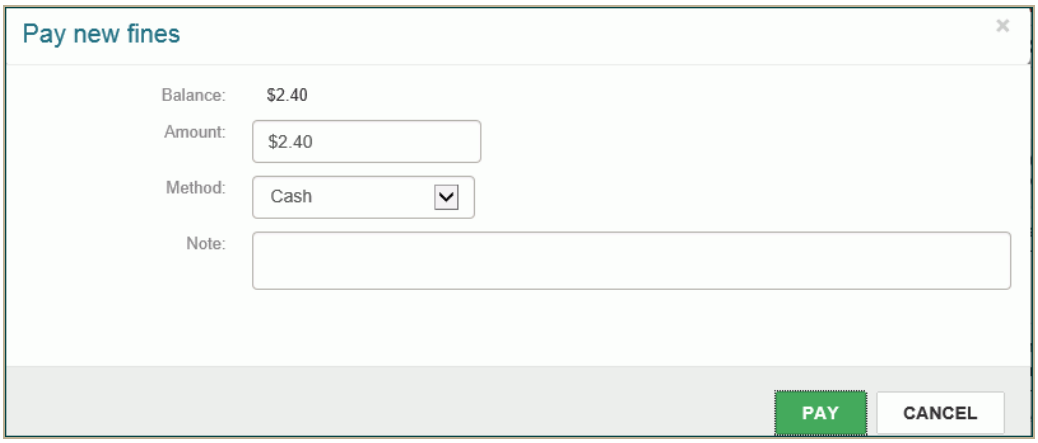
4. To view and resolve the fines, select **RESOLVE CHARGES**.

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



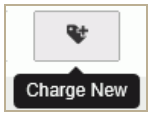

5. Select the check box next to the patron for whom you are resolving charges, and do one of the following:

- Select **PAY NEW** to pay the new charges, and enter the payment details in the Pay new fines dialog box.

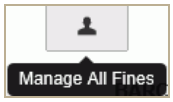



- Select the waive new button to waive the new charges.

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




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



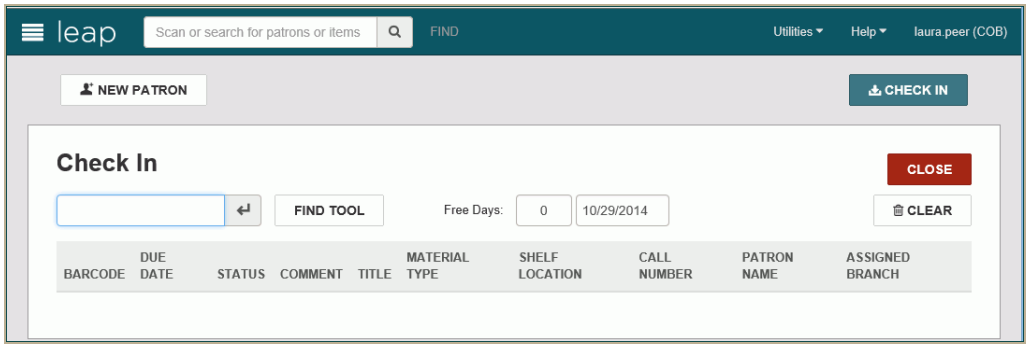
# Resolve billed items during check in

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

To resolve a billed item during check in:

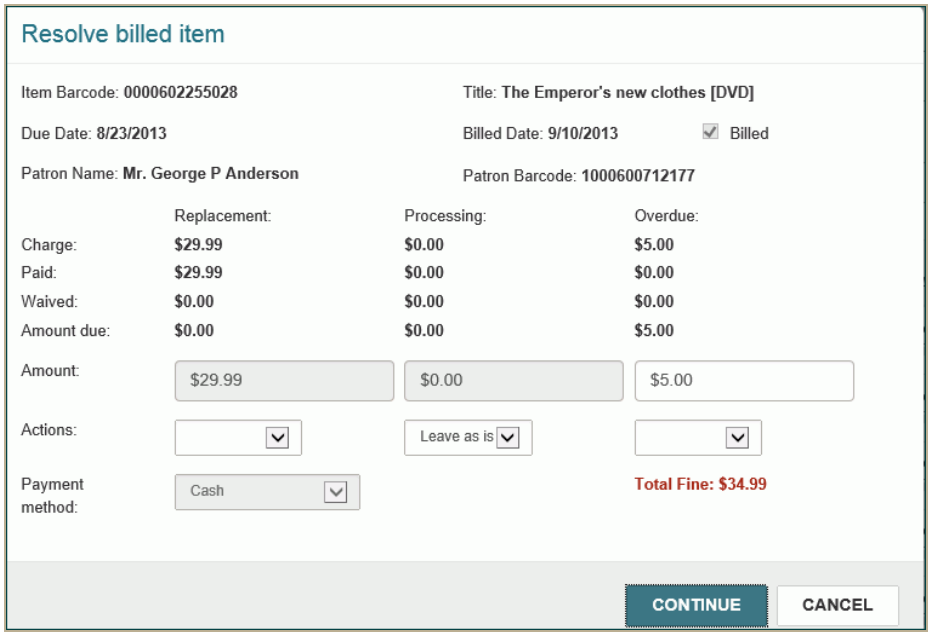
1. Log into Leap, and select **CHECK IN**.

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




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

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




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

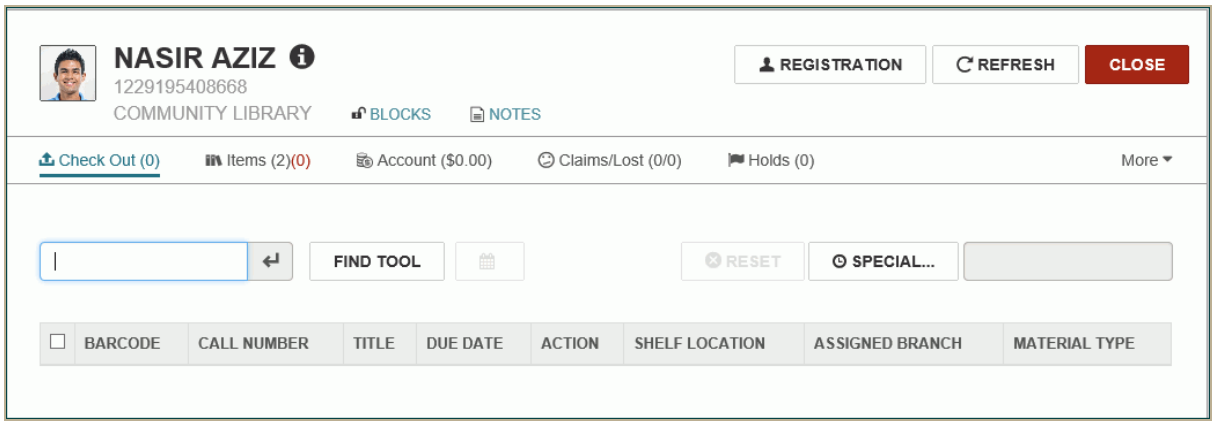


Innovative Interfaces, Inc. 2014

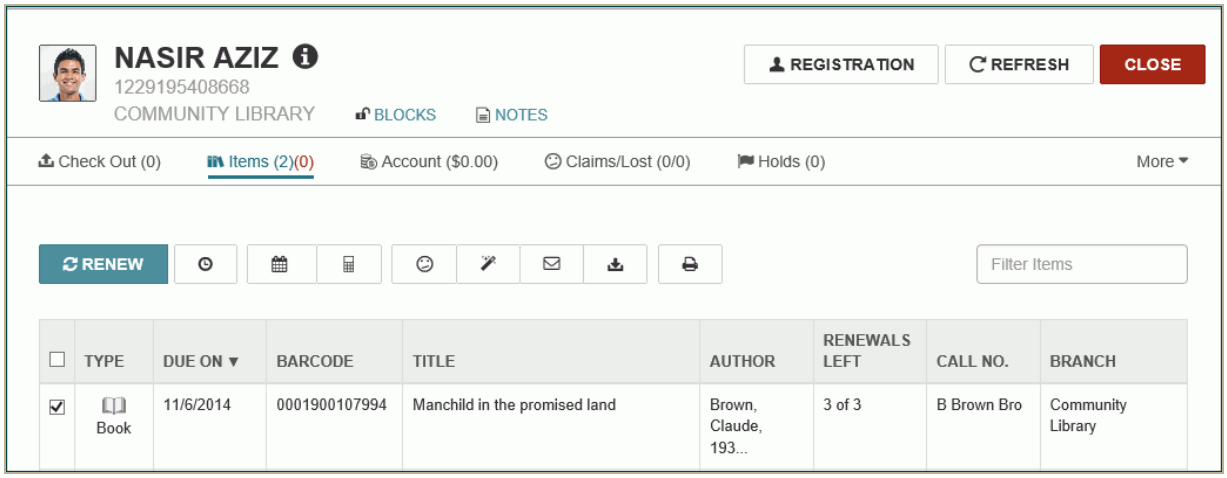
3. To resolve a charge during check in, select one of the following options in the **Action** box:
    - **Waive**
    - **Leave as is**
    - **Pay**
    - **Charge**
4. Select **CONTINUE** to check in the item and perform the selected action on the charges.

# Check Out/Renew Items

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




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




See also:

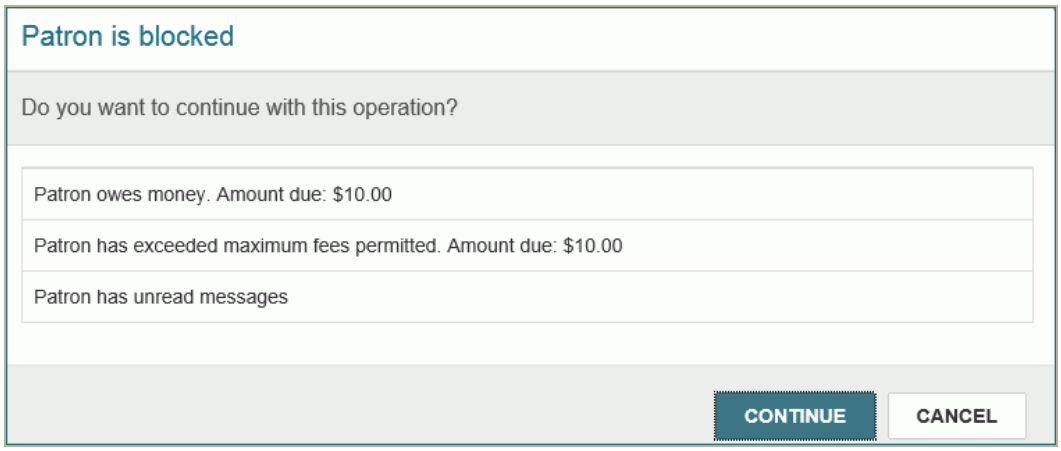

- "Messages and blocks when checking out/renewing " on page 154
- "Check out items" on page 155
- "Set a special due date/loan period during check out" on page 156
- "Renew items from the items out list" on page 79




Innovative Interfaces, Inc. 2014

## Messages and blocks when checking out/renewing

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




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

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

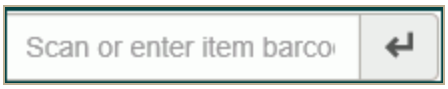
# Check out items

To check out items to a patron:

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

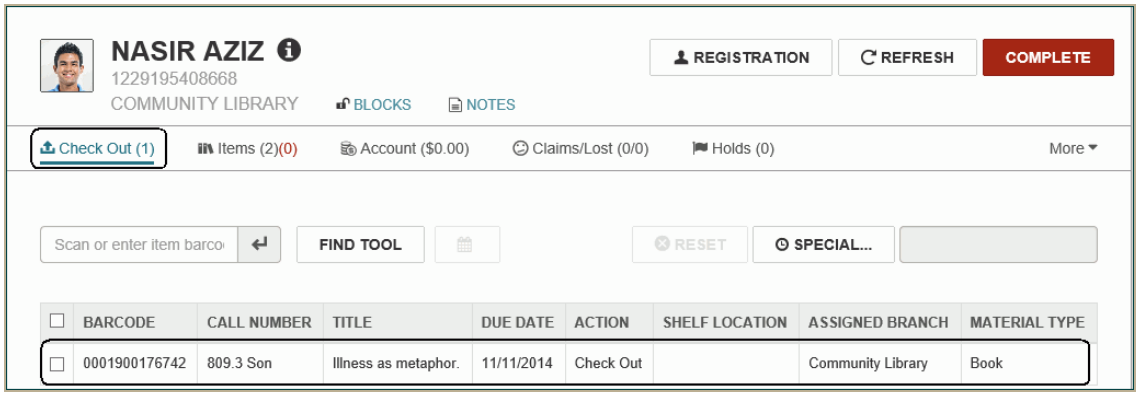
1. Open the patron's record.

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

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

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






Innovative Interfaces, Inc. 2014

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

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

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

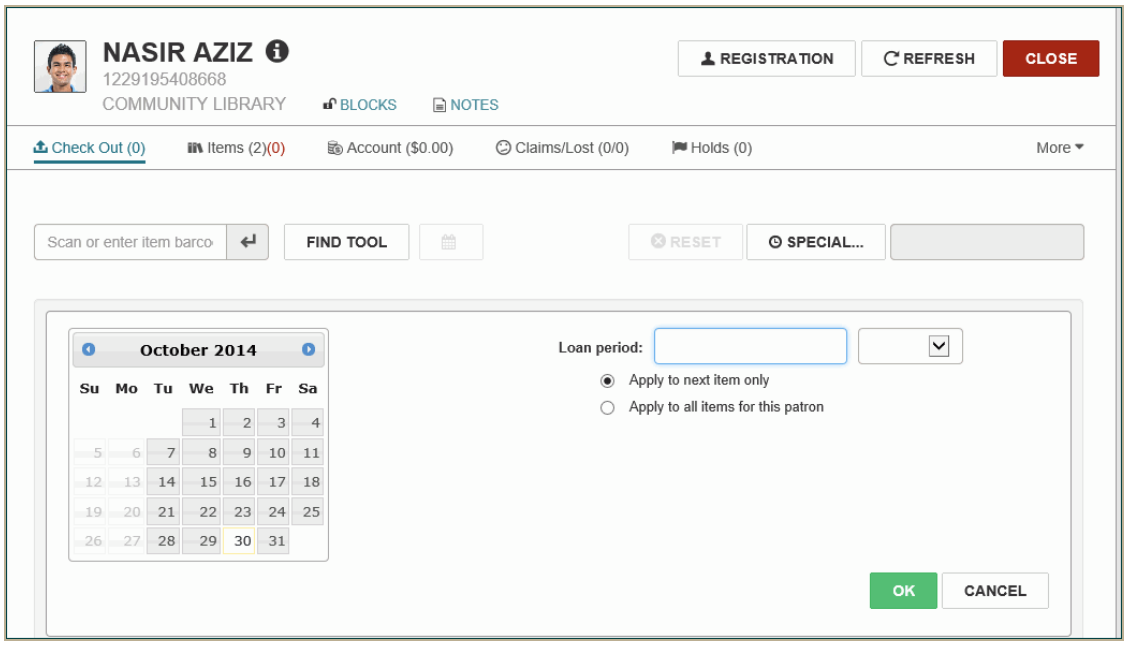
Open the patron's record.

The Check Out view is displayed.

1. Select **SPECIAL**

   The area below the button expands.

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



Innovative Interfaces, Inc. 2014

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

## Reset a special due date/loan period

To reset a special due date:

1. Open the patron's record.

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

2. Select **RESET**.

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

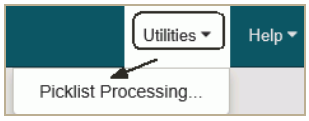


Innovative Interfaces, Inc. 2014

# Holds Picklist

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

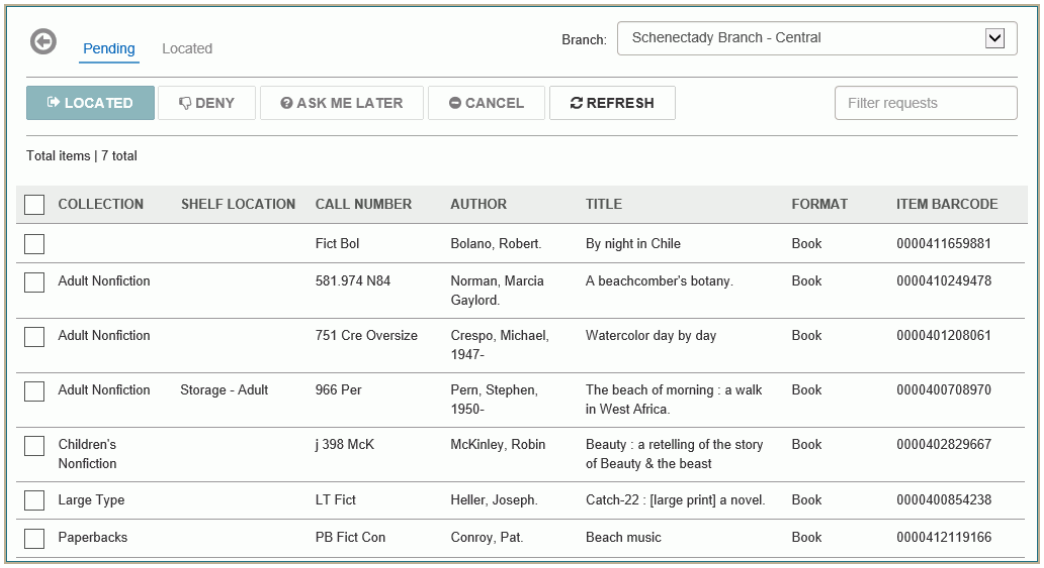
To open the Holds Picklist, select the **Utilities|Picklist processing**.




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

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

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




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

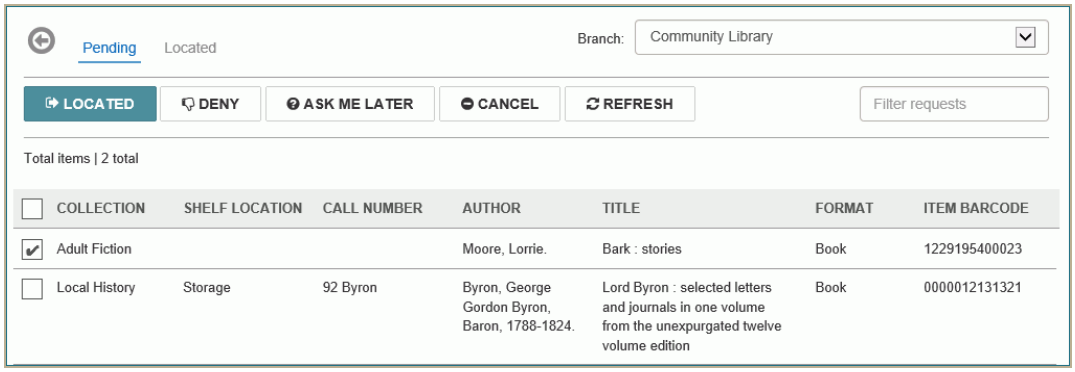


Innovative Interfaces, Inc. 2014

## Changing pending hold requests from the holds picklist

To perform an action on hold requests in the picklist:

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




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

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



Innovative Interfaces, Inc. 2014

See also:


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

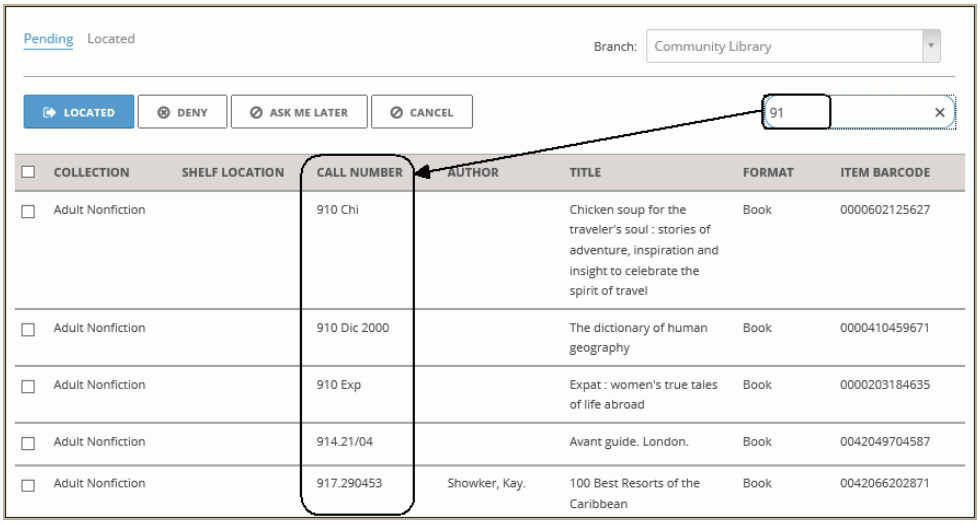
## Sort and filter the picklist

To sort and filter the picklist:

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

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

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






Innovative Interfaces, Inc. 2014

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

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

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

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

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

## Indicate an item was located

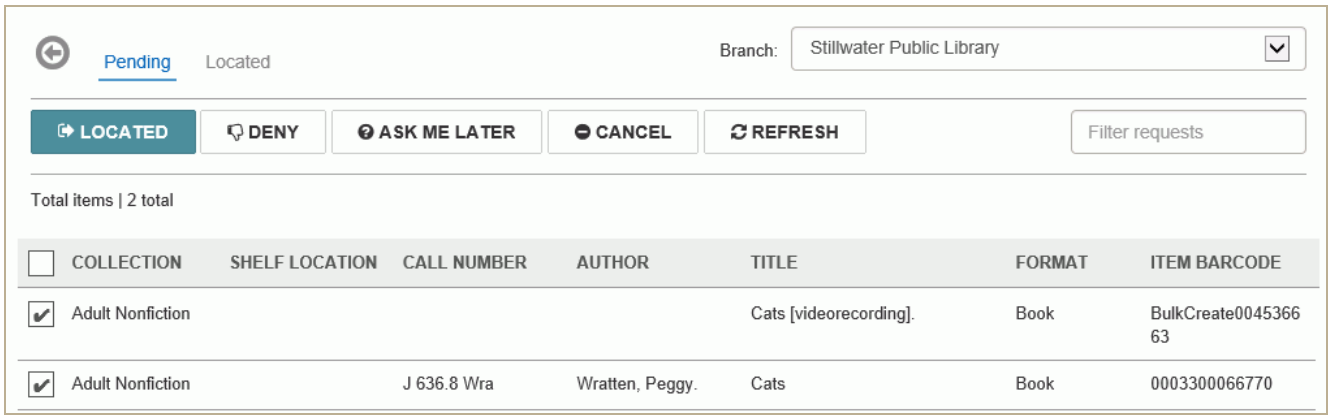
To mark items as located in the picklist:

1. Open the picklist.

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

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

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




The following occurs for each hold request marked as Located:

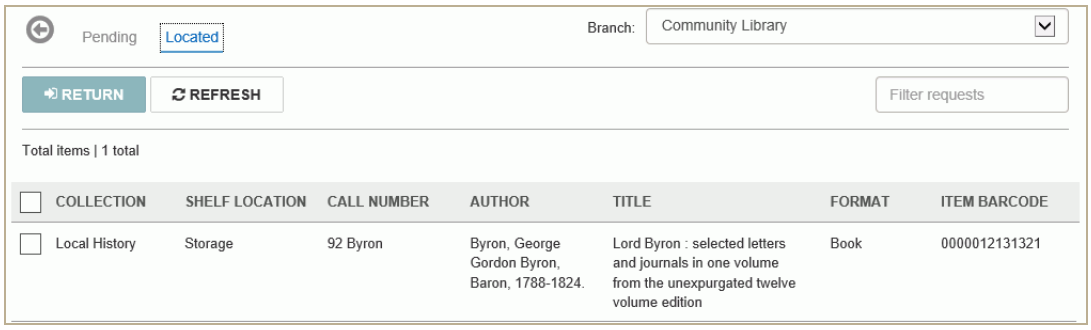
- The hold request status changes to Located
- The item status remains In
- The request moves from the **Pending** list to the **Located** list.

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

# Return a located item to the Pending list

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

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




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

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

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



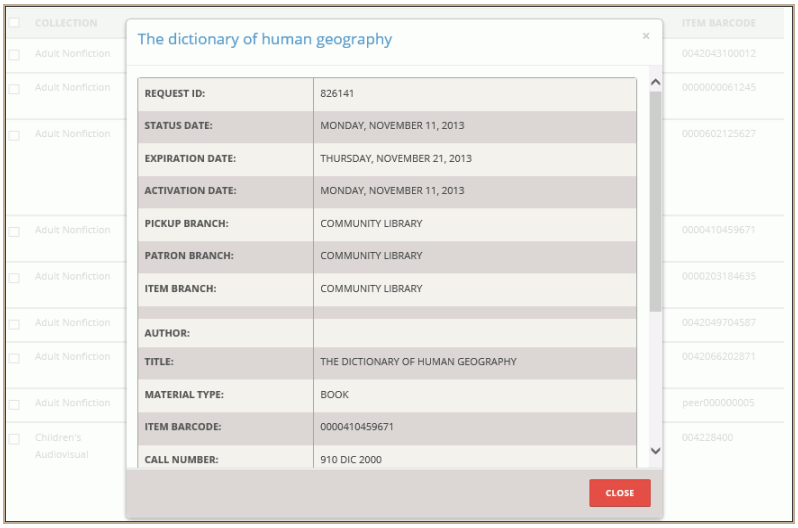
Innovative Interfaces, Inc. 2014

## View hold details from the picklist

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

**Note:**

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




The following details are displayed:

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



Innovative Interfaces, Inc. 2014

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

## Deny hold requests in the picklist

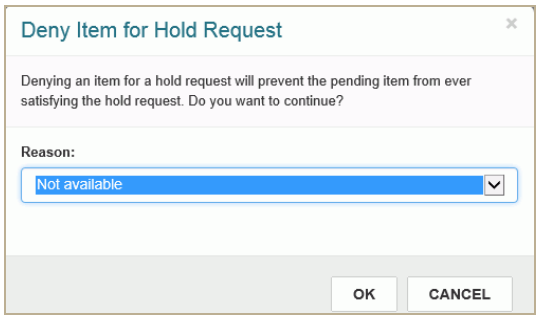
If an item is not found or it is found but it is damaged or otherwise unavailable to fill the hold request, you can deny the request from the picklist.

To deny one or multiple hold requests from the picklist:

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

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

   A dialog box opens.



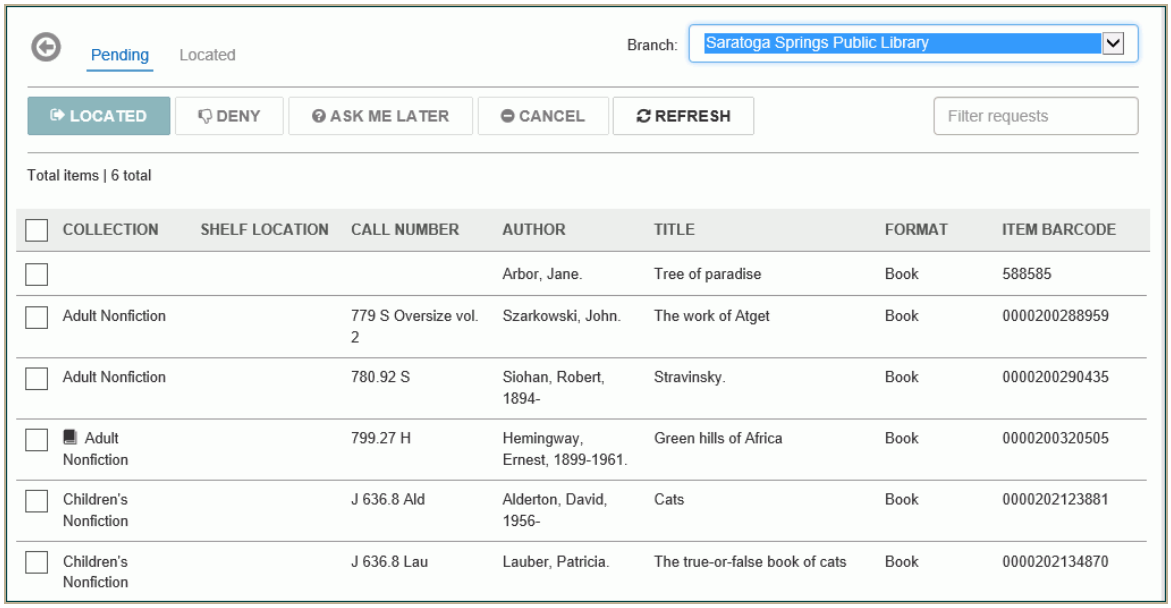

3. Select the reason the hold request was denied from the **Reason** drop-down list box.

   The hold request or requests are canceled.

# Cancel hold requests in the picklist

To cancel one or more hold requests in the picklist:

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




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

   The request or requests are canceled.



Innovative Interfaces, Inc. 2014

# Index


**A**

account

waiving charges from a patron's financial 88

associations

adding patron 141

editing existing 143

associations, patron

deleting 145

asterisks

indicating required fields 14

**B**

bibliographic records

go to title in PAC 60

opening and viewing 52, 59

placing hold requests from 105

blocks

adding patron 124

encountered during check outs and renewals 154

blocks, patron

deleting 125

branch

entering to sign in 5

**C**

camera

requirements 2

charges

adding to a patron's account 90




Innovative Interfaces, Inc. 2014

checking in
items 147
managing fines 148
overview 146
checking out
setting a special due date or loan period 156
checking out and renewing
messages and blocks 154
claiming
from the items out list 83
claims
resetting the claims count 100
collections
removing a patron's financial account from 95
viewing a patron's summary 94
credits
adding to a patron's account 92

**D**

dates
entering 15
entering in Leap 15
default search options
specifying in Find Tool 48
denying hold requests
picklist 168

**E**

estimating fines
from the items out list 82



Innovative Interfaces, Inc. 2014

## F

filter
- keyboard shortcut 10

filters
- applying in Find Tool 44
- using 17

Find Tool
- applying filters 44
- customizing by user 48
- differences in Leap and Polaris ILS 34
- doing a basic search 36
- Polaris administration settings that do not affect 34
- results list 34
- setting columns for search results 46
- setting up a power search 39
- setting up an SQL search 41
- sorting search results 51
- tabs 34

fines
- estimating from the items out list 82
- managing duriing check-in 148

## H

Help menu
- options 10

history
- viewing holds 121

hold requests
- canceling from the picklist 169
- denying from the picklist 168
- mark as Ask Me Later 163

placing from bibliographic records 105
holds
canceling 115
deleting 120
denying 116
filling now 111
grouping 117
messages or blocks when placing 102
modifying 112
placing from a patron's record 103
placing multiple for same patron 109
reactivating 114
viewing details and history 121
holds picklist
indicating items were located 164
overview 159

## I

IE11
patron password issue 7
iPad
display issues 7
requirements 2
item record
described 55
item records
opening and viewing 52
opening from the notices view 135
items
checking in 147
items out list
claiming from 83

declaring an item lost 84
estimating fines from 82
renewing from 79
viewing 77

**K**

keyboard shortcuts
accessing the list 10

**L**

Leap application
client requirements 1
details and user information 10
permissions 4
required fields 14
user interface elements 9
library account
overview of patron's 76
list views
using 17
lists
summary bar 16
lost items
declaring from the items out list 84

**M**

messages
adding patron 138
encountered during check out and renewal 154
messages and blocks
hold requests 102



Innovative Interfaces, Inc. 2014

messages, patron
deleting 139

**N**

notes
adding to a patron record 127
notices
opening the associated item record 135
viewing the history for an item 133
notification history
viewing an item's 133

**O**

overview 1

**P**

patron's checked out items
viewing 77
patron's reading history
viewing the list 129
patron associations
adding 141
deleting 145
editing existing 143
patron blocks
adding 124
deleting 125
patron messages
deleting 139
patron notes
deleting 128



Innovative Interfaces, Inc. 2014

patron passwords
issue in IE11 7
patron pictures
updating 74
patron record
described 53
overview of library account view 76
patron records
finding existing 65
opening and viewing 52
registering a new patron 71
using additional search options 67
patron registration
viewing, editing, or renewing 69
patron's collection summary
viewing 94
patron's financial account
adding a charge 90
adding credits 92
paying charges 87
removing from collections 95
viewing 86
viewing a patron's transaction summary 96
patron's transaction summary
viewing 96
patrons
adding a photo to registration 74
registering new 71
paying charges
from patron's financial account 87



Innovative Interfaces, Inc. 2014

permissions
overriding 4
overview 4
user 4
picklist
deny a hold request 168
indicating items were located 164
overview 159
power search
saving 40
setting up 39
print options
user 12
printers, receipt 24
configuring for IE on Windows 22
creating a custom paper size for Chrome on Windows 29

**R**

reading history
removing items from 130
viewing the patron's 129
receipt printers
configuring for Chrome and Safari on MAC OS X 31
configuring for Chrome on Windows 26
configuring for IE on Windows 22
creating a custom paper size for Chrome on Windows 29
creating a custom paper size for IE on Windows 24
creating a custom paper size for Safari or Chrome on MAC OS 32
records
opening and viewing in Leap 52
renewing 79
setting a special due date or loan period 81

required fields
asterisks 14

## S

saved searches
deleting 43
search results
setting columns in Find Tool 46
sorting 51
searching
automatic suggestions 65
doing a basic search for a record 36
for records 18
patron records 65
patron records, Find Tool 67
using search boxes 18
sign in
Leap 5
signing in
entering branch and workstation 5
entering username and password 5
special loan
setting for session 12
special loan period
resetting 158
setting during check out 156
SQL search
setting up 41

## T

transaction summary
viewing a patron's 96



Innovative Interfaces, Inc. 2014

## U

user
customizing Find Tool 48
print options 12
setting special loan for session 12
user interface
elements 9
username and password
entering 5
users
permissions 4

## W

waiving charges
from patron's financial account 88
workforms
moving among 10
opening multiple 10
workstation
entering to sign in 5
requirements 2



Innovative Interfaces, Inc. 2014