



OH-IUG

Leap Update:   

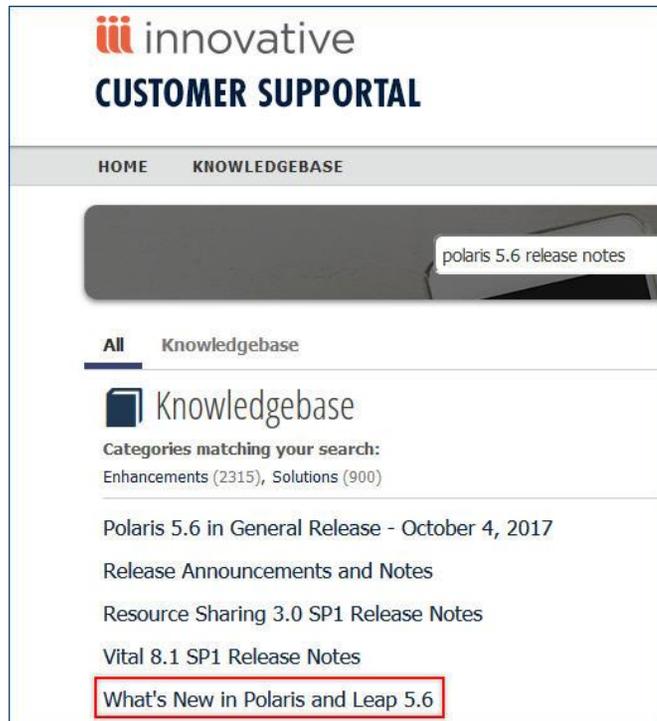
Jason Boland

October 12, 2018

the library is open

- ” Find Tool
- ” Record Sets
- ” Holds, ILL and INN-Reach
- ” Checkout / Check In
- ” Financial
- ” Everything Else

“ Supportal: Source of information





Find Tool

Find Tool - Bibliographic Record

Bibliographic Record ▶ Basic Search ▶ Call Number ▶ Exact (*) ▼

Exact

Exact (*)

5.6

Exact match implicitly truncated is offered for fields that support it.

