



Parkland Regional Library
Cooperation ■ Innovation ■ Service

CIRCULATION MANUAL

Polaris Leap and More

Abstract

Guide to using Polaris Leap to manage Patrons, Bibliographic and Item Records, and for searching and circulation activities in Parkland Regional Library system.

July 2019

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Polaris Leap

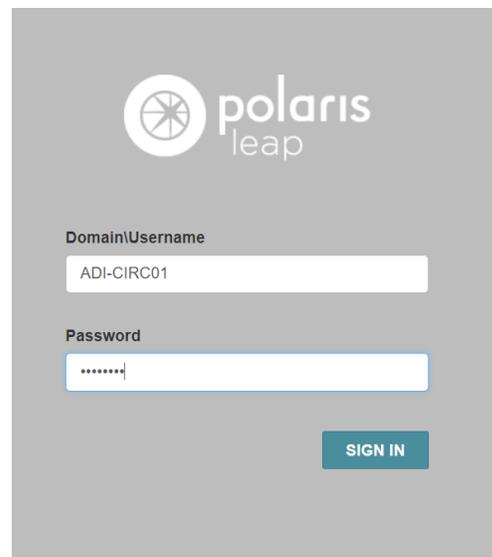
Overview

Leap is the Polaris web application that Parkland library staff use to perform common library functions, such as registering new patrons, checking out materials, placing items on hold, and pulling holds. Leap is optimized for a desktop computer but can be used on a tablet with a web browser. Google Chrome is the recommended browser for circulations functions. Currently there is no mobile app.

Leap can be used anywhere with a Wi-Fi connection, so it's great for outreach (trade shows, schools, parks, etc.), too.

How to Access

1. In the Chrome web browser, enter the URL. Training:
<http://drill.prl.ab.ca/leapwebapp>
Production:
<http://search.prl.ab.ca/leapwebapp>
2. Enter your Polaris username (workstation name) and Polaris password:
3. You maybe prompted to select a branch and work station which should match your library name and computer workstation label.



DomainUsername
ADI-CIRC01

Password

SIGN IN

Leap Interface

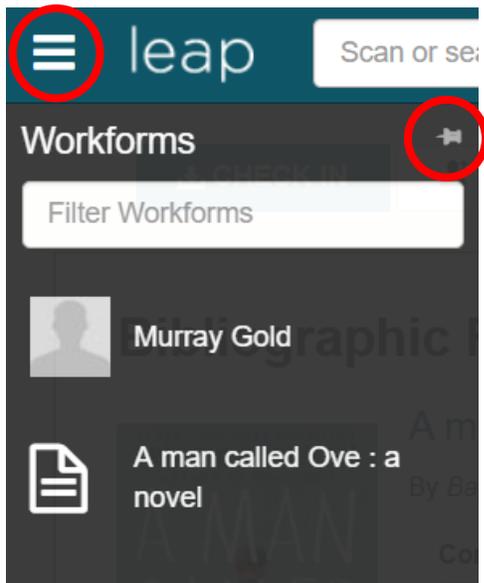
The Leap header appears when you log into Leap and remains visible while you are in the application.



The Leap header includes:

- [Workforms Tracker](#)
- [Quick Search Box](#)
- [Find Tool](#)
- [New Menu](#)
- [Utilities Menu](#)
- [Help Menu](#)
- [User Menu](#)

Workforms Tracker



To open the WORKFORMS TRACKER, click the 3-bar menu button.

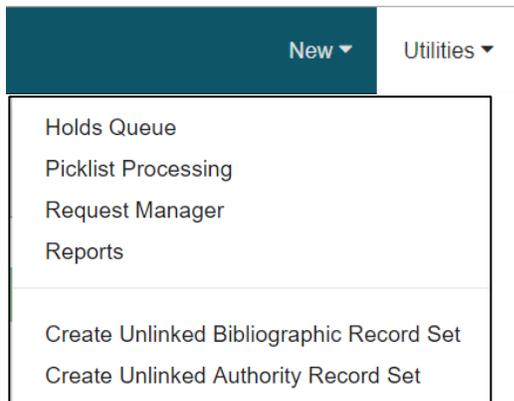
The WORKFORMS TRACKER displays the open workforms. You can pin the WORKFORMS TRACKER by selecting the pushpin icon, filter the list by typing in the **Filter Workforms** box, or close all the workforms by selecting **CLOSE ALL**. When you log out of Leap and then sign back in, the tracker remains in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

New Menu



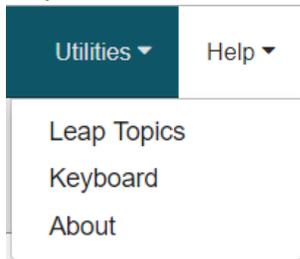
The NEW MENU includes options for creating a new patron record or a new record set.

Utilities Menu



The UTILITIES MENU includes options for opening the: HOLDS QUEUE, PICKLIST, REQUEST MANAGER, and REPORTS.

Help Menu



Click HELP to open the HELP MENU, and click Leap Topics to open [Leap Online Help](#), Keyboard to open a list of [keyboard shortcuts](#), or About to open the [About Leap](#) window.

Searching

Quick Search Bar



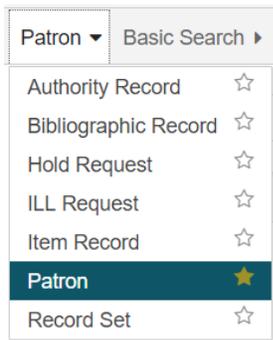
When you sign in to the Leap application, the cursor appears in the QUICK SEARCH BOX where you can scan a **patron or item** barcode, or enter search criteria to find **bibliographic or patron** records.

Find Tool

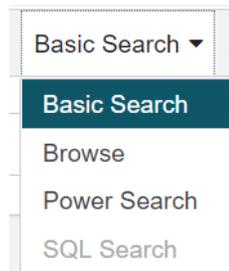


When you click FIND in the Leap header, the FIND TOOL opens to allow you to search for records and record sets.

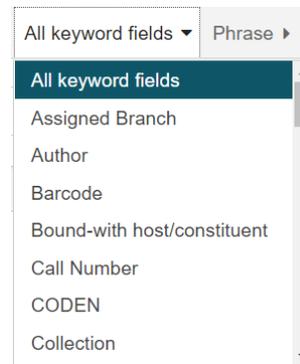
Search data base depending on the required information.



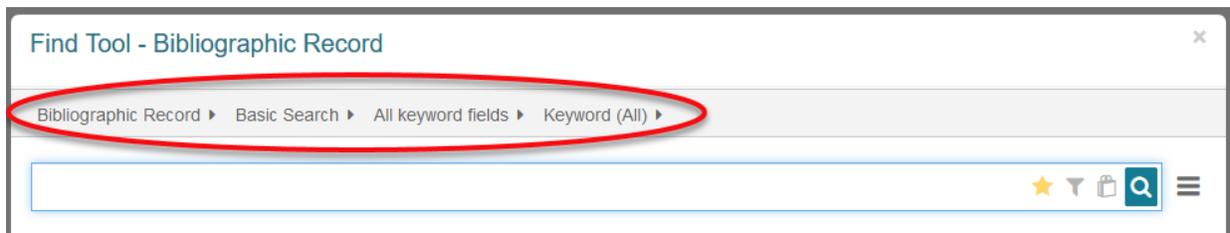
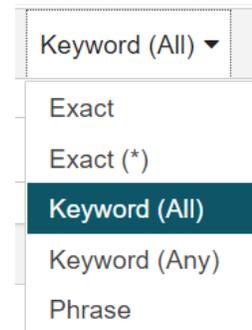
Customise search mode.

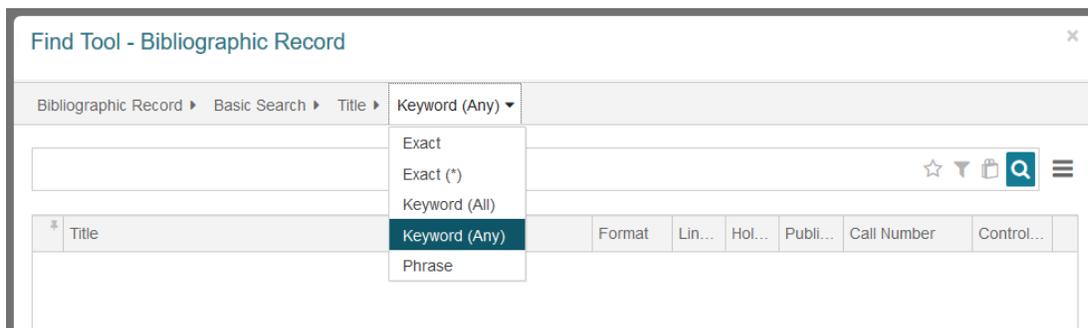


Choose qualifiers.



Specific result relation to search terms.





Searching

Each record in the library catalog contains specific information about a work, such as the title, author, and subject. You can search these record fields for keywords.

A **keyword search** in any field looks in all the search fields of the library catalog to find your keyword text. Other keyword searches narrow the search for the keyword only in the author, subject, title, or other specific fields.

An **exact search** looks for your exact text, from beginning to end, whether your search text is multiple words or just one word. An exact search is useful when you know the text precisely

A **phrase search** looks for matches to multiple words, in the same order you typed them. You might choose a phrase search when you know the phrase is part of a specific title, not necessarily at the beginning of the title.

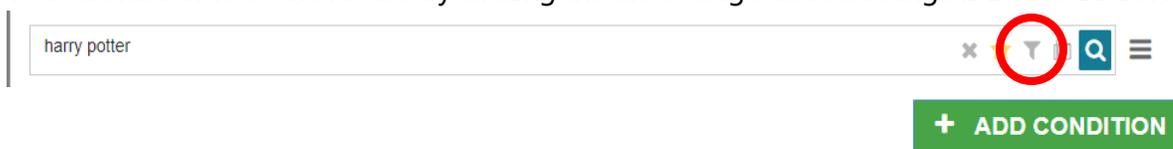
Case, spaces, punctuation - Letter case, multiple spaces, and punctuation are ignored. Omit hyphens in numbers. However, you can include the following characters if they immediately precede or follow a letter or number (no space between): + # % \$

Multiple words - If you type more than one word, the search usually looks for all the words you entered (**Keyword ALL** search). Your results may include materials with the words in any order. If you want to find the words in the exact order, begin the phrase with double quotation marks.

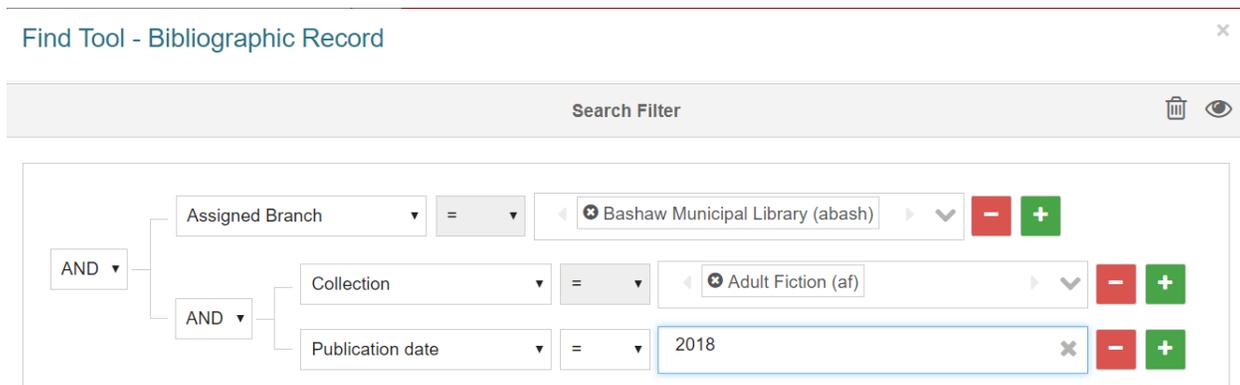
Wildcard characters - You can type a part of a word and use a wildcard character. The wildcard character asterisk (*) represents the rest of the word. For example, if you type **King***, the results include words such as *King*, *Kingsley*, and *Kingford*. The wildcard character question mark (?) represents exactly one character. For example, **wom?n** finds *woman* and *women*. If the question mark occurs at the end of a word, it does not act as a wildcard character, so you can find titles like **what color is your parachute?** Also, if you type a backslash character \ before any wildcard character, the wildcard character is treated as text.

Filters

1. You can further filter the results by clicking the filter image and selecting ADD CONDITION



2. This filtration works like an advance search. Conditions can be added or removed using the PLUS or MINUS button.



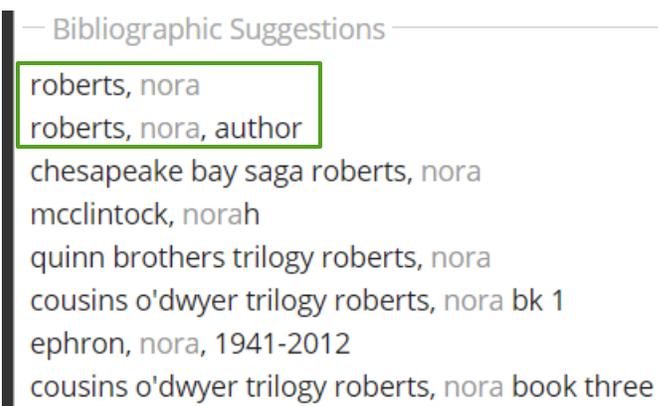
3. Choose the correct item and open the record by double-clicking on it or highlighting it and clicking the OPEN button

Search tips

Quick Search Bar

The quick search bar performs a **phrase search** meaning this is the preferred option for barcodes, exact titles, or specific authors. If you are using the suggesting for title or author use the simplest suggestion.

Example: while "roberts, nora" and "roberts, nora, author" are both correct. You will have more search results by using the first option. This is because of how our records are catalogued.



Subject Search

1. We all have those patrons that want "dinosaur books" or "vampire books" or that specific diet book. A tip for searching in Leap is to do a subject search. In your Find tool **change your qualifier to subject**. This means all your result will have your search term tagged as a subject.

Find Tool - Bibliographic Record

Bibliographic Record ▶ Basic Search ▶ **Subject** ▶ Keyword (All) ▶

2. **Add a filter** of collection if you are looking for specific age, for example easy books versus adult fiction. You can add more than one collection the filter. This will narrow your subject search so you can find an appropriate match easier.

Collection ▼ = ▼ ◀ ⊗ Beginning Reader (br) ⊗ Early (e) ▶ ▼ - +

3. If you are looking for items specifically available at your library, change your search database to **Items Record** and add two filters: assigned location and circulation status. The search results will display only items your library owns that meet the subject criteria that are currently on your shelves. This is also great for creating displays.

Item Record ▶ Basic Search ▶ Subject ▶ Keyword (All) ▶

dogs

Search Filter

AND ▼

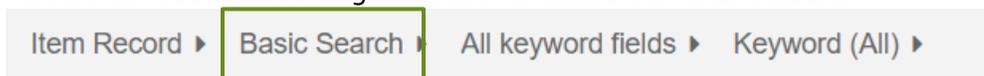
Assigned branch ▼ = ▼ ◀ ⊗ Parkland Regional Library (alap) ▶ ▼ - +

Circulation status ▼ = ▼ ◀ ⊗ Available ▶ ▼ - +

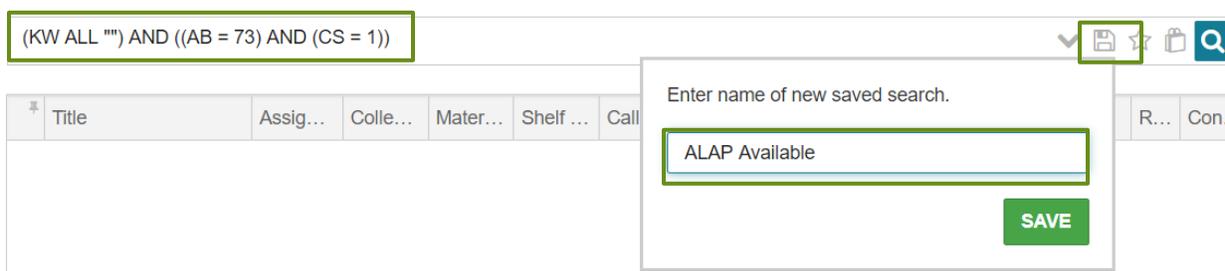
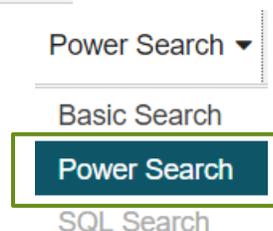
Power Searching

Polaris has no easy way to save searches filters and settings, but that doesn't mean there isn't one. If you are tired of continually adding filters for a search you do over and over again save it as a power search.

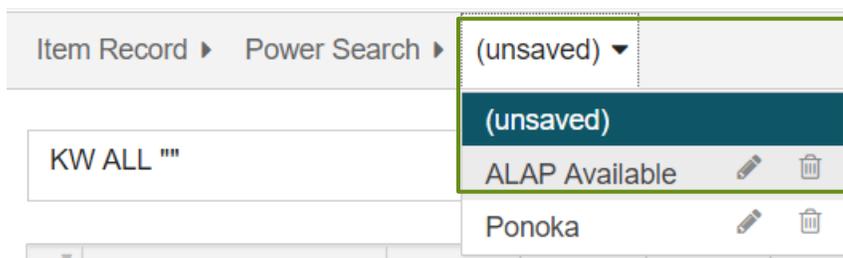
1. Create your search in basic search mode. For example: change your search database to Item Record or Patrons. Add filters of assigned branch or circulation status: available.



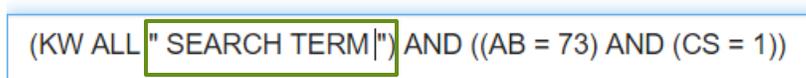
2. Once your search parameters are set, change your search mode to power search.
3. This will create a code-like search term. Click the save icon and create a name for your search.



4. Now when ever you go into your find tool change your search database to item record and your search mode to power search. Then when you click on the unsaved tab you will find you saved searches. You can edit your search names by clicking the pencil icon or deleting the saved search all together by clicking the garbage icon.

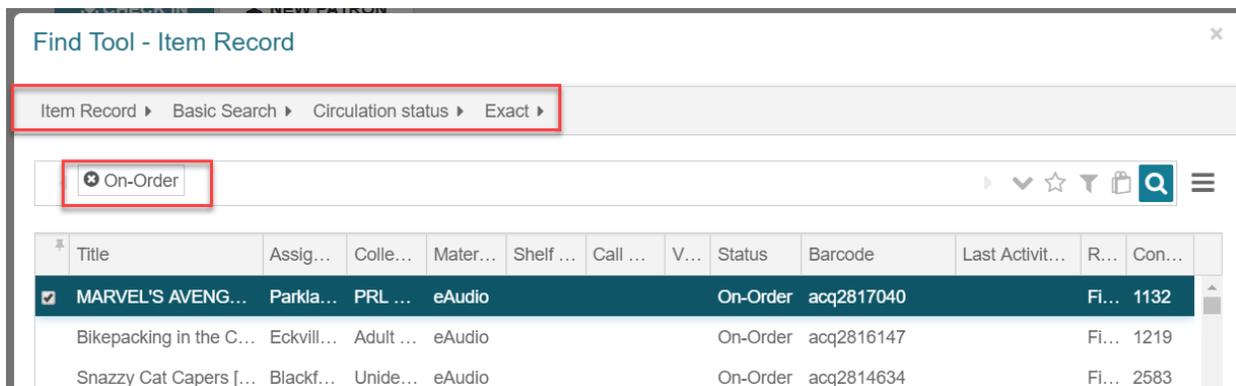


5. When performing a power search type your search terms between the quotation marks.



How to check if an item is on-order

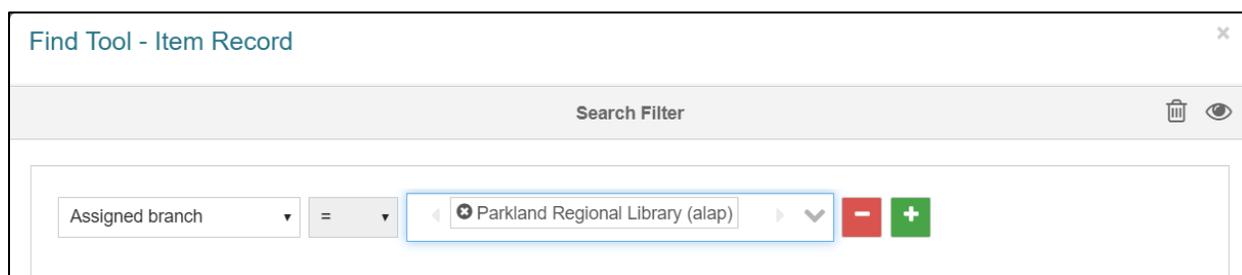
- Open your find tool. Change your search database to **Item Record**. Change your qualifier to **Circulation Status** and then change the search term to **on-order**. This will give you a list of all items in PRL that are on order.



The screenshot shows the 'Find Tool - Item Record' interface. The breadcrumb navigation is 'Item Record > Basic Search > Circulation status > Exact'. The search term 'On-Order' is entered in the search bar. The results table is as follows:

Title	Assig...	Colle...	Mater...	Shelf ...	Call ...	V...	Status	Barcode	Last Activit...	R...	Con...
<input checked="" type="checkbox"/> MARVEL'S AVENG...	Parka...	PRL ...	eAudio				On-Order	acq2817040		Fi...	1132
Bikepacking in the C...	Eckvill...	Adult ...	eAudio				On-Order	acq2816147		Fi...	1219
Snazzy Cat Capers [...]	Blackf...	Unide...	eAudio				On-Order	acq2814634		Fi...	2583

- In your find tool, follow the above steps, but also add a filter of **assigned branch** for your library. This way you can view only the on-order items from your library.



The screenshot shows the 'Find Tool - Item Record' interface with a 'Search Filter' section. The filter is set to 'Assigned branch' with an equals sign and 'Parkland Regional Library (alap)' selected from a dropdown menu.

- Rather than searching for all on order items, you can do a specific search for an ISBN with a filter of **assigned branch** for your library. This will let you know if your library already has the item on order and help prevent unintentional duplicate purchasing.
 - Change your search database to **Item Records**, your qualifier to **ISBN**, add a filter of your **assigned branch**, and enter or scan an ISBN into the text bar.

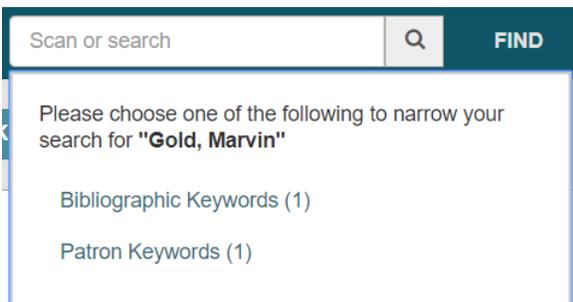


The screenshot shows the 'Find Tool - Item Record' interface. The breadcrumb navigation is 'Item Record > Basic Search > ISBN > Exact (*)'. The search term '9780838916186' is entered in the search bar. The results table is as follows:

Title	Assigned Branch	Colle...	Mater...	Shelf ...	Call ...	V...	Status	Barcode	Last Acti
<input checked="" type="checkbox"/> CREATING AND MANAGIN...	Parkland Regional Libr...	Adult ...	eAudio				On-Order	acq2808465	

Patrons

Search for patrons using the QUICK SEARCH BOX. You may search by barcode, name (last and/or first), phone number, etc.



Scan or search

Please choose one of the following to narrow your search for "Gold, Marvin"

- Bibliographic Keywords (1)
- Patron Keywords (1)

If there are both Bibliographic and Patron records for the name being searched, choose the appropriate category.

Patron Records

The PATRON RECORD workform header includes:

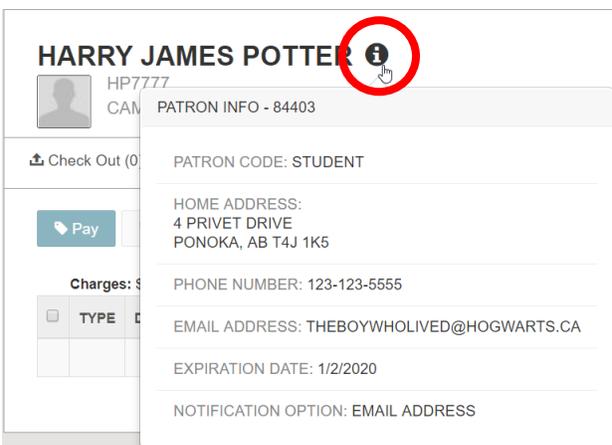
- Patron name
- Barcode
- Registered branch
- Information icon
- Links to BLOCKS and NOTES
- Registration page link
- Actions menu
- Refresh button
- Close button



HARRY JAMES POTTER ⓘ
HP7777
CAMROSE PUBLIC LIBRARY

The PATRON RECORD workform includes two main views:

1. Patron Registration Information
2. Patron Library Account Information



HARRY JAMES POTTER ⓘ
HP7777
CAM PATRON INFO - 84403

Charges: \$

TYPE	DATE

Patron Information Pop-up:

- PATRON CODE: STUDENT
- HOME ADDRESS: 4 PRIVET DRIVE, PONOKA, AB T4J 1K5
- PHONE NUMBER: 123-123-5555
- EMAIL ADDRESS: THEBOYWHOLIVED@HOGWARTS.CA
- EXPIRATION DATE: 1/2/2020
- NOTIFICATION OPTION: EMAIL ADDRESS

You can click ⓘ to open the PATRON INFO pop-up window that displays the patron code, home address, phone number, email address, registration expiration date, and notification preference.

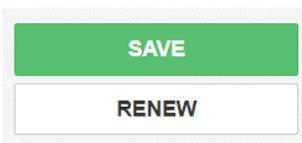
Patron Registration

Renew/Edit Patron Registration



To renew or edit an existing patron’s registration information, access the patron record by scanning their library card barcode or searching for their name. When the correct patron record is located, click on the REGISTRATION button to go to the registration view.

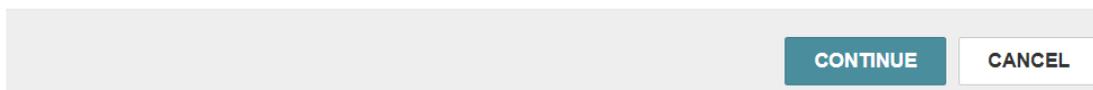
Verify/update any applicable information (address, phone number, notification option, etc.). Click Save (green button) when updating is complete.



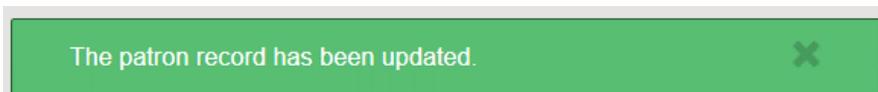
To renew, click on the RENEW button on the right-hand side of the screen.

Choose the Expiration Date and Address Check Date terms (PRL default is 1yr) and click Continue:

Expiration Date	Expiration Term
<input type="text" value="2019-02-12"/>	<input type="text" value="1"/> <input type="text" value="Years"/>
Address Check Date	Address Check Term
<input type="text" value="2019-02-12"/>	<input type="text" value="1"/> <input type="text" value="Years"/>



Notification of successful renewal will appear at the top of the screen:



Register New Patron

NOTE: Before registering a NEW PATRON, check for duplicate records – the patron may have previously been registered at a different PRL member library.

1. If there is an existing record at another PRL library, do not create a NEW PATRON record. Edit the existing record with all applicable information, including changing the REGISTERED BRANCH.

To register a new patron, select either the NEW PATRON button, or the PATRON RECORD option under the NEW MENU.



Required Fields

- Barcode
- Registered At
- Patron Code – patron codes control a patron's borrowing privileges. Most patrons will be registered with an "Adult" or "Junior" patron code.
- Last Name
- First Name
- Expiration Date – default is one year from date of registration
- Statistical Class
- Address – start with Postal Code.
- Password (PIN) –Required for patrons to access eResources and PAC online. The PRL default PASSWORD (PIN) is the last four digits of the patron's phone number.

It is best practice to always include EMAIL AND PHONE NUMBERS to ensure patrons can be notified of holds, due dates, and fees.

Scroll down the page to view/complete all sections or use the section buttons on the left side menu.

Patron Registration 1

The screenshot shows a 'Profile' registration form. On the left is a sidebar menu with options: Profile, Attributes, Email, Address, Phone/Fax, Notifications, Preferences, and Password. The main form area is titled 'Profile' and contains the following fields: 'Barcode *' (text input), 'Registered At *' (dropdown menu with 'Marigold Library System' selected), 'Former Barcode' (text input), 'Patron Code *' (dropdown menu with 'Standard' selected), 'Last Name *' (text input), and 'Date of Registration' (text input with '2018-02-12'). To the right of the form is a button panel with a green 'SAVE' button and a white 'CANCEL' button.

Notification Settings

Patrons may choose to be notified by mail, phone, text, or email. Patrons who choose text notifications need to provide their cell phone number and cell service provider. Patrons may choose phone or email and have additional text notices as well.

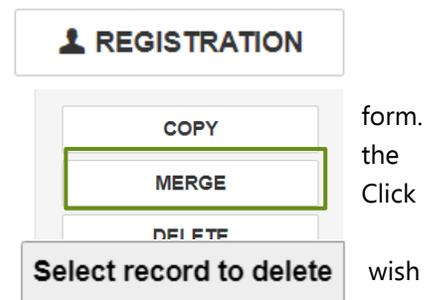
The screenshot shows the 'Notification Settings' section. It includes a 'Notification Option' dropdown menu set to 'Email Address' and a checked checkbox for 'Additional TXT Notice'. Below this is a section for 'Text Messaging Phone' with a dropdown set to 'Phone 2' and a 'Wireless Carrier' dropdown set to 'Bell Canada'.

When all applicable fields are complete, click SAVE.

Merging duplicate patron records

If you discover that a patron has multiple patron records, you can merge them into one. This is handy if a patron has moved to a new community.

1. Open the patron record you wish to keep: this should be the record with the correct address and contact information.
2. Click the registration button located at the top of the patron record.
3. Then select the merge button on the right side of the registration form.
4. You will see a pop up with all the primary record information on left side and the secondary record (to be deleted) will be blank. the button Select Record to Delete. Click the
5. Then use the find tool box to locate the duplicate record you to delete. When you find the appropriate record, double click to open. wish
6. The "to be deleted" record information will display on the right side of the merge workform. Click the Merge button.



7. You will be promoted to confirm the action, click continue.

Merge Patron Records

Primary record
Albus Dumbledore
5404 56 Avenue Lacombe AB
Patron 21000007618734
barcode:
Patron Borrow by Mail- allowed
code:
Address: 5404 56 Avenue
Lacombe, AB T4L 1G1
Email TheGreatestWizardOfAllTime@Hogwarts.org
address:
eReceipt: No
Expiration 8/20/2025
date:
Notification Email Address

Secondary record (to be deleted)
Patron barcode:
Patron code:
Address:
Email address:
eReceipt:
Expiration date:
Notification option:
Phone 1:
Statistical class:
Acct charges:

MERGE **CANCEL** **Select record to delete** **Open record**

Register Multiple Family Members

1. Once the first family member registration has been completed and saved, you can register additional family members, by clicking the COPY button.

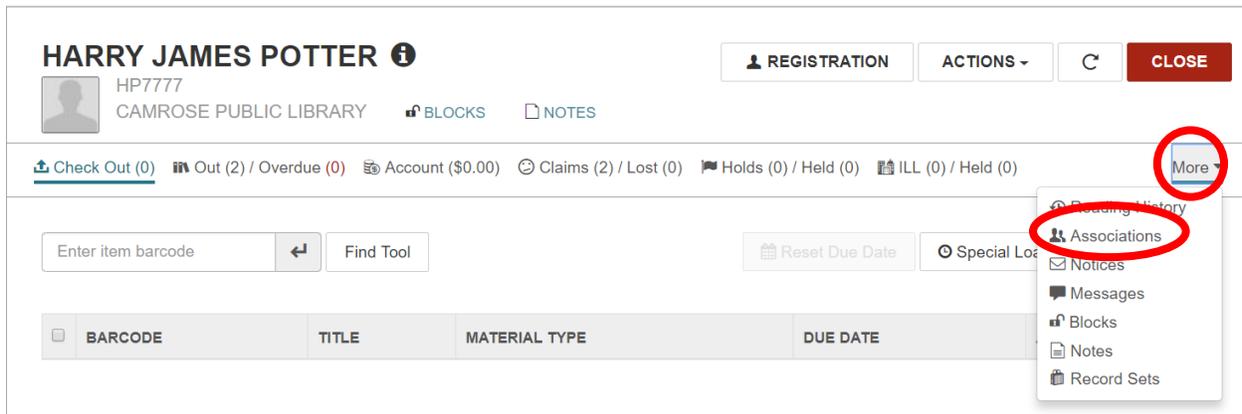
SAVE
RENEW
COPY

2. Edit applicable fields (barcode, name) and click SAVE.

Associate Family Members

You can create ASSOCIATIONS between two or more patron records so that when one record is open, all associated patron records are conveniently accessible.

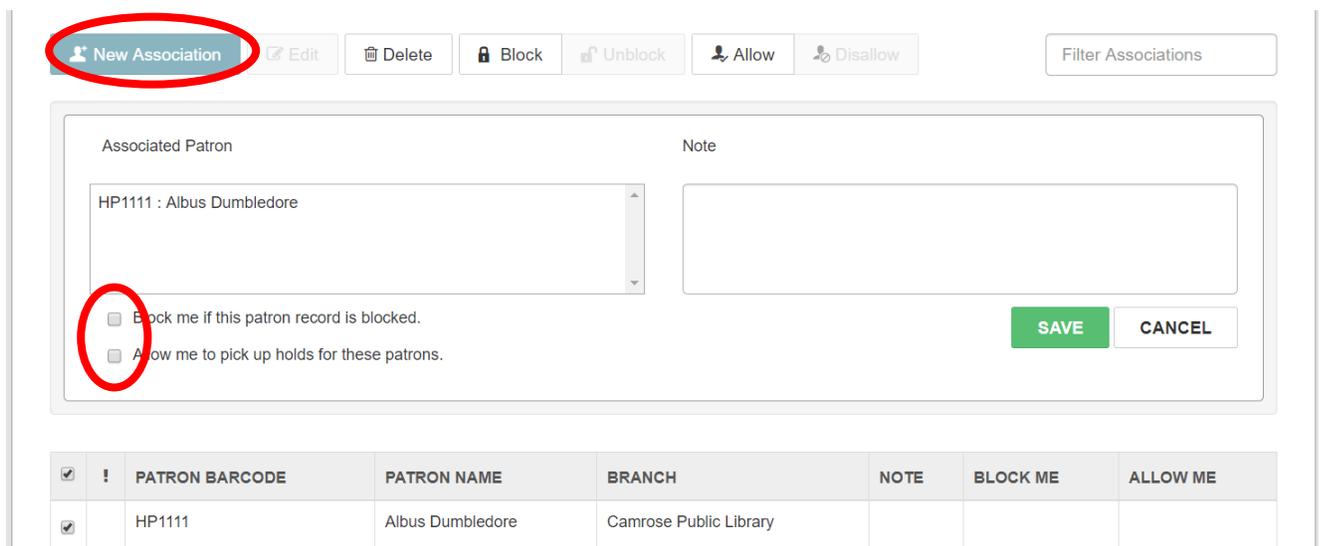
NOTE: Associated patrons **CANNOT** see each other's accounts.



The screenshot shows the patron record for HARRY JAMES POTTER (HP7777) at CAMROSE PUBLIC LIBRARY. The 'More' dropdown menu is open, and the 'Associations' option is highlighted with a red circle. Other options in the menu include Reading History, Notices, Messages, Blocks, Notes, and Record Sets. The 'REGISTRATION' button is also visible.

If the patron has associations, they will be listed. From this view you can add a new associated patron, click to view an associated patron's record, or edit/delete an existing association.

To add a new association (family member, care giver etc.) click NEW ASSOCIATION and scan patron barcode. There are options to block a patron when an associated patron is blocked and/or to give permission to pick up associates items.



The screenshot shows the 'New Association' form. The 'New Association' button is highlighted with a red circle. The form includes a dropdown menu for 'Associated Patron' with the value 'HP1111 : Albus Dumbledore'. Below the dropdown are two checkboxes: 'Block me if this patron record is blocked.' (highlighted with a red circle) and 'Allow me to pick up holds for these patrons.' There are 'SAVE' and 'CANCEL' buttons. Below the form is a table listing the associated patron.

<input checked="" type="checkbox"/>	!	PATRON BARCODE	PATRON NAME	BRANCH	NOTE	BLOCK ME	ALLOW ME
<input checked="" type="checkbox"/>		HP1111	Albus Dumbledore	Camrose Public Library			

Information for New Patrons

At registration, take the opportunity to inform new patrons about the variety of services available through your library and through the regional system.

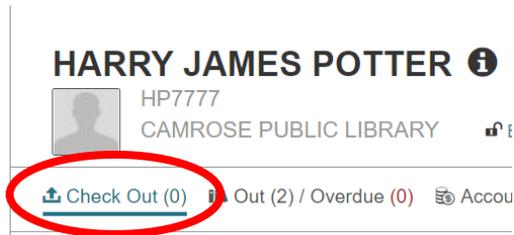
- How to access their online account at <http://search.prl.ab.ca>, using their barcode and PASSWORD (PIN).
- Where to access eResources from your library's website and the Public Access Catalogue (PAC).
- Where they can use their PRL library card, and how to access libraries Alberta-wide through ME Libraries (melibraries.ca).
- How they can stay informed about local library programs.
- Automated library notifications:
 - Library item coming due - two days prior to due date, a REMINDER notice is sent that items are coming due
 - 1st OVERDUE NOTICE – sent at 1 days past due date
 - 2nd OVERDUE NOTICE – sent at 7 days past due date
 - 3rd OVERDUE NOTICE – sent at 14 days past due date
 - BILLING NOTICE – at 28 days past due date, the item is set to LOST and the patron is billed a replacement charge (this bill is sent by MAIL)
 - Notice that a hold is available for pick up (a hold expires after 7 days)
 - 2nd hold notice, after 3 days, if item has not been picked up yet
 - Patron registration (membership) is about to expire – one month before expiration

Patron Library Account

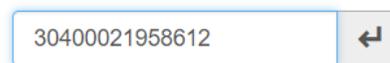
Check Out Items

A patron can have 50 items checked out at one time. Once they have reached this limit, there will be a soft block on their account. Staff can override this block after acknowledgment but patrons may be prevented from accessing self-serve online features.

1. Open the patron's record.
CHECK OUT should be the default action.



2. Scan or type item barcode.



3. Switch over to OUT view to see all items checked out to the patron.



4. When you are finished all transactions, click COMPLETE.



Out/Overdue

When an item is overdue the number of overdue items will turn red and each item will be marked with a yellow caution symbol. When an overdue item is checked in, the marked item will disappear and the charge will appear in the ACCOUNTS tab if not paid or waived directly.

A soft block will pop up on the patron's account after 10 items become overdue. After notifying the patron, you can acknowledge the block and continue.

[Check Out \(0\)](#) | [Out \(6\) / Overdue \(3\)](#) | [Account \(\\$0.00\)](#) | [Claims \(1\) / Lost \(0\)](#) | [Holds \(10\) / Held \(1\)](#) | [ILL \(0\) / Held \(0\)](#) | More ▾

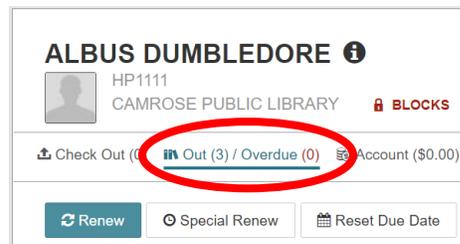
[Renew](#) | [Special Renew](#) | [Reset Due Date](#) | [Estimate Fines](#) | More ▾ |

	TYPE	DUE ON ▾	BARCODE	TITLE	AUTHOR	RENEWALS LEFT	FILLS HOLD	CALL NO.	BRANCH
<input type="checkbox"/>	Book	10/25/2011	31000042779325	Wild cats	Batten, Mary.	5 of 5	Yes	599.75 BAT	Carstairs Public Librar...

Renew loaned items

PRL items can be renewed up to 5 times. To renew an item, the item must first not fill a hold request.

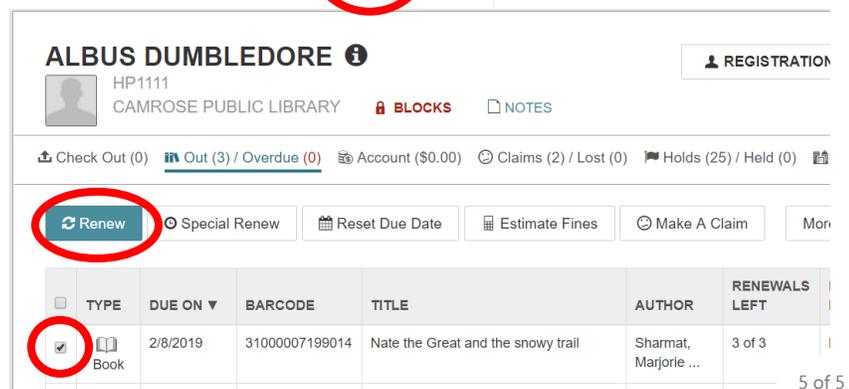
1. Find the item in the patron's OUT/OVERDUE tab.



2. Ensure the item as renewals let and that it does not fill another hold.

RENEWALS LEFT	FILLS HOLD	CALL NO.
5 of 5		E SHA LEVEL 4

3. Click the box beside the item and click RENEW

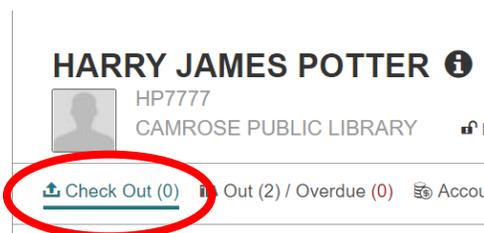


Special Loan/Extended Due Dates

NOTE: Do not extend due dates for material from other libraries without permission.

To set a special due date/loan period prior to scanning items:

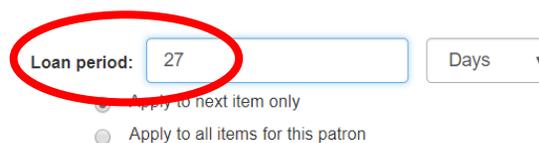
1. Open the patron's record. CHECK OUT should be the default action.



2. Click the SPECIAL LOAN button.



3. Choose new loan period.



4. Scan or type item barcode.

5. When you are finished all transactions, click COMPLETE.

COMPLETE

To extend the due date of checked out items, without using a renewal, RESET the item due date.

1. Open the patron's record. CHECK OUT should be the default action. Switch over to OUT view.

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[Check Out \(0\)](#) **Out (2) / Overdue (0)** [Accou](#)

2. Check off the item(s) you wish to reset.

<input type="checkbox"/>	TYPE	DUE ON ▼	BARCODE	TITLE
<input checked="" type="checkbox"/>	Book - Paperback	2018-03-05	30400022012195	Lash-up

3. Choose new due date.

Reset Due Date Estimate Fines Make A

Mar 2018

RCODE	TITL	Su	Mo	Tu	We	Th	Fr	Sa
100022012195	Last	4	5	6	7	8	9	10
		11	12	13	14	15	16	17
		18	19	20	21	22	23	24
100005955055	Micr	25	26	27	28	29	30	31

4. When you are finished all transactions, click COMPLETE.

COMPLETE

Patron Blocks

The BLOCKS icon is a red closed lock if the patron has blocks that prevent circulations or a green open lock if the patron has no blocks. To see a patron's blocks, click the BLOCKS icon. The blocks include the block description and creation date. A patron's account will be SOFT blocked when they have any minimal fees. Staff can acknowledge the notice and continue transactions. Patrons are HARD blocked when they have accrued \$25.00 in fines. At this point fees must be paid down or waived before further transactions can be made.

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 **BLOCKS**  NOTES

REGISTRATION ACTIONS ↕ ↻ CLOSE

Check Out (0) Out (4) / Overdue (1) Account (\$5.99) Claims (1) / Lost (0) Holds (10) / Held (0) ILL (0) / Held (0) Blocks ▾

Add Block Delete Properties Filter Blocks

BLOCK DESCRIPTION	CREATION DATE
Patron owes money. Amount due: \$5.99	

Patron without BLOCKS:

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 **BLOCKS**  NOTES

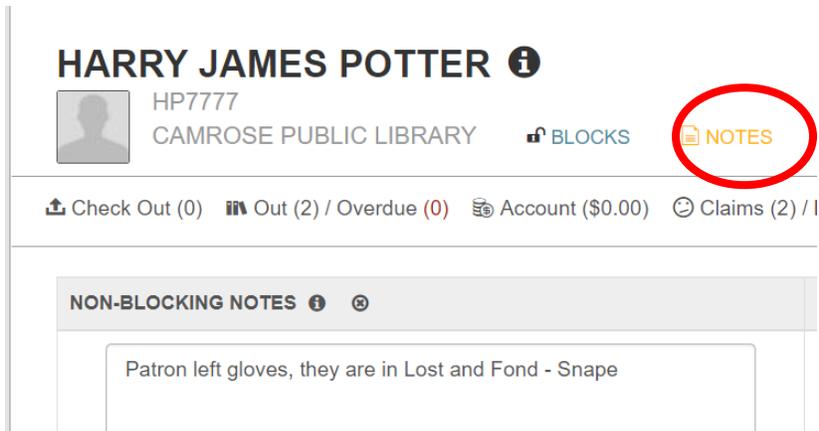
REGISTRATION ACTIONS ↕ ↻ CLOSE

Check Out (0) Out (2) / Overdue (0) Account (\$0.00) Claims (2) / Lost (0) Holds (0) / Held (0) ILL (0) / Held (0) More ▾

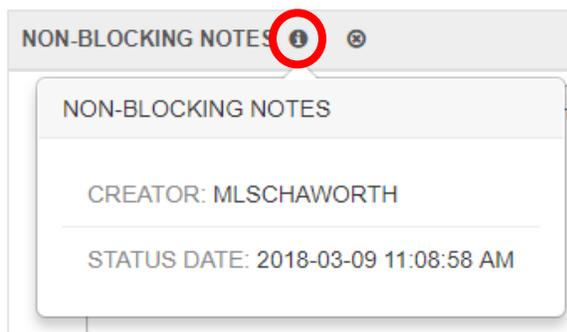
Patron Notes

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. If the NOTES button is yellow, the patron record contains non-blocking notes. If the NOTES button is red, the patron record contains blocking notes.

NOTE: Blocking notes prevent patrons from using eResources and PAC online services (placing holds, etc.). Please only use if necessary.



You can click on the information icon to see the note creator and the date and time the note was added or updated.



You can add a note, edit an existing note, or delete a note by clicking in the NOTE box. Click on UPDATE NOTES to save changes.

UPDATE NOTES

Patron Fines/Fees

To view the patron's financial account with your library, open the patron record and select ACCOUNT. The patron's ACCOUNT SUMMARY list appears.

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REGISTRATION ACTIONS C CLOSE

Check Out (0) Out (4) / Overdue (1) **Account (\$5.99)** Claims (1) / Lost (0) Holds (10) / Held (0) ILL (0) / Held (0) More ▾

Pay Waive Charge Add Charge Create Credit Refund Credit More ▾ Filter Charges

Charges: \$5.99 Deposits: \$0.00 Credits: \$0.00 Balance: \$5.99 View: Account Summary ▾

TYPE	DATE	BARCODE	TITLE	REASON	ORGANIZATION	NOTE	BILLED	AMOUNT	BALANCE
<input type="checkbox"/> Charge	1/8/2019			Replacement Cost	Parkland Regional Library			\$5.99	\$5.99
									\$5.99

Collecting Payments:

1. In the ACCOUNT SUMMARY view, check the box next to the charge(s) to be paid.

Pay Waive Charge Add Charge

Charges: \$2.20 Deposits: \$0.00

TYPE	DATE	BARCODE
<input checked="" type="checkbox"/> Charge	2018-03-09	39335024442019
<input checked="" type="checkbox"/> Charge	2018-03-09	30400005079765

2. Click on the blue PAY button. Items can be WAIVE by using the same steps and clicking WAIVE CHARGES.

Pay Waive Charge

3. Choose to pay/waive either full amount (default) or partial amount.

Balance: **\$2.20**

Amount:

Method:

4. Click the green PAY/ WAIVE button.

PAY OR WAIVE

Claims

When an item is checked out to a patron, but the patron claims they have already returned it, or never checked out the item, you can assign a CLAIM status to the item.

To assign a CLAIM status:

1. Open the patron's record. CHECK OUT should be the default action. Switch over to OUT view.

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Check Out (0) **Out (4) / Overdue (1)**

Pay Waive Charge Add

2. Select the check box next to the item(s) to CLAIM.

<input type="checkbox"/>	TYPE	DUE ON ▼	BARCODE	TITLE
<input checked="" type="checkbox"/>	Book - Paperback	2018-04-06	30400022023515	Breaking point

3. Click the MAKE A CLAIM button.

Renew Special Renew Reset Due Date Estimate Fines **Make A Claim**

4. Choose the appropriate CLAIM status.

Choose a claim status:

- Claim Returned ▼
- Claim Returned**
- Claim Never Had

5. Click on the green CLAIM button.

CLAIM

Lost Items

NOTE: Items with a status of LOST were checked out by a patron and lost. MISSING items were lost/misplaced from the library without being checked out.

To declare an item LOST from the patron's ITEMS OUT list:

1. Open the patron's record. CHECK OUT should be the default action. Switch over to OUT view.

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Check Out (0) **Out (4) / Overdue (1)**

2. Select the check box next to the item(s) to DECLARE LOST.

<input type="checkbox"/>	TYPE	DUE ON	BARCODE	TITLE
<input checked="" type="checkbox"/>	Book - Paperback	2018-04-06	30400022023515	Breaking point

3. Click the DECLARE LOST button.

Renew Special Renew Reset Due Date Estimate Fines Make A Claim **Declare Lost**

4. Choose action option (Pay, Waive, Charge) and click on OK.

Declare lost item

Item Barcode: 30400022012310 Title: Death wears a beauty mask and other stories

Due Date: 2018-04-02 Billed Date: Billed

Patron Name: Gold, Marina Patron Barcode: 20400002396305 Total Fine: \$9.99

Charge:	Replacement: \$9.99	Processing: \$0.00	Overdue: \$0.00
Paid:	\$0.00	\$0.00	\$0.00
Waived:	\$0.00	\$0.00	\$0.00
Amount due:	\$9.99	\$0.00	\$0.00

Action: Leave as is Leave as is

Amount:

Payment method: Cash Payment amount: \$0.00

OK CANCEL

5. Charged items will automatically show in the patron's ACCOUNT SUMMARY.

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Check Out (0) Out (4) / Overdue (1) **Account (\$5.99)**

Pay Waive Charge Add Charge Create

Viewing Claims/Lost Items

If the patron has CLAIMS or LOST items, they can be viewed through the CLAIMS/LOST tab in the patron's account:

1. Open the patron's record.
CHECK OUT should be the default action. Switch over to CLAIMS/LOST.

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Check Out (0) Out (4) / Overdue (1) **Account (\$5.99)** **Claims (1) / Lost (0)**

2. The patron's CLAIMS/LOST items will be listed.

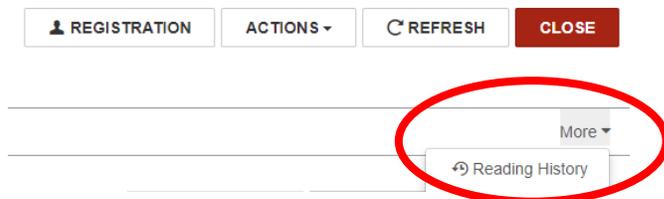
Total Claims: 1		Current Claims: 1		Lost: 1	
BARCODE	TITLE	CLAIM DATE	DESCRIPTION	DUE DATE	
30400022023515	Breaking point	2018-03-09	Claim Returned	2018-04-06	
30400022012310	Death wears a beauty mask and other stories	2018-03-09	Lost/Unpaid	2018-04-02	

Reading History

If the patron has chosen to keep a READING HISTORY, you can view their history in their account. During registration or by editing their account on the PAC patrons can choose to have their reading history kept. This is also where they can update or revoke their permission.

Note: If a patron is storing their Reading History and decides to revoke permission, they will not be able to see it again after it is deleted.

1. Open the patron's account. On the right-hand side, choose MORE and READING HISTORY.



2. The list will appear in order of newest to oldest.

<input type="checkbox"/>	FORMAT	CHECKOUT DATE ▲	TITLE	AUTHOR
<input type="checkbox"/>	Book	2018-03-06 9:04:25 AM	The legend of Caleb York	Spillane, Mickey, 1918-2006, author
<input type="checkbox"/>	Book	2018-03-06 9:00:16 AM	The 14th colony	Berry, Steve, 1955-, author
<input type="checkbox"/>	Book	2018-03-06 9:00:10 AM	Panacea	Wilson, F. Paul, Francis Paul), author

3. Sort the list by clicking on any of the column headers.

4. Use the FILTER HISTORY box to search for a specific title or author.



Holds

Placing holds for patrons can be done from the PATRON RECORD or the BIBLIOGRAPHIC RECORD. A Patron can place up to 250 holds.

Holds Statuses

Holds statuses change automatically. It is important to check in ALL items received in the library, including new materials, as this causes the item status to change.

The most common HOLDS STATUSES are:

- **PENDING** – The hold has been placed and the system is checking to see if there is an available copy.
- **ACTIVE** – An available copy has been identified and the holds alert will show on that library's PICKLIST.
- **SHIPPED** – The item has been scanned at a library and is being shipped to your location.
- **HELD** – The item has arrived at its destination library and scanned. It is now available for the patron to check out.
- **UNCLAIMED** – If a hold is not picked up by the patron within ten days, it is considered unclaimed.
- **CANCELLED** – The hold has been cancelled (possibly by the patron or because the last copy has become unavailable). Cancelling of a hold for any reason triggers a notification to be sent to the patron.
- **IN-TRANSIT** – The item is being returned to its home library.

Place Hold from Patron Account

1. Open the patron's record. CHECK OUT should be the default action. Switch to HOLDS view.

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REGISTRATION

BLOCKS NOTES

Check Out (0) Out (4) / Overdue (1) Account (\$5.99) Claims (1) / Lost (0) **Holds (10) / Held (0)**

2. Click on NEW HOLD button.

New Hold

3. Search for an item by entering TITLE, by using the FIND TOOL, or by scanning an item barcode.

Title
Search for a title

Barcode
Scan a barcode

FIND TOOL

4. Once the desired title is located, double-click on it, or single-click to highlight and click OPEN.

Find Tool - Bibliographic Record

Bibliographic Record ▸ Basic Search ▸ Title ▸

Mr. Mercedes

Title	Author	Format	85	0	2014	1187466	
Mr. Mercedes : a novel	King, Stephen, 19...	Book	85	0	2014	1187466	
Mr. Mercedes : a novel	King, Stephen, 19...	Audio ...	17	0	2014	1192425	
Mr. Mercedes : a novel	King, Stephen, 19...	Audio ...	7	0	2014	1194115	
Mr. Mercedes	King, Stephen, 19...	Large ...	4	0	2014	1215487	
Mr. Mercedes : a novel	King, Stephen, 19...	Eaudio...	1	*	2014	813/.54	1282384
Mr Mercedes : roman	King, Stephen, 19...	Book	1	0	2015	1311912	
Mr. Mercedes : a novel	King, Stephen, 19...	Book	88	0	2017	1376981	
Mr. Mercedes	King, Stephen, au...	Audio ...	2	0	2014	1413623	
Mr. Mercedes : a novel	King, Stephen, 19...	Book	2	1	2015	1470265	

Ready 9 result(s)

Count Only

OPEN **CANCEL**

5. Click on PLACE HOLD to complete.



Place Hold from Bibliographic Record

1. Locate desired title by using the QUICK SEARCH box or FIND TOOL.



2. Choose the correct item and open the record by double-clicking on it or highlighting it and clicking the OPEN button.

Find Tool - Bibliographic Record

Bibliographic Record ▸ Basic Search ▸ All keyword fields ▸ Phrase ▸

scrappy little nobody

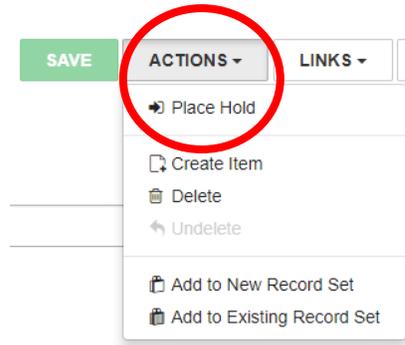
Title	Author	Format	Lin...	Hol...	Publ...	Call Number	Cont...
Scrappy little nobody	Kendrick, Anna, a...	Book	23	0	2016	792.02/8092	1434329
Scrappy Little Nobody	Kendrick, Anna	Eaudio...	4	*	2016		1403266
Scrappy little nobody	Kendrick, Anna, a...	Audio ...	2	0	2016	792.02/8092	1467609
Scrappy Little Nobody	Kendrick, Anna	Ebook	2	*	2016		1472323

Ready 4 result(s)

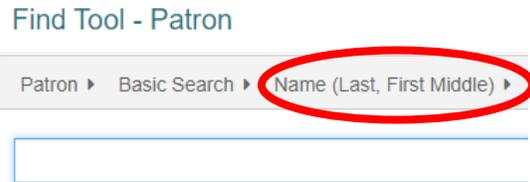
Count Only

ADD TO RECORD SET ▾ **OPEN** **CANCEL**

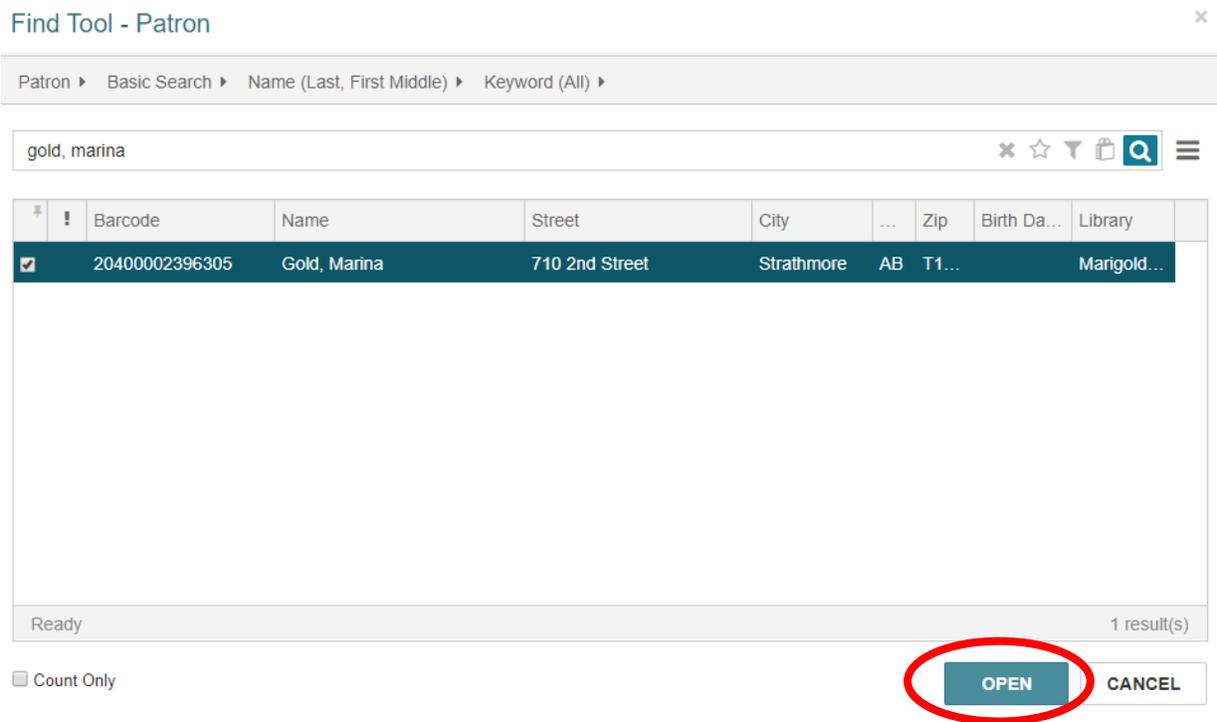
3. Use the ACTIONS drop down menu to choose PLACE HOLD.



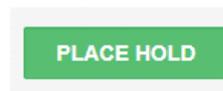
4. Locate patron in the FIND TOOL window. Choose to find by name, barcode, or other criteria. If the patron's record is currently open a prompt will appear to select that patron.



5. Choose the correct patron and open the record by double-clicking on it or highlighting it and clicking the OPEN button.



6. The HOLDS form will open in the patron's account. Click on the PLACE HOLD button.



Grouping Holds

If a patron doesn't care which format the item they want to borrow comes in (e.g., regular print/large print, DVD/Blu-ray, etc.), you can group multiple titles together. When one of the items in the GROUP HOLDS is filled, the other requests are automatically deleted. This allows the hold to be filled in the quickest way possible.

The GROUP is considered a single request in the patron's total request limit.

1. Place holds on all bibliographic records in the formats desired.
2. Open the patron's record and select the HOLDS tab.

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REGISTRATION ACTIONS

BLOCKS NOTES

Check Out (0) Out (4) / Overdue (1) Account (\$5.99) Claims (1) / Lost (0) **Holds (10) / Held (0)** ILL (0) / Held (0)

3. Check off the holds you want to group together.

<input checked="" type="checkbox"/>	Bonderoff, Jason.	Alan Alda : an unauthorized biography	Book	792.028 BON	3/11/2019	Pending	Ponoka Jubilee Library	1			
<input checked="" type="checkbox"/>	Bonham, Frank.	The eye of the hunter an Evans novel of the west	Large Print	WES BON	3/11/2019	Pending	Ponoka Jubilee Library	1			

4. Under the MORE drop-down menu, choose ADD TO GROUP.

New Hold Cancel Reactivate Delete Fill Now Convert To ILL Deny Ask Me Later More

AUTHOR	TITLE	FORMAT	CALL NUMBER	ACTIVATION D

Return Add To Group Remove From Group

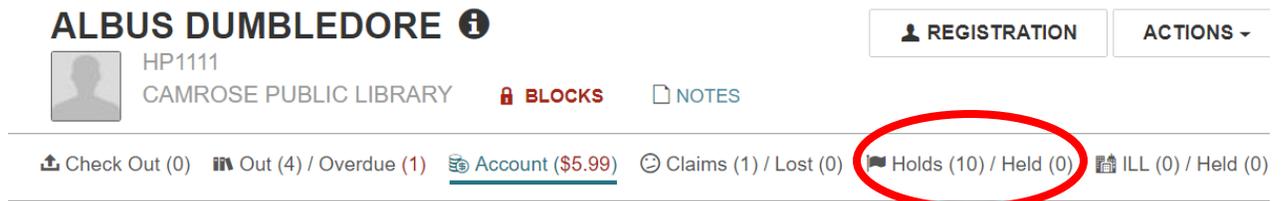
5. The group will be given a letter name.

<input type="checkbox"/>	Bonderoff, Jason.	Alan Alda : an unauthorized biography	Book	792.028 BON	3/11/2019	Pending	Ponoka Jubilee Library	1	A
<input type="checkbox"/>	Bonham, Frank.	The eye of the hunter an Evans novel of the west	Large Print	WES BON	3/11/2019	Pending	Ponoka Jubilee Library	1	A

Suspending Holds (Inactive)

To suspend an unfulfilled hold without losing the patron's place in the holds queue, change the ACTIVATION DATE.

1. Open the patron's record and select the HOLDS tab.



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REGISTRATION ACTIONS

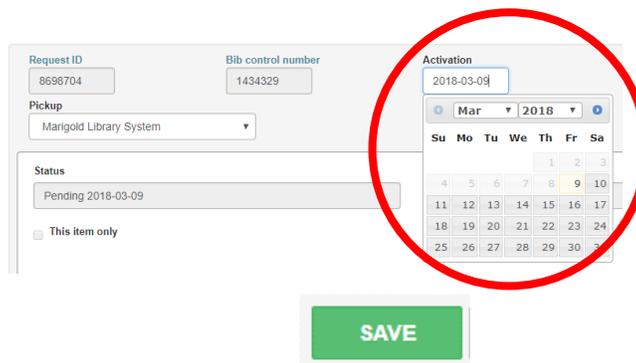
BLOCKS NOTES

Check Out (0) Out (4) / Overdue (1) Account (\$5.99) Claims (1) / Lost (0) **Holds (10) / Held (0)** ILL (0) / Held (0)

2. Click on the title you wish to set as inactive.

<input type="checkbox"/>	AUTHOR ▼	TITLE
<input type="checkbox"/>		Thor: Ragnarok (Blu-ray)
<input type="checkbox"/>		Thor: Ragnarok
<input type="checkbox"/>	Kendrick, Anna, author	Scrappy little nobody

3. In the hold form, change the ACTIVATION date.



Request ID: 8698704
Bib control number: 1434329
Activation: 2018-03-09

Pickup: Marigold Library System

Status: Pending 2018-03-09

This item only

SAVE

4. Click on the SAVE button.

Cancelling and Deleting Holds

To cancel an unfulfilled/un-transferred hold that the patron no longer requires:

1. Open the patron's record and select the HOLDS tab.

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BLOCKS **NOTES**

REGISTRATION **ACTIONS** ▾

Check Out (0) Out (4) / Overdue (1) Account (\$5.99) Claims (1) / Lost (0) **Holds (10) / Held (0)** ILL (0) / Held (0)

2. Check off the hold(s) you want to cancel.

<input checked="" type="checkbox"/>	Bonderoff, Jason.	Alan Alda : an unauthorized biography	Book	792.028 BON	3/11/2019	Pending	Ponoka Jubilee Library	1			
<input checked="" type="checkbox"/>	Bonham, Frank.	The eye of the hunter an Evans novel of the west	Large Print	WES BON	3/11/2019	Pending	Ponoka Jubilee Library	1			

3. Click on the CANCEL button.



The status will change to cancelled. The cancelled hold(s) will remain listed in the patron's HOLDS list until deleted.

To delete a cancelled hold:

1. Open the patron's record and select the HOLDS tab.

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BLOCKS **NOTES**

REGISTRATION **ACTIONS** ▾

Check Out (0) Out (4) / Overdue (1) Account (\$5.99) Claims (1) / Lost (0) **Holds (10) / Held (0)** ILL (0) / Held (0)

2. Check off the cancelled holds you wish to delete.

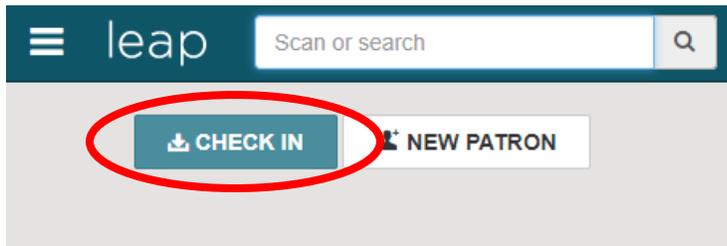
<input checked="" type="checkbox"/>	Bonderoff, Jason.	Alan Alda : an unauthorized biography	Book	792.028 BON	3/11/2019	Pending	Ponoka Jubilee Library	1			
<input checked="" type="checkbox"/>	Bonham, Frank.	The eye of the hunter an Evans novel of the west	Large Print	WES BON	3/11/2019	Pending	Ponoka Jubilee Library	1			

3. Click on the DELETE button.



Checking Items In

Item CHECK IN is done from the main Leap screen.



The default mode is 2 FREE DAYS which allows for a two-day grace period for items that are returned late. If grace days are exceeded, the fine is calculated as if there were no grace period. If it is necessary to add additional free days contact IT at helpdesk@prl.ab.ca.

There are four check in modes:

- NORMAL: the default mode that displays all notices.
- BULK: quickly check in multiple items in bulk mode. With bulk check-in, most blocks and dialog boxes do not appear.
- IN-HOUSE: when checking in items that patrons used while inside the library. The item's history is updated with Checked in via In House. If any checked in items have blocks or can satisfy a hold request, a message appears.
- INVENTORY: take an inventory of items on the shelf by scanning item barcodes or reading RFID tags. Items are not checked in when you use the Inventory mode in Leap; this mode used to update the Last inventory date field in the item record.

To check in scan or enter item barcode in to scan box.

Check In

A screenshot of the 'Check In' screen in the Leap system. At the top, there are four mode options: 'Normal (0)', 'Bulk (0)', 'In House (0)', and 'Inventory (0)'. Below these, there is a search bar with the text 'Scan or enter item barcode' and a 'FIND TOOL' button. The search bar is circled in red. To the right of the search bar, there are two input fields: 'Free Days' with the value '1' and a date field with the value '2018-03-08'. At the bottom, there is a table header with columns: 'BARCODE', 'DUE DATE', 'STATUS', and 'COMMENT'.

If the item fills a hold at your library, the following message will pop-up:

Fill hold request

Breaking point
Barcode: 30400022023515

satisfies a hold request for:
Gold, Marina
Barcode: 20400002396305
Phone: 403-934-5334

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

If the item needs to be transferred to another library to fill a hold, the following message will pop-up:

Transfer for hold

Barcode: 31000043570020
Title: The man from Snowy River

This item fills a request at
Hardisty Public Library (aha)

Transfer for hold?
(Click Cancel to stop the check-in/check-out process.)

If the item belongs to another library and needs to be sent back, the following message will appear:

Item is in-transit

The item is now In-Transit to Bashaw Municipal Library (abash)

If the item is returned late use CONTINUE to pay now, WAIVE to not charge the patron, CHARGE ACCOUNT to add charge to the patron's account to be paid at a later time. Click CANCEL to not check-in the item at all.

Overdue Fine

Item barcode: 31000042779325
Title: Wild cats
Due date: 10/25/2018
Patron barcode: HP1111
Name: Albus Dumbledore
Fine: \$5.00

Patron has account balance

CONTINUE **WAIVE** **CHARGE ACCOUNT** **CANCEL**

Damaged Items

When an item is returned damaged and deemed "unable to circulate" the staff member to check in the item will mark the item as damaged.

1. Open the item record (regardless of assigned branch) by clicking on the checked in item.
2. Open the item record and select BLOCKS AND NOTES.
3. Change the LIBRARY ASSIGNED BLOCK to DAMAGED.
4. In PHYSICAL CONDITION add description of the damage as well as staff information [initials @ library code].
5. Click SAVE.

Library Assigned Block

(None)

(None)

Check Contents

See Note

Damaged

Physical Condition

water damage on page 53-70
[Prof.S - ALAP]

The same staff member will then charge the patron, if applicable.

1. Open the last patron's record (regardless of assigned branch). This can be done by clicking the patron's name on the check in screen or by viewing the circulation history of the item.

BARCODE	DUE DATE	STATUS	COMMENT	TITLE	MATERIAL TYPE	SHELF LOCATION	PATRON NAME
31000038364330	3/21/2019	Checked Out -> In-Transit	To Carstairs Public Library (acars)	We all sleep	Book		Albus Dumbledore

2. Open the patron's ACCOUNT tab and select ADD CHARGE.
3. Add the item's replacement cost (or reference the default replacement cost document Q:\Collections\Collection Development\Evaluating your collection).
4. Select DAMAGED ITEM as the fee reason.
5. Scan/type in the damaged item's barcode.
6. Add note [damage description - initials @ library code].
7. Click ADD CHARGE.

ALBUS DUMBLEDORE ⓘ

HP1111
CAMROSE PUBLIC LIBRARY

Account (\$0.00)

Pay Waive Charge Add Charge Create Credit Refund

Amount: 5.00

Fee Reason: Damaged Item

Item Barcode: 31000044218009

Notes: water damage 1/11/19 [Prof. S ALAP]

FIND TOOL

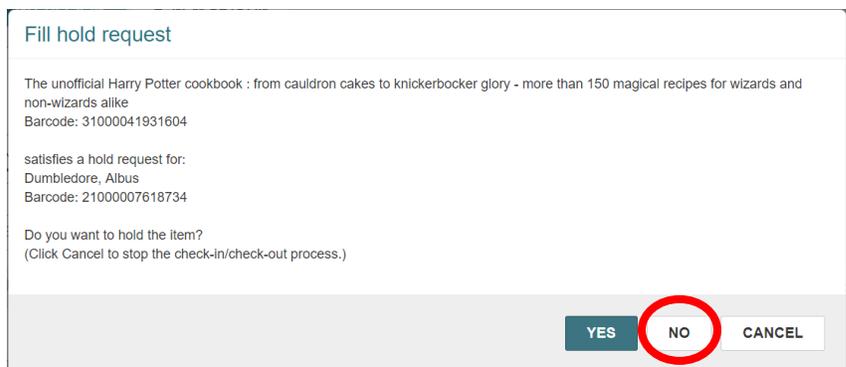
If either the item and/or patron are not from your library complete the [damaged item form](#) located on the support site <http://support.prl.ab.ca>. Then, if necessary, send the item to the patron's library via van or courier. Label item as damaged.

If the patron takes responsibility the fee can be paid right away or can remain as a charge on the patron's account (if the patron denies responsibility, waive the charge). If you have taken money for the damaged item, send a cheque with a copy of the damaged item form notification, to the owning library.

NOTE: If you decide to weed the item from your collection without charging a replacement cost, email the patron's library to confirm no charges will be levied and remove the charge from the patrons account.

Unable to lend an item

1. Check in the item.
2. A FILLS A HOLD notice will appear, click NO.



The screenshot shows a 'Fill hold request' form. It contains the following text: 'The unofficial Harry Potter cookbook : from cauldron cakes to knickerbocker glory - more than 150 magical recipes for wizards and non-wizards alike', 'Barcode: 31000041931604', 'satisfies a hold request for: Dumbledore, Albus', 'Barcode: 21000007618734', and 'Do you want to hold the item? (Click Cancel to stop the check-in/check-out process.)'. At the bottom right, there are three buttons: 'YES', 'NO', and 'CANCEL'. The 'NO' button is circled in red.

3. A REACTIVATE HOLD notice will appear, click YES. This ensure the patron is placed at the top of the holds queue.

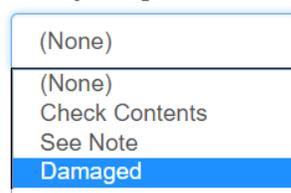


The screenshot shows a 'Reactivate hold' form. It contains the following text: 'Do you want to reactivate the hold request for this patron?', 'Name: Dumbledore, Albus', and 'Barcode: 21000007618734'. At the bottom right, there are two buttons: 'YES' and 'NO'. The 'YES' button is circled in red.

4. An ITEM IS IN-TRANSIT notice will appear stating the owning library, An ITEM IS IN-TRANSIT notice will appear stating the owning library, click YES.

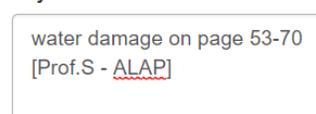
5. Click item to open ITEM RECORD. In the BLOCKS AND NOTES tab change LIBRARY ASSIGNED BLOCK to damaged and note the damage in the PHYSICAL CONDITION field of the item record [Item received in damaged condition – yourinitials@yourlibrarycode].
6. Complete the [damaged item form](#). Then send the item to the owning library via van or courier. Label item as damaged.
7. Click SAVE.

Library Assigned Block



The screenshot shows a dropdown menu for 'Library Assigned Block'. The options are: '(None)', '(None)', 'Check Contents', 'See Note', and 'Damaged'. The 'Damaged' option is highlighted in blue.

Physical Condition

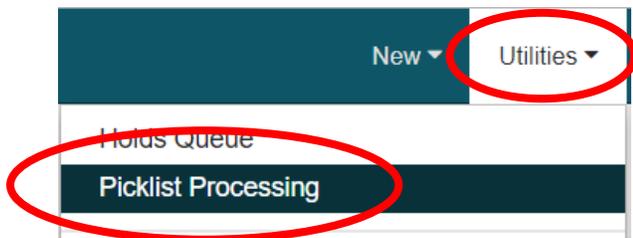


The screenshot shows a text field for 'Physical Condition' containing the text: 'water damage on page 53-70 [Prof.S - ALAP]'.

Picklist Processing

Pending Holds Request

To generate the list of holds that can be filled by your library:



Picklist

Marigold Library System

REFRESH

CLOSE

Pending (2)

Located (0)

Unclaimed (0)

Unclaimed ILL (0)

Holds to Transfer (0)

Located

Ask Me Later

Missing

Deny

Properties

Filter requests

Total items | 2 total

<input type="checkbox"/>	COLLECTION	SHELF LOCATION	CALL NUMBER	AUTHOR	TITLE	MATERIAL TYPE	PICKUP BRANCH	BARCODE	PENDING DATE
<input type="checkbox"/>	DVD		SUI		Suits, Season six	Video - DVD	ACAM	30410000148770	2018-02-12
<input type="checkbox"/>	Professional Collection	Professional Collection	005.432 CRA	Crawley, Don R.	The accidental administrator : Linux server step-by-step configuration guide	Book	AVE	30400006578831	2018-02-09

NOTE: The PICKLIST can be printed out or viewed on a tablet to make collecting items easier.

Once items have been collected from your shelves, check them in using the CHECK IN screen and hold/send as directed.

Unclaimed Request list

The unclaimed items view includes all ILL requests for the selected pickup branch that have a status of received-held and an unclaimed date earlier than the current date.

Picklist

Parkland Regional Library

REFRESH

CLOSE

Pending (2) Located (0) **Unclaimed (1)** Unclaimed ILL (0) Holds to Transfer (0)

Properties

Filter requests

Total items | 1 total

<input type="checkbox"/>	AUTHOR	TITLE	MATERIAL TYPE	PATRON NAME	PATRON BRANCH	ITEM BARCODE	UNCLAIMED DATE
<input type="checkbox"/>	Gardner, Erle Stanley, 1889-1970.	The case of the caretaker's cat	Large Print	alap		31000045474841	3/27/2019

Bibliographic and Item Records

All library materials have a BIBLIOGRAPHIC (BIB) RECORD and an ITEM RECORD.

Bibliographic Records

A BIBLIOGRAPHIC RECORD is used for cataloguing purposes and is the main record that individual ITEMS are attached to.

The screenshot shows a bibliographic record for the book "The wanted" by Robert Crais. The record includes a cover image, the title, author, control number (1632030), owner (The Regional Automation Consortium (TRAC) (sys)), and record status (Final). There are checkboxes for "Display in PAC", "Host", and "ILL". Below the record details, there are tabs for "Preview", "Items", "MARC", "Headings", "Statistics", "Record Sets", and "Resources". The "Items" tab is selected, and the "Availability" link is highlighted. The record details include the publisher (G.P. Putnam's Sons), date (2017), description (322 pages; 24 cm), and series information.

To see if there is a copy in your library, click on either the ITEMS tab or the AVAILABILITY link:

The screenshot shows the navigation tabs for the record: "Preview", "Items", and "MARC". The "Items" tab is circled in red. Below these tabs, there are three sub-tabs: "Brief", "Full", and "Availability". The "Availability" sub-tab is circled in red.

To view the HOLDS QUEUE for a title, click on the LINKS drop-down menu and choose HOLDS QUEUE:

The screenshot shows the action buttons for the record: "SAVE", "ACTIONS", "LINKS", "REFRESH", "RESULTS", and "CLOSE". The "LINKS" button is circled in red, and its dropdown menu is open, showing "Holds Queue" and "PAC". The "Holds Queue" option is circled in red.

To view the PAC record, click on the LINKS drop-down menu and choose PAC (the record will open in PAC web server in a new tab):

The screenshot shows the action buttons for the record: "SAVE", "ACTIONS", "LINKS", "REFRESH", "RESULTS", and "CLOSE". The "LINKS" button is circled in red, and its dropdown menu is open, showing "Holds Queue" and "PAC". The "PAC" option is circled in red.

Item Records

An ITEM RECORD is used for individual copies of materials.

Item Record ⓘ

Breaking point
By Box, C. J., author

Barcode: 30400022023515
Call number: M BOXC BREA 80
Collection: Paperback
Shelf location: L2U
Owning branch: Marigold Library System

ILL Non-circulating
Record status: Final
Bib control number: 1174536
Parent item:
Assigned branch: Marigold Library System

eContent Display in PAC
Issue:
Issue control number:
Price: \$11.99
Circulation status: In || 2018-03-09 2:25:20 PM

SAVE ACTIONS LINKS REFRESH CLOSE

Details Circulation Controls Blocks and Notes History Statistics Record Sets More

Due date: Renewals taken: 0 Renewals limit: 2 Renewal date: Current borrower: Loaning branch: Held for: Held at: Check-out date: Original due date: Last location: Check-in at: Marigold Library System Ck-in date: 2018-03-09 2:25:32 PM Wkstn/user: LEAP Access Computer/MLSchaworth Last use: Borrower: 20400002396305 Loaning branch: Marigold Library System Circ date: 2018-03-09 9:59:06 AM In-transit/Transferred From: Sent: To: Received:

Manage Item Record

To manage an Item Record including shelf location, circulation status, and adding non-public notes, library assigned blocks, and free text blocks.

1. Access the Leap CHECK IN workform and check in the item.
 - To manage the record the item must belong to your library, the item status must be available, and the item record must be closed.

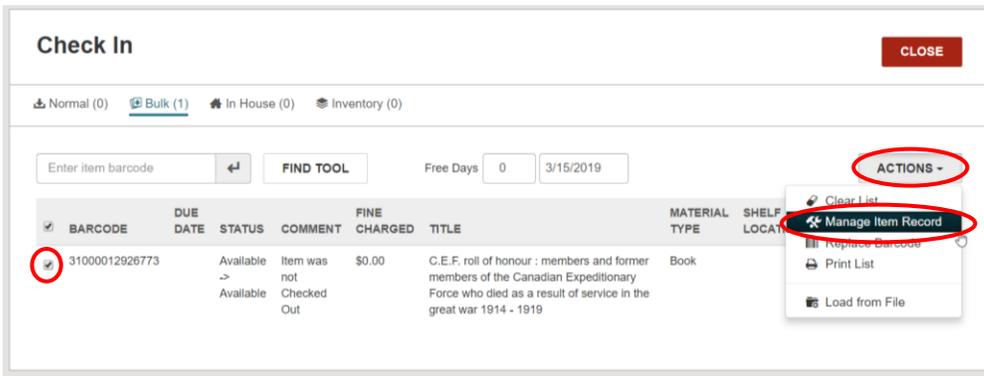
Check In CLOSE

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

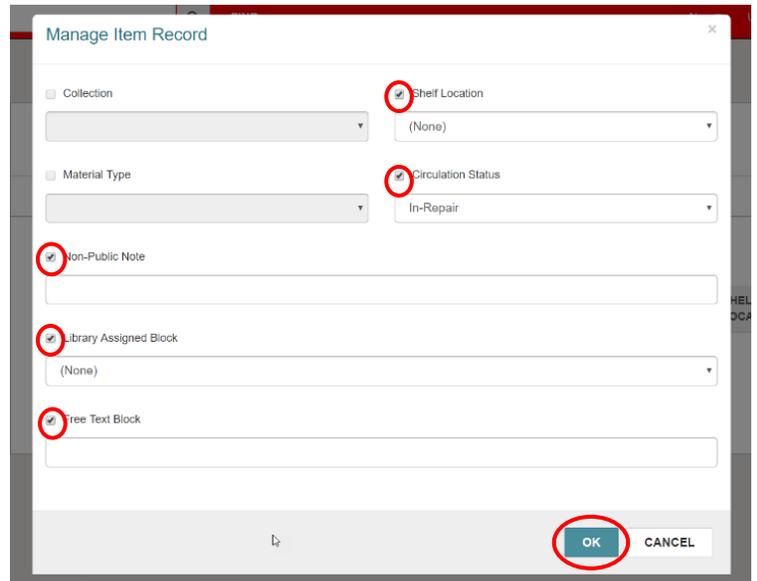
Enter item barcode FIND TOOL Free Days 0 3/15/2019 ACTIONS

BARCODE	DUE DATE	STATUS	COMMENT	FINE CHARGED	TITLE	MATERIAL TYPE	SHELF LOCATION	PATRON NAME	COLLECTION
<input type="checkbox"/> 31000012926773		Available -> Available	Item was not Checked Out	\$0.00	C.E.F. roll of honour : members and former members of the Canadian Expeditionary Force who died as a result of service in the great war 1914 - 1919	Book			Adult Non-Fiction (anf)

2. Check the box beside the item you wish to adjust and then select Manage Item Record from the Action drop-down menu. This must be done one item at a time.



3. A Manage Item Record screen will appear. Check the box of the sections you wish to adjust and select from a drop-down menu or begin typing in the free text boxes.
4. When the necessary changes are made, click OK.



More Blocks and Notes can be edited by opening the item's record and selecting the **BLOCKS AND NOTES** tabs.



Blocks and notes should be used as follows:

- **LIBRARY ASSIGNED BLOCKS:** (drop down menu) Check Contents, See Notes, Damaged
 - This is used **ONLY** to identify items that are damaged beyond the ability to circulate.
- **FREE TEXT BLOCK**
 - Use to identify content information, such as number of discs; New item release dates; noted minor damage.
- **PUBLIC NOTES**
 - This is used to identify format.
- **NON-PUBLIC NOTES**
- **PHYSICAL CONDITION**
 - This is used to describe minor and major damages
- **SPECIAL ITEM CHECK-IN**

Note: Patrons can request ALL notes associated with their record from the library through a FOIP request.

Item Statistics

To view statistics for the item, click the statistics tab in the item record.

[Details](#) [Circulation](#) [Controls](#) [Blocks and Notes](#) [History](#) [Statistics](#) [Record Sets](#)

Year-to-date circulation: 1	Year-to-date in-house use: 0
Previous year-to-date circulation: 1	Previous year-to-date in-house use: 0
Lifetime circulation: 2	Lifetime in-house use: 0

Item Circulation

View the last use information (including last borrower) select the circulation tab in the item record.

[Details](#) [Circulation](#) [Controls](#) [Blocks and Notes](#) [History](#) [Statistics](#) [Record Sets](#)

Due date:	Current borrower:
Renewals taken: 0	Loaning branch:
Renewals limit: 2	Held for:
Renewal date:	Held at:
Last location Check-in at: Marigold Library System Ck-in date: 2018-03-09 2:25:32 PM Wkstn/user: LEAP Access Computer/MLSchaworth	Last use Borrower: 20400002396305 Loaning branch: Marigold Library System Circ date: 2018-03-09 9:59:06 AM

Adding Item Records

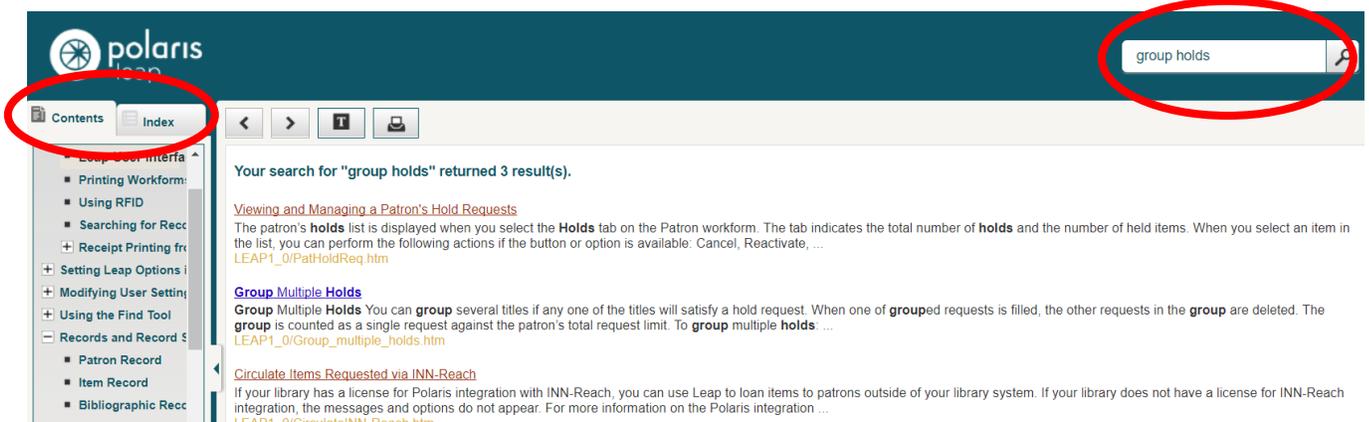
Advanced training is required to add ITEM RECORDS. This includes adding magazine issues and adding copies of items to an existing bib record. Contact your Consultant Librarian for more information.

Leap Help Menu

On the main toolbar, click HELP and choose LEAP TOPICS. The LEAP HELP MENU will open in a new tab.



Use the CONTENTS MENU, INDEX, or SEARCH BOX to locate help on specific topics:



Print instructions easily using the print icon:

