

POLARIS LEAP

CIRCULATION

CHECKING IN:

- Normal Mode: This mode prompts for decisions on charges, in transit and holds.
 - Bulk Mode: This mode prompts for decisions on in transit and holds, but automatically charges fines to the patrons account.
- From the home page, select the **CHECK IN** button.
- Click the desired mode.
- Scan the items barcode into the **ENTER ITEM BARCODE** box.
- After an item is scanned, a pop-up message will flash on the top of the screen. A green pop-up will appear if the check in was successful. A red pop-up message will appear if the check in was unsuccessful.
 - If the item was successful, a pop-up may appear. (SEE: POP-UPS)
- When finished check in, click **CLOSE** in the top right corner to close the check in page.

DO NOT CHECK IN AN ITEM IF IT IS MISSING A PART!

CHECKING OUT:

- Scan the patrons bar code in **QUICK SEARCH** box. Leap will open patron account and default to the **CHECK OUT** tab.
- Scan item barcode in the box labeled **ENTER ITEM BARCODE**.
- After an item is scanned, a pop-up may appear. (SEE: POP-UPS)
 - Click **CONTINUE** to check out the item. Click **CANCEL** to cancel the checkout of item.
- When all items are checked out, select **COMPLETE** in the right corner. This will generate a checkout receipt and close the patrons account.
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RENEWING FROM OUT/OVERDUE TAB:

- Open a patron's record using the **QUICK SEARCH** box or the **FIND TOOL**.
- Select the tab labeled **OUT/OVERDUE**. Click the checkbox next to the item the patron wishes to renew.
- Click the **RENEW** button.
- If successful a new due date will appear in the due date column. If the item is NOT renewable, a pop-up may appear. (SEE: POP-UPS)
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RENEWING FROM CHECKOUT TAB:

- Open a patron's record using the **QUICK SEARCH** box or the **FIND TOOL**.

-Scan the items barcode in the **ENTER ITEM BARCODE** box.

- You will receive a pop-up titled **Renew item**, with text saying **“This item is already checked out to this patron. Do you want to renew it?”**

-Click **CONTINUE** to confirm the renewal. Then **COMPLETE** to finish the transaction.

CHANGING AN ITEMS STATUS: (SET TO MENDING)

-From the home page, select the **CHECK IN** button.

-Scan the items barcode in the **ENTER ITEM BARCODE** box.

-Once the item is check in successfully. Click the checkbox next to the item/s you wish to change the status of.

-Click the **ACTIONS** drop down menu, and select **MANAGE ITEM RECORD** from the list.

-A pop-up will appear. Select the check box labeled **CIRCULATION STATUS** to activate list. From the drop down menu, and select **MENDING** from the list.

-Click **OKAY** to complete the action and update the record/s. A green pop-up message will flash on the top of the screen, if the item/s records were updated successfully.

- You can't update an item records if the item record is open in the background.

CHANGING AN ITEMS STATUS: (SET TO LOST)

-From the Patrons record, Switch to the **OUT/OVERDUE** tab.

-Select the item using the check box.

-Once selected, The **DECLARE LOST** button will become unlocked.

-You will then receive a **Declare lost item** pop-up.

- Select **CHARGE** from the **ACTIONS** drop down in the Replacement column.
- Make sure to select **WAIVE** from the **ACTION** drop down for the Processing column.

-A green popup will flash on the top of the screen if done successfully.

-The patron record will now have a block titled: Patron owes money. Amount due:

CHANGING AN ITEMS STATUS: (SET TO DAMAGED)

- When checking in items that have been returned with damaged. The status of the item needs to be changed.

-From the home page, select the **CHECK IN** button.

-Click the tab titled **DAMAGED**.

-Scan the items barcode in the **ENTER ITEM BARCODE** box.

-A pop-up box will appear titled **Declare Item Damaged**. It will list the items barcode, material type, current status, Current patron, and title.

-You will be given two options to choose from.

- **DECLARE DAMAGED: CHARGE AND NOTIFY**
- **DECLARE DAMAGED: UPDATE ITEM ONLY**

- Optional: Special item check-in note (will appear on the item record and patron notice)
- Click **OKAY** to complete the action. **CANCEL** will cancel the item being checked in.
- Charge and notify option will change the items status to damaged and add a charge to the patrons account for replacement cost.
- Update item only option will only change the status of the item. It will no longer be on the patrons account.

POP-UPS

IT'S VERY IMPORTANT FOR STAFF TO READ ALERTS BEFORE TAKING ACTION!

CONTINUE HOLDING ITEM:

- Will appear when checking in an item that is being held for a patron on the hold shelf.
- Pop-up will be titled **Continue holding item**. With text **“This item is held for:”** Then it lists the patrons name and barcode number. **“Continue to hold the item? (Clicking Cancel to stop the check-in/check-out process.)”**
- Click **YES** if the item should remain on the hold shelf for the patron.
- Select **NO** if the hold item should be removed. The hold will then be removed from the patron’s record.

DUPLICATE PATRON RECORDS:

- Will appear when checking in an item that is being held for a patron on the hold shelf.
- Pop-up will be titled **Duplicate Patron Records**. With text **“The following patrons exist in the database already and may be a duplicate of PATRONS NAME (Barcode).”**
- Click **CONTUNE** to bypass the popup and save the patrons record.
- Select **CANCEL** to cancel the save.

FILL HOLD REQUEST:

- Will appear when checking in an item that can fill a local hold.
- Pop-up will be titled **Fill hold request**. It lists the items title and barcode. With text **“satisfies a hold request for:”** Then it list the patrons name and barcode number. **“Do you want to hold this item? (Click Cancel to stop the check-in/check-out process.)”**
- You can choose from **YES, NO, or CANCEL**.
- Clicking **YES** will fulfill the hold and place the item in transit.
- To deny the request, click **NO**. You will then be prompted to reactivate the hold. Press **YES**. The patron will remain the request list for the next available copy. By clicking **NO** the status of the hold will be canceled and patron will not receive a copy.
- CANCEL** will stop the check-in or checking out of the item. The status will remain the same.

ITEM FILLS A REQUEST:

- Will appear when trying to renew an item/s on a patrons account that has one or more requests on it.

-Pop-up will be titled **Item fills a request**. It lists the item barcode and title. With text **“This item fills a request at ‘library name’. Do you want to renew the item? (The hold request will remain active.)”**

-You can choose to select **RENEW**, which will renew the item. Or **DO NOT RENEW**, which will cancel the renew.

ITEM IS BLOCKED (CHECK-IN):

- Will appear when checking in an item that has a note attached to it.
- Notes such as: number of disc or noted damage

-Pop-up will be titled **Item is blocked**. With text **“Do you want to continue with this operation?”** Then list the title and the note or block attached.

-You can select **ITEM RECORD** to open the item record.

-Clicking **CONTINUE** to continue the checking in of the item. **CANCEL** will cancel the check in.

ITEM IS BLOCKED (CHECKOUT):

- Will appear when checking out an item to a patron that has a block on its record.

-Pop-up will be titled **Item is blocked**. With text **“Do you want to continue with this operation?”** It will also list the reasons why item is blocked.

-Selecting **CONTINUE** will close the pop-up and check out the item.

-Choose **CANCEL** to cancel the checkout and close the pop-up.

-Clicking Item record will open the items record, pausing the checkout of the item.

ITEM IS IN-TRANSIT:

- Appears when a library item has been checked in at a branch other than its home library and is currently being moved through the library network.

-Pop-up will be titled **Item is in-transit**. With text **“The item is now In-Transit to ‘library name’”**.

-Select **OK** and send the item back.

ITEM NOT FOUND (ON-THE-FLY):

- Will appear when the database cannot find a matching record when checking out an item. Creating On-the-fly records creates a temporary record for the item to be checked out to patron.
- Pop-up will be titled **Item not found**. With text **“This item is not linked to a record, and cannot circulate. Would you like to create a record ‘on-the-fly’?”**

-When checking out an item and you get this pops-up, hit **CANCEL** and rescan the item. As the barcode might have been misread or scanned wrong. If it pops up a second time, hit **CONTINUE**.

-The pop-up will change and now be titled, **Brief Item Entry**. Fill out the fields required by your library.

-When finished, click **CONTINUE**. The item is now checked out to the patron.

PATRON IS BLOCKED:

- Will appear when checking out an item to a patron that has a block in patron's record.

-Pop-up will be titled **Patron is blocked**. With text "**Do you want to continue with this operation?**" It will also list the reasons why item is blocked. You may need to look at patrons **NOTE** tab to get more information.

-Selecting **CONTINUE** will close the pop-up and check out the item. The pop-up will not appear again during this transaction.

-Please choose **CANCEL** to cancel the checkout and close the pop-up. This gives you a change to look at the patrons account in detail.

REACTIVATE HOLD:

- Will appear if you select **NO** to a hold transfer or request.

-Pop-up will be titled **Reactivate hold**. With text "**Do you wish to reactivate the hold request for this patron?**" Then list the patrons name and barcode.

-Selecting **YES** will put the patron back on the top of the hold list.

-Selecting **NO** will remove patron from hold queue, and the hold will show as canceled on patron's record in the **HOLDS/HELD** tab.

RENEWAL LIMITED EXCEEDED:

- Will appear when the max number of renewal has been reach on an item.

-Pop-up will be titled **Renewal limit exceeded**. It lists the item barcode and title. With text "**Item is over the renewal limit of 2. Item has been renewed 2 times.**" Then "**Do you want to continue with renewal?**"

-Clicking **CONTINUE** to override and renew for a 3 time. Select **CANCEL** to cancel the renewal.

RESOLVE LOST ITEM:

- Will appear when an item with the status of lost that has been paid for by patron is checked in.

-Pop-up will be titled **Resolve lost item**. It lists the item barcode, title, lost date and patrons name and barcode that was associated with item.

-As we do not do refunds or credit, change the **ACTION** drop down to LEAVE AS IS.

-Then press **CONTINUE**.

-A green pop-up will flash on the top of the screen if check-in was successful.

-If the item is declared lost on patron's record, but patron has not yet paid. When item is scan in to check in, no pop up shows. But the item will show in check in list with comment 'Item was Lost'.

TRANSFER FOR HOLD:

- Will appear when the item wants to fill a hold for another library.
- Pop-up will be titled **Transfer for hold**. It lists the item barcode and title. With text “**This item fills a request at ‘library name’. Transfer for hold? (Click Cancel to stop the check-in/check-out process.)**”

-You can choose from **YES**, **NO**, or **CANCEL**.

-Clicking **YES** will fulfill the hold and place the item in transit.

-To deny the request, click **NO**. You will then be prompted to reactivate the hold. Press **YES**. The patron will remain the request list for the next available copy. By clicking **NO** the status of the hold will be canceled and patron will not receive a copy.

-**CANCEL** will stop the check-in or checking out of the item. The status will remain the same.

VALID EMAIL ADDRESS NOT FOUND:

- Will appear when patron record does not have an email address on file. Reminds staff patron will not receive reminder notices. (like the almost overdue, and auto-renewal notices)
- Pop-up will be titled **Valid email address not found**. With text “**Reminder notices option is e-mail. Do you want to continue?**”

-Clicking **CONTINUE** to bypass the popup.

-Clicking **CANCEL** will cancel the saving of the patron’s record.

PLACING HOLDS

FROM BIBLIOGRAPHIC RECORD:

- Bibliographic level holds may also be referred to as title-level holds.
- This method is especially helpful if you are looking for a title and do not yet have the patron’s library card number or name available to bring up the patron record.

-From the home page, select the **FIND** button. Make sure that Bibliographic Record is selected as the first drop down option.

-Type the title into the search box and hit enter or press the magnify glass button. (SEE: SEARCH FILTERS)

-Find the record you want from this search list. Double click or press **OPEN** to open the bibliographic record.

-Select the **ACTIONS** drop down menu and press **PLACE HOLD**.

- If you currently have a patron record open a pop-up menu will appear listing the current open patron records. Select the appropriate patron name and hit **OKAY**. Or use the **FIND TOOL** to search for a patron record.
- If you do not have any patron records currently open, the patron find tool will pop-up. Search the patron name and select the correct record from the list.

-Leap will then open the patrons record to the **HOLDS/HELD** tab.

-Here you can change the pickup location or suspend the hold to a later date. When you are finished press **PLACE HOLD**. A green pop-up will flash on the top of the screen if the hold was successful.

FROM PATRONS RECORD:

- This method is most useful when a patron wants to place many holds at once.
- From the home page, scan the patrons barcode or type their name into the **SCAN OR SEARCH** bar. Or you can use the **FIND** button.
- Once you have the patrons record up, open the **HOLDS/HELD** tab.
- Press **NEW HOLD**. It will then drop open for you to place a hold.
- Type in the title of the item in to the **SEARCH FOR A TITLE** bar, or use the **FIND TOOL**. (SEE: SEARCH FILTERS)
- Select the desired record from the list and press **OPEN**, or double click.
- Please note: you will not be able to open a bib record from here. If you need to investigate different bib before placing the hold use the PLACING HOLDS: FROM BIBLIOGRAPHIC RECORD method.
- Leap will auto fill in the info. You can change the pickup location or suspend the hold to a later date. When you are finished press **PLACE HOLD**. A green pop-up will flash on the top of the screen if the hold was successful.

ITEM SPECIFIC HOLD:

- Once you have a bibliographic record open, select **LOCAL ITEMS** or **ALL ITEMS** from the tabs.
- From the list, open the desired item record.
- With the item record now open. Press **ACTIONS** button and select **PLACE HOLD** from the drop down options.
- Leap will ask you to find a patron or select one from a list of opened patron accounts.
- Now in the patron's record, you will see a barcode in the barcode field. When you hit **PLACE HOLD**, it will be for that specific item. (SEE: EXPLORING PATRONS RECORD)
- You can also do a specific hold from the **FIND TOOL**. Switch Bibliographic record to item record from the first drop down. Then do a basic search for either barcode or title. (SEE: FIND TOOL)
 - Item specific holds will be marked with a book icon, before the authors name in the author column in the **HOLDS/HELD** tab.

PULL LISTS

PICKLIST POSSESSING:

- The Picklist is a list of materials of to be pulled to fill hold requests from patrons.
- Select the **UTILITES** drop down. Then press **PICKLIST POSSESSING**.
- When using the picklist make sure the correct branch is selected.

-There are 5 different tabs on the picklist page.

- PENDING: There are items located at your library that need to be pulled to trap holds for patrons.
- LOCATED: There are hold that have been pulled from the shelf by library staff that have not yet be trapped.
- UNCLAIMED: Contains expired holds that need to be pulled from the hold shelf, checked in and put back into circulation.
- UNCLAIMED ILL: This list all the inner library loan request for the selected pickup branch, that have expired on the hold shelf.
- HOLDS TO TRANSFER: This contains a list of held item that need to be transferred to a different pickup branch.

TO PULL HOLD REQUEST:

-Select the **UTILITES** drop down. Then press **PICKLIST POSSESSING**.

-Select the **PENDING** Tab.

-Press the column header **COLLECTION** to organized the list by Collection.

-It can be printed the page by clicking the **PRINT** button in the top right corner.

- ***Remember: Holds with a book icon before the collection, are item specific holds. They will only be triggered by item with the same barcode.***

TO PULL EXPIRED HOLDS:

-Select the **UTILITES** drop down. Then press **PICKLIST POSSESSING**.

-Select the **UNCLAIMED** Tab.

-Press the column header **PATRON NAME** to organized the list by alphabetically by patrons last name.

-It can be printed the page by clicking the **PRINT** button in the top right corner.

TO PRINT LIST OF CURRENTLY HOLD SHELF:

-Select the **UTILITES** drop down. Then press **REQUEST MANAGER**.

-Select your branch location.

-Change the **STATUS** to held, and the **BY** to pickup.

- Press the column header **PATRON NAME** to organized the list by alphabetically by patrons last name.

-It can be printed the page by clicking the **PRINT** button in the top right corner.

EXPLORING PATRONS RECORDS

-You can access a patron's record by using the **QUICK BOX**.

- Scan the patrons barcode

- key in the barcode (must add prefix, 2324300, or * in place of it.)
- or by patron's name, address phone number or email.
- Or use the **FIND TOOL** and performing a patron record search.

-The patrons name, barcode and home library will appear in the Header. Clicking the icon next to patron's name will open a pop up with contact info, card expiration date, and patron code.

CHECK OUT TAB:

-This is where staff will scan items the patron is checking out.

OUT/OVERDUE TAB:

-Displays the items the patron has currently checked out, including overdue items.

-Here you can renew items and declare items lost or damaged.

ACCOUNT TAB:

-Displays is the patron owes any money, and where staff can handle payment.

PAYING FOR A LOST OR DAMAGED ITEM

-If the item is one that the price can be halved. Select the item with the check box, The **WAIVE CHARGE** button should now be unlocked.

-Type in the amount you wish to waive, in text box labeled **AMOUNT TO WAIVE**. And press the green **WAIVE** button.

-It will now show the current price under the **BALANCE COLUMN**.

-Select the Item again to unlock the **PAY** button.

-A drop down will open with the option the change the amount paid, the method of payment, and a note.

-Press **PAY**.

CLAIMS/LOST TAB:

-Displays claimed returned items or any items the patron has been billed for.

HOLDS/HELD TAB:

-This tab lists the holds the patron is currently waiting for, recently canceled holds, and holds that went unclaimed. You can also place a new hold on this tab.

- The table shows: Author, Title, Format, Cal Number, activation date, status, pickup branch, queue, hold until, and group.
- Staff can cancel hold with the status of: Requested, Paused, Locating, and Shipped.
- You cannot cancel a hold with the status of Held, as it is already on the hold shelf. To cancel, you must scan the item in check-in and select **NO** to remove it from the hold shelf.

-To cancel a request, select the hold/s you wish to cancel using the check box. Once selected, the **CANCEL** button will activate. Press **CANCEL**. The status of the hold/s is now changed to CANCELED. The canceled hold/s will remain on the patron record for a set amount of days.

-If the patron wishes to reactivate the hold/s. Select the hold/s by using the check box. The **REACTIVATE** button will now be unlocked. Pressing it will change the status back to PENDING.

-To completely delete a requests, the hold status must first be **CANCELED**. When selected, the **DELETE** button will become unlocked. Pressing it will remove the hold/s complete off the patrons account. It cannot be reactivated.

-If a patron dose not pick up the hold item within the given time frame, that status will change from READY FOR PICKUP to UNCLAIMED. Unclaimed holds will keep the status, until the hold is checked in, at which point it will become canceled.

-HOLD STATUSES: THERE ARE SOME HOLD STATUSES YOU SHOULD BE AWARE OF AS YOU PROCEED IN LEAP:

- **CANCELLED:** the request has been cancelled by the patron or by staff. Cancelled hold requests remain visible to the patron and to staff for 14 days. During this time, staff may reactivate the request for the patron.
- **LOCATED:** a staff member working on the picklist has pulled the item and marked it as Located using the Picklist Processing tool.
- **LOCATING:** the request has been assigned to a library's Picklist.
- **PAUSED:** The request activation date has been changed to a date in the future. An item cannot be trapped to fill the request until the activation date. The request will continue to move up the holds queue while paused.
- **READY FOR PICKUP:** an item has been trapped to fill the request and is ready for the patron to come pick it up.
- **REQUESTED:** the system is actively looking for items to fill the hold request.
- **SHIPPED:** an item has been trapped to fill the request at a branch other than the pickup branch. The item is currently in transit to the pickup branch.
- **UNCLAIMED:** the requesting patron has not picked up their hold within the specified period of time. The hold automatically transitions from Ready for Pickup to Unclaimed. Once staff pull the hold and check it in, the hold status then moves to Cancelled.
- **UNFILLABLE:** no items in the system are able to fill the request. The library can opt to convert an Unfillable request into an out-of-system ILL.
- **UNABLE TO FILL:** a hold request that has not been filled within a specified period of time. Currently, a request is set to expire one year after the Activation date in the request record. Upon expiring, holds remain in the system for 14 days before being deleted from the patron's record.

BLOCKS TAB:

-Has a shortcut in the patron's header information.

- If a patron has a block, it will appear red with a lock icon next to it.
- If the patron has no blocks, it will appear blue with an unlocked icon next to it.

-Displays patron alerts such as: Money is owed, their account is expired, or if they have holds ready for pick up.

NOTES TAB:

- Has a shortcut in the patron's header information.
 - If a patron has no notes, it will appear blue.
 - If the patron has a non-blocking note, it will appear yellow.
 - If the patron has a blocking note, it will appear red.
 - Displays free-text messages entered by staff.
 - Blocking notes will appear when you check out an item to a patron.
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DATED NOTES TAB:

- Appears under the **MORE** drop down.
 - Displays free-text messages entered by staff.
 - Dated notes appear in a list with columns for Creator, Branch, and Creation date.
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REGISTRATION BUTTON:

- To view or edit the patron's records information.
 - Here you can make a duplicate, or delete the record.
 - Make sure to save any changes made before leaving.
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EXPLORING BIBLIOGRAPHIC RECORDS

- You can access a bibliographic record by searching in the **QUICK BOX** or the **FIND TOOL** and performing a bibliographic record search.
 - After typing a search, you will see a list of results. Double clicking on an entry will open that bib record, or by pressing the **OPEN** button.
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PREVIEW TAB:

- Shows different levels of information about the record.
 - Brief: a small snapshot of data
 - Full: More data in detail
 - Availability: displays local holding
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LOCAL ITEMS:

- Shows just the items owned by your library's branches.
 - You can click on a column heading to sort the list. Or use the **FILTER BOX** to narrow down any of the information in the list columns.
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-Clicking on an item from the list will take you to the individual record or **ITEM RECORD**. The bib record will still be open in the background.

ALL ITEMS TAB:

-Shows items owned by library in the consortium.

-You can click on a column heading to sort the list. Or use the **FILTER BOX** to narrow down any of the information in the list columns.

-Clicking on an item from the list will take you to the individual record or **ITEM RECORD**. The bib record will still be open in the background.

STATISTIC TAB:

-Shows statistics associated with this bib record.

ACTION DROP DOWN:

-In the **ACTION** drop down, you can do a few things but the most important is **PLACE HOLD**.

EXPLORING ITEM RECORDS

- You can access an item record by scanning the item barcode into the **QUICK BOX** or the **FIND TOOL** and performing an item record search.
- If using the Find tool, after typing a search, you will see a list of results. Double clicking on an entry will open that item record, or by pressing the **OPEN** button.

-The item header information is static, and will display no matter which tab you are viewing. It contains important information such as: Item Barcode, Call number, Collection, Shelf Location, Circulation Status, and Price of item.

DETAILS TAB:

-You can view and edit the item header information.

CIRCULATION TAB:

-Contains information associated with the item's most recent transaction. When it was last checked in. The current borrower, if item is checked out, and the previous borrowers record.

BLOCKS AND NOTES TAB:

-Will display any library blocks and staff blocks associated with the item.

- Item blocks will appear to staff as a pop up when they both check the item in or check the item out.
 - Item notes will not appear in check-in or checkout.
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HISTORY TAB:

-Will display 2 years' worth of transaction history for the item. Transactions such as: Checked in, checked out, put in transit, or modified.

STATISTICS TAB:

-Shows circulation and inventory info from the item.

- The circulation status tally's up both renewals and checkouts.

NOTICES TAB:

-List notices the current patron received for this item. Like reminder notices or overdue notices.

ACTIONS DROP DOWN:

-In the **ACTION** drop down you can: **CHECK IN** the item, Place an item specific hold with **PLACE HOLD**.

QUICK SEARCH BOX

- The Quick Search Box is a search tool in Leap used to quickly locate library materials and patrons.

-There are two ways to search in the **QUICK SEARCH** box:

- Search by patron barcode, item barcode, or a bibliographic record ISBN/UPC
- Search by keyword(s)

-When a keyword is types in to the quick search box, Leap will attend to locate mating patron or bibliographic records.

-As you type leap will display automatic suggest if a matches are found.

-Quick Search box is searching key index fields:

- FOR BIB RECORDS: Title, Author, subject and genre headings, notes, summary and more!
- FOR PATRON RECORDS: Name, Address, Phone Number, and email.

-When searching a field for patron record, you must search the same way it shows in patron's record. (Ex. 989-111-1111 or 9891111111 will show different results)

FIND TOOL

- The **FIND TOOL** is a search tool in Leap used to build simple and advanced searches for finding library materials and patrons. The Search Database, Mode, Qualifier, and Relation are used to determine what and how you are searching.

-The **FIND TOOL** can be found next to the **QUICK SEARCH BOX**.

-Use the **DROP-DOWN MENUS** in the upper portion of the find tool to select what and how you want to search.

-Type in your search terms or, depending on your search configuration, select the values you'd like to search for from a drop-down list.

-**APPLY FILTERS** to narrow down your search. (SEE: SEARCH FILTERS)

-Click the magnify glass or enter on your keyboard to start search.

- Double click or press **OPEN** on a record in your search results to open and view the record.
- To return to search results, press **RESULTS** on the record page.

-You can view and rerun resent searches, click the clock with the back arrow.

DROP DOWN MENU

-The 1st drop down menu is the **DATABASE COLUMN**. Select the type of record you are looking for. Such as: Bibliographic record, item records and patron records.

-The 2nd drop down menu is the **MODE COLUMN**. Here you indicate the type of search you will be doing. Most of the time it will be the Basic search.

-The 3rd drop down option is the **QUALIFIER COLUMN**. This column allows you to select the specific field you would like to search by.

- If searching for a bibliographic record you can search by title, ISBN, or subject.
- If searching for a patron record you can search by birthday, email, or phone number.

-The 4th and final drop down option is the **RELATION COLUMN**. Here you can select how Leap will link together your search text.

- **KEYWORD (ALL)**: Looks for records that contain all of your search terms. Puts an 'and' between each word. (Ex. Station Eleven > Station AND Eleven) Leap will look for records with both words appear in varying title fields. The search terms don't have to be listed together or in that order.
- **KEYWORD (ANY)**: Look for records that contain at least one of your search terms. Puts an 'or' between each term. (Ex. Station Eleven > Station OR Eleven) Leap will look for records where Station or Eleven may appear alone or together.
- **PHRASE**: Searches for your teams as if they had quotations around them. Search teams appear together and in the same order. (Ex. Station Eleven = "Station Eleven") Leap will look for records where Station Eleven appear together as they were typed.
- **EXACT**: Looks for records that contain term(s) in the field you are searching (and nothing else!) Helpful for one word titles. (Ex. Searching for Station Eleven will not return records for Station Eleven: A Novel.)
- **EXACT (*)**: Looks for records that begin with your search terms in the field you are searching. Applies a wild card to the end of your search. (Ex. Searching for "Station Eleven" = Station Eleven, Station eleven: A Novel, etc.)

WILDCARDS

-Wildcards are used in search terms to represent one or more other characters. They're helpful with filling in gaps in searches where you may not know the full search term or proper spelling.

- THE ASTERISKS (*): Represents one or more characters. Type part of a word/phrase and use * to prompt the Find Tool to complete the rest of the search. (Ex. Searching Run* results in Run, Running, or Runner)
- THE QUESTION MARK (?): Represents exactly one character. Substitute the question mark (?) for whatever character or digit is unknown. (Ex. Don't know if name is Lindsey or Lindsay. Search "Linds?y" will search for both.)

SEARCH FILTERS:

- Filters can be applied to your search to help narrow down the list of results.
- Click the **FUNNEL** icon at the end of the search bar.
- From the Search Filter View, click **ADD CONDITION** button.
- Use the **DROP-DOWN MENU** to select a filter to apply.
- Depending on what type of filter you select, you may be prompted to enter in a date range, type in text, or choose from a list of pre-determined options.
- Click **APPLY** to apply the filter to your search.

- Click the **STAR ICON** to save the applied filters as your user's default.

EXAMPLE. You want to find Children's Cookbooks that are currently on the shelf at Wirt for a patron.

1. Select **ITEM RECORD** in the database column dropdown.
2. Select the **FUNNEL TOOL**.
3. **ADD CONDITION**, switch 'All keyword fields' to 'Assigned branch'. And selected 'Bay Co-Alice and Jack Wirt (bbc)'.
4. Press the **GREEN PLUS** icon to add another condition. Change 'All keyword fields' to 'Circulation status' and selected 'Checked it'
5. Press the **GREEN PLUS** icon again. Change 'All keyword fields' to 'Collection' and selected 'Juvenile Nonfiction'
6. Press **APPLY**.
7. Back at the **FIND TOOL**, switch the qualifier column to **SUBJECT**.
8. Search 'Cookbooks'

-After Step 6, you could also add another **CONDITION** for Subject, type in cookbooks in the text box.

-Then search ******. It will provide you with the same list.

POWER SEARCH:

- Allows you to create search queries you can use again and again.
- Saves you time by creating a search with default filters already in place.

-EXAMPLE: (AB = 65) AND ((MAT = 7) AND (CS = 1))

-AB, MAT, and CS are access points, or fields you are searching by

-AND and = are operators, or links between search components

-64,7, and 1 are search strings, or terms or values you are searching for

-Let's build one!

1. Repeat steps 1-7 in the example above.
2. Type Cookbooks into the search, but don't hit enter.
3. Switch **BASIC SEARCH** to **POWER SEARCH**.
4. You should now see "(SU ALL "Cookbooks") AND ((AB = 6) AND ((CS = 1) AND (COL = 181)))" in the search box.

-You can save this power search to your Polaris/Leap account. And will be available every time you log into leap.

-Click the **FLOPPY DISC** icon. Give your power search a name. (Wirt-Checked in-Juvenile nonfic-Cookbooks)

-To find saved Power Search:

1. Open **FIND TOOL**.
2. Selected the record type you created the power search for.
3. Change search mode to **POWER SEARCH**.
4. Select the saved search column and select your saved power search from the list.

-You can easy change parts of your saved power search.

-Using example from above: (SU ALL "Cookbooks") AND ((AB = 6) AND ((CS = 1) AND (COL = 181))) and change Cookbooks to Hockey, (SU ALL "Hockey") AND ((AB = 6) AND ((CS = 1) AND (COL = 181)))

CREATING PATRON RECORDS

-The patron registration workform is where staff can create, add, edit, and remove patron information in Leap.

MAKE SURE NO PATRON EXISTS BEFORE CREATING A NEW ONE.

- Search the patrons full name into the **QUICK SEARCH BAR**.
- Once you confirm patron is not in the database, click **NEW PATRON**. Or go to the **NEW** dropdown menu and select **PATRON RECORD**.
- Fill the form based on your library requirements.
- When finished, press **SAVE**. Leap will notify you if you are missing a required field.

-The Patron Registration workform is divided up into sections. Scroll up or down on your browser screen to access the different sections. You can also use the left-hand menu to quickly jump to a section.

-Required fields are indicated by the asterisk. You will not be able to save a record if any of these fields are left blank.

PROFILE SECTION:

- The Profile section contains many of the settings that determines a patron's circulation limits and access to services.

- Here you will see: Barcode*, Former Barcode, Last Name*, First Name, Middle Name, Registered At*, Patron Code, Date of Registrations, Expiration Date*, Birth Date*, and Statistical Class*

-There is also a box section for Name on identification.

-Enter names in all caps, and use middle initial. Ex. JOHN B SMITH

-Enter full birth date as Month/Date/Year. Ex. 10/19/1986

ATTRIBUTES SECTION:

- The Attributes section contains additional user information fields. Not all Attribute fields may apply to your library.
- Here you will see: Newsletter Yes/No*, Internet access (yes/no)*, and Parent/Guardian

-If the patron is under 18, Fill the Parent/Guardian with the name of the parent signing then up.

EMAIL SECTION:

- The Email section contains the patrons email.
- Here you will see: Email Address and Alt Email Address

-Please fill out the email address using lowercase.

ADDRESS SECTION:

- The Address section contains the patrons mailing address.
- Here you will see: Address Type, Postal Code*, Street Address*, Street Address Line 2, Street Address Line 3, City*, State* and County.

-Put address information all in uppercase.

-Changing the Postal Code, should result in City, State and County to update.

-If patron lives in apartment or something similar, Put Apt. number in Street Address Line 2.

-You can use abbreviations, such as: RD for road, APT for apartment, ST for street, and AVE for avenue.

-Use N,S,E, or W for cardinal directions.

PHONE/FAX SECTION:

- The Phone/Fax section contains the patrons phone number.
- Here you will see: Phone 1, Phone 2, and Phone 3.

-Please enter the patron's area code. Ex. 989-780-7741

NOTIFICATIONS SECTION:

- The Notification section contains how the patron would like to be notified.
- Here you will see: Notices Address, eReceipt Option, and Notification Option.

-Notices Address: is the address print notices will be sent to.

-eReceipt Options: If the patron wants to receive a digital receipt. It will then send a digital receipt instead of a printed one.

-Notification options: determines what form of notice the patron wants to receive.

-You will also find the Additional TXT Notice box check box. Which will send second notice by text message.

PREFERENCES SECTION:

- Most of these settings are checkbox-style settings and are optional. Most patrons won't require use of these settings or will manage themselves through their online account.

-You will mainly use Preferred Pickup Branch in this section.

-There are specific Preference settings staff should be aware of:

- Do not exclude patrons from Overdue or Billing notices. This will prevent the patron's overdue items from transitioning to Lost.
- Do not select the option to email notices in Plain Text format. The system is unable to issue overdue notices in plain text format due to current notice formatting.
- Do not opt to maintain the patron's reading history without their knowledge or permission.

PASSWORD SECTION:

- Password is similar to Horizons 4-digit pin number.
- If the field is left blank, overnight it will default to the last 4-digits to the patrons Phone 1 number.