6.1

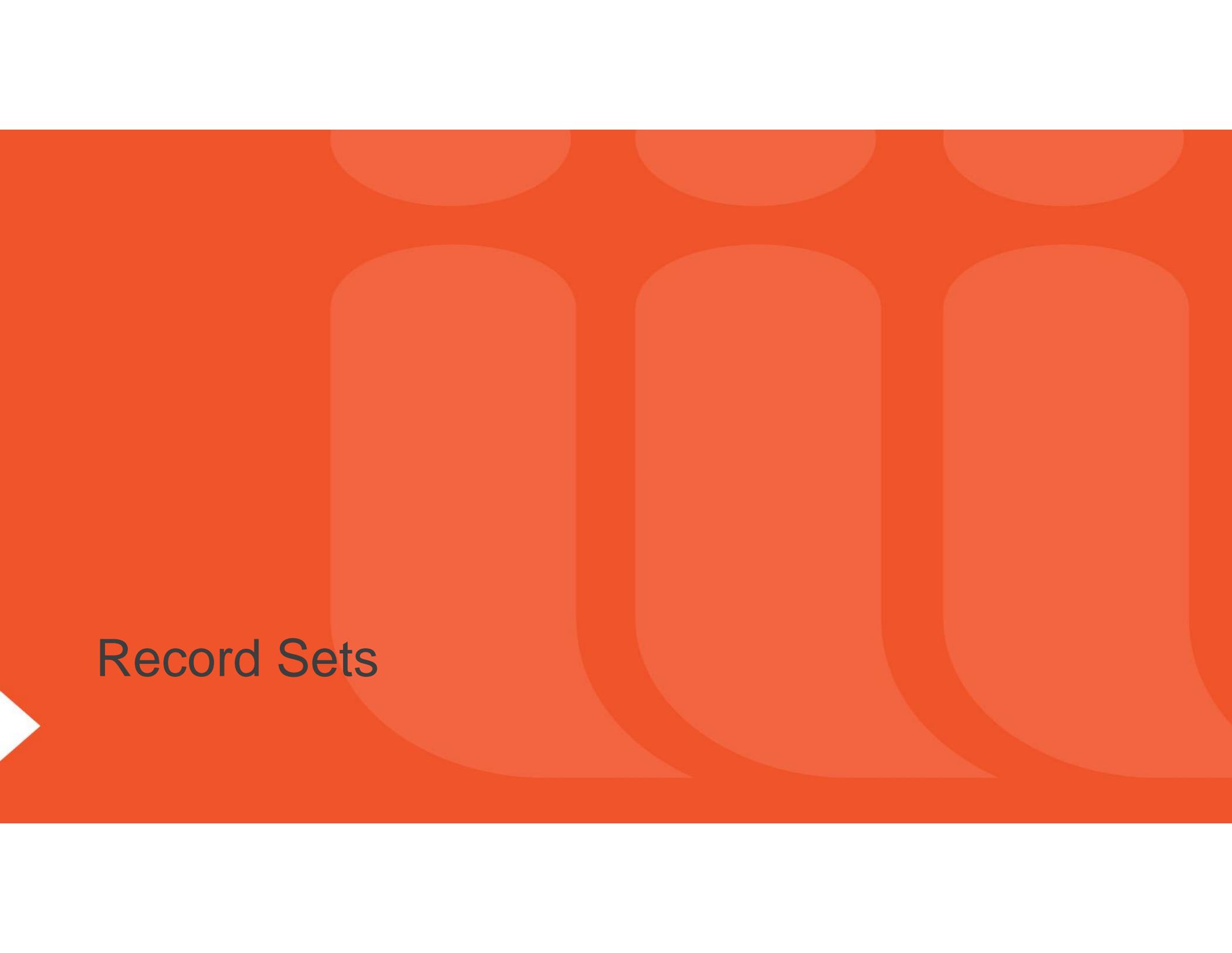
Find Tool - Bibliographic Record

Bibliographic Record ▶ Basic Search ▶ All keyword fields ▶ Keyword (All) ▶

dogs

<input type="checkbox"/>	Title	Author	Format	Linked Items	Holds	Publicati...	Call Number	Control...	Reco
<input checked="" type="checkbox"/>	Walt Disney's Lady and...		Music ...	1	0	1997		153819	Final
<input checked="" type="checkbox"/>	I am puppy, hear me ya...	Shaff, Val...	Book	1	0	2000	636.707 S525i	153949	Final
<input checked="" type="checkbox"/>	Here come Poppy and ...	Gardiner, ...	Book	1	0	2000	[E]	153956	Final
<input checked="" type="checkbox"/>	Strange neighbors	Labatt, M...	Book	1	0	2000	jC813/.54	153965	Final
<input type="checkbox"/>	Bad dog	Laden, Nina.	Book	1	0	2000	[E]	153966	Final
<input checked="" type="checkbox"/>	George and Diggety	Stern, Ma...	Book	1	0	2000	[Fic]	153978	Final
<input type="checkbox"/>	Chewy Lewis	Schneider	Book	2	0	2000	[E]	154000	Final

De-select a Row in the Find Tool



Record Sets

Support for Patron Record Sets

5.6

Find Tool - Record Set

Record Set ▶ Basic Search ▶ Type ▶ Exact ▶

◀ Patron

Type

- Authority
- Bibliographic
- Item
- Patron

Name	Record Type	Owner	Total Records	Creation Date	Note
Harford - Conservatory P...	Patron	Polaris Library ...	13	9/25/2014	
Harford - Ballroom Patrons	Patron	Polaris Library ...	10	9/25/2014	
Patron Address Type Cle...	Patron	Polaris Library ...	0	3/19/2018	
Inactive Holds	Patron	Hudson Public ...	0	6/18/2018	

Support for Patron Record Sets

Patron Record Set ⓘ

Name

Owner

Record Set ID

Note

Record Count

<input type="checkbox"/>	BARCODE	NAME	STREET	CITY	STATE	POSTAL CODE	LIBRARY
<input type="checkbox"/>	21526002482106	\George, CHERYL KAMAL ABDULLA	283 SECOND STREET #2	PENCE	WI	54550	Ballroom Library
<input type="checkbox"/>	21526003167235	ACHARYA, JAMES M	62 LIBERTY STREET	PRT WASHINGTON	NY	11054	Ballroom Library
<input type="checkbox"/>	21526003693982	ACHARYA, Steven K	107 Joppa Hill Rd.	STEAMBURG	NY	14783	Ballroom Library
<input type="checkbox"/>	21526000111442	ADAMS, DEJA L	5 MOORES CT	EASTCHESTER	NY	10709	Ballroom Library
<input type="checkbox"/>	21526000995687	ADAMS, ERIC E.	5 BROWN ST.	RICHLAND	WA	99354	Ballroom Library
<input type="checkbox"/>	21526003850826	Adhansopoulos, Nicholas T	47 Mockingbird Hill Road	ELROY	WI	53929	Ballroom Library

- “ Create a New Empty Patron Record Set
- “ Create a Patron Record Set from All Find Tool Results
- “ Create a Patron Record Set from Selected Find Tool Results
- “ Create a Record Set from the Patron Record Workform
- “ Create a Record Set of Linked Item Records from a Patron Record Set
- “ Add Patron Records from Find Tool Results to an Existing Record Set
- “ Copy Patron Records from One Record Set to Another
- “ Copy Records from a Patron Record Set to a New Record Set
- “ Add a Patron Record to an Existing Record Set from the Patron Record Workform
- “ Record Set View of Patron Record Workform
- “ Modify a Patron Record Set
- “ Add Patron Records to a Record Set from a File
- “ Delete a Patron Record Set

```
Cat Titles.txt - Notepad
File Edit Format View Help
31111002308489
31111171537746
31111001169635
31111004741127
31111006806738
```

5.6

Add Patrons or Items to a Record Set from a File

The file must be in one of the following formats: .txt, .csv, or .xls/.xlsx, and the barcodes must be in the file. If it is an Excel file, you can specify the column that contains the barcode.

Item Record Set ⓘ

SAVE ACTIONS - REFRESH RESULTS CLOSE

Name: Owner: Record Set ID:

Note: Record Count:

Scan or enter barcode ↵ FIND TOOL

ACTIONS - Filter Records

Add from File

ASSIGNED	MATERIAL	SHELF	CONTROL

6.1

Check in items as a batch via file.

Item Record Set ⓘ

SAVE ACTIONS - REFRESH

Name: Waukesha - Ballroom, Conservatory

Owner: Polaris Libr

Note:

Scan or enter barcode ↵ FIND TOOL ACTIONS -

<input type="checkbox"/>	TITLE	ASSIGNED BRANCH	COLLECTION	MATERIAL TYPE
<input type="checkbox"/>	200 years of American sculpture	Ballroom Library	Nonfiction (NF)	Book

Owning Branch (No change) ▾

Assigned Branch (No change) ▾

Collection (No change) ▾

Shelf Location (No change) ▾

Home Branch (No change) ▾

Temporary Location

Actions Menu:

- Bulk Change
- Create Bibliographic Record Set
- Export
- Delete

6.1

You can bulk change item records from an item record set in Leap.

Bibliographic Record Set ?

SAVE ACTIONS ▾ REFRESH RESULTS CLOSE

Name: Hot Teen Reads Owner: Washburn Public Library (br)

Note:

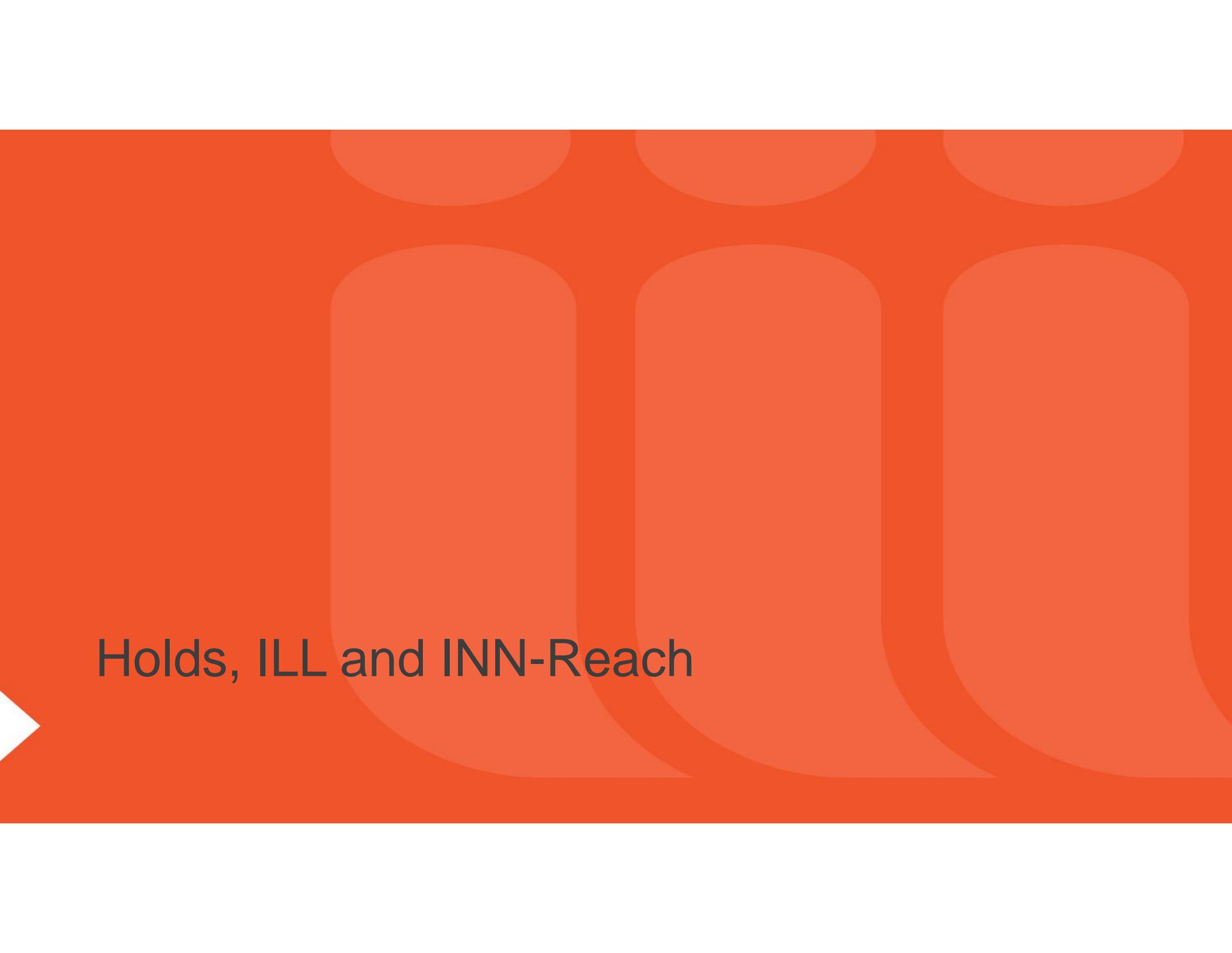
Record Set ID: 101 Record Count: 13

Scan or enter barcode FIND TOOL ACTIONS ▾ Filter Records

<input type="checkbox"/>	TITLE	AUTHOR	FORMAT	LINKED ITEMS	HOLDS	PUB DATE	CALL NO.	CONTROL NUMBER	STATUS
<input type="checkbox"/>	Beautiful chaos	Garcia, Kami.	Book	7	0	2011	[Fic]	460508	Final
<input type="checkbox"/>	Beautiful creatures	Garcia, Kami.	Book	12	0	2009	[Fic]	412734	Final

Export to Excel from a Record Set

6.1



Holdings, ILL and INN-Reach

Link to Hold Request from Hold in Patron Record

5.6

6.0

Click on hold request to bring up hold workform. In 6.0, one-click to get to hold request.

STACEY SMITH ⓘ

21111800440957
CONSERVATORY LIBRARY

REGISTRATION ACTIONS - REFRESH CLOSE

BLOCKS NOTES

Check Out (0) Out (0) / Overdue (0) Account (\$84.25) Claims (0) / Lost (0) **Holds (1) / Held (0)** ILL (0) / Held (0) Reading History Associations Notices More ▾

New Hold Cancel Reactivate Delete Fill Now Convert To ILL Deny Ask Me Later Return More ▾ Filter Holds

<input type="checkbox"/>	AUTHOR ▾	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS	PICKUP BRANCH	QUEUE	HOLD UNTIL	GROUP
<input type="checkbox"/>	Carley, Wayne.	Mixed-up magic.	Book		10/8/2018	Active	Hudson Public Library	2		

Hold Request ⓘ

Mixed-up magic.

Request ID: 1714 Bib control number: 31301

Status: Active 10/8/2018 This item only

Request date: 10/8/2018 Borrow by mail

Origin: Library Tracking number:

Hold Queue Filter

5.6

6.0

You can filter the hold queue by any column in 5.6. You can select a column to filter in 6.0.

Holds Queue

Mixed-up magic.
By Carley, Wayne.
Control number: 31301

PLACE HOLD SAVE REFRESH RESULTS CLOSE

Queue (4) All Holds Requests (4)

Up Down Top Bottom

	POSITION	PATRON NAME	PATRON BRANCH	STATUS	PICKUP BRANCH	VOLUME	DATE	EXPIRATION DATE
<input type="checkbox"/>	1 of 4	Laws, Lissa M.	Limantour Beach Library	Located	Hudson Public Library			7/7/2019
<input type="checkbox"/>	2 of 4	Smith, STACEY	Conservatory Library	Active	Hudson Public Library			10/8/2019
<input type="checkbox"/>	3 of 4	JOHNSON, MELANIE HOANG	Ocean Beach Public Library	Active	Hudson Public Library			10/8/2019
<input type="checkbox"/>	4 of 4	PAUL, BOC, Rachel	Hudson Public Library	Active	Hudson Public Library			10/8/2019

Patron Branch Filter Holds

Filter by Column

- Patron Name
- Patron Branch
- Status
- Pickup Branch
- Volume
- Issue
- Request Date
- Expiration Date

Phone number added to request notification information

6.0

Fill hold request

George's marvelous medicine
Barcode: 31111120285396

satisfies a hold request for:
Laudon Sorlin, Aki
Barcode: 21111300148073
Phone: 330-521-9967

Notification option: Mailing Address
Exclude from hold notices: No

Do you want to hold the item?
(Click Cancel to stop the check-in/check-out process.)

Set in Polaris Administration:

<System/Library/Branch> | Parameters | Request | Hold Options | Staff client & Pac
Display Patron phone when trapped

6.1

The option to set an item to a circulation status of Missing is available only if permissions on the login allow changing the item's circulation status, and login branch matches the item's assigned branch.

Picklist

📌 Pending (1) 📍 Located (0) ⌚ Unclaimed (3) ⌚ Unclaimed ILL (1) 📦 Holds to Transfer (0)

📍 Located ⌚ Ask Me Later **🔍 Missing** 🚫 Deny ⓘ Properties INN-Reach Only

Total items | 1 total

<input checked="" type="checkbox"/>	COLLECTION	SHELF LOCATION	CALL NUMBER	AUTHOR	TITLE
<input checked="" type="checkbox"/>	Nonfiction		598.885 mia	Middleton, Alex L. A.	American goldfinch

INN-Reach filter added to Picklist

6.1

Located Ask Me Later Missing Deny Properties **INN-Reach Only** Filter requests

Total items | 4 total

<input type="checkbox"/>	COLLECTION	SHELF LOCATION	CALL NUMBER	AUTHOR	TITLE	MATERIAL TYPE	PICKUP BRANCH	BARCODE	PENDING DATE
<input type="checkbox"/>	<i>I</i> Fiction				Polaris title to use for lending.	Book	HPL	31111000000710	9/14/2018
<input type="checkbox"/>	■ Fiction		J FIC DAHL, R	Dahl, Roald.	George's marvelous medicine	Book	HPL	31111120285396	7/7/2018
<input type="checkbox"/>	Fiction		J FIC TUTTLE, L	Tuttle, Lisa, 1952-	Catwitch	Book	HPL	31111120418170	7/7/2018
<input type="checkbox"/>	■ Teen Fiction		YA FIC NORTON, M	Norton, Mary.	Bed-knob and broomstick	Book	HPL	31111000314577	7/7/2018

INN-Reach requests added to Request Manager

6.1

Request Manager

Branch: Status: By:

[Holds](#) [ILL](#) [INN-Reach](#)

Total items | 1 total

<input type="checkbox"/>	AUTHOR	TITLE	FORMAT	PATRON NAME	INN-REACH PICKUP BRANCH	BARCODE	ITEM	SHIPPED DATE
<input type="checkbox"/>	Bell, Thomas, 1903-1961.	Out of this furnace	Book	INNREACH, p2184251@nair1	nair1 Print	0001000007425	Held	6/11/2018

5.6

6.0

Convert a Hold to an ILL Request

You can convert an Active, Inactive, Expired, or Not Supplied hold request to an ILL request from the Patron Record workform or the Hold Request workform. In 6.0, you can choose multiple holds.

MS. KATIE NATALIA BRAY ⓘ

21111200304493
HUDSON PUBLIC LIBRARY

BLOCKS **NOTES**

REGISTRATION ACTIONS - REFRESH CLOSE

Check Out (0) Out (5) / Overdue (5) Account (\$10.00) Claims (0) / Lost (0) **Holds (3) / Held (0)** ILL (1) / Held (0) Reading History Associations Notices More ▾

New Hold Cancel Reactivate Delete Fill Now **Convert To ILL** Deny Ask Me Later Return More ▾ Filter Holds

<input type="checkbox"/>	AUTHOR ▾	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS	PICKUP BRANCH	QUEUE	HOLD UNTIL	GROUP
<input checked="" type="checkbox"/>	Allende, Isabel.	La casa de los espíritus	Book		6/27/2018	Active	Hudson Public Library	1		
<input type="checkbox"/>	Asylum Street Spankers (Musical group)	God's favorite band	Music CD	CD FK ASYS GOD'S	6/27/2018	Pending	Hudson Public Library	1		
<input type="checkbox"/>	Martin, George R. R.	A storm of swords	Book		6/27/2018	Active	Hudson Public Library	1		

MS. KATIE NATALIA BRAY 21111200304493
 HUDSON PUBLIC LIBRARY BLOCKS NOTES

REGISTRATION ACTIONS REFRESH CLOSE

Check Out (0) Out (5) / Overdue (5) Account (\$10.00) Claims (0) / Lost (0) Holds (2) / Held (0) **ILL (2) / Held (0)** Reading History Associations Notices More

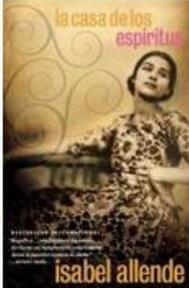
Export Receive Return Cancel Delete

<input type="checkbox"/>	AUTHOR	TITLE	FORMAT	ACTIVATION DATE	STATUS	ITEM	PICKUP BRANCH
<input type="checkbox"/>		X-Men	Videotape		Inactive		Hudson Public Library
<input type="checkbox"/>	Allende, Isabel.	La casa de los espíritus	Book		Inactive		Hudson Public Library



Can start on the:
 Patron Record Workform
 Hold Request Workform

ILL Request i



La casa de los espíritus
 By Allende, Isabel.

Request ID: 226
 Status: Inactive 10/3/2018
 Previous status: Inactive

DAVID HALL ⓘ

8585 HUDSON PUBLIC LIBRARY **BLOCKS** NOTES

REGISTRATION ACTIONS ▾ REFRESH RESULTS CLOS

Check Out (0) Out (1) / Overdue (0) Account (\$0.00) Claims (0) / Lost (0) **Hold (3) / Held (1)** ILL (0) / Held (0) Reading History Associations Notices

New Hold Cancel Reactivate Delete Fill Now Convert To ILL Deny Ask Me Later Return More ▾ Filter Holds

Activation: 10/8/2018 Expiration: 10/8/2019 Pickup: Hudson Public Library

PLACE HOLD **UNLOCK** CANCEL

Title: Pete the Cat Checks Out the Library

Author:

Unlock hold request

Unlocking a hold request allows you to manually edit request information. However, it is not guaranteed that the request will be filled. Do you want to unlock this hold request?

UNLOCK CANCEL

Unlock a New Hold Request

Unlocking a hold request allows generating a hold with to convert to ILL.

5.6

ILL Request ⓘ

Pete the Cat Checks Out the Library

Request ID: 227 Bib control number:
 Status: Inactive 10/8/2018 Item barcode:
 Previous status: Inactive

Patron barcode: 8
 Patron name: Hall
 Patron phone:
 E-mail address: gonzalez.armanda2@gmail.com

SAVE ACTIONS ▾ REFRESH CLOSE

Export
 Receive
 Return
 Cancel
 Delete

Details Notes

Export Receive Return Cancel Delete

<input checked="" type="checkbox"/>	AUTHOR	TITLE	FORMAT	ACTIVATION DATE	STATUS
<input checked="" type="checkbox"/>		Pete the Cat Checks Out the Library	Book		Inactive

5.6

Export an ILL Request

An ILL request with an inactive status can be exported to OCLC. If the patron has multiple inactive ILL requests, they can be exported as a group.

ILL Request ⓘ

Pete the Cat Checks Out the Library

Request ID: 227 Bib control number:
 Status: **Inactive** 10/8/2018 Item barcode:
 Previous status: **Inactive**

Patron barcode: 8
 Patron name: Hall
 Patron phone:
 E-mail address: gonzalez.armanda2@gmail.com

SAVE ACTIONS ▾ REFRESH CLOSE

- Export
- Receive**
- Return
- Cancel
- Delete

Details Notes

Export **Receive** Return Cancel Delete

<input checked="" type="checkbox"/>	AUTHOR	TITLE	FORMAT	ACTIVATION DATE	STATUS
<input checked="" type="checkbox"/>		Pete the Cat Checks Out the Library	Book		Inactive

5.6

Receive an ILL Request

When the ILL item arrives, receiving it will generate a dialog box for the item creation and send notification to the patron for pickup.

ILL Request ⓘ

Pete the Cat Checks Out the Library

Request ID: 227 Bib control number: 545381
 Status: Received 10/8/2018 Item barcode: 321321123
 Previous status: Received

Patron barcode: 8
 Patron name: Hall
 Patron phone:
 E-mail address: gonzalez.armanda2@gmail.com

SAVE ACTIONS ▾ REFRESH CLOSE

- Export
- Receive
- Return**
- Cancel
- Delete

Details Notes

Export Receive **Return** Cancel Delete

<input checked="" type="checkbox"/>	AUTHOR	TITLE	FORMAT	ACTIVATION DATE	STATUS
<input checked="" type="checkbox"/>		Pete the Cat Checks Out the Library	Book		Received

5.6

Return an ILL Request

After the ILL item circulates, it can be marked with circulation status returned.

ILL Request ⓘ

Pete the Cat Checks Out the Library

Request ID: 228 Bib control number:
 Status: Inactive 10/8/2018 Item barcode:
 Previous status: Inactive

Patron barcode: 8
 Patron name: Hal
 Patron phone:
 E-mail address: gonzalez.armanda2@gmail.com

DAVID HALL ⓘ

8585
 HUDSON PUBLIC LIBRARY **BLOCKS** NOTES

REGISTRATION ACTIONS - REFRESH CLOSE

Check Out (0) Out (1) / Overdue (0) Account (\$0.00) Claims (0) / Lost (0) Holds (3) / Held (1) **ILL (2) / Held (0)** Reading History Associations Notices More ▾

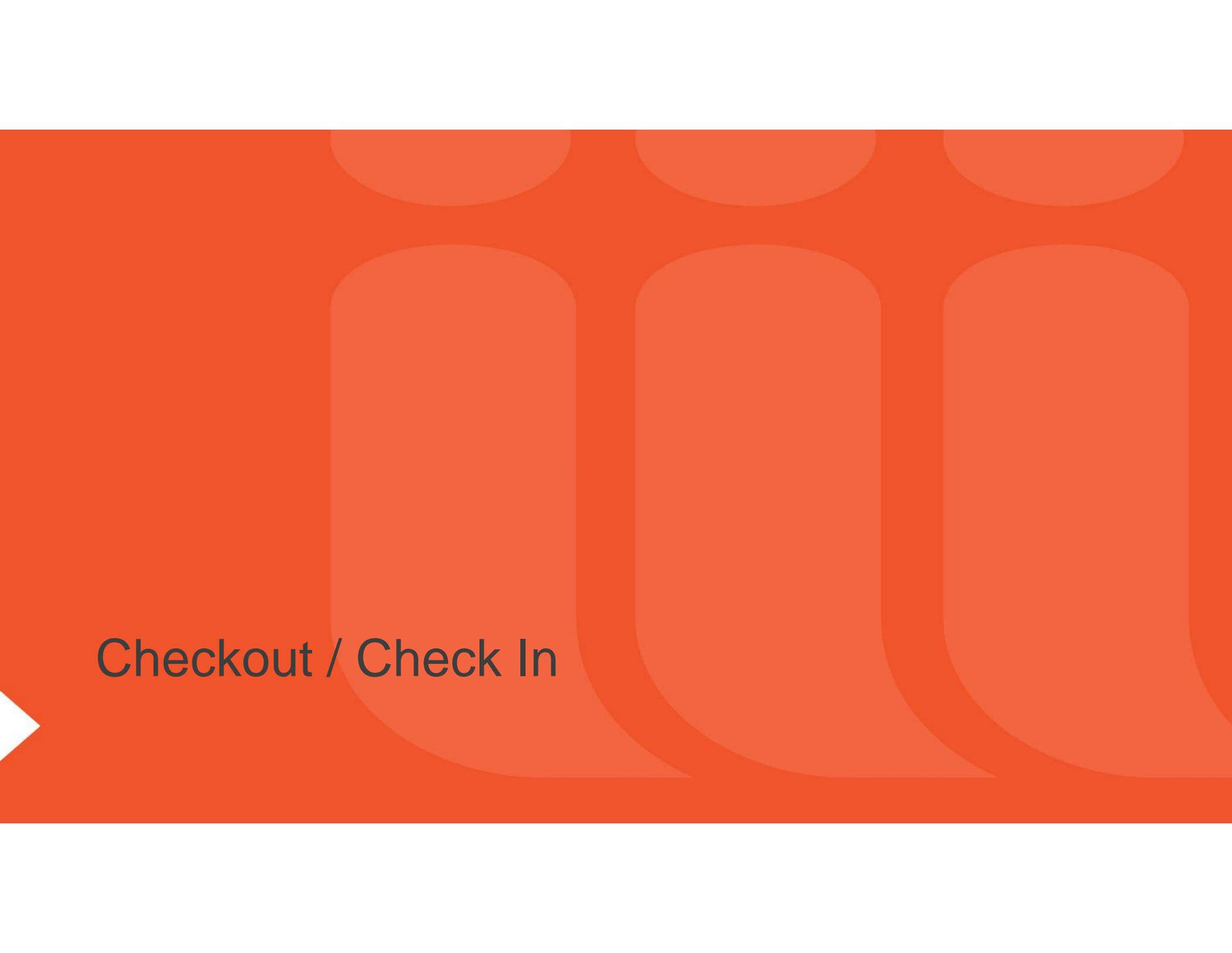
Export Receive Return **Cancel** Delete Filter ILLs

<input type="checkbox"/>	AUTHOR	TITLE	FORMAT	ACTIVATION DATE	STATUS	ITEM ▾	PICKUP BRANCH
<input checked="" type="checkbox"/>		Pete the Cat Checks Out the Library	Book		Inactive		Hudson Public Library

5.6

Cancel or Delete an ILL Request

An ILL request may be cancelled if active or inactive or deleted if inactive, cancelled or returned. Cancel retains the request with that status, delete purges the request from Polaris.



Checkout / Check In

ANAR KAMAT ⓘ
 1001900146413
 COMMUNITY LIBRARY

REGISTRATION ACTIONS REFRESH CLOSE

BLOCKS NOTES

Check Out (0) **Out (2) / Overdue (1)** Account (\$25.00) Claims (0) / Lost (0) Holds (4) / Held (1) ILL (1) / Held (0) More ▾

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

Nov 2017

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

Reason
 Select a reason ▾

Note

RESET DUE DATE CANCEL

6.0

Reason required for Change Due Date

In Polaris Administration, a table can be set up with a list of reasons for changing a due date and a separate setting can require it be supplied.

Check In CLOSE

Normal (1)
 Bulk (0)
 In House (0)
 Inventory (0)

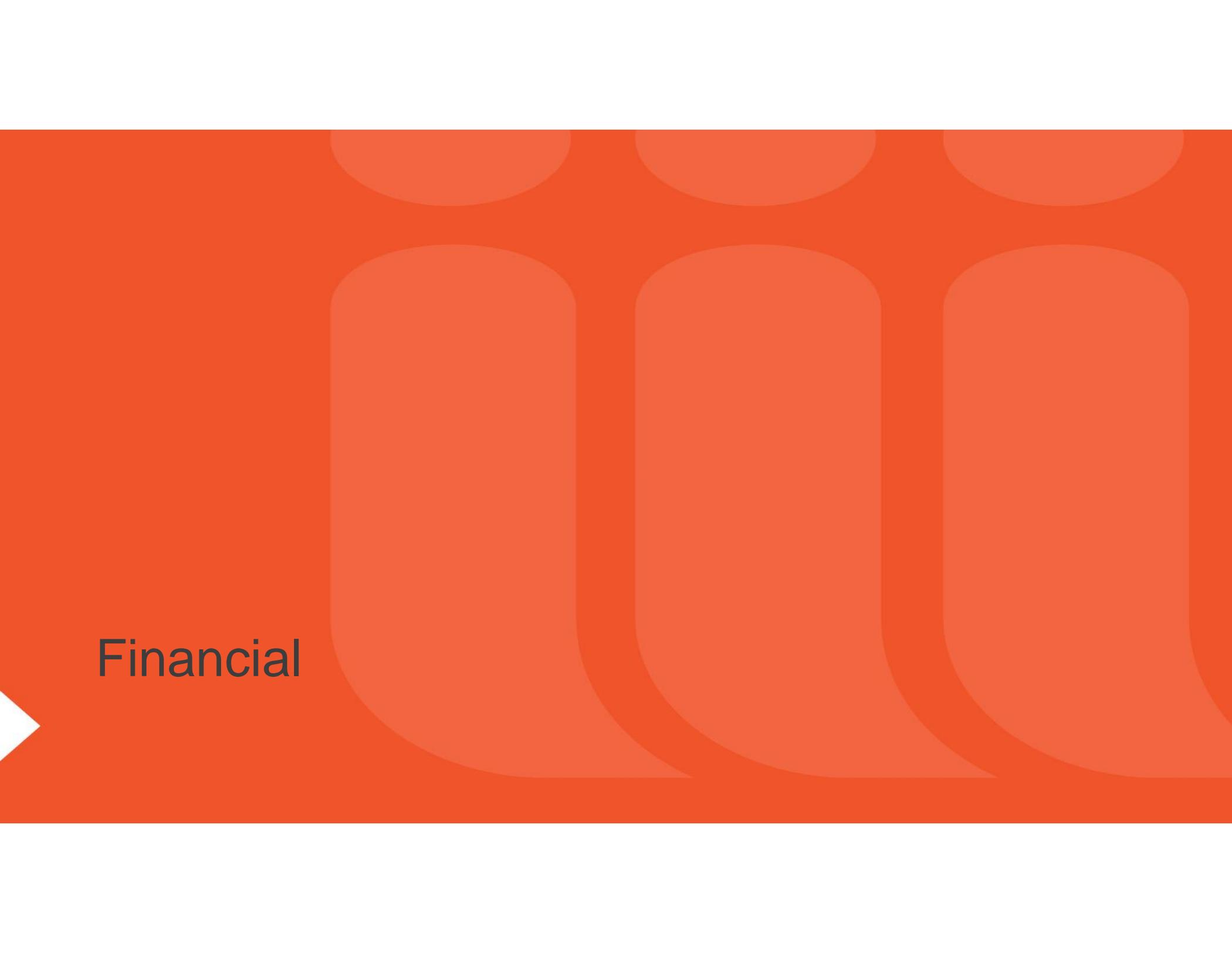
Free Days:
ACTIONS ▾

<input type="checkbox"/>	BARCODE	DUE DATE	STATUS	COMMENT	TITLE	MATERIAL TYPE	SHELF LOCATION	CALL NUMBER	PATRON NAME	ASSIGNED BRANCH	COLLECTION
<input type="checkbox"/>	0001900024157	12/12/2017	Out -> In		10 lb. penalty	Book		Fict Fra	Anar Kamat	Community Library (COB)	

6.1

Link to the Patron or Item from Check In

When checking in items in Leap, you can select a row to open the item record or open the patron record from the patron name link.



Financial

6.0

You can accept credit card payments from Leap if your library has a license for Polaris credit card payments and a license for the payments gateway (EnvisionWare or Comprise), and the licensed gateway is configured in Polaris Administration.

6.1

Credit card payments can be refunded.

6.1

You can print a list of the patron's current fines and fees from the Patron Record.



Everything Else

ANAR KAMAT 1001900145413 COMMUNITY LIBRARY

REGISTRATION ACTIONS REFRESH CLOSE

Check Out (0) Out (2) / Overdu

Scan or enter item barcode

BARCODE CALL NUMBE

Blocks Notes

The record is being modified by another staff member

PATRON STATUS IS LOCKED BY:
USER: POLARISEXEC
WORKSTATION: PEER
OBJECT ID: 280953
OBJECT TYPE: 44
LOCK DATE: 9/11/2017
EMAIL: POLARISEXEC@IIL.COM

PATRON RECORD IS LOCKED BY:
USER: POLARISEXEC
WORKSTATION: PEER
OBJECT ID: 280953
OBJECT TYPE: 27
LOCK DATE: 9/11/2017
EMAIL: POLARISEXEC@IIL.COM

CLOSE

5.6

Staff Email added to Lock Information

5.6

The screenshot shows a software interface with three buttons at the top: 'Add Block', 'Delete', and 'Properties'. The 'Properties' button is highlighted with a red box. Below the buttons is a table with the following content:

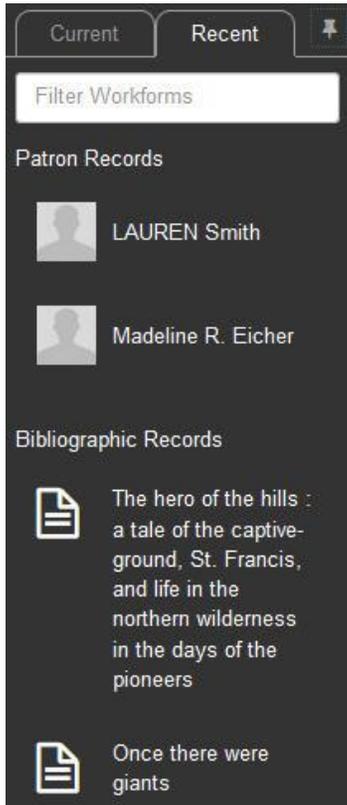
<input type="checkbox"/>	BLOCK DESCRIPTION
	Total overdue items: 1
	Long overdue: 1 of 1
	Patron owes money. Amount:
<input checked="" type="checkbox"/>	Please check patron's address.

An 'About' window is open over the bottom right of the table, displaying the following information:

Created by:	polarisguest
Date created:	6/26/2017 3:25:12 PM
Library:	Hudson Public Library
Workstation:	TESTDRIVETERM
Modified by:	
Date modified:	

The Block Properties window displays the details regarding that block.

- 5.6** You can use Leap for circulating media from an integrated media dispenser. The media dispenser interacts with Leap using the existing Media Dispenser parameter settings in Polaris Administration.
- 6.0** The keyboard shortcut, CTRL + SHIFT + Z, was implemented as an alternative to clicking the SAVE button when you make a change.
- 6.1** When you check out an item for an Outreach Services patron from Leap, an alert message appears if the patron already borrowed this item.



The Workform tracker has two tabs: the Current tab displays the records and record sets you have open, and the Recent tab displays recently-opened patron, item, and bibliographic records.

6.0

ut (4) / Overdue (4) Account (\$0.00) Claims (0) / Lost (0) Holds (0) / Held (0) ILL (0) / Held (0) Reading History

Profile

Barcode *	Registered At *
<input type="text" value="21111602061199"/>	<input type="text" value="Kitchen Library"/>
Former Barcode	Patron Code *
<input type="text"/>	<input type="text" value="Adult"/>

SAVE
RENEW
RESET PASSWORD
COPY

6.1

You can now reset a password for an existing patron from the Patron Registration workform in Leap.

Item Record ⓘ



The Bourne ultimatum
By Ludlum, Robert, 1927-2001.

Barcode: 31111001566620
Call number: F LUDLUM
Collection: Fiction
Shelf location: None
Owning branch: WPKL

In-Transit

6.0

Circulation status may appear at the bottom of the book image in the Item Record display.

Settings SAVE REFRESH CLOSE

[Print Options](#) [Special Loan](#) [Workform User Defaults](#)

Workforms: Default view		Request manager: Default status		Workform tracker: Recent records
Check in	Bulk	Holds	Active	Patron 2
Item record	Circulation	ILL	Inactive	Bibliographic 2
		INN-Reach	Active	Item 2

6.1

On the Settings workform, the Workform User Defaults tab now has drop-down lists from which you can select your defaults for displaying Leap workforms.

 innovative

Thank you!

Jason Boland
jboland@iii.com

the library is open