Parkland Regional Library System

POLARIS LEAP MANUAL

Circulation 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.

February 2024

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Polaris Leap

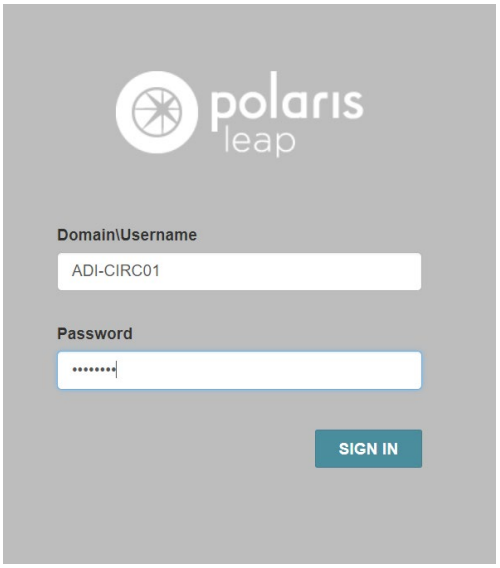
Overview

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
   Circulation:
   http://search.prl.ab.ca/leapwebapp
2. Enter your Polaris domain/username (workstation name) and Polaris password.
3. You may be prompted to select a branch and work station which should match your library name and computer workstation label.



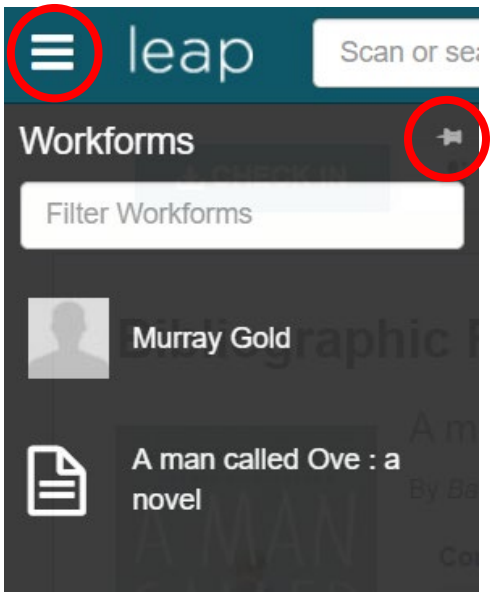
Leap Interface

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

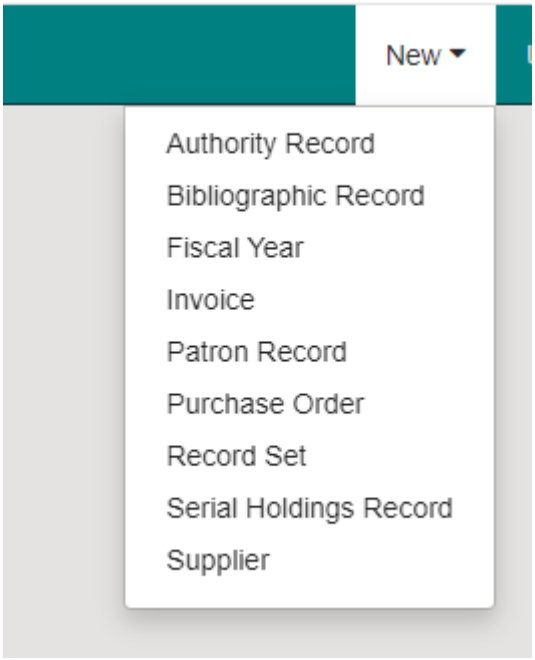
Workforms Tracker



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

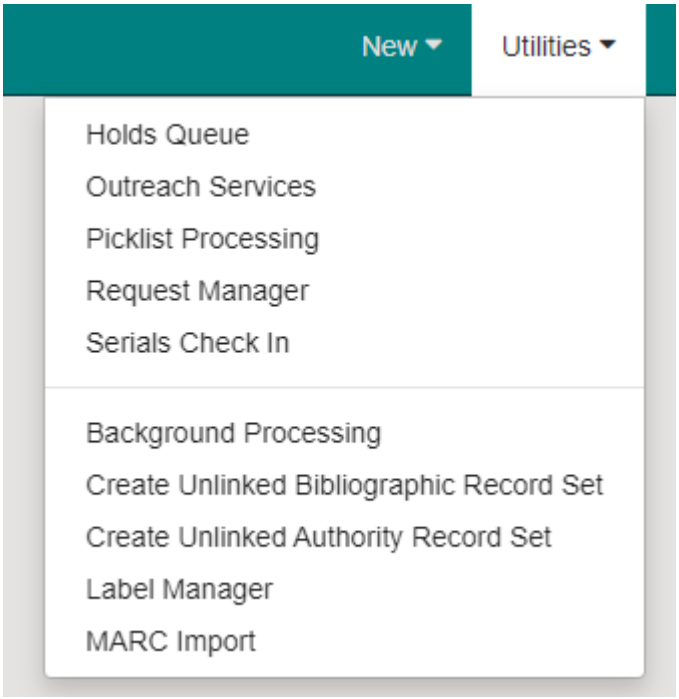
The WORKFORMS TRACKER displays the open workforms. You can pin the WORKFORMS TRACKER by selecting the pushpin icon, filter the list by typing in the **Filter Workforms** box, or close all the workforms by selecting **CLOSE ALL**. When you log out of Leap and then sign back in, the tracker remains in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

New Menu



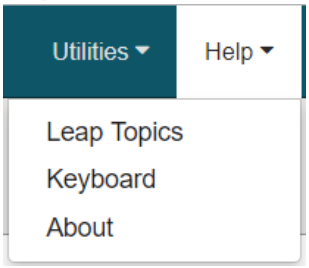
The NEW MENU includes options for creating a new patron record and a new record set among other functions.

Utilities Menu



The UTILITIES MENU includes options for opening the: Holds Queue, Outreach Services, Picklist Processing, Request Manager, and Serials Check In.

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.

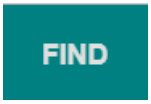
Searching

Quick Search Bar

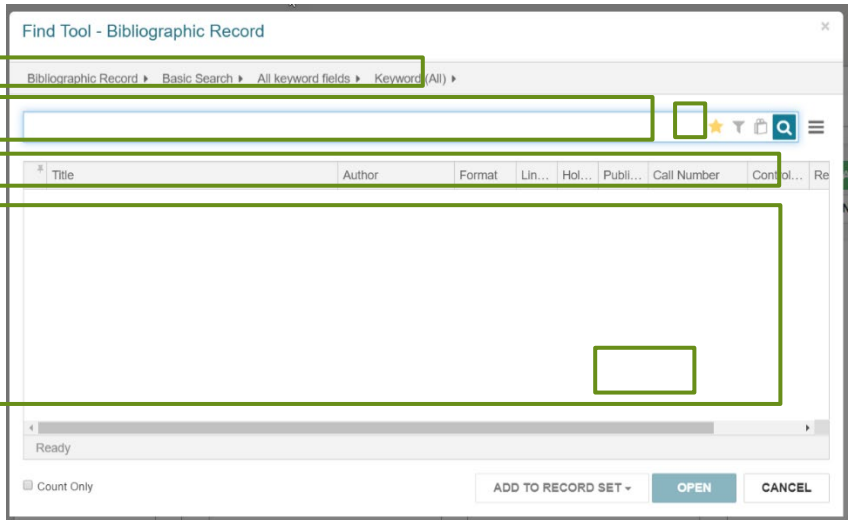
When you sign in to the Leap application, the cursor appears in the QUICK SEARCH BOX where you can scan a **patron or item** barcode, or enter search criteria to find **bibliographic or patron** records.

Find Tool

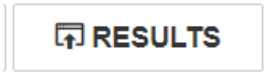
The FIND TOOL is an advanced search tool for more complex searching.



1. Click the F**ind button** located at the top of the web page and this will directly open the Find Tool.
2. The Find Tool includes: **search parameters**, **search terms**, options, including **column settings and search filters**, and **results.**
3. The search parameters are the 4 components that define your search: databases, search modes, qualifiers, and relations
   a. The **database** field identifies the type of records you are searching for.
   b. The **search modes** are Basic, Browse, and Power.
   c. The **qualifier** is your point of entry to the record and identifies the field being searched. There is a different list of qualifiers for each database.
   d. The **relation** parameter defines the relation between the qualifiers selected and the search terms entered.



4. You can add a **filter** to your search by selecting the **funnel icon**. Then **click ADD CONDITION**. From here use the first drop-down menu to select the qualifier you wish to filter by and then enter the appropriate options in the second drop-down menu.
5. After selecting your search parameters and entering your search terms **click SEARCH** to perform your search. The results will be listed in the bottom section of the Find Tool.
    a. You can view the **number of results** in the lower right corner of the Find Tool.
    b. You can **sort your results** by clicking the column headings at the top of your search results.
    c. When you have found the record you are looking for, **double-click** the entry or **select the entry and click open.**
    d. To return to your search results from the record, click the **RESULTS button** in the upper right of the record screen.



Searching Relations

Each record in the library catalogue 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 catalogue 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.

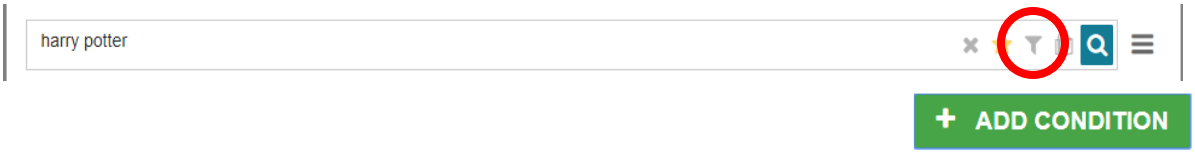
Case, spaces, punctuation - Letter case, multiple spaces, and punctuation are ignored. Omit hyphens in numbers. However, you can include the following characters if they immediately precede or follow a letter or number (no space between): **+ # % $**

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.

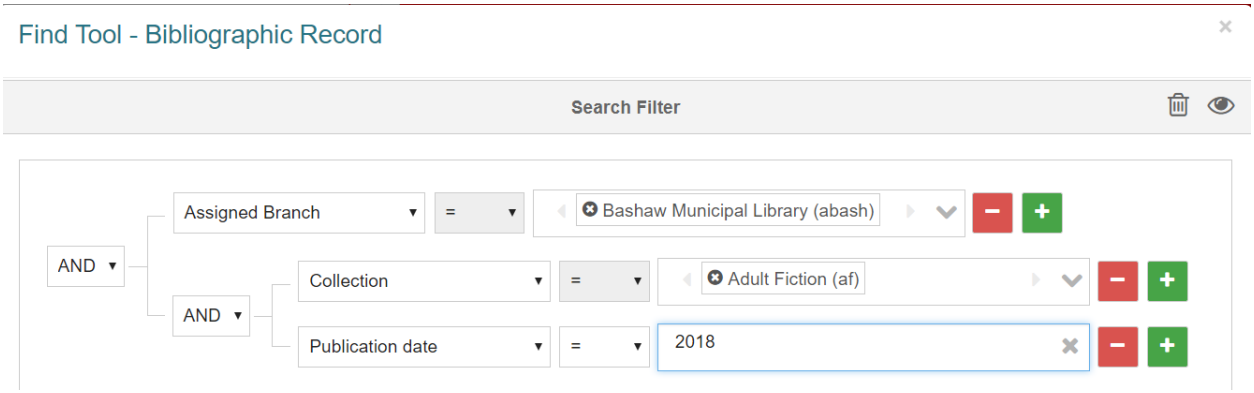
Wildcard characters - You can type a part of a word and use a wildcard character. The wildcard character asterisk (*) represents the rest of the word. For example, if you type **King***, the results include words such as *King*, *Kingsley*, and *Kingford*. The wildcard character question mark (?) represents 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.

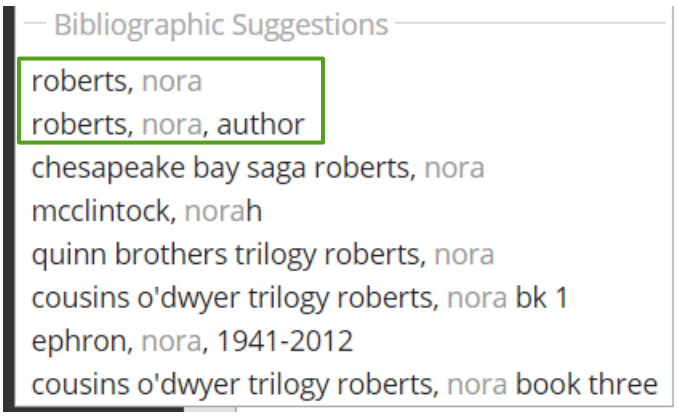


3. Choose the correct item and open the record by double-clicking on it or highlighting it and clicking the OPEN button

Search tips

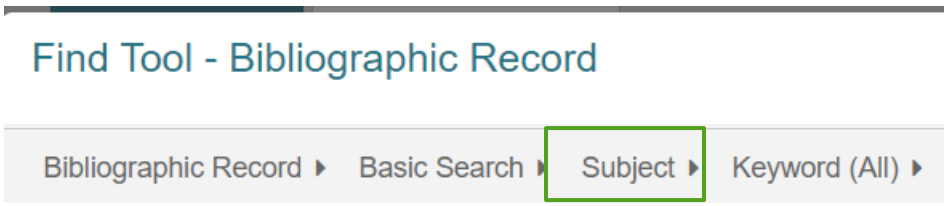
Quick Search Bar

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.

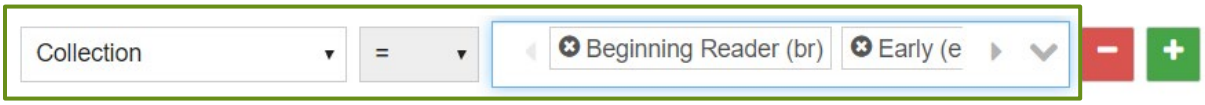


Subject Search

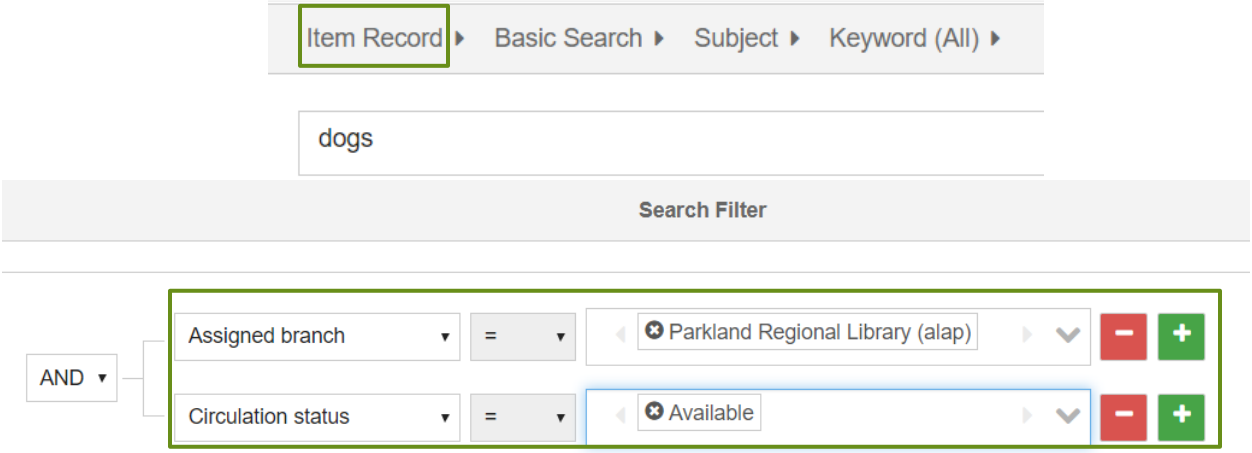
1. We all have those patrons that want "dinosaur books" or "vampire books" or that specific diet book. A tip for searching in Leap is to do a subject search. In your Find Tool **change your qualifier to subject.** This means all your results will have your search term tagged as a subject.



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.



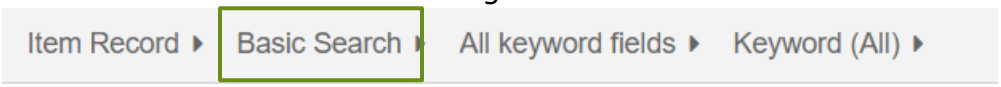
3. If you are looking for items specifically available at your library, change your search database to **Items Record** and add two filters: assigned location and circulation status. The search results will display only items your library owns that meet the subject criteria that are currently on your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



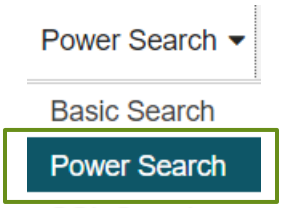
Power Searching

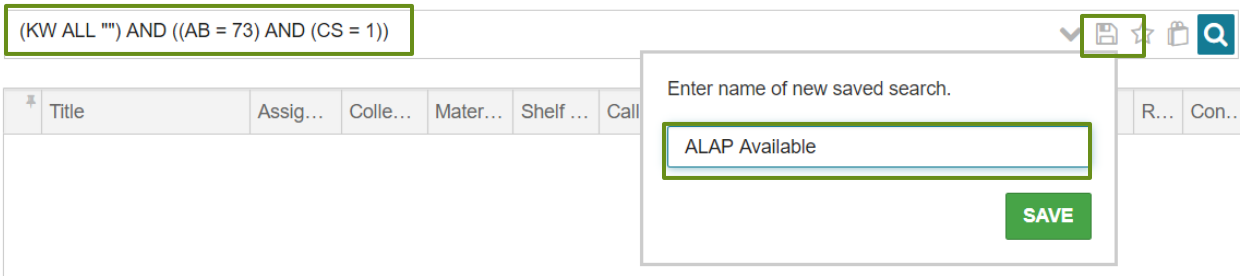
Polaris has no easy way to save searches filters and settings, but that doesn't mean there isn't one. If you are tired of continually adding filters for a search your do over and over again save it as a power search.

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.

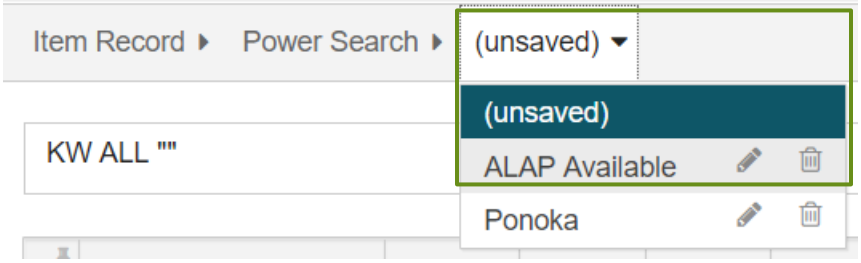


2. Once your search parameters are set, change your search mode to power search.
3. This will create a code-like search term. Click the save icon and create a name for your search.

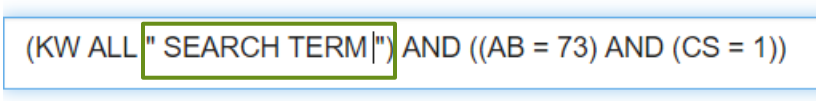




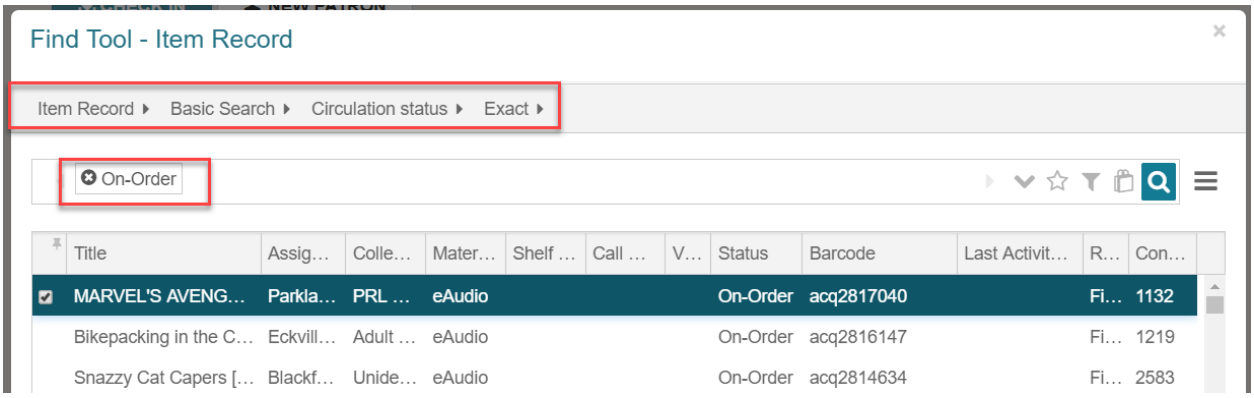
4. Now whenever you go into your Find Tool change your search database to item record and your search mode to power search. Then click on the unsaved tab and you will find your saved searches. You can edit your search names by clicking the pencil icon or deleting the saved search all together by clicking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

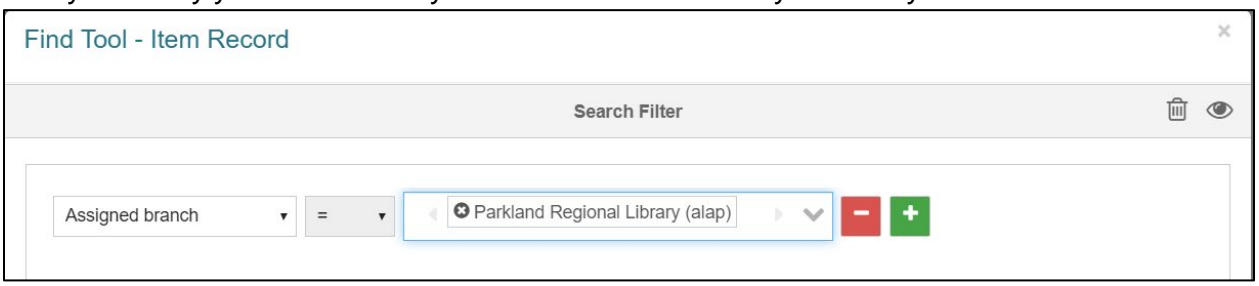


5. When performing a power search type your search terms between quotation marks.

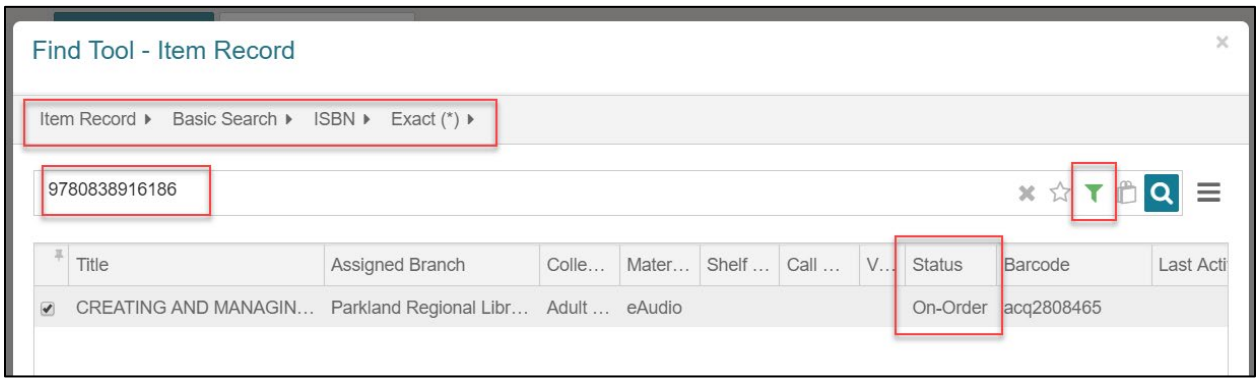


How to Check if an Item is On Order

1. 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 PRLS that are on order.
2. 

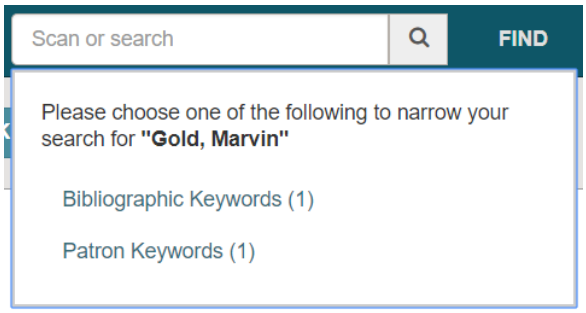
3. In your Find Tool, follow the above steps, but also add a filter of **assigned branch** for your library. This way you can view only the on-order items from your library.
4. 

5. Rather than searching for <u>all</u> 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.
6. 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.



Patrons

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



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

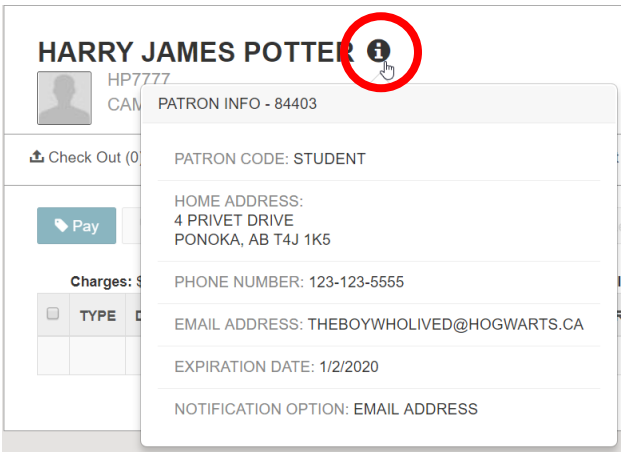
Patron Records

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

The PATRON RECORD workform includes two main views:

1. Patron Registration Information
2. Patron Library Account Information



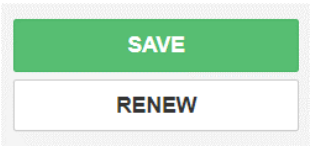
You can click to open the PATRON INFO pop-up window that displays the patron code, home address, phone number, email address, registration expiration date, and notification preference.

Patron Registration

Renew/Edit Patron Registration

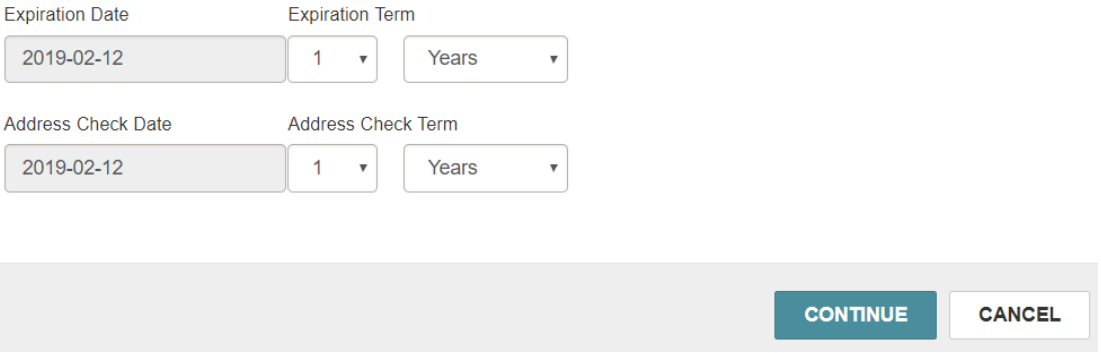
To renew or edit an existing patron's registration information, access the patron record by scanning their library card barcode or searching for their name. When the correct patron record is located, click on the REGISTRATION button to go to the registration page link.

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

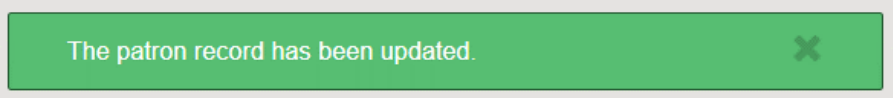


To renew, click on the RENEW button on the right-hand side of the screen.

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



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

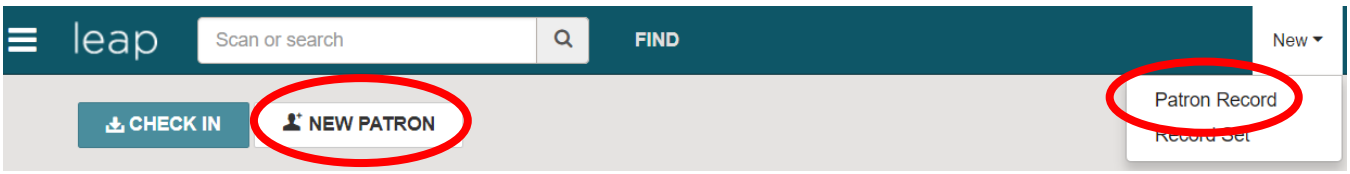


Register New Patron

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

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

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

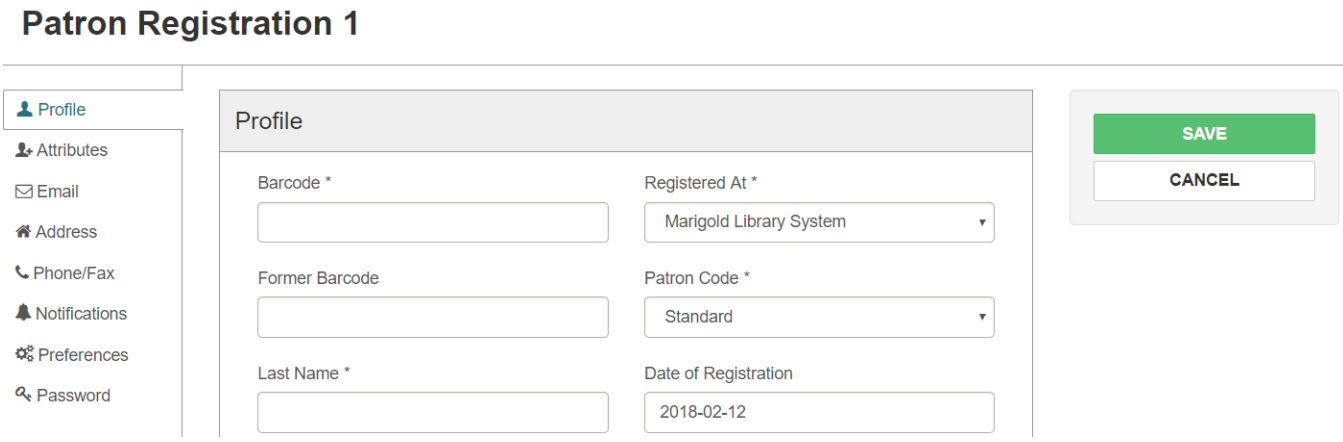


Required Fields

- 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 the Postal Code.
    - Postal Code – L1L 1L1 (Upper Case with a space)
    - City – Spelled correctly (only first letter capitalized)
    - Province – AB (no other variations)
    - County – Full County title, i.e., "Mountain View County". **Please leave this blank if the patron is not a county resident.** If a patron's mailing address is directly in the county, please include it in the city field and leave the county field blank.
- Phone – xxx-xxx-xxxx
- Password (PIN) – Required for patrons to access the PRLS eLibrary and PAC online. The PRLS default password (PIN) is the last four digits of the patron's phone number.

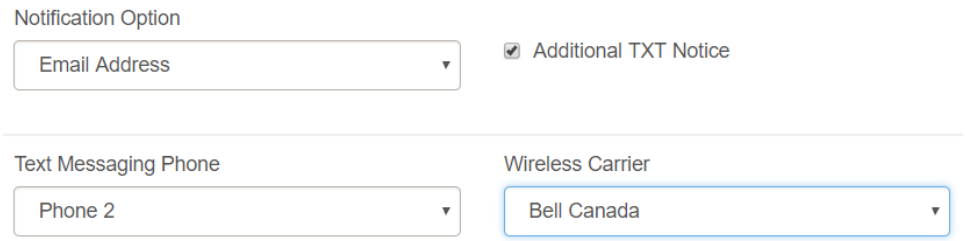
It is best practice to always include EMAIL AND PHONE NUMBERS to ensure patrons can be notified of holds, due dates, and fees.

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



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.



When all applicable fields are complete, click SAVE.

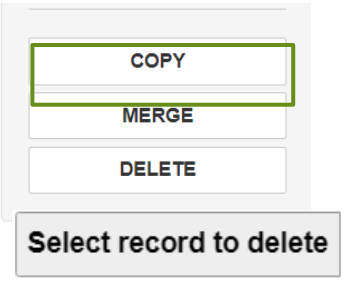
NOTE: Telus, Koodo, Rogers, and Fido no longer support the text message notification function of Polaris. Patrons using these carriers will not be able to receive text notifications.

Merging Duplicate Patron Records

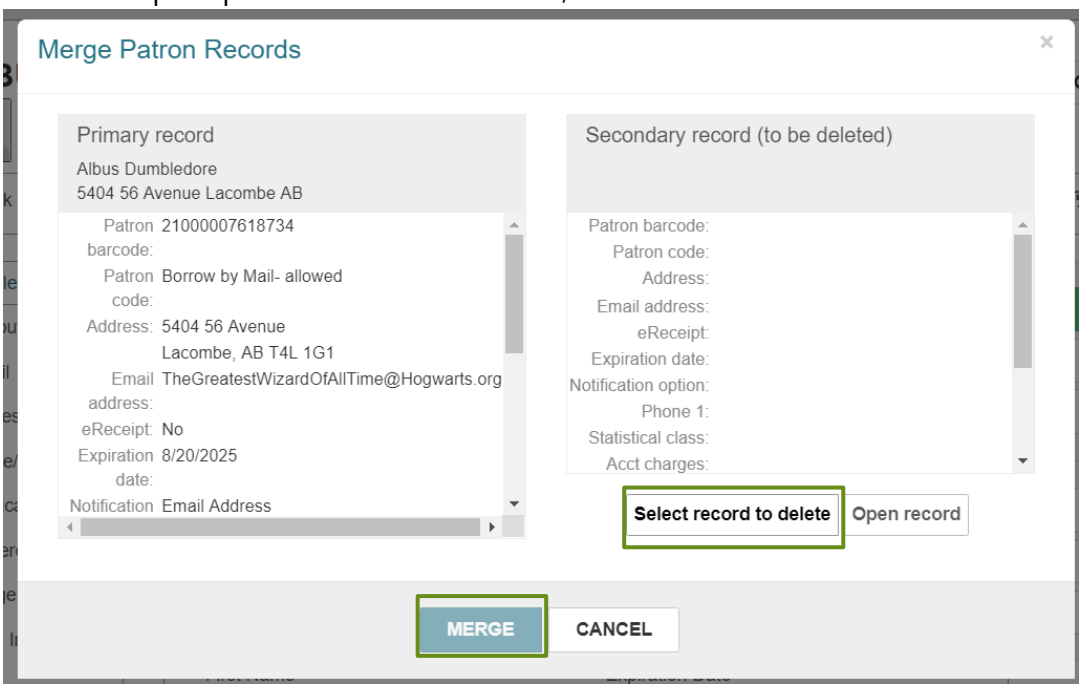
If you discover that a patron has multiple patron records, you can merge them into one. This is handy if a patron has moved to a new community.

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 the left side and the secondary record (to be deleted will be blank. Click the button Select Record to Delete.

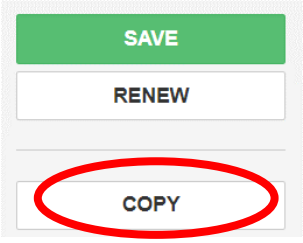


5. Then use the Find Tool box to locate the duplicate record you wish to delete. When you find the appropriate record, double click to open.
6. The "to be deleted" record information will display on the right side of the merge workform. Click the MERGE button.
7. You will be prompted to confirm the action, click CONTINUE.



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.

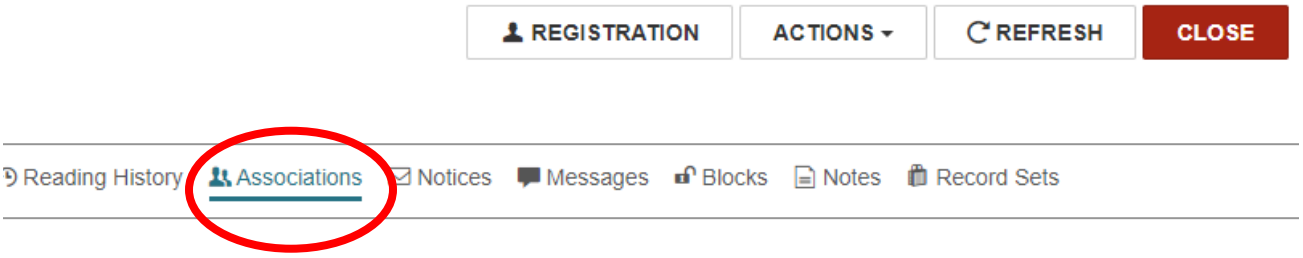


2. Edit applicable fields (barcode, name) and click SAVE.

Adding Patron Associations

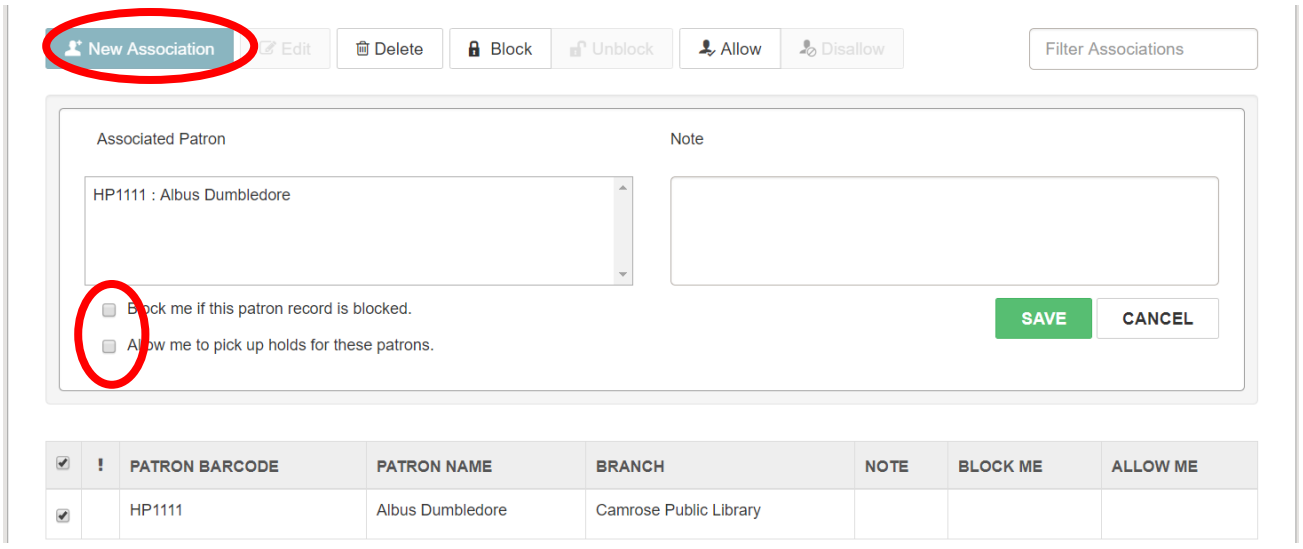
You can create ASSOCIATIONS between two or more patron records so that when one record is open, all associated patron records are conveniently accessible. **Only create an ASSOCIATION if requested by and with the consent of all patrons involved.**

NOTE: Associated patrons CANNOT see each other's accounts in the PAC.



Click on ASSOCIATIONS in the menu below the patrons' name, barcode, and home library. If the patron has associations, they will be listed. From this tab 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, caregiver, etc.) click NEW ASSOCIATION and scan the patron barcode. There are options to block a patron when an associated patron is blocked and/or to permit to pick up an associates' hold items.



Information for New Patrons

At registration, take the opportunity to inform new patrons about the variety of services available through your library and through Parkland Regional Library System.

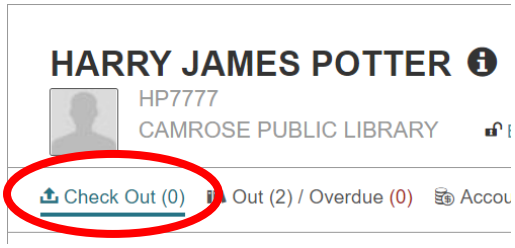
- How to access their online account at http://search.prl.ab.ca, using their barcode and PASSWORD (PIN).
- Where to access eLibrary from your library's website and the Public Access Catalogue (PAC).
- Where they can use their PRLS library card, and how to access libraries Alberta-wide through ME Libraries (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 10 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

Checking Out Items

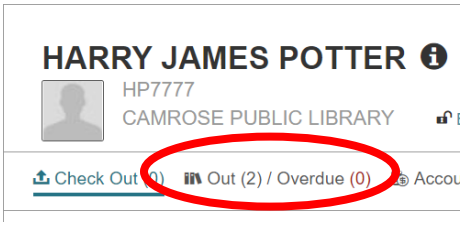
A patron can have up to 100 items checked out at one time. Once they have reached this limit, there will be a soft block on their account. Staff can override this block after acknowledgment but patrons may be prevented from accessing self-serve online features.

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



2. Scan or type item barcode.

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

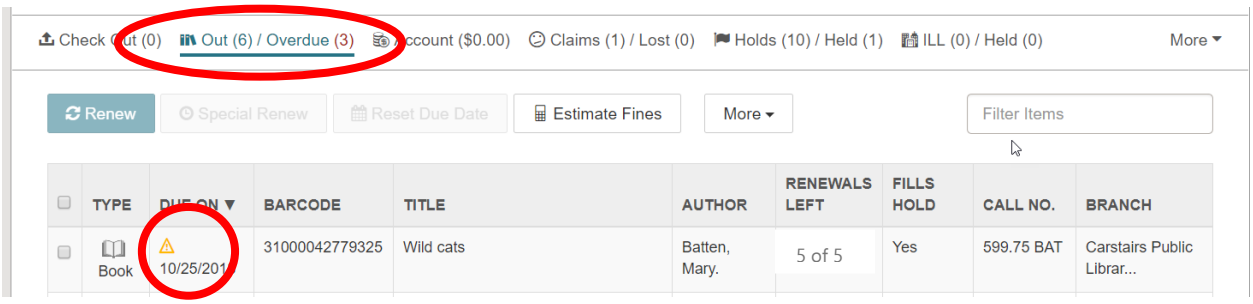


4. When you are finished all transactions, click COMPLETE.

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 a late fee will appear in the ACCOUNTS tab if not paid or waived directly.

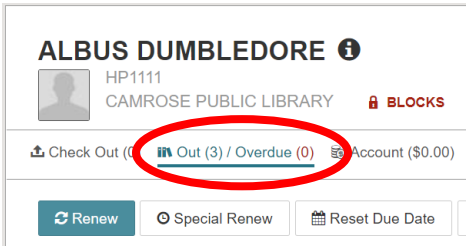
A soft block will pop up on the patron's account after 10 items become overdue. After notifying the patron, you can acknowledge the block and continue.



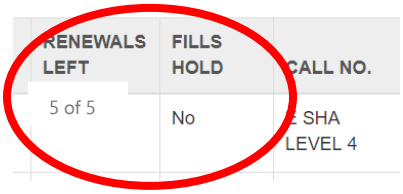
Renewing Loaned Items

PRLS items can be renewed up to 5 times, if the item does not fill a hold request.

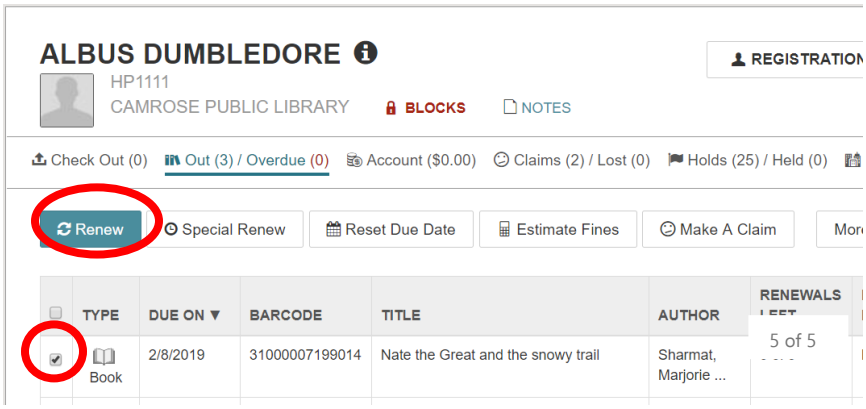
1. Find the item in the patron's OUT/OVERDUE tab.



2. Ensure the item has renewals left and that it does not fill a hold.



3. Click the box beside the item and click RENEW

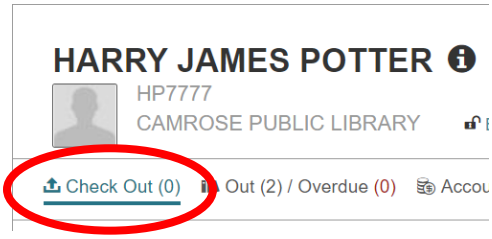


Special Loan/Extended Due Dates

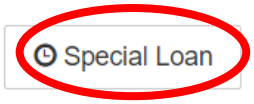
NOTE: Do not extend/reset item due dates for materials from other libraries without permission.

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

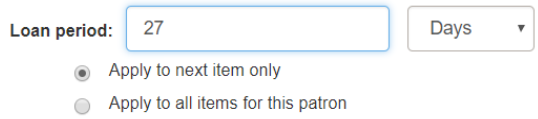
1. Open the patron's record. CHECK OUT should be the default action.



2. Click the SPECIAL LOAN button.



3. Choose new loan period.

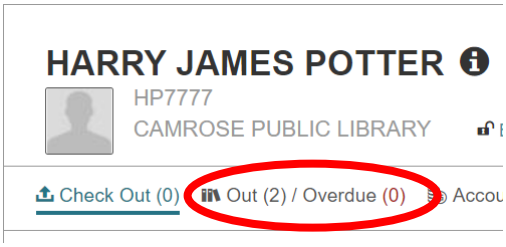


4. Scan or type item barcode.

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

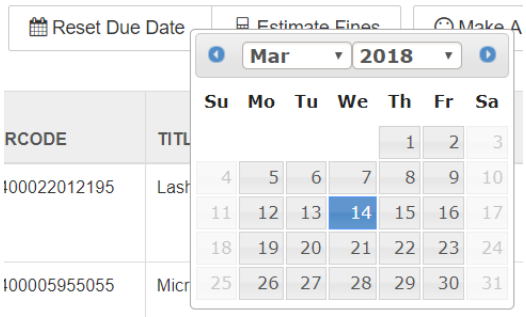
To extend the due date of checked out items, without using a renewal, RESET the item due date.

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



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

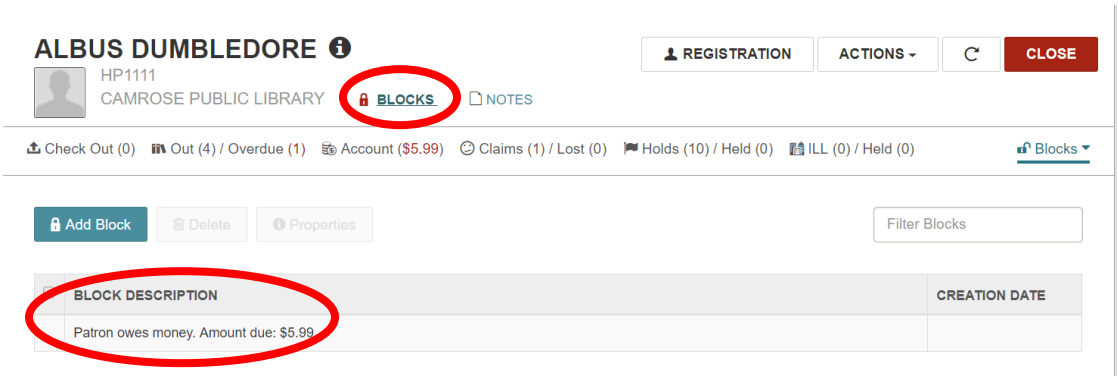
3. Choose new due date.



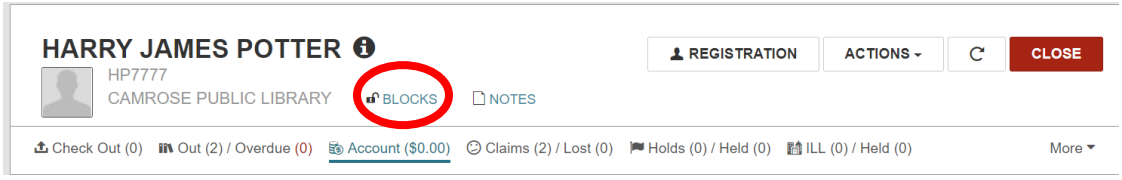
4. When you are finished all transactions, click COMPLETE.

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 if they have any small fees. Staff can acknowledge the notice and continue transactions. Patrons are blocked when they have accrued $25.00 in fines. At this point fees should be paid down or waived before any transactions can be made.



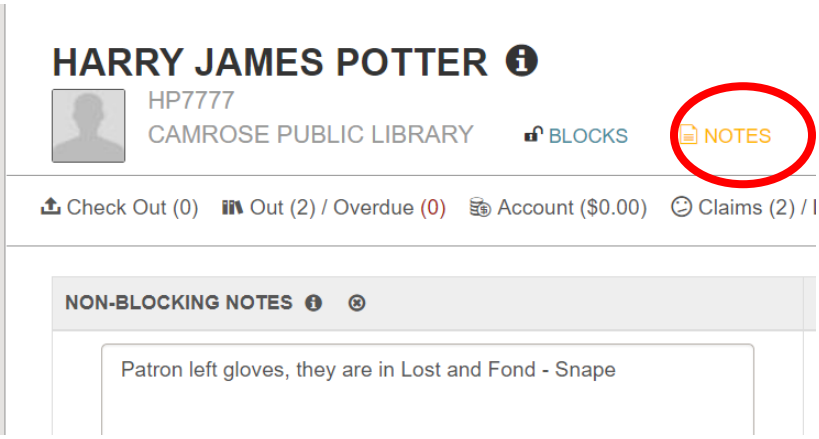
Patron without BLOCKS:



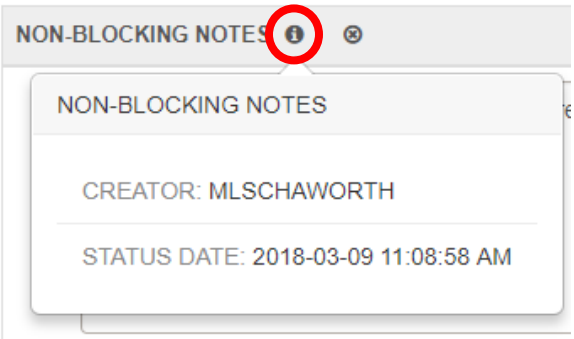
Patron Notes

The patron NOTES tab displays existing non-blocking notes and blocking notes. You can add notes, edit existing notes, and delete notes from this section. 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 the eLibrary and PAC online services (placing holds, etc.). Please use only if necessary.



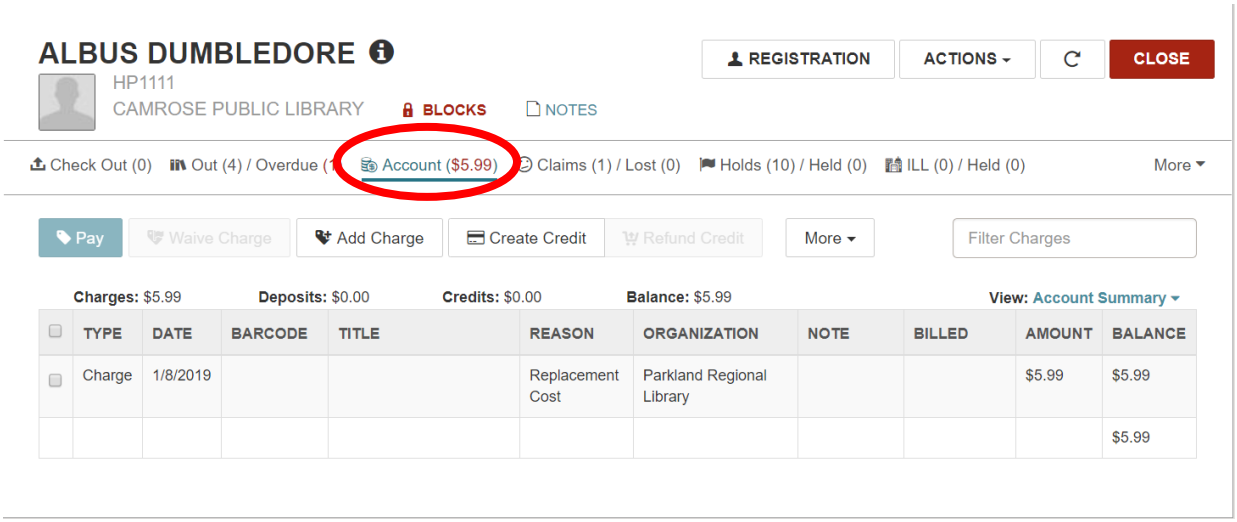
You can click on the information icon to see the note creator and the date and time the note was added or updated.



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.

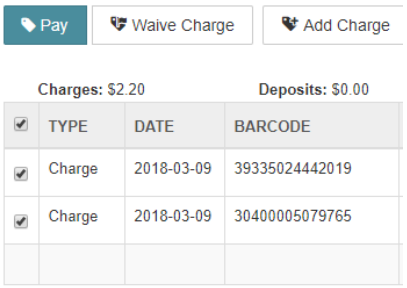
Patron Fines/Fees

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



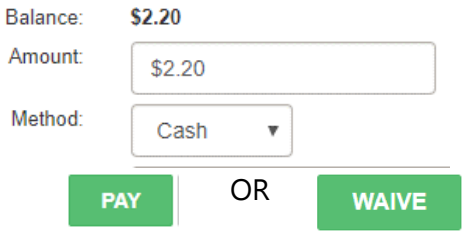
To collect a patron payment:

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



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

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



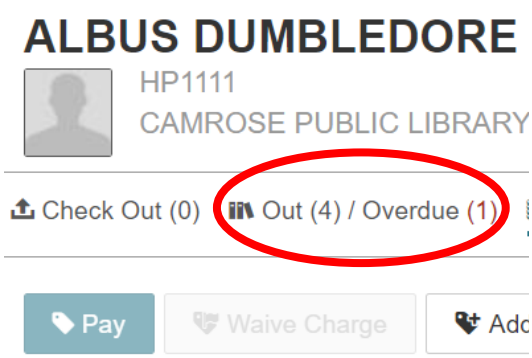
4. Click either the green PAY or WAIVE buttons.

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.

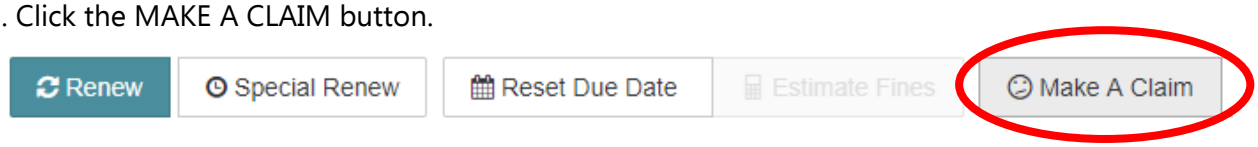
To assign a CLAIM status:

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

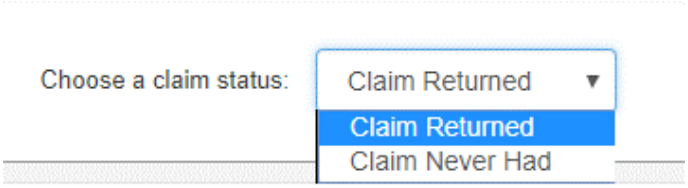


2. Select the check box next to the item(s) to CLAIM.

3. Click the MAKE A CLAIM button.



4. Choose the appropriate CLAIM status.



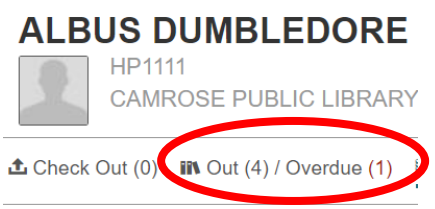
5. Click on the green CLAIM button.

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.

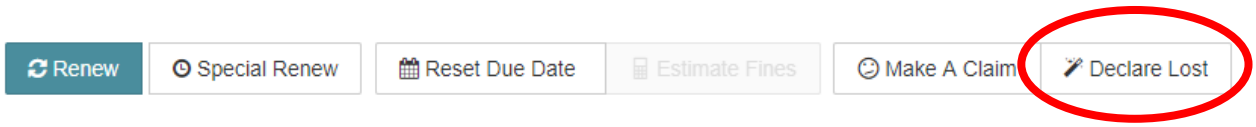
To declare an item LOST from the patron's checkouts:

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

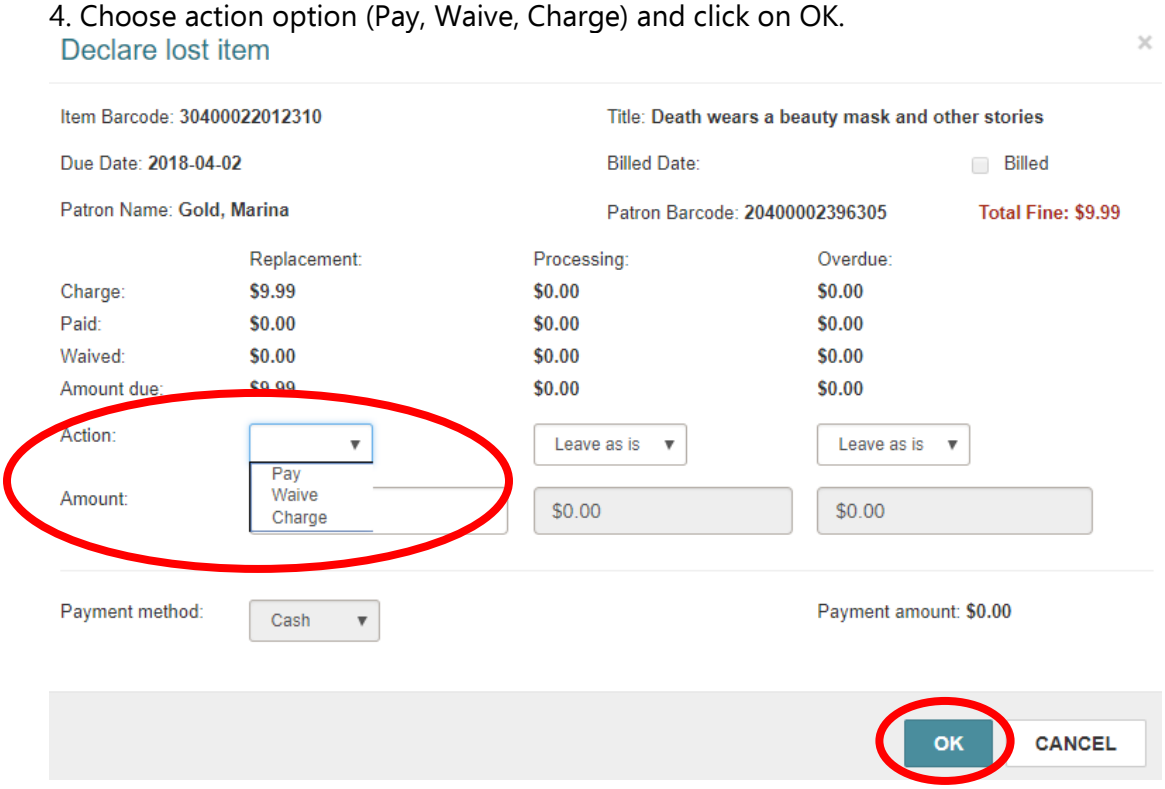


2. Select the check box next to the item(s) to DECLARE LOST.

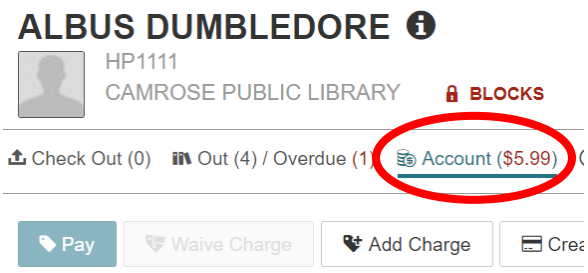
3. Click the DECLARE LOST button.



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



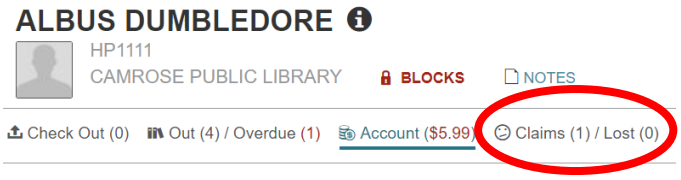
5. Charged items will automatically show in the patron's ACCOUNT tab.



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 the CLAIMS/LOST tab.



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

Total Claims: 1 Current Claims: 1 Lost: 1

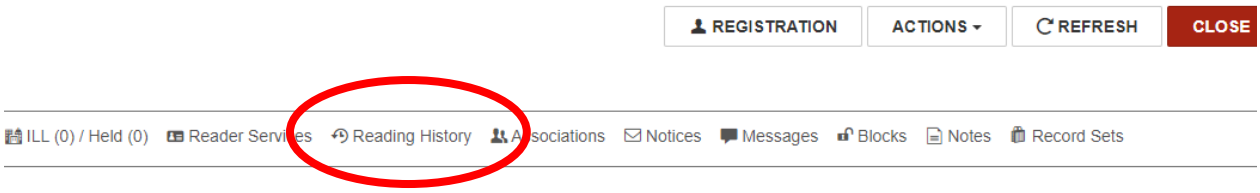
BARCODE	TITLE	CLAIM DATE	DESCRIPTION	DUE DATE
30400022023515	Breaking point	2018-03-09	Claim Returned	2018-04-06
30400022012310	Death wears a beauty mask and other stories	2018-03-09	Lost/Unpaid	2018-04-02

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. Click on the READING HISTORY tab.

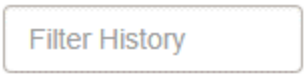


2. The list will appear in order of newest to oldest.

	FORMAT	CHECKOUT DATE ▲	TITLE	AUTHOR
	Book	2018-03-06 9:04:25 AM	The legend of Caleb York	Spillane, Mickey, 1918-2006, author
	Book	2018-03-06 9:00:16 AM	The 14th colony	Berry, Steve, 1955-, author
	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 at one time.

Holds Statuses

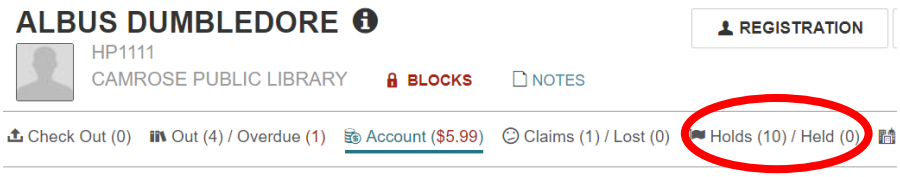
Holds statuses change automatically. It is important to check in **all** items received in the library, including new materials, as this causes the item status to update.

The most common HOLDS STATUSES are:

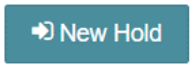
- **PENDING** – The hold has been placed and the system is checking to see if there is an available copy.
- **ACTIVE** – An available copy has been identified and the holds alert will show on that library's PICKLIST.
- **SHIPPED** – The item has been scanned at a library and is being shipped to your location.
- **HELD** – The item has arrived at its destination library and been scanned. It is now available for the patron to check out.
- **UNCLAIMED** – If a hold is not picked up by the patron within 10 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

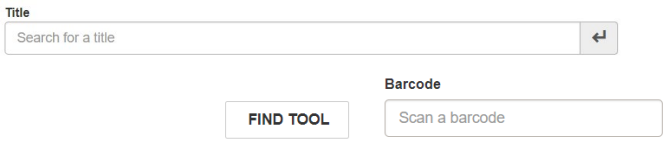
1. Open the patron's record. CHECK OUT should be the default action. Switch to HOLDS tab.



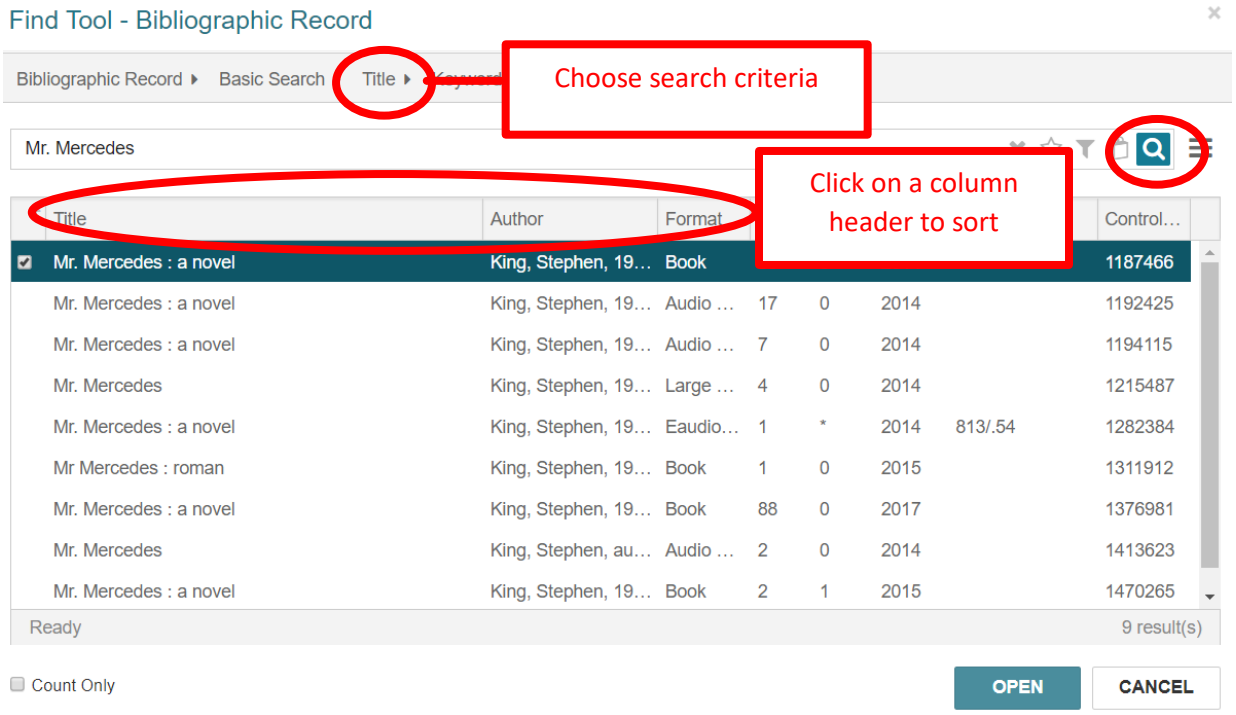
2. Click on NEW HOLD button.



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



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

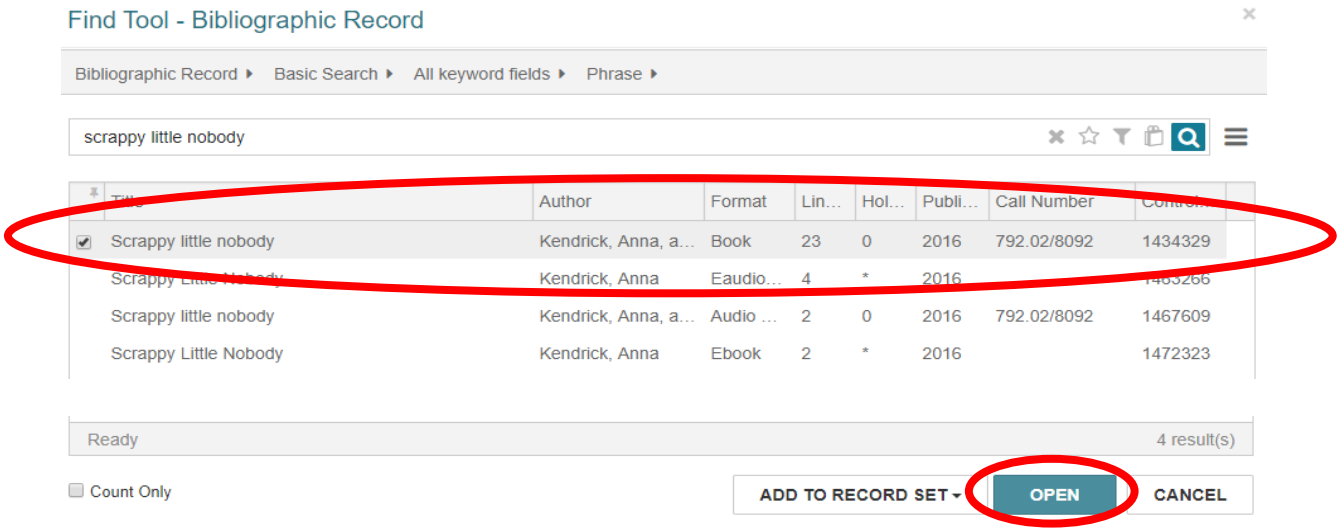


5. Click PLACE HOLD to complete.

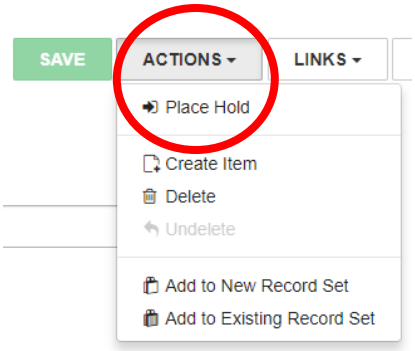
Place Hold from Bibliographic Record

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

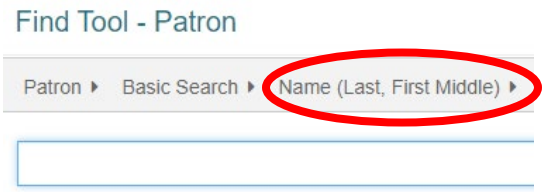
2. Choose the correct item and open the record by double-clicking on it or highlighting it and clicking the OPEN button.



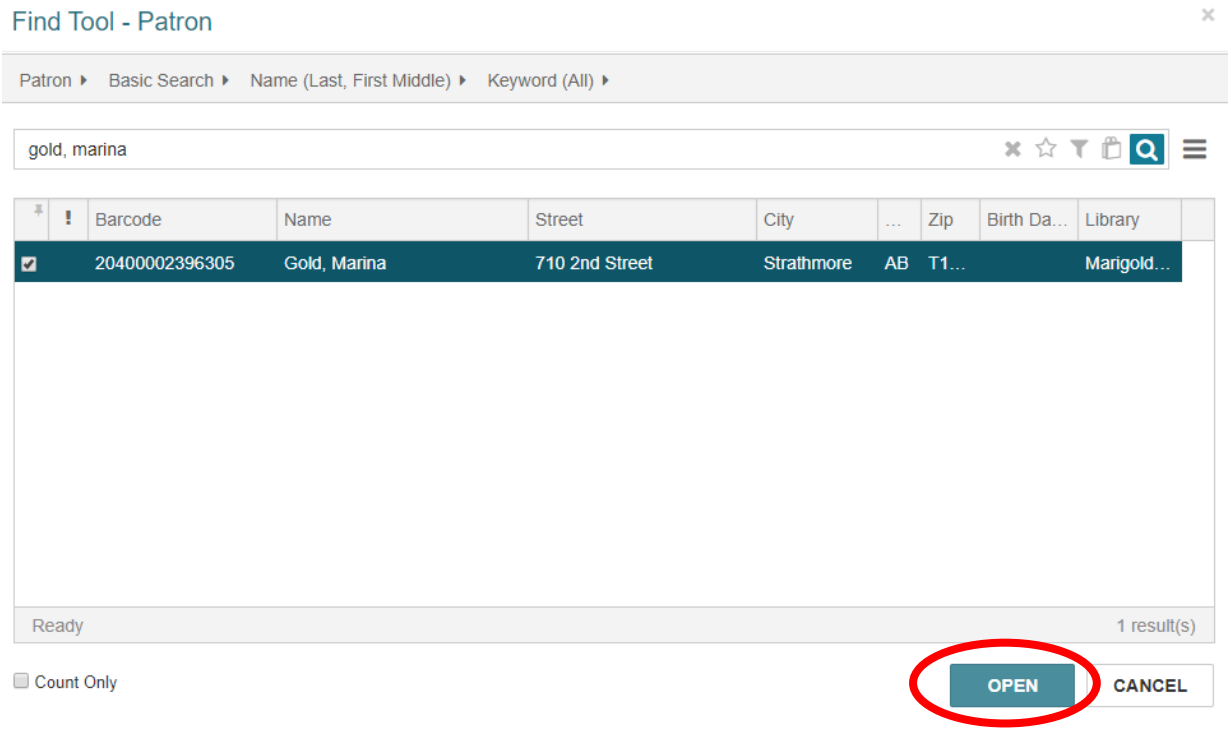
3. Use the ACTIONS drop down menu to choose PLACE HOLD.



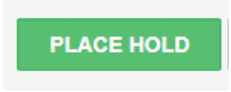
4. Locate patron in the FIND TOOL window. Find them by name, barcode, or other criteria. If the patron's record is currently open a prompt will appear to select that patron.



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.



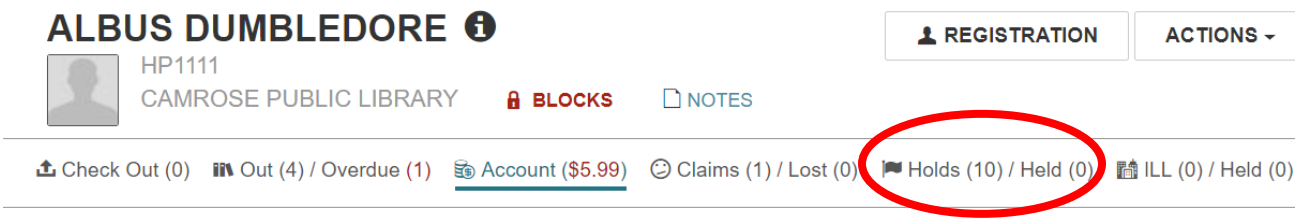
Grouping Holds

If a patron doesn't care what 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 grouped holds is filled, the other requests are automatically deleted. This allows the hold to be filled in the quickest way possible.

Note: 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.

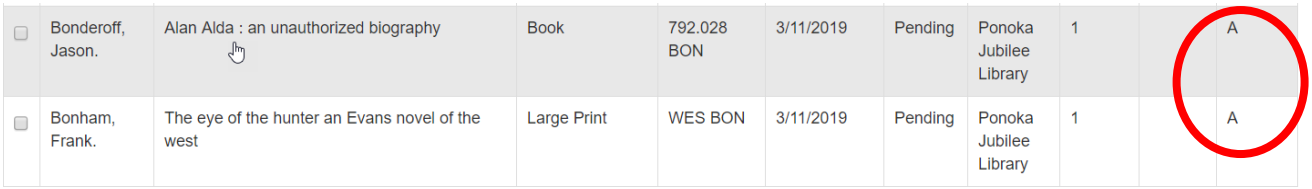


3. Check off the holds you want to group together.

☑	Bonderoff, Jason.	Alan Alda : an unauthorized biography	Book	792.028 BON	3/11/2019	Pending	Ponoka Jubilee Library	1		
☑	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. From within the HOLDS/HELD tab click ADD TO GROUP (located between the RETURN button and the MORE drop-down menu.

5. The group will be given a letter name.

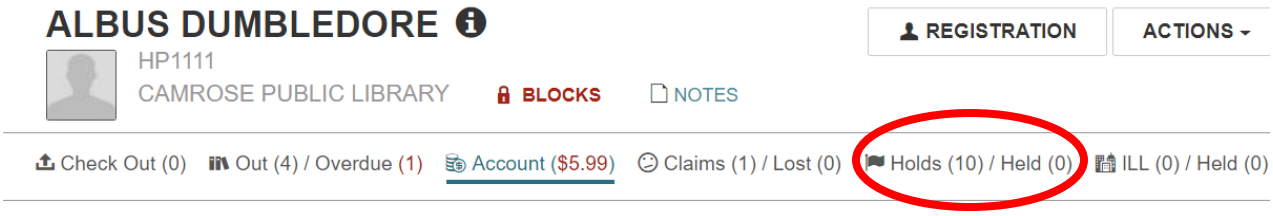


☐	Bonderoff, Jason.	Alan Alda : an unauthorized biography	Book	792.028 BON	3/11/2019	Pending	Ponoka Jubilee Library	1		A
☐	Bonham, Frank.	The eye of the hunter an Evans novel of the west	Large Print	WES BON	3/11/2019	Pending	Ponoka Jubilee Library	1		A

Suspending Holds (Inactive)

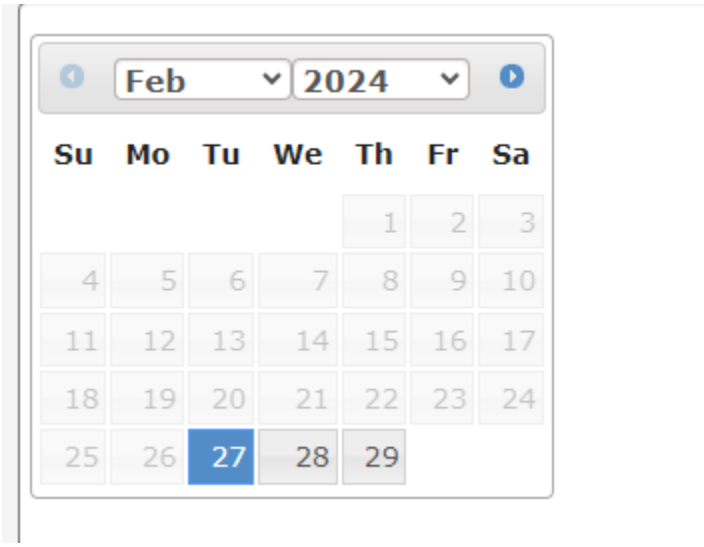
To suspend a hold request without losing the patron's place in the holds queue, change the Activation Date.

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



2. Check the box beside the title you wish to suspend.

3. Click on the SUSPEND/REACTIVATE button and select the new Activation Date for the hold.

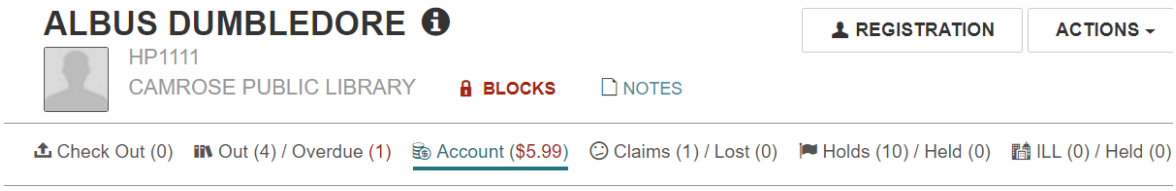


4. Click on the UPDATE ACTIVATION DATE button.

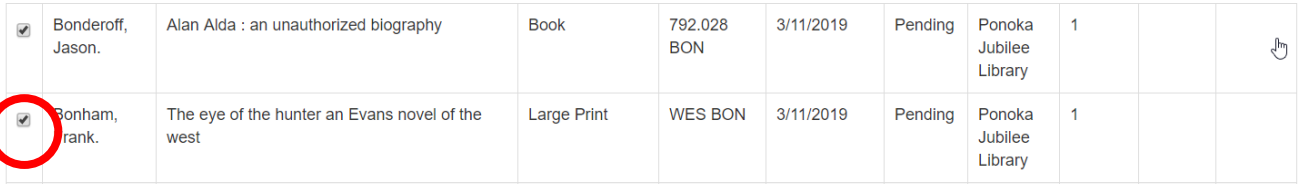
Cancelling and Deleting Holds

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

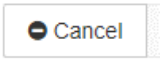
1. Open the patron's record and select the HOLDS tab.



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



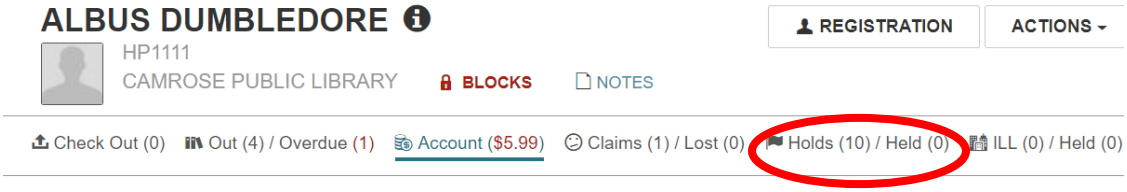
3. Click on the CANCEL button.



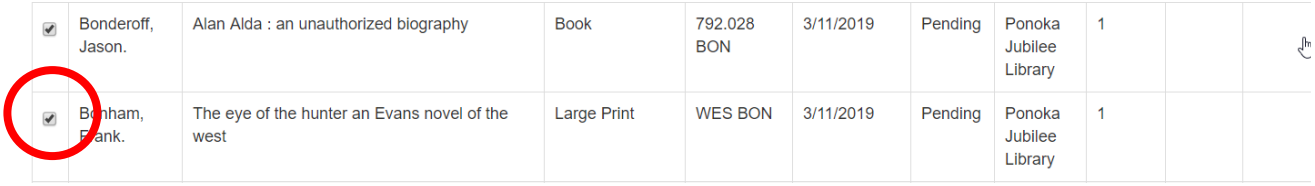
The status will change to cancelled. The cancelled hold(s) will remain listed in the patron's HOLDS list until deleted.

To delete a cancelled hold:

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



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

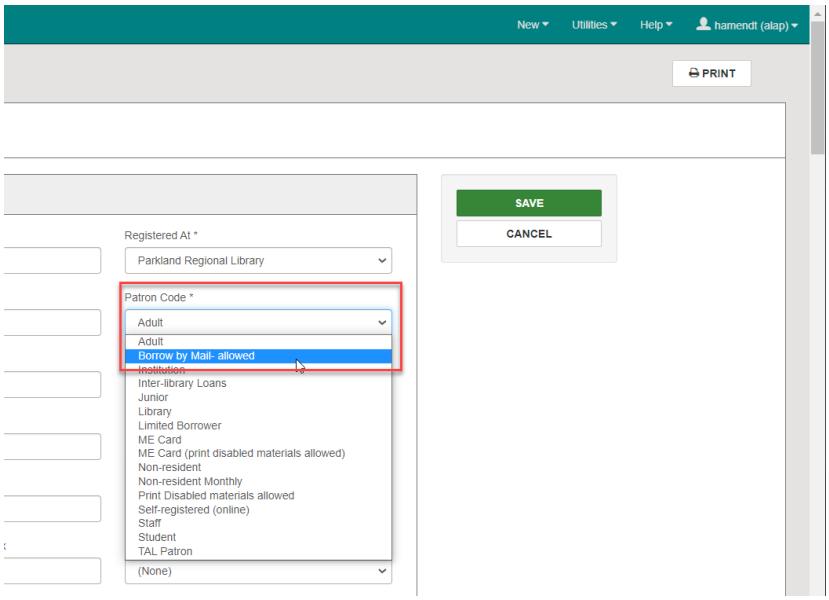


3. Click on the DELETE button.

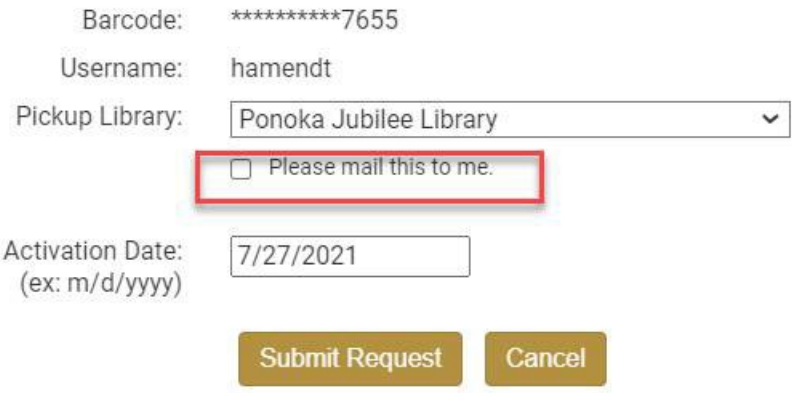
Borrow by Mail Process

The process to sign up a patron for "borrow by mail" is fairly simple. Please follow these steps.

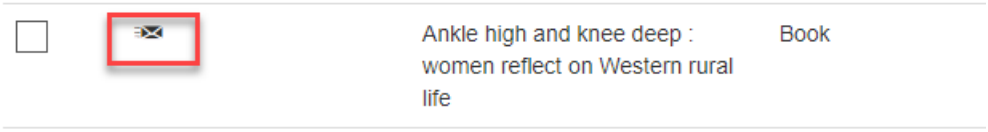
1. You must ensure the patron code is set to "borrow by mail -allowed". You can do this in the PATRON REGISTRATION. Then click SAVE.



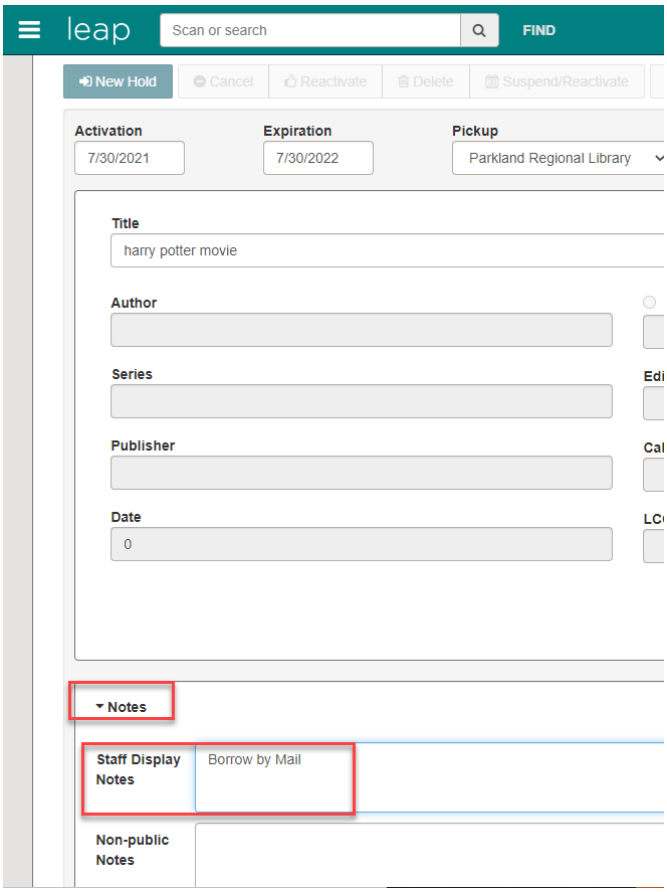
2. The patron must place holds via the Public Access Catalogue (PAC) on the library's website.
3. When they place a hold, they will see a check box saying "Please mail this to me". They must check this for **every** hold they place.

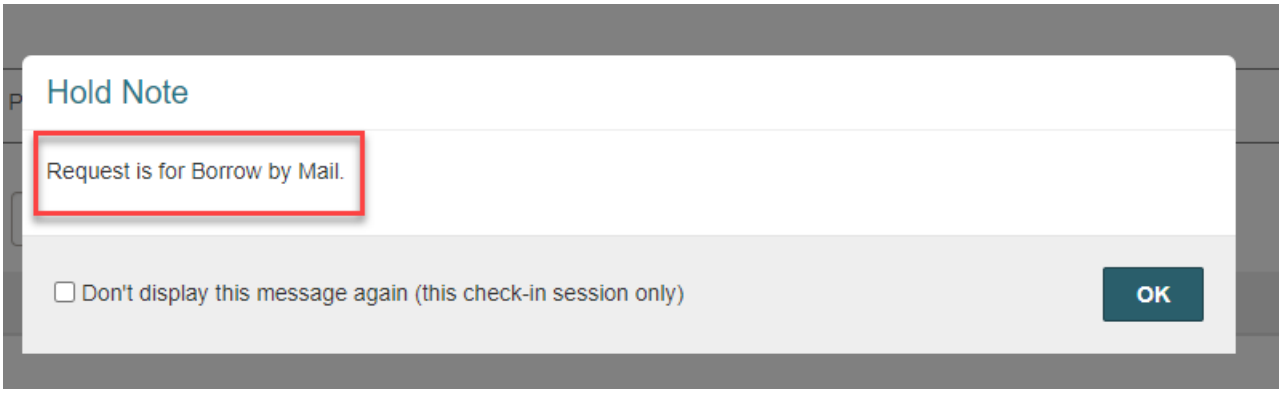


4. Library staff will see BORROW BY MAIL hold on the Picklist as it is identified by an envelope icon. Library staff will check in the hold as usual.



5. If staff are placing holds for patrons they can add a STAFF DISPLAY NOTE to the hold request. This will **NOT** produce an envelope icon on the pick list, but staff will see the note when the item is checked in.





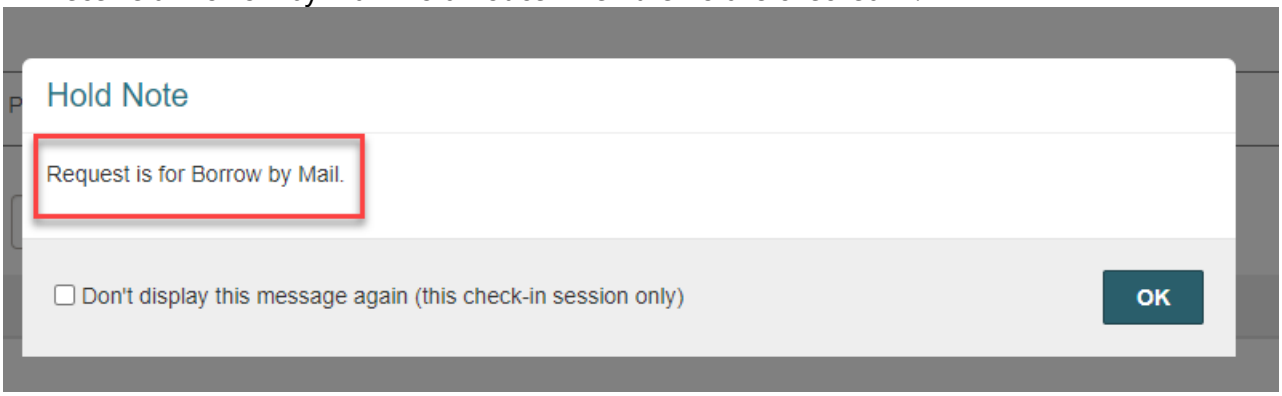
6. This item will be transferred to the patron's registered library. This process is unchangeable within the Polaris software.

Note: If Libraries would like to forgo the Polaris procedure and mail the items directly, that is acceptable.

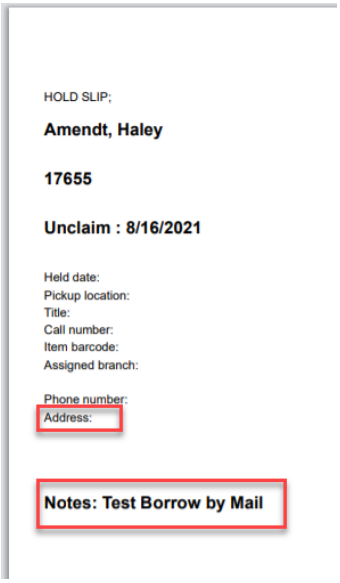
To mail items directly:

a. Identify "mail-to" holds by finding the envelope icon on your picklist.
b. Instead of checking in the hold, go to the picklist and click on the item, which will open the hold request.
c. In the top right of the hold request you will find the patron barcode, click to open the patron record.
d. Directly check out the item to the patron (extend the due date, to include mailing time).
e. Locate the patron's mailing address by hovering over the icon beside their name.

7. Libraries that receive a borrow-by-mail item in the grey bin, or pull their own patron's item, will receive a "Borrow by Mail" hold notice when the hold is checked in.

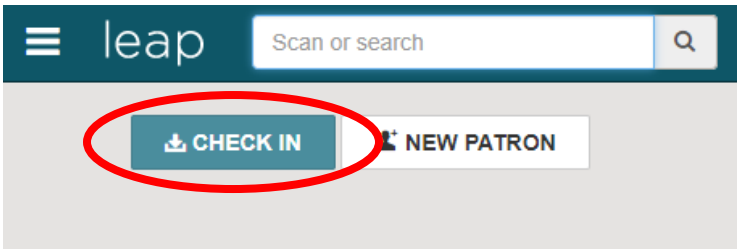


8. The hold slip print display will contain the patron's information including patron name, item information, phone and address information, and the Borrow by Mail hold notes.



Checking In Items

Item CHECK IN is done from the Leap homescreen.

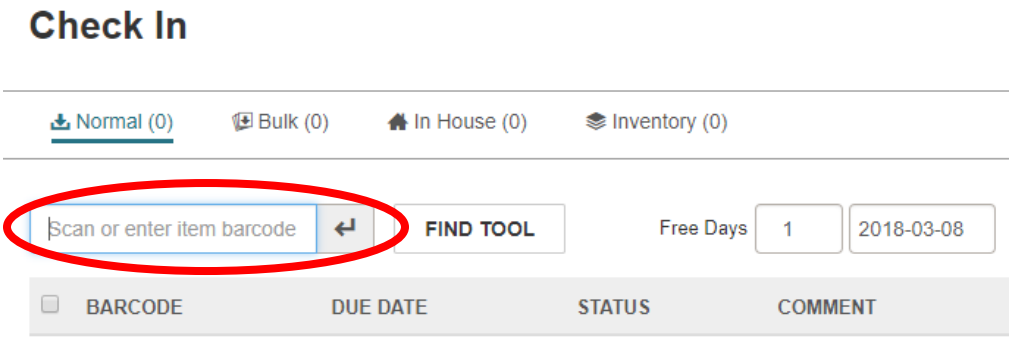


The default mode is 2 FREE DAYS which allows for a two-day grace period for items that are returned late. If grace days are exceeded, the fine is calculated as if there were no grace period. If it is necessary to add additional free days contact IT at helpdesk@prl.ab.ca.

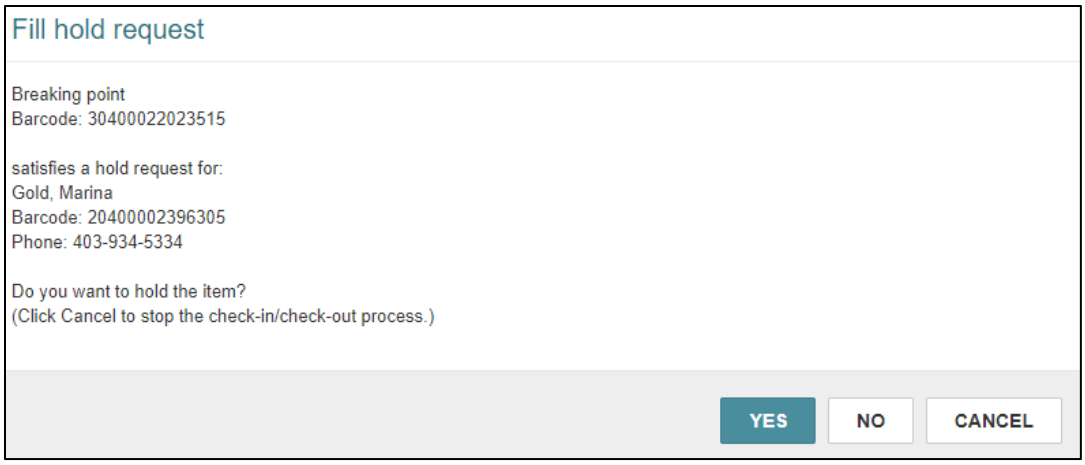
There are four check-in modes:

- 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 will appear.
- 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.

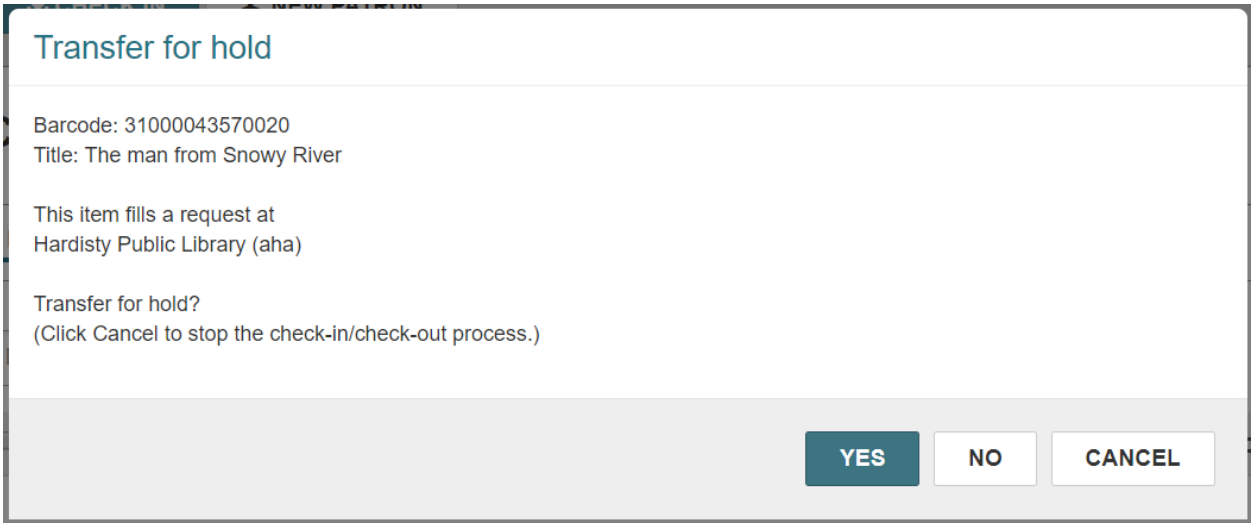
To check in scan or enter item barcode in to scan box.



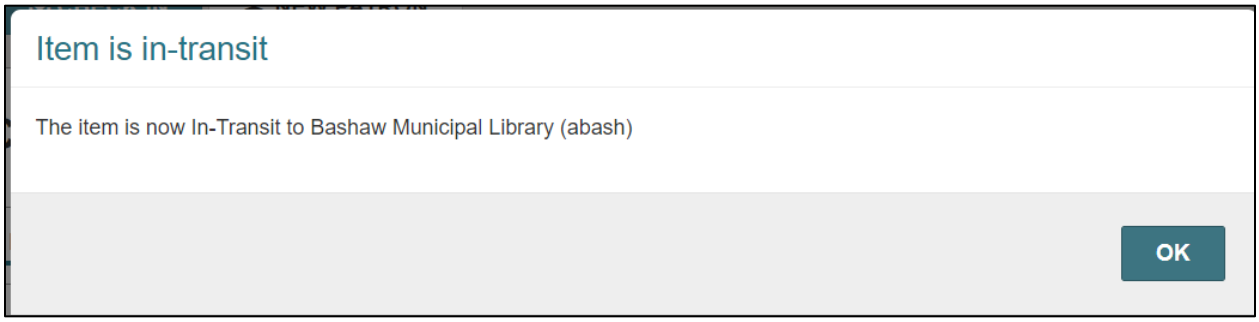
If the item fills a hold at your library, the following message will pop-up:



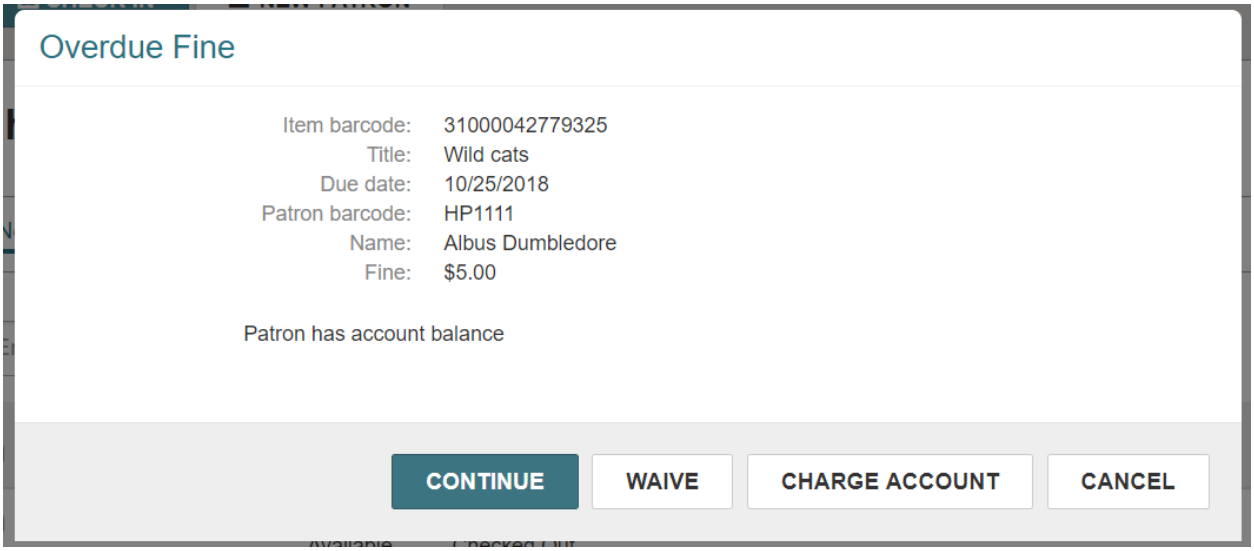
If the item needs to be transferred to another library to fill a hold, the following message will pop-up:



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



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.



Serials Check-In

Terms:

Serials Check-In – Changes the status of a predicted magazine issue from "expected" to "received". This creates an IN-PROCESS link in the catalogue. This step was previously done by PRLS Staff.

Processing Serials – Adds a barcode, call number, and volume information to prepare the item for circulation. Then check in the item for circulation.

When you receive a magazine follow these steps:

Predicted issues need to be checked in before regular processing. Once this step happens the issue is visible to patrons.

1. Login to LEAP using your Polaris Advanced (ADV) user account.
2. Click the **UTLITIES** drop-down menu (located at the very top of the screen) and select **SERIALS CHECK-IN**.
3. This will populate a Find Tool search for the magazines.
    a. Search for the serial title. The Find Tool defaults to an exact title search. You may wish to change it to a **title keyword search** if you have trouble locating the magazine.
    b. Using the LIBRARY LOCATION column, identify the magazine with your library code.
    c. Double-click to open.
4. Sort the list of issues by selecting the STATUS column.
5. Find the issue you are checking in. The status will be "Expected".

6. Ensure that the volume, issue, and date match the item you have in hand.
    a. If they do not match, contact PRLS using the **MAGAZINE QUESTIONS** web form found on the Support Site.
7. Select the box beside the issue you wish to check in and click the CHECK IN button located at the top left-hand side of the screen.
8. This issue is now checked in and ready for processing.

Processing Serials

1. In LEAP, use the find tool to locate the bibliographic record for the magazine you are working with.
    a. You can do a browse search for the serial title.
    b. Select and open the serial.
    c. Open the bibliographic record.
2. Click the ITEMS tab to display the full list of items.
3. Use the filter to search for your Library.
4. Locate the issue you wish to process. Select the item by double-clicking on it.
    a. The item should have an "In-Process" status.
    b. Items are listed in descending order from the check-in date, so the most recent issue "In-Process" should appear at the top of your Library's listing.
5. Click the DETAILS tab.
6. Fill in the barcode and price information in the appropriate fields.
7. Click the CONTROL tab.
8. Fill in the cutter (call number) and volume information in the appropriate fields.
9. Click the SAVE button from the top right-hand side of the screen.
10. Check in the magazine and put it into circulation.

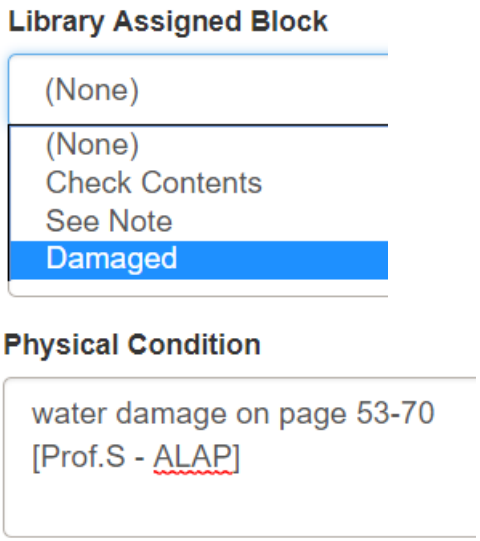
Damaged Items

Note: These instructions apply to in-system Polaris LEAP items only. For interlibrary loan items, please contact our ILL staff at **ill@prl.ab.ca**.

Steps in Polaris when receiving an item that is damaged:

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

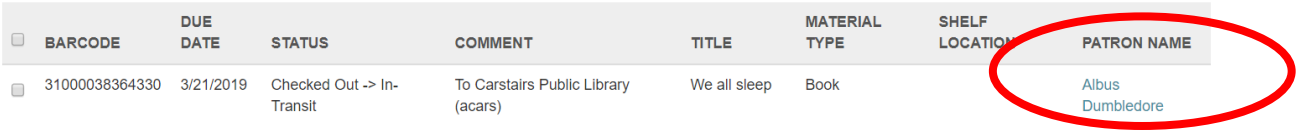
1. Open the item record (*regardless of the assigned branch*) by clicking on the checked-in item.
2. Select BLOCKS AND NOTES.
3. Change the LIBRARY ASSIGNED BLOCK to DAMAGED.
4. In PHYSICAL CONDITION add a description of the damage as well as staff information [staff initials @ library code].
5. Click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



If either the item and/or patron are not from your library complete the damaged item form located on the PRLS Support Site http://support.prl.ab.ca **OR** call the library that the item/patron belongs to discuss how they'd like to proceed. Then, if necessary, send the item to the patron's library via van or courier. Label the item as damaged.

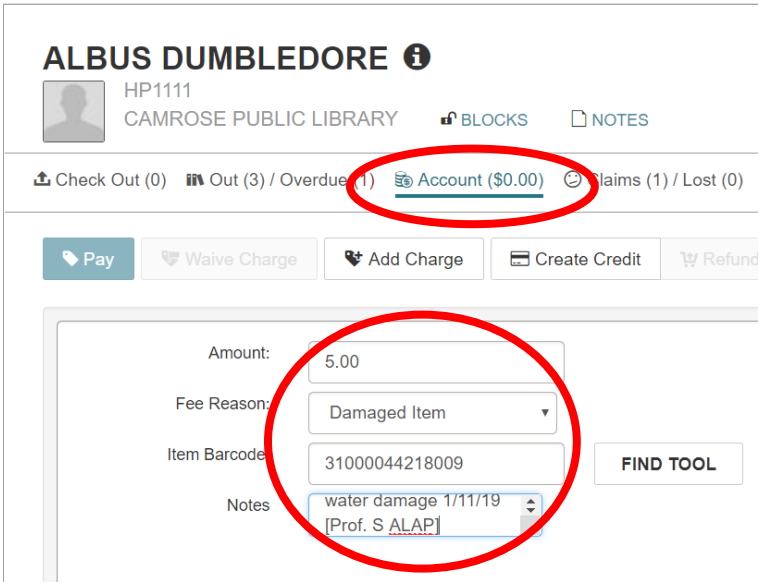
The staff member will then charge the patron, if applicable.

1. Open the last patron's record (*regardless of the assigned branch*) by clicking the patron's name on the check-in screen.



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 prices by collection* 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 – staff initials @ library code].
7. Click ADD CHARGE.



At this point, the fee can be paid right away or can remain as a charge on the patron's account. If you have taken money for the damaged item, send payment with a copy of the damaged item form notification, to the owning library.

Responsibilities of the library that owns the item:

1. As the owning library, you have the discretion of whether to collect replacement fees for a damaged item. Your decision will be based on a number of factors, including the age of the item, number of circulations, extent of damage versus normal wear and tear, etc.
2. The owning library will check in the damaged item, and the BLOCK (damaged block) will appear prompting the owning library to check the condition of the item. If necessary, the owning library will change the item's record circulation status to WITHDRAWN.

a. Check the box of the item and click ACTION and click MANAGE ITEM RECORD. Click the box for CIRCULATION STATUS and change the status to WITHDRAWN.

NOTE: If you check in the item again the circulation status will return to available.

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

Responsibilities of the borrower's home library:

As the borrower's library, you have a duty to contact your borrower within 2 weeks of discovering damage to an item last signed out to that patron and to find out if they will accept responsibility for the damage.

If your patron admits responsibility, you can **collect payment immediately.** In the ACCOUNT tab of the patron's records check the box of the damage charge and click PAY. Collect the replacement fee and give the damaged item to the borrower if they wish to keep it. Send payment with a copy of the damaged item form notification, to the owning library.

If your patron does not accept responsibility for the damage, remove the damaged item block from the patron record, inform the owning library that the borrower is not accepting responsibility, and return the item to the owning library.

Note: At a meeting of PRLS Library Managers in October 2008 it was decided that the owning library will absorb the cost of damaged items when the borrower does not accept responsibility for the damage.

When the item is damaged at your library:

If another library's item is damaged in your possession (book drop issues, spillage at the circulation desk, etc.):

1. Complete the damaged item form **OR** call the library that the item belongs to discuss how they'd like to proceed.
2. Send the item back to the owning library and sort out replacement fees (if applicable).

Transferring funds for replacement costs:

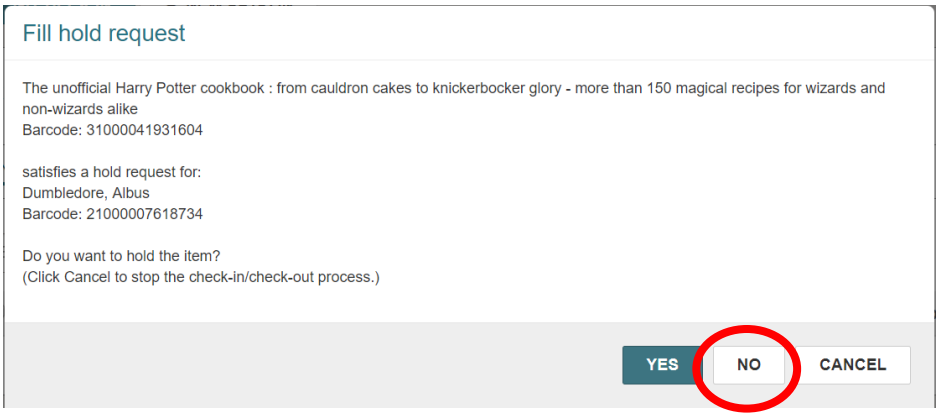
Options to transfer funds from your patron or library to the owning library:

1. Have the patron write a cheque for the amount to the owning library and send by van run in a blue bag.
2. If you collect fees by debit, credit or cash, deposit funds to your library account and issue a cheque for the amount collected to the owning library. ***Libraries should not send cash via the PRLS van run.***

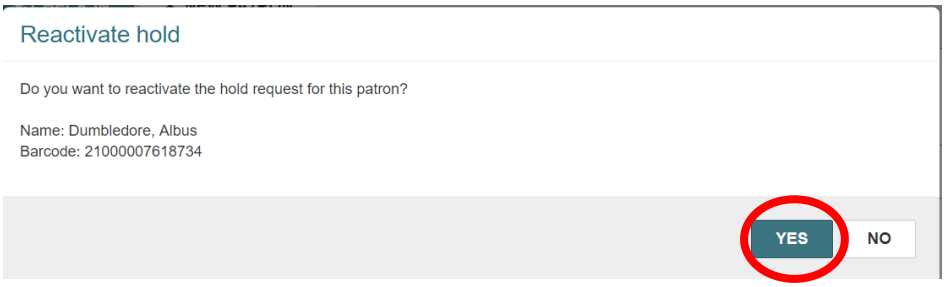
Other steps that may need to be taken:

An item is received at your library in damaged condition to fill a request made by one of your patrons. It is not your item and the last borrower on record is not your patron.

a. Check-in the item.
b. A FILLS A HOLD window will appear, click NO.



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



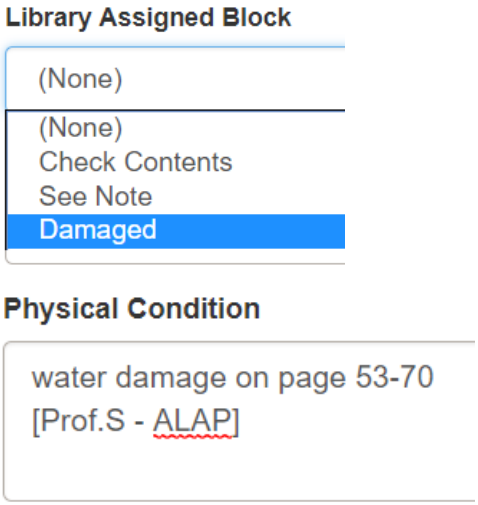
d. An ITEM IS IN-TRANSIT window will appear stating the owning library, click YES.

e. Click item to open ITEM RECORD.

f. 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 – staff initials @ library code].

g. Complete the damaged item form **OR** call the library that the item belongs to discuss how they'd like to proceed. Then send the item to the owning library via van or courier. Label the item as damaged.

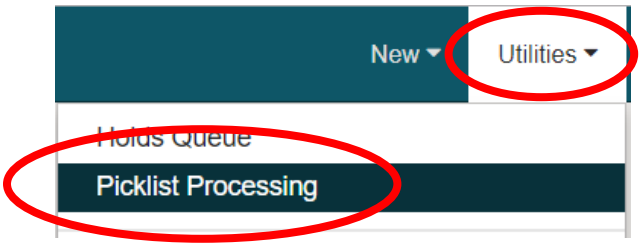
h. Click SAVE.

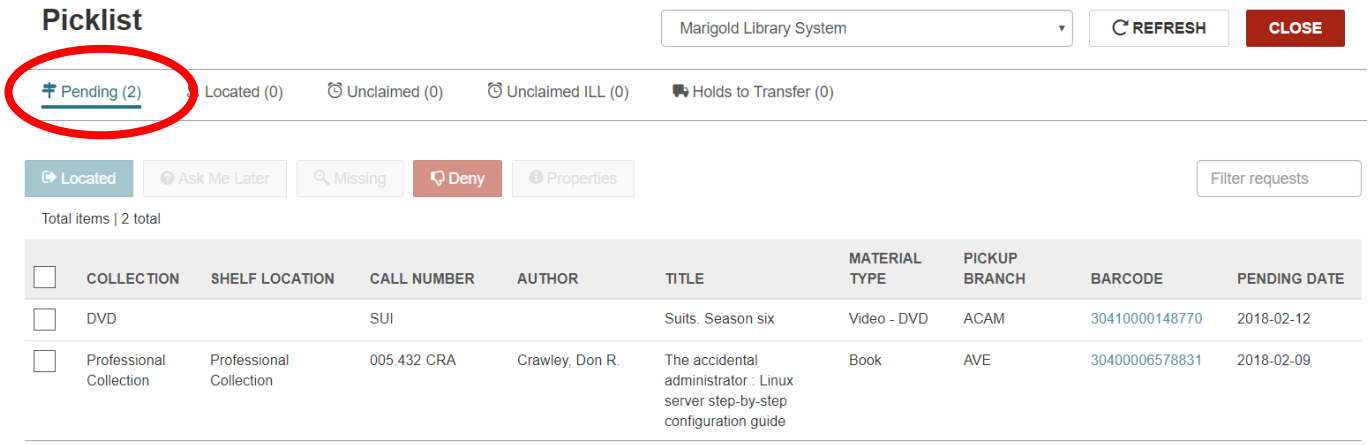


Picklist Processing

Pending Holds Request

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



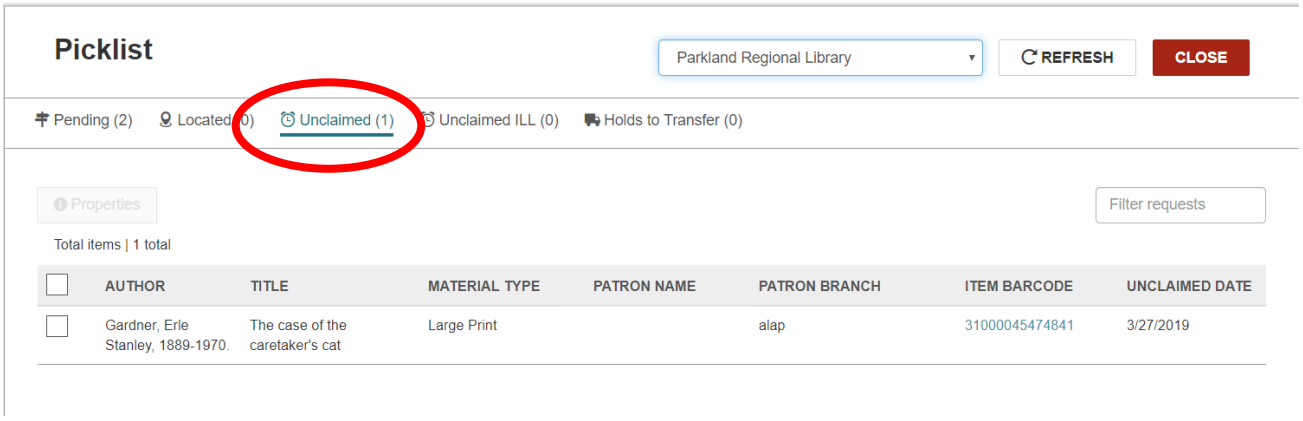


NOTE: The PICKLIST can be printed out or viewed on a tablet to make collecting items easier.

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 list 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.

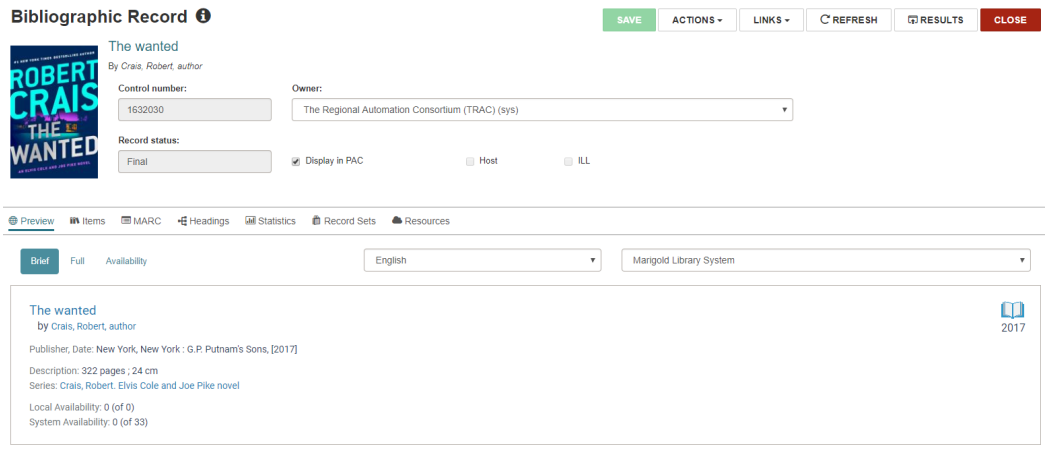


Bibliographic and Item Records

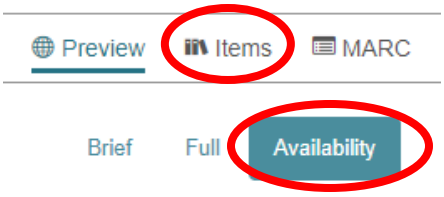
All library materials have a BIBLIOGRAPHIC (BIB) RECORD and an ITEM RECORD.

Bibliographic Records

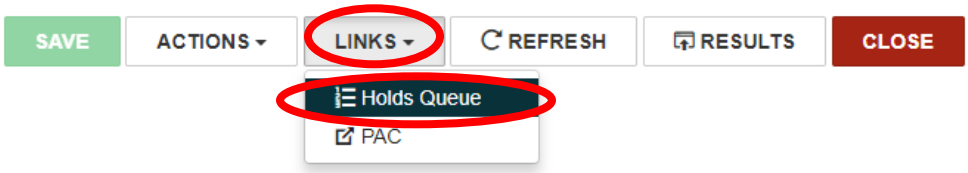
A BIBLIOGRAPHIC RECORD is used for cataloguing purposes and is the main record that individual ITEM RECORDS are attached to.



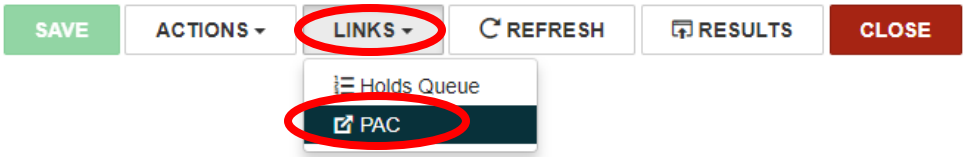
To see if there is a copy in your library, click on either the ITEMS tab or the AVAILABILITY link.



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

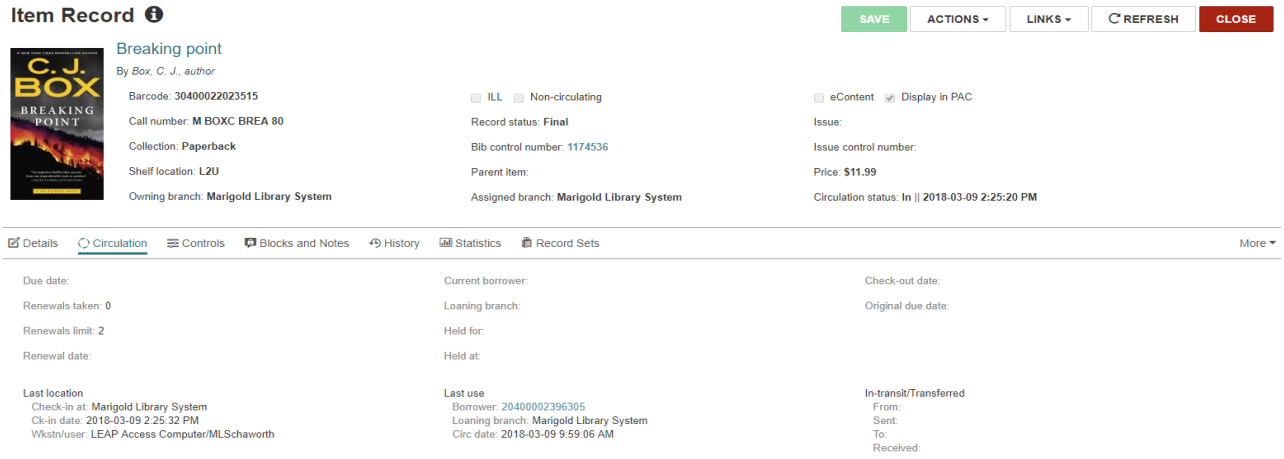


To view the PAC record, click on the LINKS drop-down menu and choose PAC (the record will open in PAC web server in a new tab).



Item Records

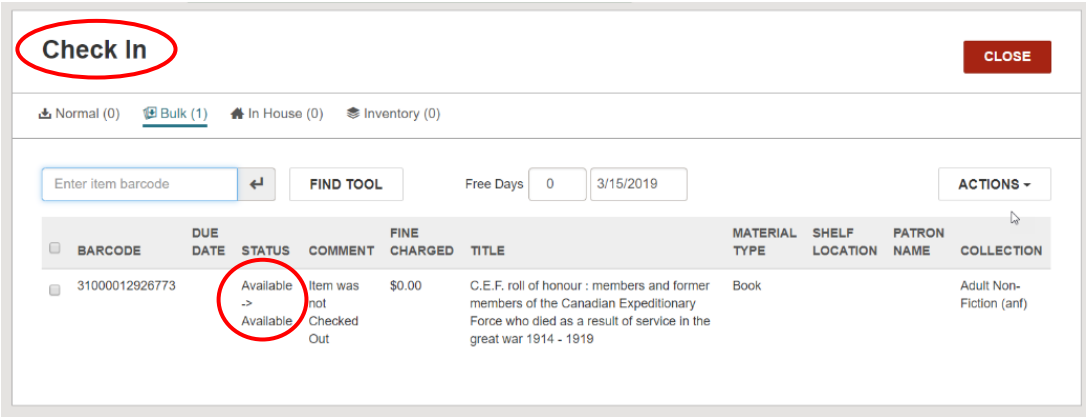
An ITEM RECORD is used for individual copies of a title.



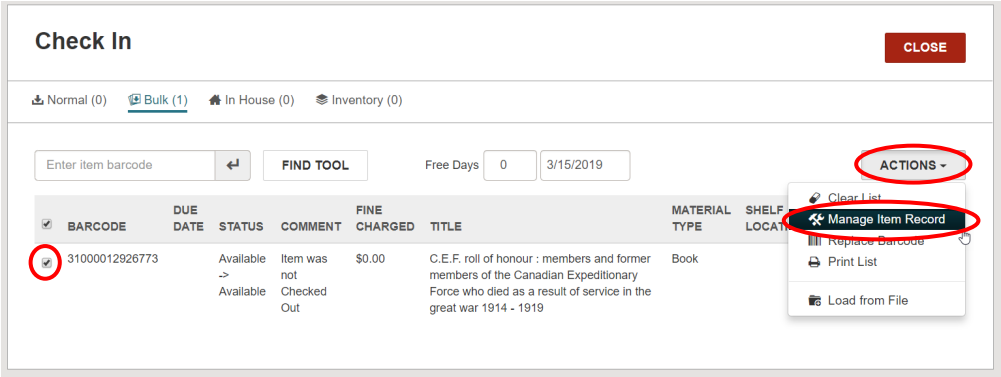
Manage Item Record

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.

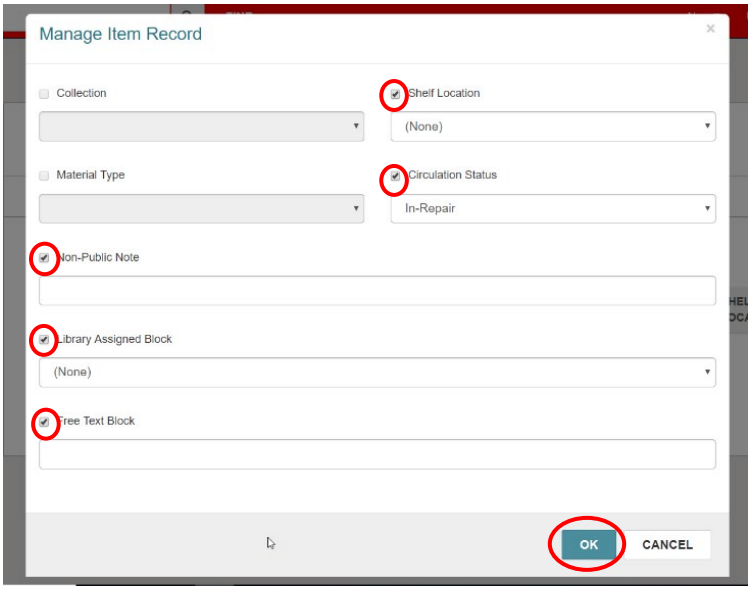


2. Check the box beside the item you wish to adjust and then select MANAGE ITEM RECORD from the ACTIONS drop-down menu. This must be done one item at a time.



3. MANAGE ITEM RECORDscreen 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.

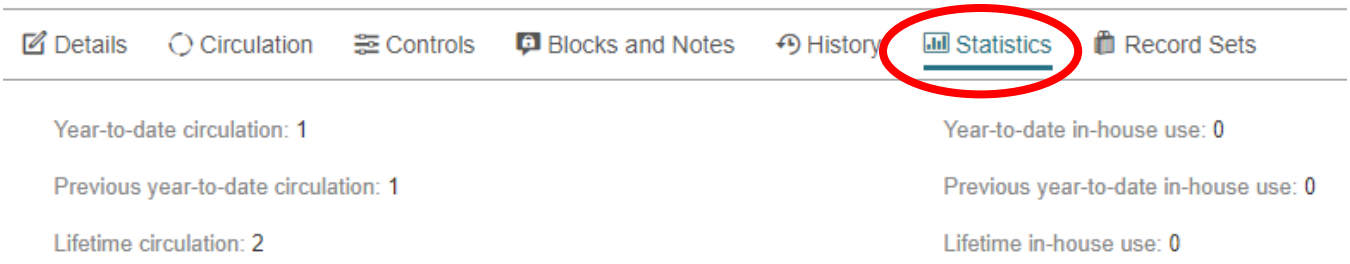
BLOCKS and NOTES should be used as follows:

- 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 by making a FOIP request.

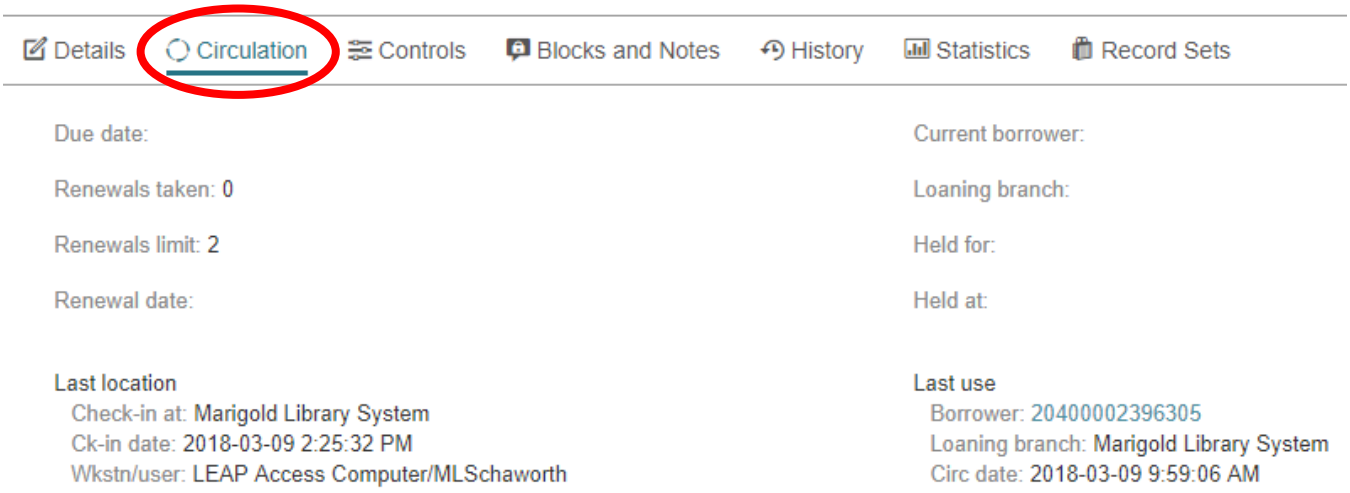
Item Statistics

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



Item Circulation

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



Adding Item Records

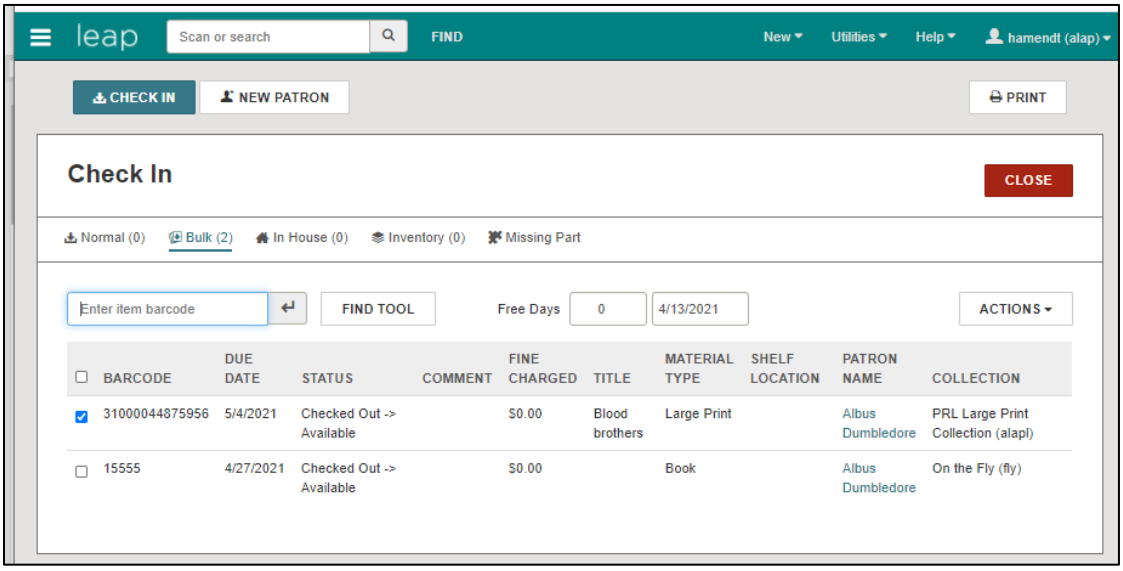
Advanced training is required to add ITEM RECORDS. This includes adding magazine issues and adding copies of items to an existing BIB RECORD. Contact your Consultant Librarian for more information.

Withdraw an Item with an Odd Status

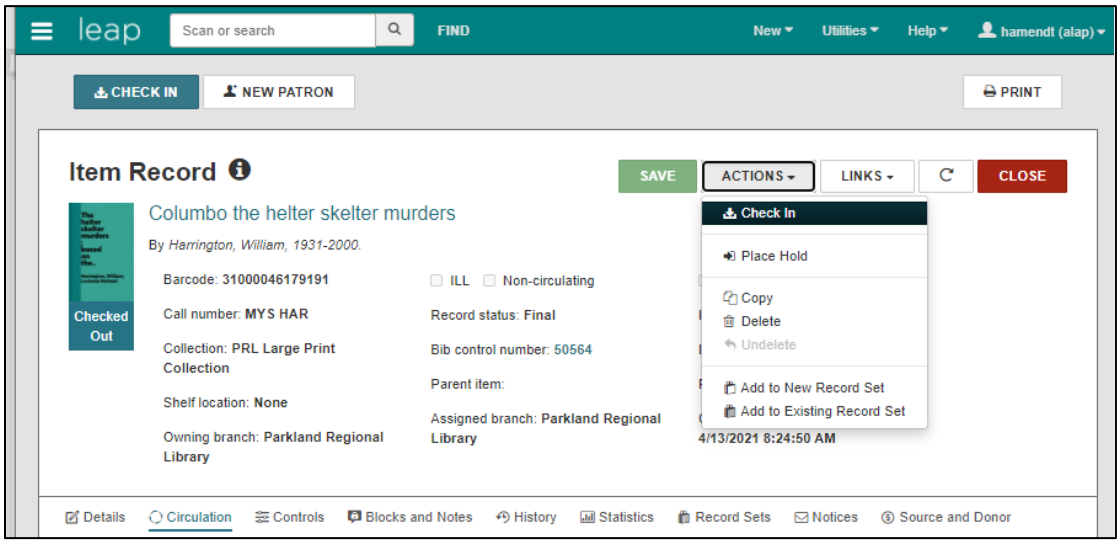
This procedure should be used when withdrawing items that have a status that prevents you from editing the record (in transit, checked out, lost, etc.).

Note: You can only edit items that are owned by your library.

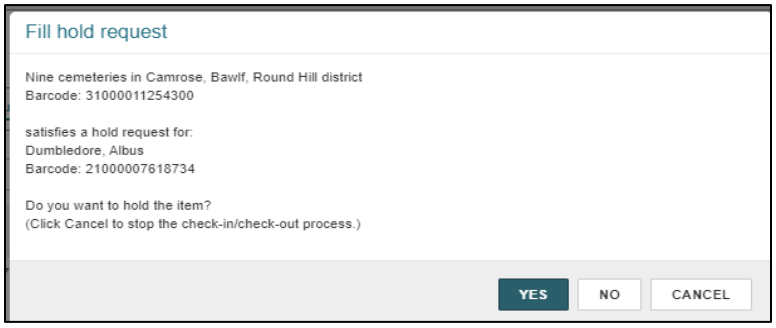
1. Force check-in the item.
    a. Copy and paste the barcode into the check-in field.



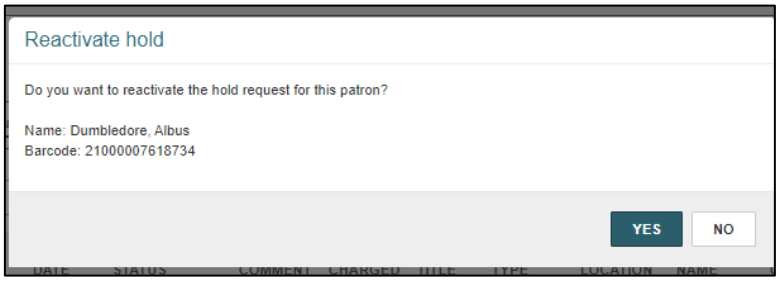
b. You may need to open the item record and select **Check In** from the **ACTION** drop-down menu.



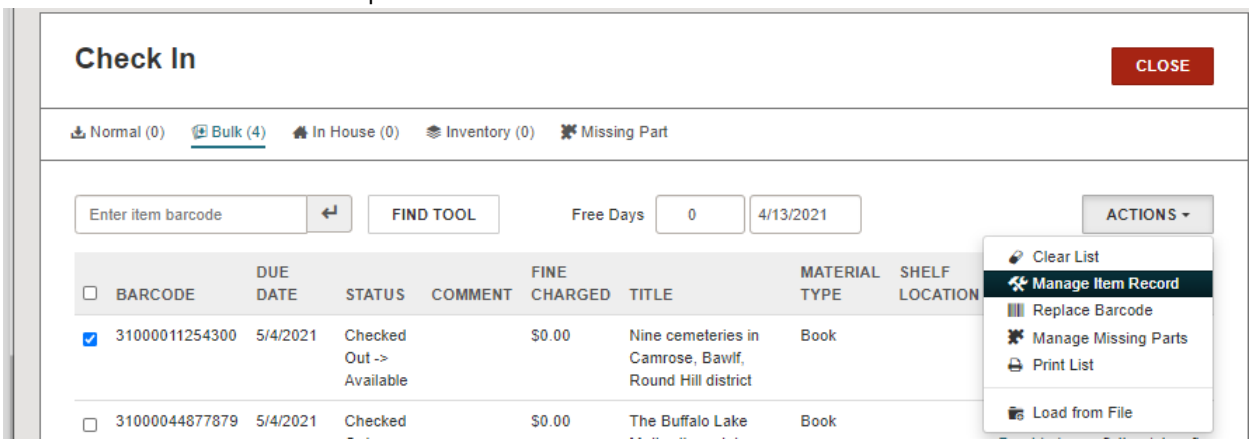
2. Deny and reactivate any holds.
   a. Click **No** to reject filling the hold.



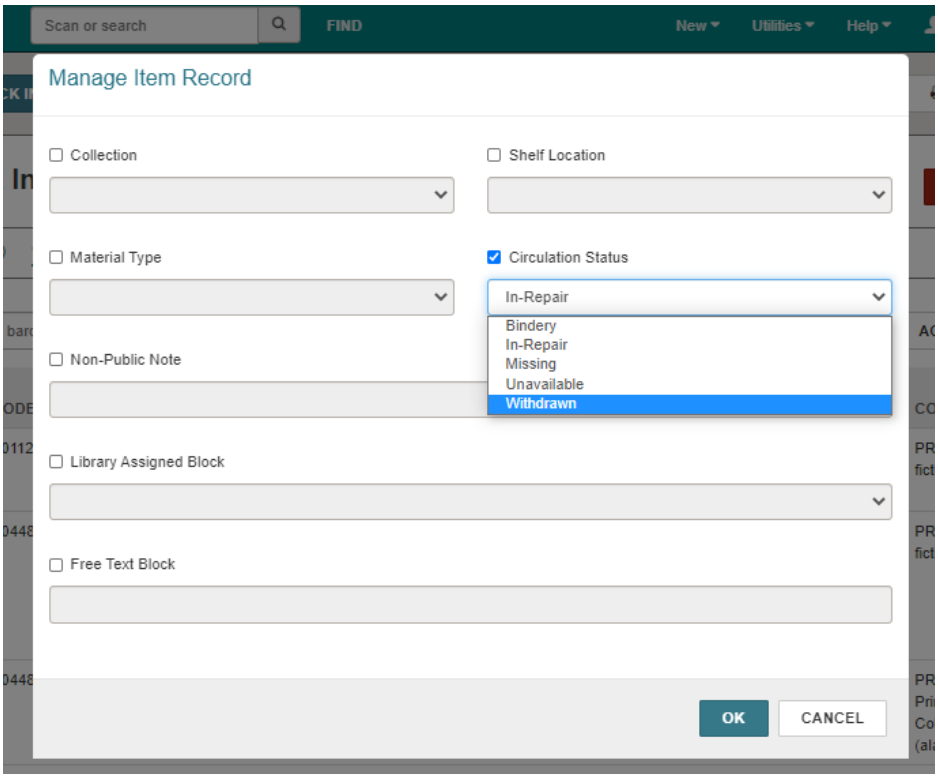
   b. Click **Yes** to reactivate the hold.



3. Once the item is checked in, check the box left of the checked-in item, and click **Manage Item Records** from the **ACTION** drop-down menu.



4. Check the box beside Circulation Status, then select **Withdrawn** from the drop-down menu. Then click **OK**.



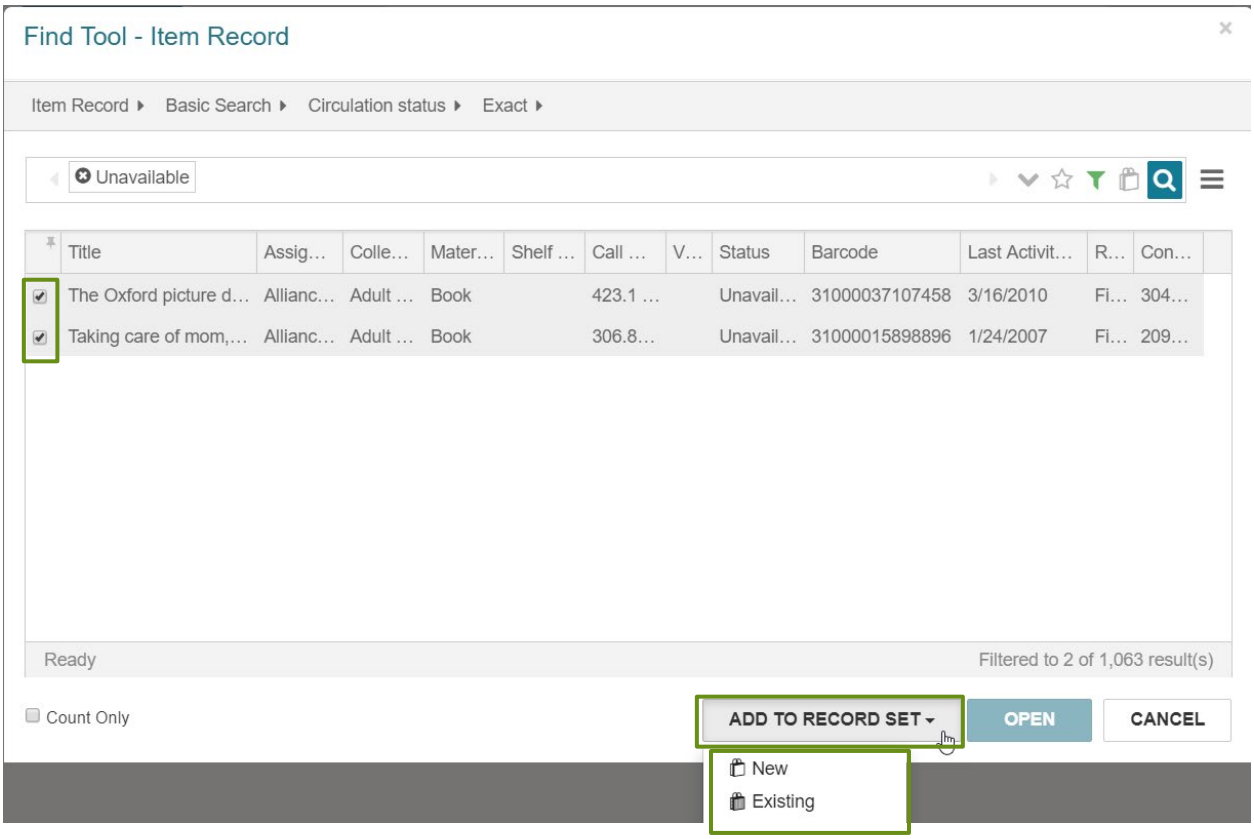
5. The item has been withdrawn.

Record Sets

Record sets are a great way to view and group several records.

Adding items to a record set:

1. Perform a search using the find tool. This can be for item records, bibliographic records, or patron records. Check the box beside the search results and click the ADD TO RECORD SET button.



2. Select **NEW record set** or **EXISTING record set.**
    a. **New** – You will be taken to a new record set workform. Your record set name should include your library code [ALAP-record set].

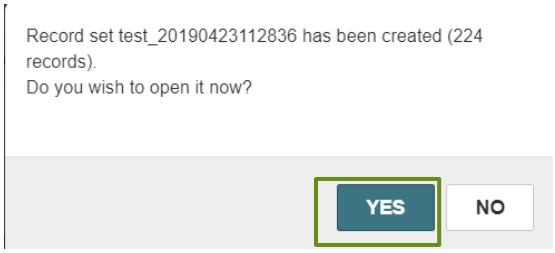
NOTE: Ensure you change the record owner from your login username to your member library, that way the record set can be accessed/edited by any of your library's Polaris accounts.

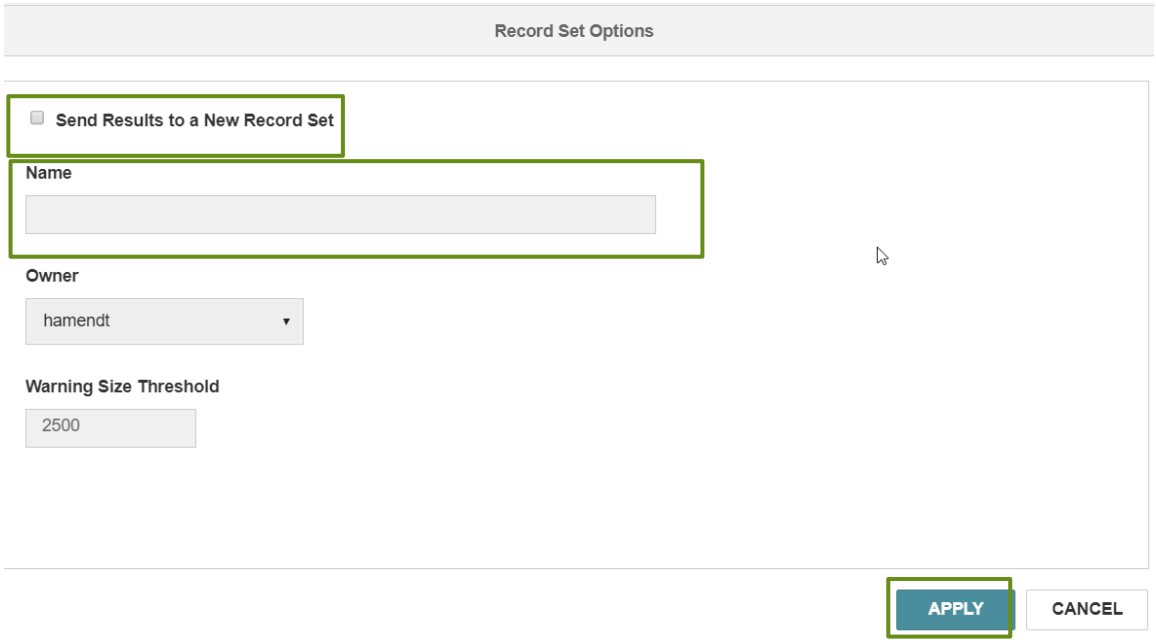
    b. **Existing**- You will be prompted to search for a record set by name. You can search with a * to view all record sets.

Adding results to a record set:

1. Perform a search using the Find Tool. This can be for item records, bibliographic records, or patron records.

2. Select the bag icon to open **Record Set Option.** Check the box to **send results to a new record set.** Your record set name should include your library code and the owner should be your library.
3. Click **Apply**
4. Once the send results option is set the bag icon will be green .
5. Then click the search button again .
6. You will receive a pop-up notice informing you the record set has been
7. created. Click **Yes.**

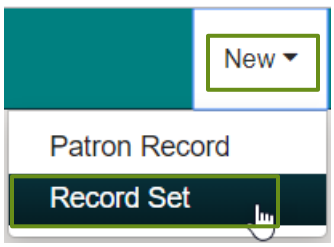




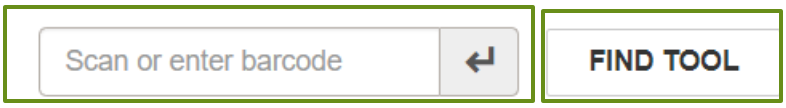
How to create a new record set:

Another way to create a record set and add items to it:

1. Click **Record Set** in the **New** drop-down menu. Then select the type of record set you are making: Authority, Bibliographic, Item, or Patron.
2. Name the record set using your library code, change the owner to your library rather than individual login.



3. You can then scan your items into the appropriate field or use the Find tool to perform a search for items.

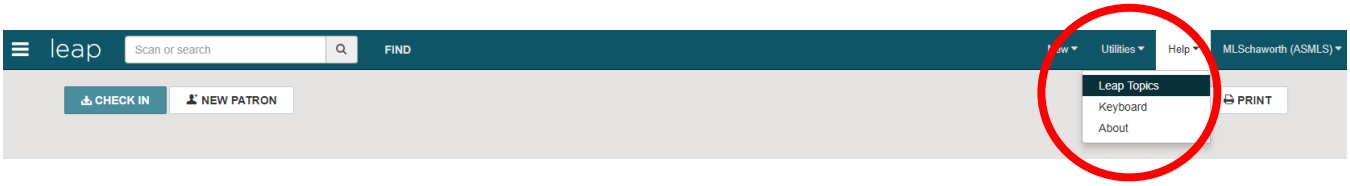


Viewing record sets:

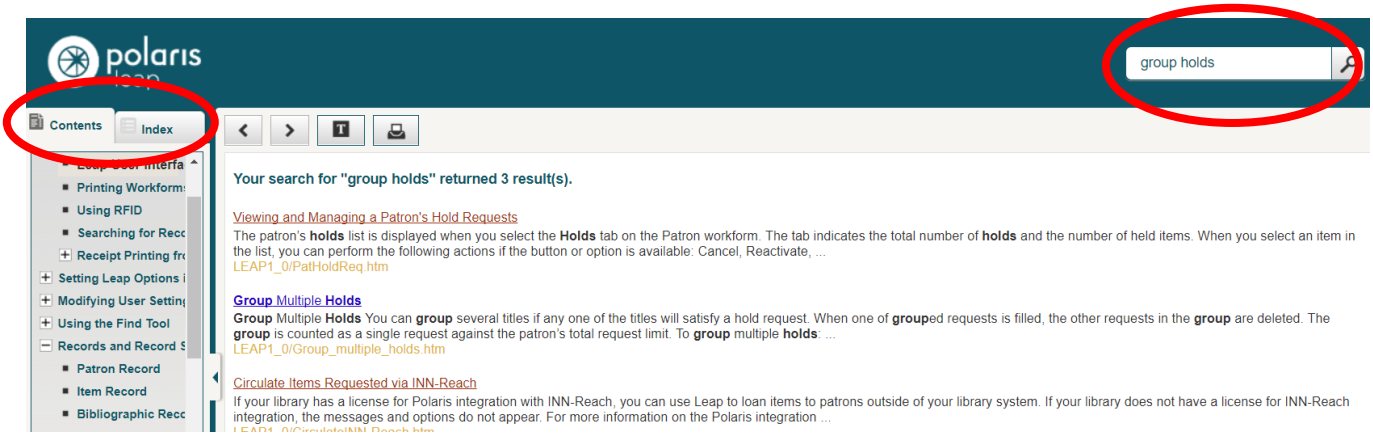
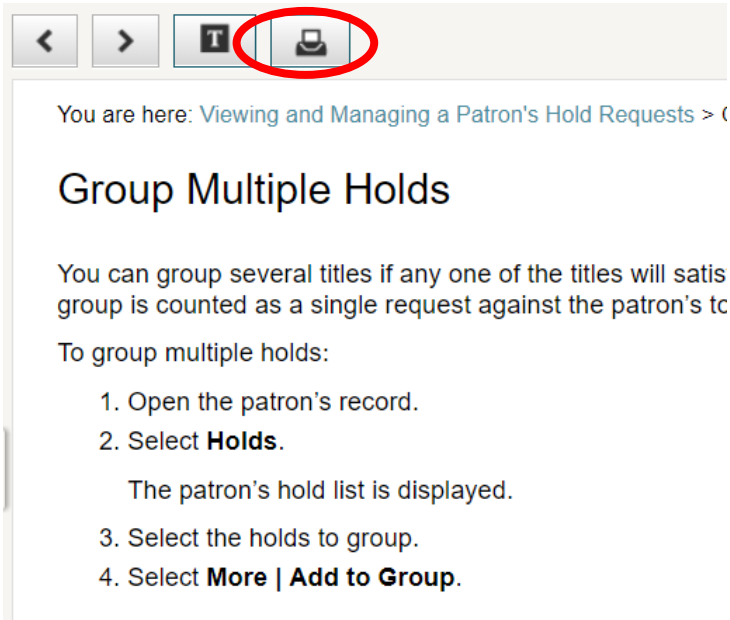
1. Perform a **record set search in the find tool** and click the result to open and view a record set. You can only open and edit record sets created by your library.

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: