



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

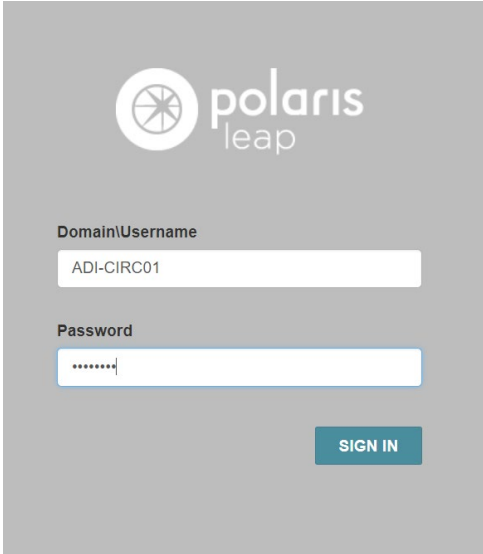
Overview

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.



The screenshot shows the Polaris Leap login page. At the top left is the Polaris Leap logo, which consists of a circular icon with a stylized 'P' and the text 'polaris leap'. Below the logo are two input fields: 'Domain\Username' with the value 'ADI-CIRC01' and 'Password' with a masked password '*****'. A blue 'SIGN IN' button is located at the bottom right of the form.

Leap Interface

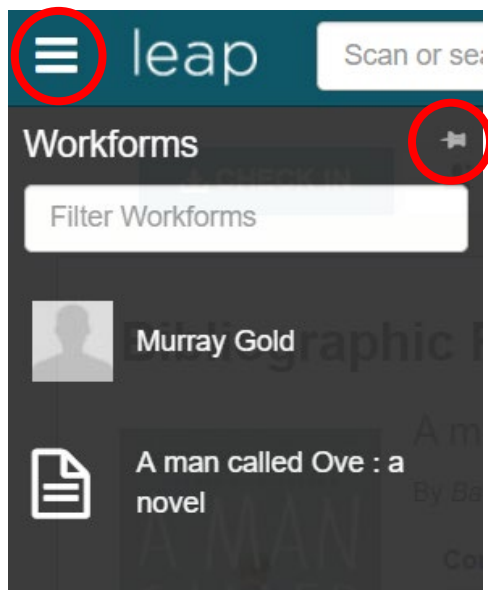
The Leap header appears when you log into Leap and remains visible while you are in the application.



The Leap header includes:

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

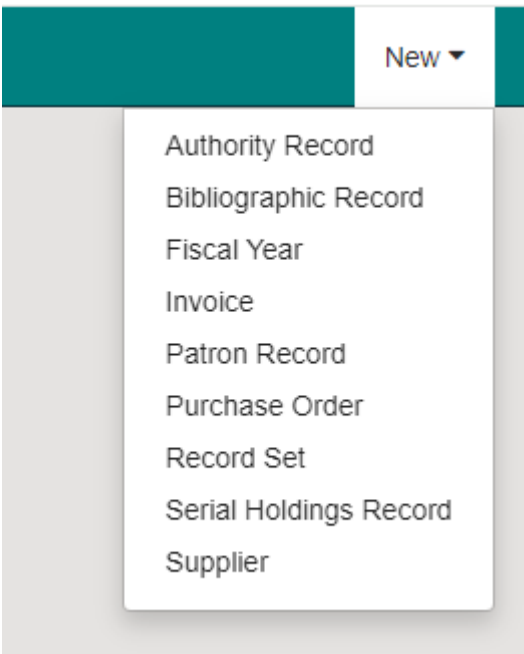
Workforms Tracker



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

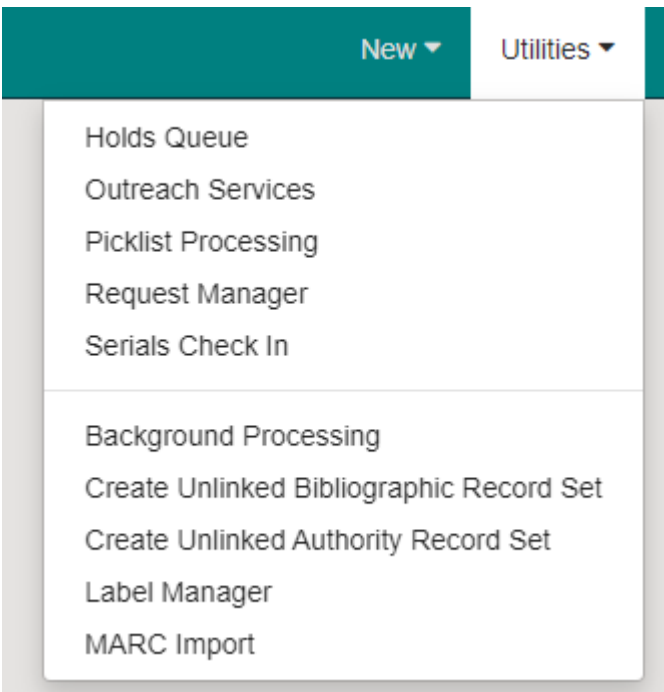
The WORKFORMS TRACKER displays the open workforms. You can pin the WORKFORMS TRACKER by selecting the pushpin icon, filter the list by typing in the **Filter Workforms** box, or close all the workforms by selecting **CLOSE ALL**. When you log out of Leap and then sign back in, the tracker remains in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

New Menu



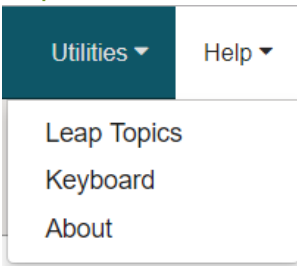
The NEW MENU includes options for creating a new patron record and a new record set among other functions.

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

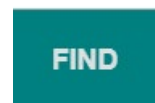


When you sign in to the Leap application, the cursor appears in the QUICK SEARCH BOX where you can scan a **patron or item** barcode, or enter search criteria to find **bibliographic or patron** records.

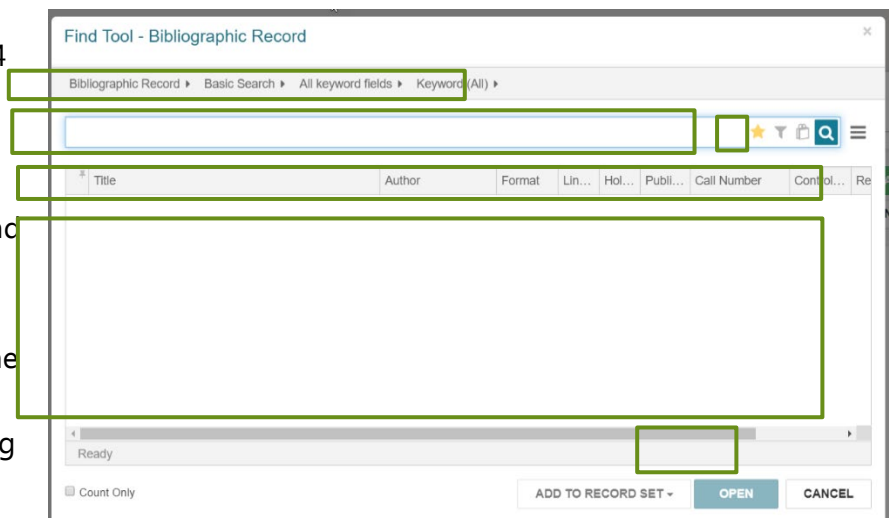
Find Tool

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

1. Click the **Find 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 **RESULTS button** in the upper right of the record screen.



the

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.

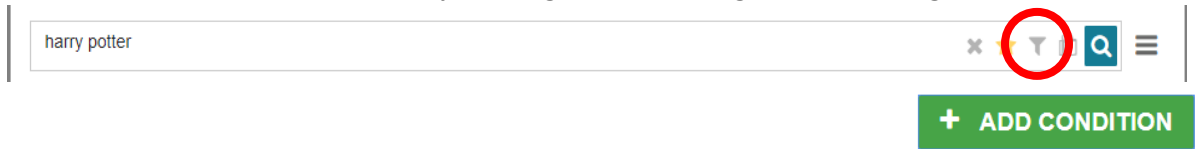
Case, spaces, punctuation - Letter case, multiple spaces, and punctuation are ignored. Omit hyphens in numbers. However, you can include the following characters if they immediately precede or follow a letter or number (no space between): + # % \$

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

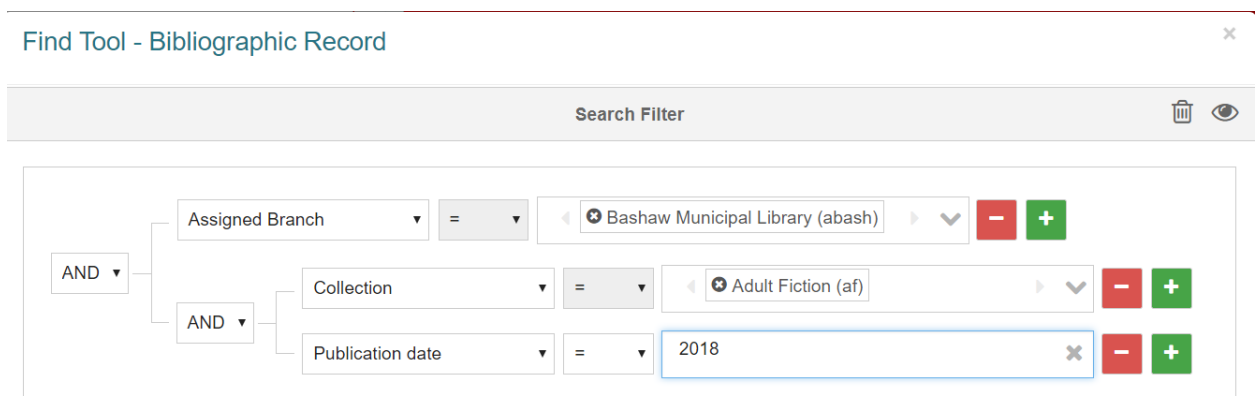
1. You can further filter the results by clicking the filter image and selecting ADD CONDITION



harry potter [x] [Filter icon circled in red] [Search icon] [Menu icon]

+ ADD CONDITION

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



Find Tool - Bibliographic Record [x]

Search Filter [Trash icon] [Eye icon]

AND [v]

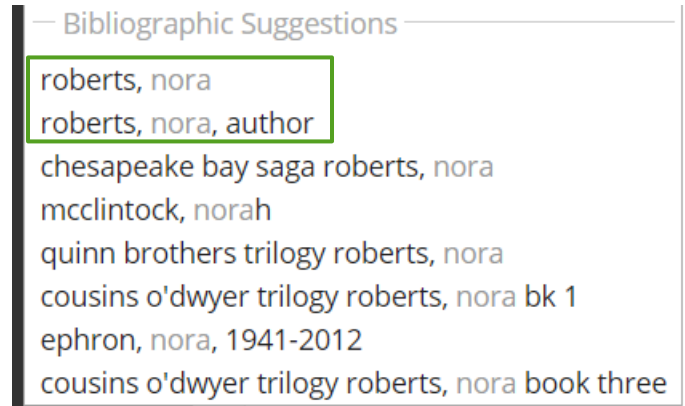
- Assigned Branch [v] = [v] Bashaw Municipal Library (abash) [v] [-] [+]
- AND [v]
 - Collection [v] = [v] Adult Fiction (af) [v] [-] [+]
 - Publication date [v] = [v] 2018 [x] [-] [+]

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.



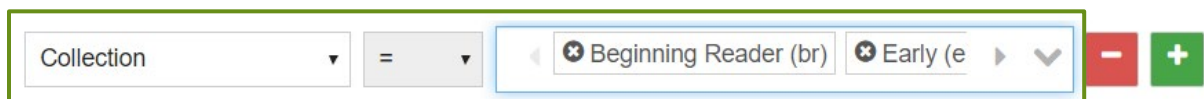
Subject Search

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.

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.



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) ▾

- +

⊗ 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.

Item Record ▸
Basic Search ▸
All keyword fields ▸
Keyword (All) ▸

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.

Power Search ▾

Basic Search
Power Search
SQL Search

(KW ALL "") AND ((AB = 73) AND (CS = 1))

▾
📄
🗑️
🔍

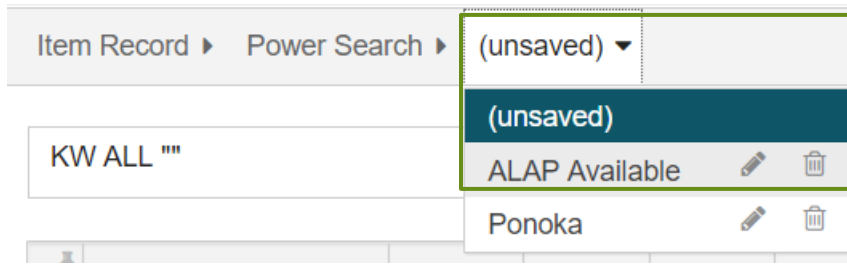
#	Title	Assig...	Colle...	Mater...	Shelf ...	Call	R...	Con..

Enter name of new saved search.

ALAP Available

SAVE

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.

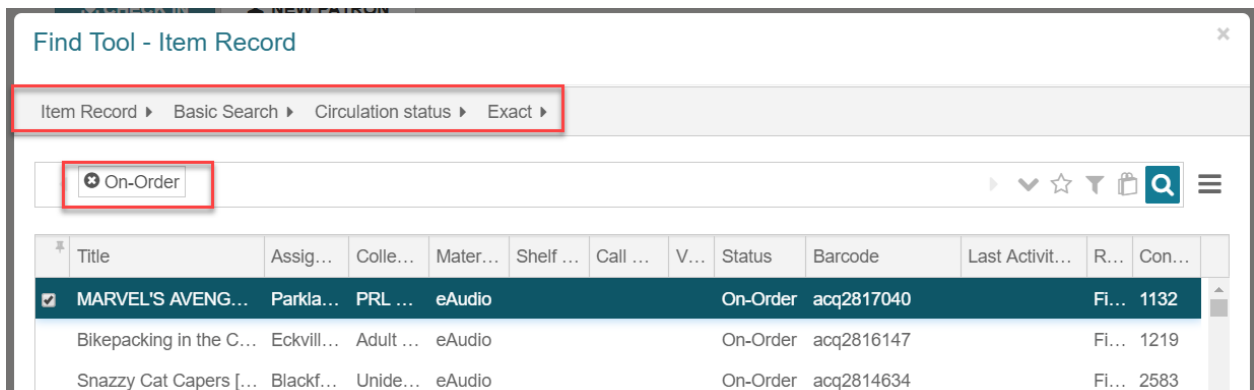


- When performing a power search type your search terms between quotation marks.

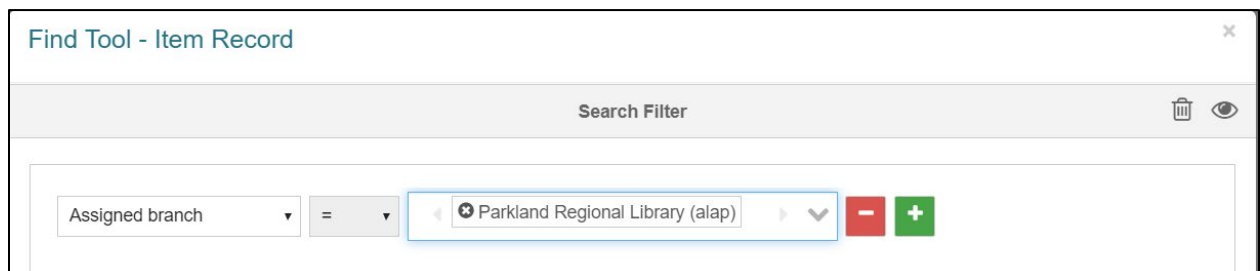
(KW ALL "SEARCH TERM") AND ((AB = 73) AND (CS = 1))

How to Check if an Item is On Order

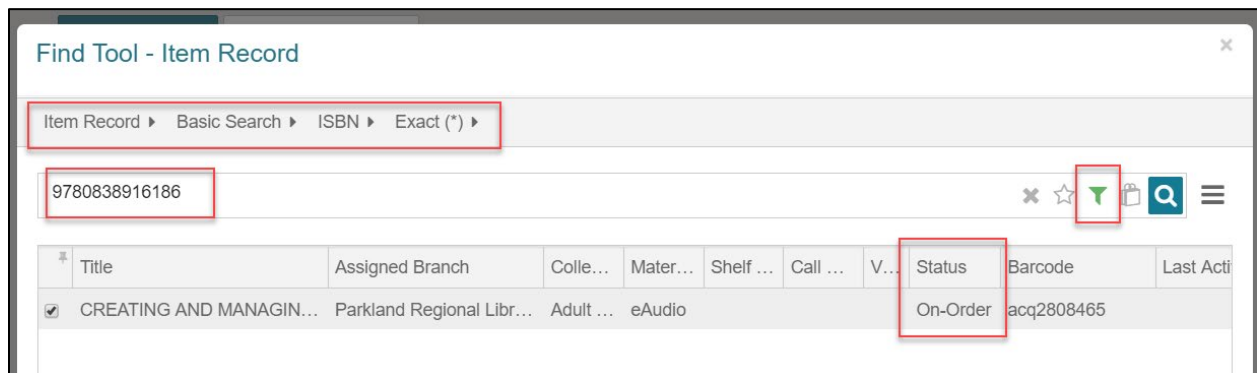
- Open your Find Tool. Change your search database to **Item Record**. Change your qualifier to **Circulation Status** and then change the search term to **On-Order**. This will give you a list of all items in PRLS that are on order.



- 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.

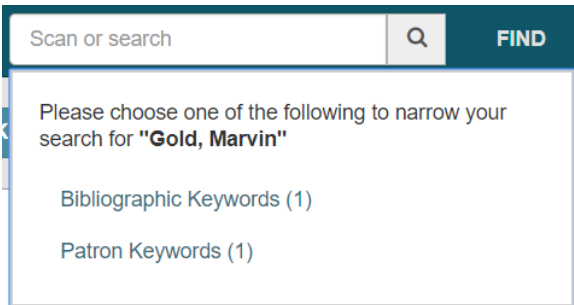


3. Rather than searching for all on order items, you can do a specific search for an ISBN with a filter of **assigned branch** for your library. This will let you know if your library already has the item on order and help prevent unintentional duplicate purchasing.
4. Change your search database to **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.

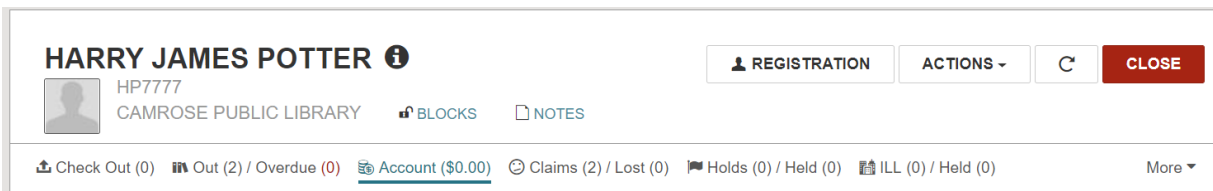


If there are both Bibliographic and Patron records for the name being searched, choose the appropriate category.

Patron Records

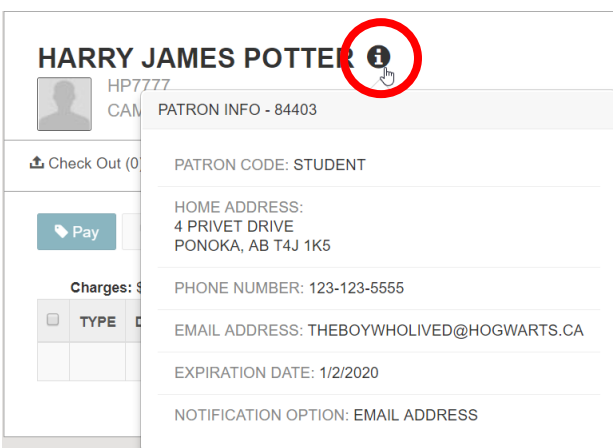
The PATRON RECORD workform header includes:

- 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:

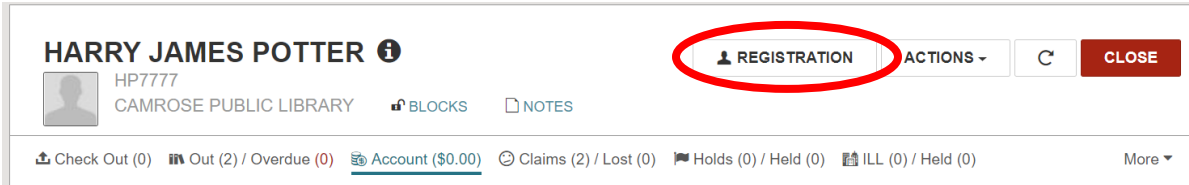
1. Patron Registration Information
2. Patron Library Account Information



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.

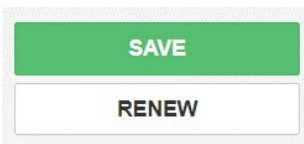
Patron Registration

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.

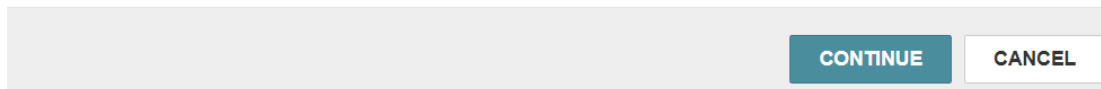
Verify/update any applicable information (address, phone number, notification option, etc.). Click SAVE (green button) when update is complete.



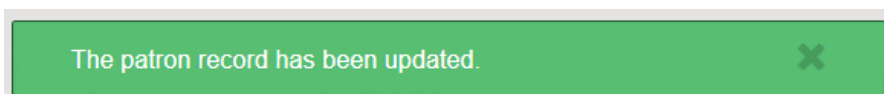
To renew, click on the RENEW button on the right-hand side of the screen.

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

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:

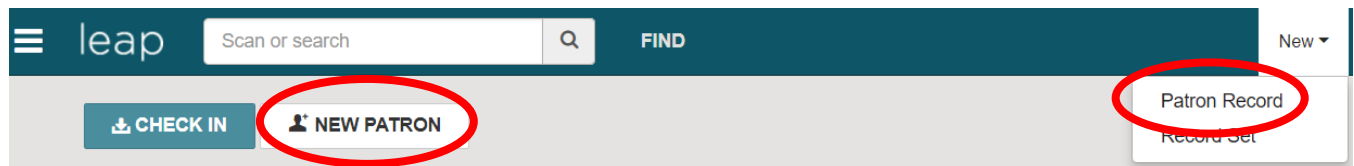


Register New Patron

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

Patron Registration 1

<ul style="list-style-type: none">  Profile  Attributes  Email  Address  Phone/Fax  Notifications  Preferences  Password 	<div style="background-color: #f0f0f0; padding: 5px; border: 1px solid #ccc;">Profile</div> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 5px;">Barcode *</td> <td style="width: 50%; padding: 5px;">Registered At *</td> </tr> <tr> <td style="padding: 5px;"><input type="text"/></td> <td style="padding: 5px;"><input type="text" value="Marigold Library System"/></td> </tr> <tr> <td style="padding: 5px;">Former Barcode</td> <td style="padding: 5px;">Patron Code *</td> </tr> <tr> <td style="padding: 5px;"><input type="text"/></td> <td style="padding: 5px;"><input type="text" value="Standard"/></td> </tr> <tr> <td style="padding: 5px;">Last Name *</td> <td style="padding: 5px;">Date of Registration</td> </tr> <tr> <td style="padding: 5px;"><input type="text"/></td> <td style="padding: 5px;"><input type="text" value="2018-02-12"/></td> </tr> </table>	Barcode *	Registered At *	<input type="text"/>	<input type="text" value="Marigold Library System"/>	Former Barcode	Patron Code *	<input type="text"/>	<input type="text" value="Standard"/>	Last Name *	Date of Registration	<input type="text"/>	<input type="text" value="2018-02-12"/>	<div style="background-color: #4CAF50; color: white; text-align: center; padding: 5px; margin-bottom: 5px;">SAVE</div> <div style="background-color: #ccc; text-align: center; padding: 5px;">CANCEL</div>
Barcode *	Registered At *													
<input type="text"/>	<input type="text" value="Marigold Library System"/>													
Former Barcode	Patron Code *													
<input type="text"/>	<input type="text" value="Standard"/>													
Last Name *	Date of Registration													
<input type="text"/>	<input type="text" value="2018-02-12"/>													

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.

Notification Option	<input checked="" type="checkbox"/> Additional TXT Notice
<input type="text" value="Email Address"/>	
Text Messaging Phone	Wireless Carrier
<input type="text" value="Phone 2"/>	<input type="text" value="Bell Canada"/>


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.

 REGISTRATION

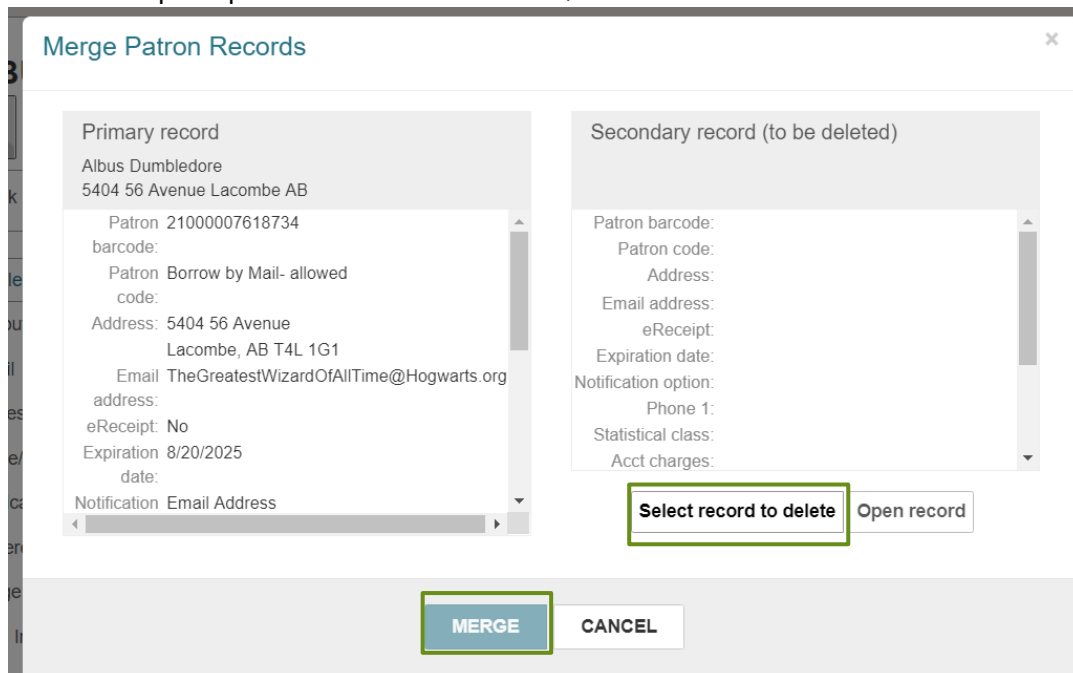
COPY

MERGE

DELETE

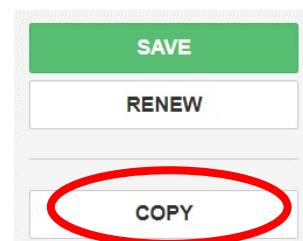
4. You will see a pop up with all the primary record information on the left side and the secondary record (to be deleted) will be blank. Click the button Select Record to Delete.
5. Then use the Find Tool box to locate the duplicate record you wish to delete. When you find the appropriate record, double click to open.
6. The “to be deleted” record information will display on the right side of the merge workflow. Click the MERGE button.
7. You will be prompted to confirm the action, click CONTINUE.

Select record to delete



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.

REGISTRATION
ACTIONS ▾
REFRESH
CLOSE

Reading History
Associations
Notices
Messages
Blocks
Notes
Record Sets

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.

New Association
Edit
Delete
Block
Unblock
Allow
Disallow
Filter Associations

Associated Patron: HP1111 : Albus Dumbledore

Note:

Block me if this patron record is blocked.
 Allow me to pick up holds for these patrons.

SAVE
CANCEL

✓	!	PATRON BARCODE	PATRON NAME	BRANCH	NOTE	BLOCK ME	ALLOW ME
✓		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 Parkland Regional Library System.

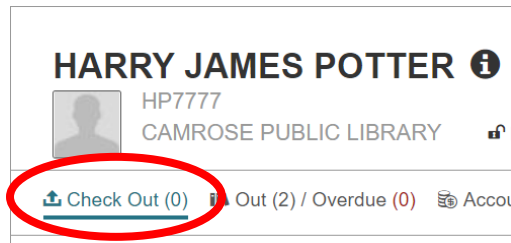
- How to access their online account at <http://search.prl.ab.ca>, using their barcode and PASSWORD (PIN).
- Where to access eLibrary from your library's website and the Public Access Catalogue (PAC).
- Where they can use their PRLS library card, and how to access libraries Alberta-wide through ME Libraries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

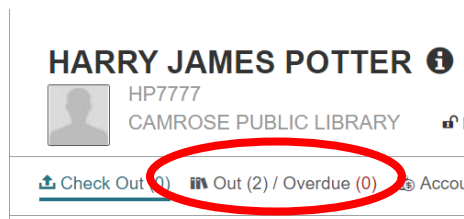
1. Open the patron's record.
CHECK OUT should be the default action.



HARRY JAMES POTTER ⓘ
 HP7777
 CAMROSE PUBLIC LIBRARY ⓘ ⓘ
 Check Out (0) ⓘ Out (2) / Overdue (0) ⓘ Accou

2. Scan or type item barcode.

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



HARRY JAMES POTTER ⓘ
 HP7777
 CAMROSE PUBLIC LIBRARY ⓘ ⓘ
 Check Out (0) ⓘ **Out (2) / Overdue (0)** ⓘ Accou

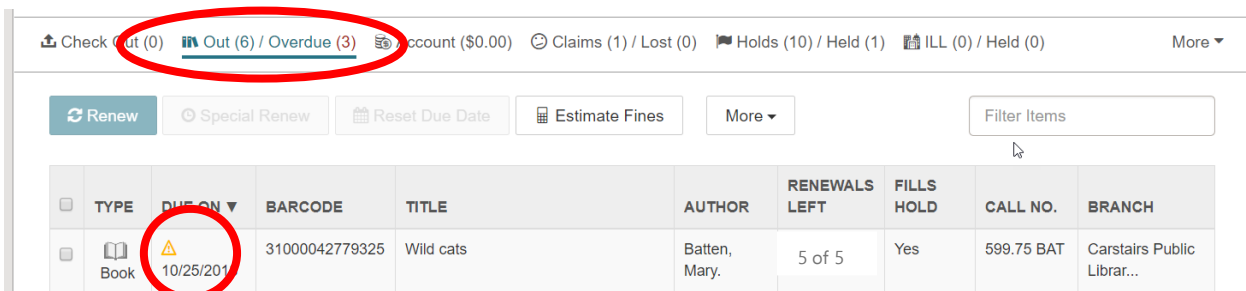
4. When you are finished all transactions, click COMPLETE.

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.



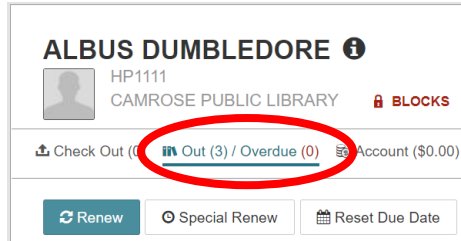
Check Out (0) **Out (6) / Overdue (3)** Account (\$0.00) Claims (1) / Lost (0) Holds (10) / Held (1) ILL (0) / Held (0) More ▾

	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...

Renewing Loaned Items

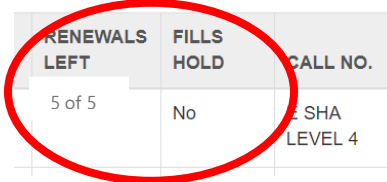
PRLS items can be renewed up to 5 times, if the item does not fill a hold request.

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



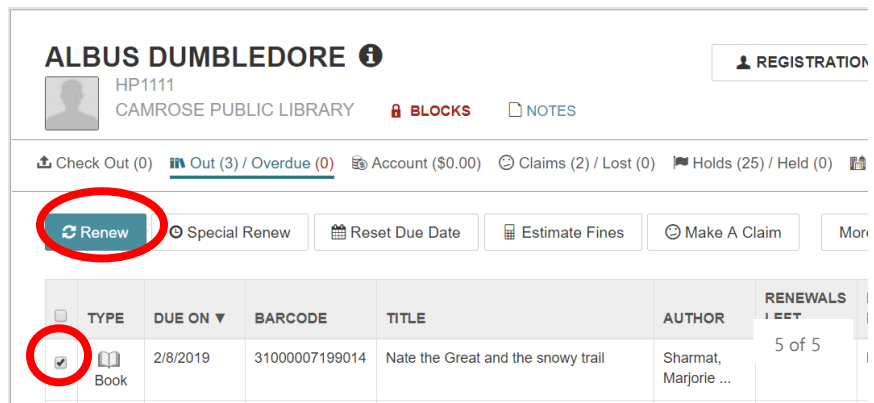
ALBUS DUMBLEDORE ⓘ
 HP1111
 CAMROSE PUBLIC LIBRARY **BLOCKS**
 Check Out (0) **Out (3) / Overdue (0)** Account (\$0.00)
 Renew Special Renew Reset Due Date

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



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

3. Click the box beside the item and click RENEW



ALBUS DUMBLEDORE ⓘ REGISTRATION
 HP1111
 CAMROSE PUBLIC LIBRARY **BLOCKS** NOTES
 Check Out (0) **Out (3) / Overdue (0)** Account (\$0.00) Claims (2) / Lost (0) Holds (25) / Held (0)
 Renew Special Renew Reset Due Date Estimate Fines Make A Claim Mon

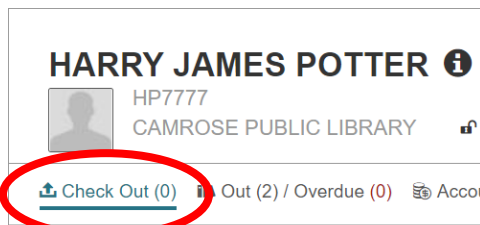
<input type="checkbox"/>	TYPE	DUE ON	BARCODE	TITLE	AUTHOR	RENEWALS LEFT
<input checked="" type="checkbox"/>	Book	2/8/2019	3100007199014	Nate the Great and the snowy trail	Sharmat, Marjorie ...	5 of 5

Special Loan/Extended Due Dates

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

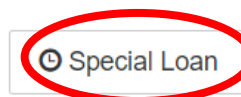
To set a special due date/loan period prior to scanning items:

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



HARRY JAMES POTTER ⓘ
 HP7777
 CAMROSE PUBLIC LIBRARY ⓘ
 Check Out (0) **Out (2) / Overdue (0)** Accou

2. Click the SPECIAL LOAN button.



Special Loan

3. Choose new loan period.

Loan period: Days ▼

Apply to next item only
 Apply to all items for this patron

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 tab.

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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...

RCODE	TITL	Su	Mo	Tu	We	Th	Fr	Sa
100022012195	Lash	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 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.

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BLOCKS NOTES

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

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 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.

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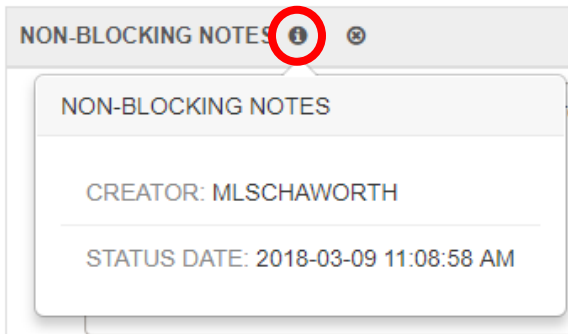
BLOCKS **NOTES**

Check Out (0) Out (2) / Overdue (0) Account (\$0.00) Claims (2) / 1

NON-BLOCKING NOTES ⓘ ⊗

Patron left gloves, they are in Lost and Fond - Snape

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

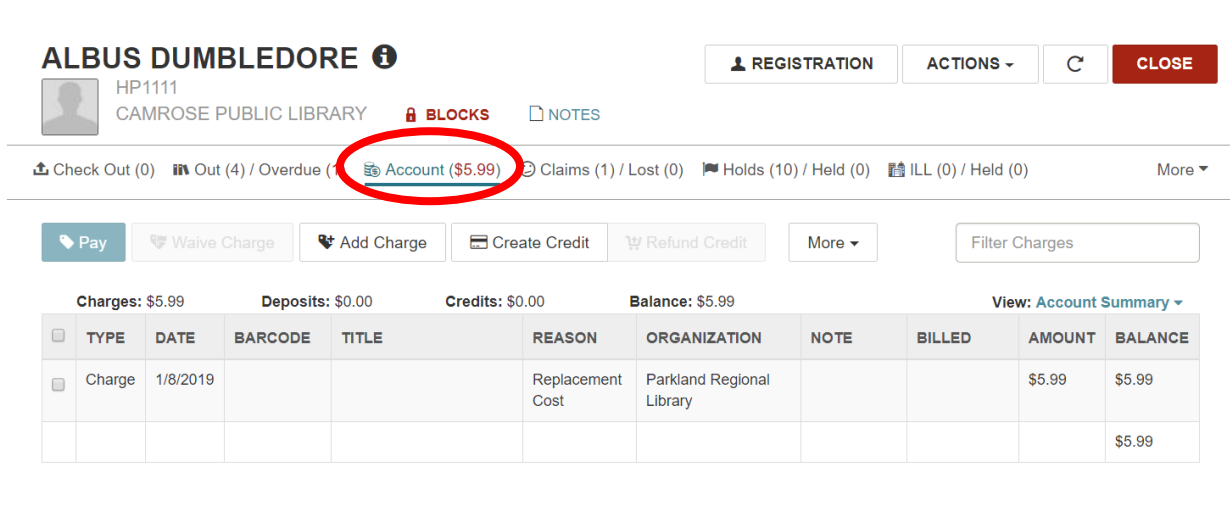


You can add a note, edit an existing note, or delete a note by clicking in the NOTE box. Click on UPDATE NOTES to save changes.

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 ↕ ↻ CLOSE

BLOCKS NOTES

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
Charge	1/8/2019			Replacement Cost	Parkland Regional Library			\$5.99	\$5.99
									\$5.99

To collect a patron payment:

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

Charges: \$2.20 Deposits: \$0.00

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

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.

Balance: **\$2.20**

Amount:

Method:

4. Click either the green PAY or WAIVE buttons.

OR

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.

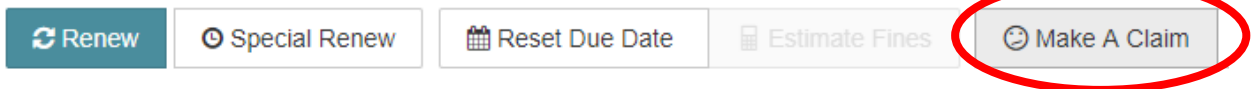
ALBUS DUMBLEDORE

HP1111
CAMROSE PUBLIC LIBRARY

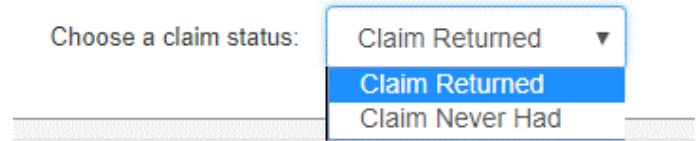
2. Select the check box next to the item(s) to CLAIM.

<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.



4. Choose the appropriate CLAIM status.



5. Click on the green CLAIM button.

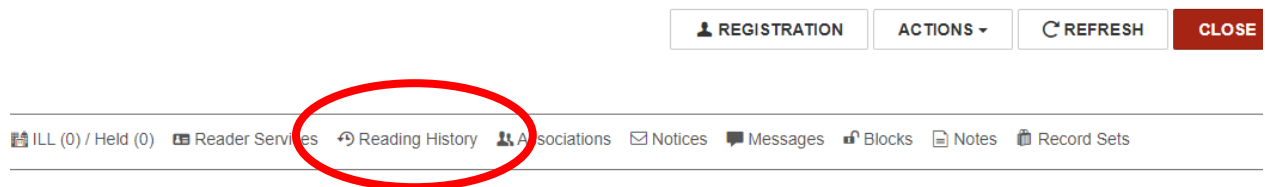


Reading History

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

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.



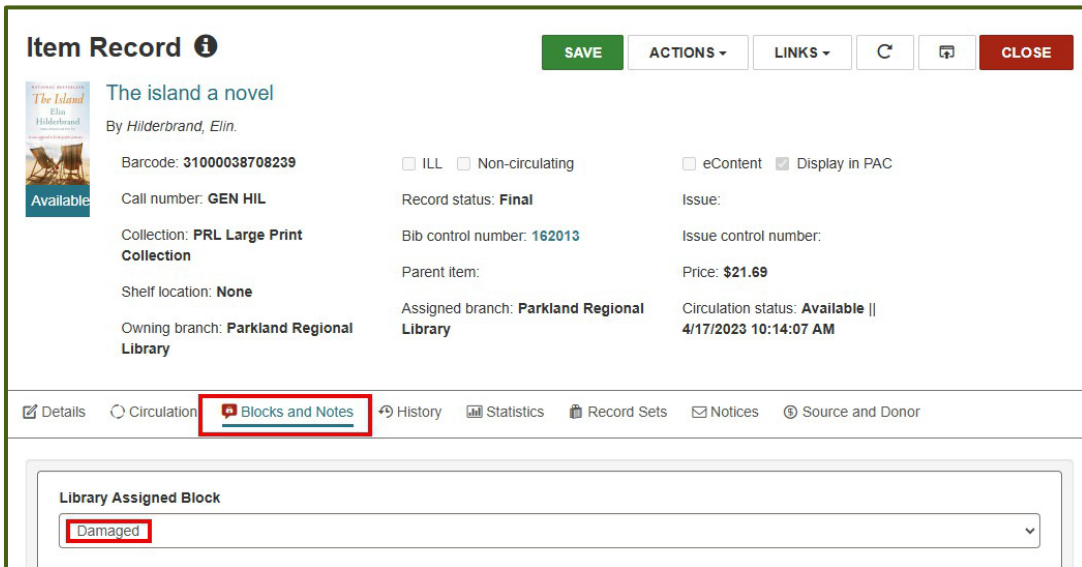
Damaged or Lost Item Procedure

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

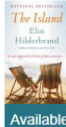
Steps in Polaris When Receiving an Item That Is Damaged

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** and change the **Library Assigned Block** to “Damaged”.



Item Record ⓘ SAVE ACTIONS ▾ LINKS ▾ ↻ 📄 CLOSE

 **The island a novel**
By Hilderbrand, Elin

Barcode: 31000038708239 ILL Non-circulating eContent Display in PAC

Call number: GEN HIL Record status: Final Issue:

Collection: PRL Large Print Collection Bib control number: 162013 Issue control number:

Shelf location: None Parent item: Price: \$21.69

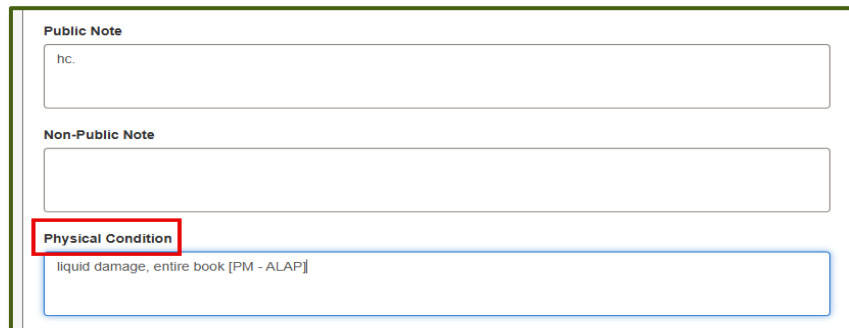
Owning branch: Parkland Regional Library Assigned branch: Parkland Regional Library Circulation status: Available || 4/17/2023 10:14:07 AM

🔍 Details 🔄 Circulation **📄 Blocks and Notes** 🕒 History 📊 Statistics 📁 Record Sets 📧 Notices 🔗 Source and Donor

Library Assigned Block

Damaged ▾

3. Under **Physical Condition**, add a description of the damage as well as staff information [staff initials – library code] and click **Save**.



Public Note

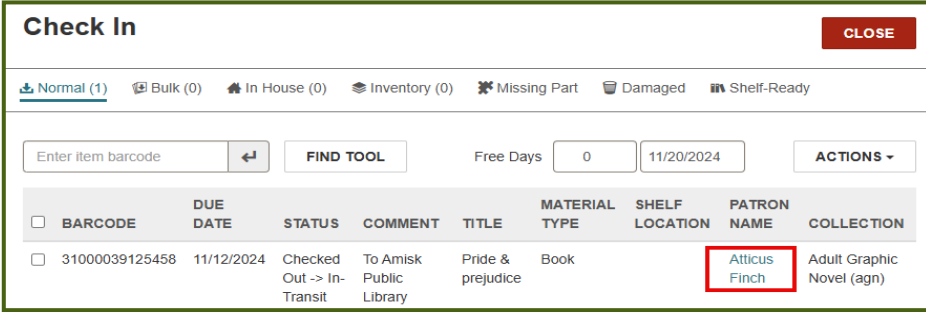
hc.

Non-Public Note

Physical Condition

liquid damage, entire book [PM - ALAP]

4. Open the last patron’s record (regardless of the assigned branch) by clicking the **Patron’s Name** on the **Check In** screen.



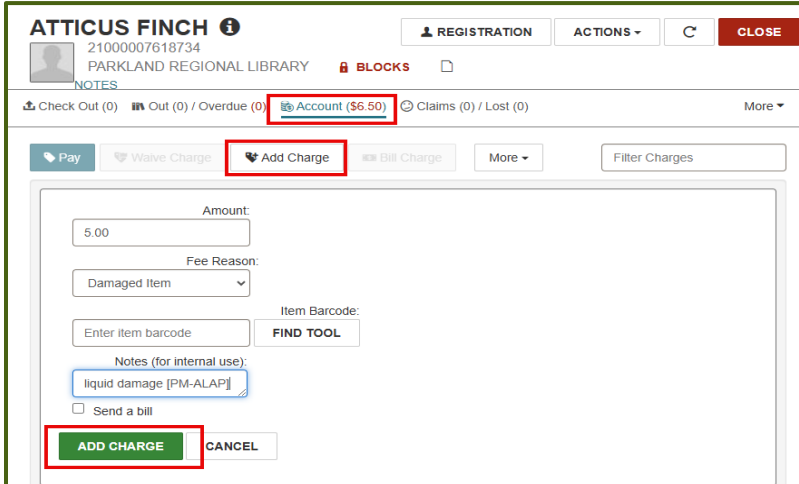
Check In CLOSE

Normal (1) Bulk (0) In House (0) Inventory (0) Missing Part Damaged Shelf-Ready

Enter item barcode Free Days ACTIONS ▾

<input type="checkbox"/>	BARCODE	DUE DATE	STATUS	COMMENT	TITLE	MATERIAL TYPE	SHELF LOCATION	PATRON NAME	COLLECTION
<input type="checkbox"/>	31000039125458	11/12/2024	Checked Out -> In-Transit	To Amisk Public Library	Pride & prejudice	Book		Atticus Finch	Adult Graphic Novel (agn)

5. Open the patron's **Account** tab and select **Add Charge**. Add the item's replacement **Amount** (or reference the "Default Prices by Collection" document on the Q-Drive).
Q:\Collections\Collection Development\Evaluating your collection
6. Select "Damaged Item" as the **Fee Reason** and scan or type in the damaged item's **Barcode**.
7. In **Notes**, add the damage description and [staff initials-library code], click **Add Charge**.



ATTICUS FINCH REGISTRATION ACTIONS ↕ CANCEL CLOSE

21000007618734
PARKLAND REGIONAL LIBRARY BLOCKS

NOTES

Check Out (0) Out (0) / Overdue (0) Account (\$6.50) Claims (0) / Lost (0) More ▾

Add Charge More ▾ Filter Charges

Amount:

Fee Reason:

Enter item barcode Item Barcode:

Notes (for internal use):

Send a bill

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 (*either by etransfer or cheque*) with a copy of the [Damaged or Lost Item Form](#) to the owning library.

If either the item and/or patron are not from your library complete the [Damaged or Lost Item Form](#) on the PRLS Support Site or call the library that the item/patron belongs to, 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.

Steps in Polaris When an Item Is Lost

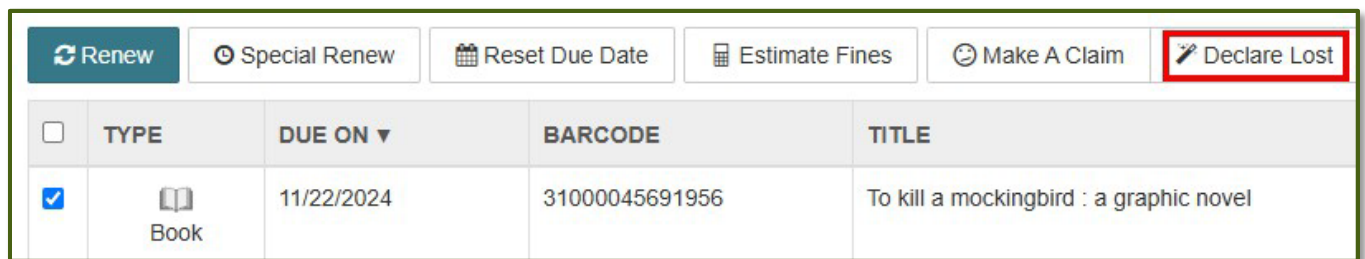
Note: Items with a status of **Lost** were checked out by a patron and lost. **Missing** items were misplaced from the library without being checked out. So, a Lost status has a patron attached to the item, a Missing status does not.

To declare an item **Lost** from the patron's checkouts:

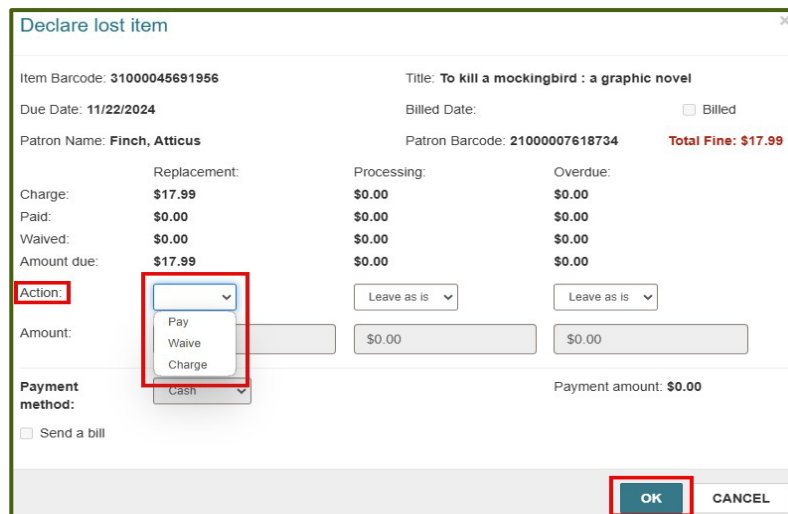
1. Open the patron's record. **Check Out** should be the default action. Switch over to the **Out / Overdue** tab.



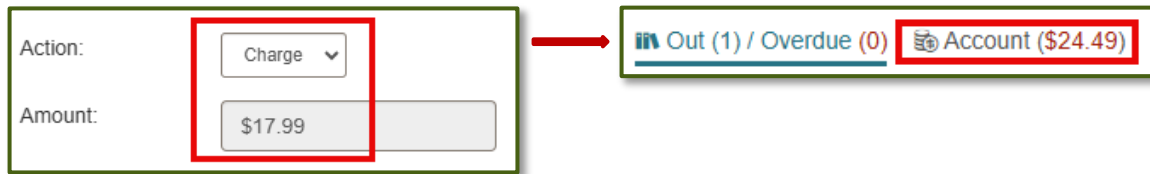
2. Select the check box next to the item(s) to declare lost and click the **Declare Lost** button.



3. Choose an **Action** option (Pay, Waive, or Charge) and click **OK**.



4. Charged items will automatically show up in the patron's **Account** tab.



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 lost item, send payment (*either by etransfer or cheque*) with a copy of the [Damaged or Lost Item Form](#) to the owning library.

Responsibilities of the Owning Library

1. As the owning library, you have the discretion of whether to collect replacement fees for a damaged or lost item. Your decision will be based on a number of factors, including the age of the item, number of circulations, and the extent of damage versus normal wear and tear, etc.
2. The owning library will check in the damaged item, and the **Block** (damaged block or lost item) will pop-up 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".

Item is blocked

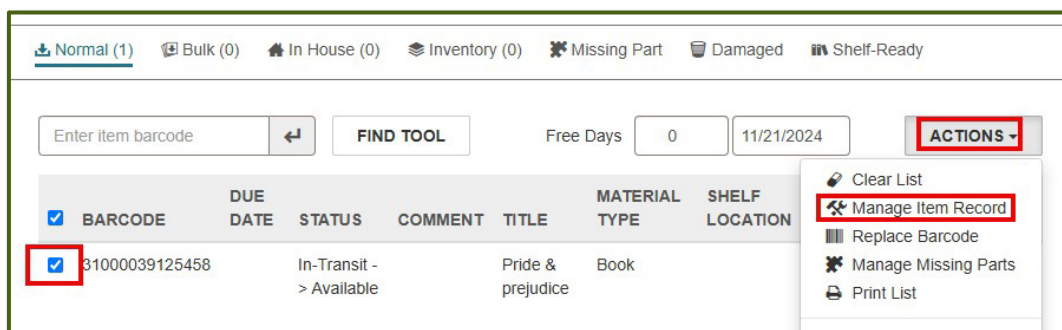
Do you want to continue with this operation?

Pride & prejudice

Damaged

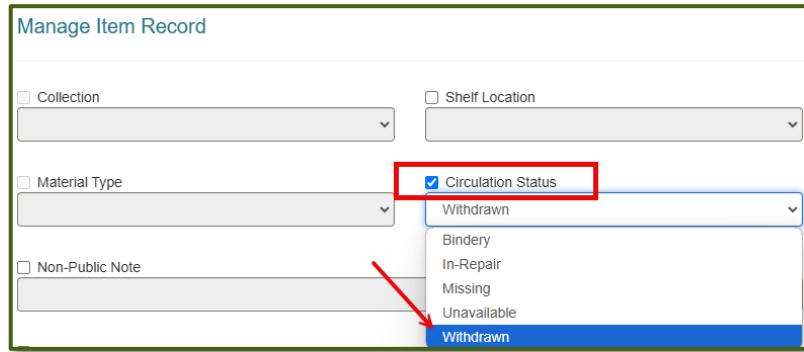
ITEM RECORD **CONTINUE** CANCEL

3. Click **Continue** on the block pop-up and check the box of the item and click **Actions** and click **Manage Item Record**.



BARCODE	DUE DATE	STATUS	COMMENT	TITLE	MATERIAL TYPE	SHELF LOCATION
<input checked="" type="checkbox"/>	31000039125458	In-Transit - > Available		Pride & prejudice	Book	

4. Click the box for **Circulation Status** and change the status to "Withdrawn"



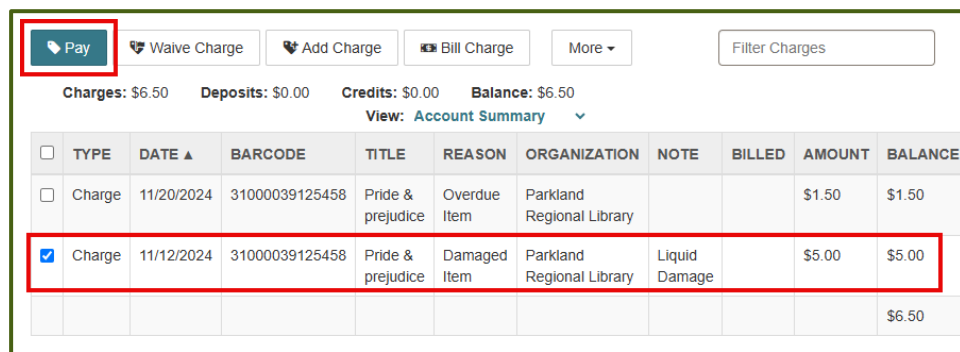
Note: If you check-in the item again the circulation status will return to available.

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 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.

1. **Patron Accepts 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.



<input type="button" value="Pay"/> <input type="button" value="Waive Charge"/> <input type="button" value="Add Charge"/> <input type="button" value="Bill Charge"/> <input type="button" value="More"/> <input type="text" value="Filter Charges"/>										
Charges: \$6.50 Deposits: \$0.00 Credits: \$0.00 Balance: \$6.50 View: Account Summary										
<input type="checkbox"/>	TYPE	DATE ▲	BARCODE	TITLE	REASON	ORGANIZATION	NOTE	BILLED	AMOUNT	BALANCE
<input type="checkbox"/>	Charge	11/20/2024	31000039125458	Pride & prejudice	Overdue Item	Parkland Regional Library			\$1.50	\$1.50
<input checked="" type="checkbox"/>	Charge	11/12/2024	31000039125458	Pride & prejudice	Damaged Item	Parkland Regional Library	Liquid Damage		\$5.00	\$5.00
										\$6.50

2. **Patron Does Not Accept Responsibility** - 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 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 or Lost 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

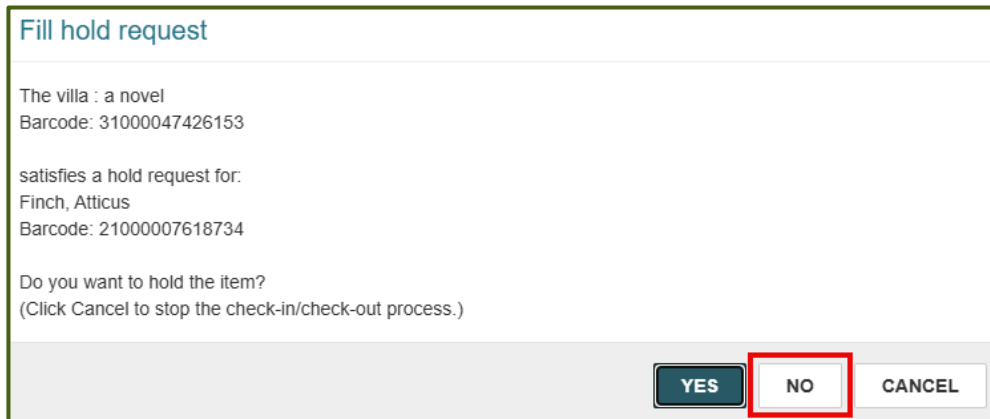
Options to transfer funds from your patron or library to the owning library:

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 the 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

If an item is received at your library to fill a request made by one of your patrons and it is in damaged condition, remember it is not your item and the last borrower on record is not your patron.

1. Check-in the item, and a **Fills Hold Request** will appear, click **No**.



Fill hold request

The villa : a novel
Barcode: 31000047426153

satisfies a hold request for:
Finch, Atticus
Barcode: 21000007618734

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

YES NO CANCEL

2. A **Reactivate Hold** window will appear, click **Yes**. This ensures the patron is placed at the top of the holds queue.

Reactivate hold

Do you want to reactivate the hold request for this patron?

Name: Finch, Atticus
Barcode: 21000007618734

YES NO

3. An **Item is In-Transit** window will appear stating the owning library, click **OK**.

Item is in-transit

The item is now In-Transit to Caroline Municipal Library (acaro)

OK

4. Click item to open the **Item Record**. In the **Blocks and Notes** tab, change the **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]. Click **Save**.

Library Assigned Block

Damaged

(None)

Check Contents

See Note

Damaged

System Block

Physical Condition

item received in damaged condition [PM-ALAP]

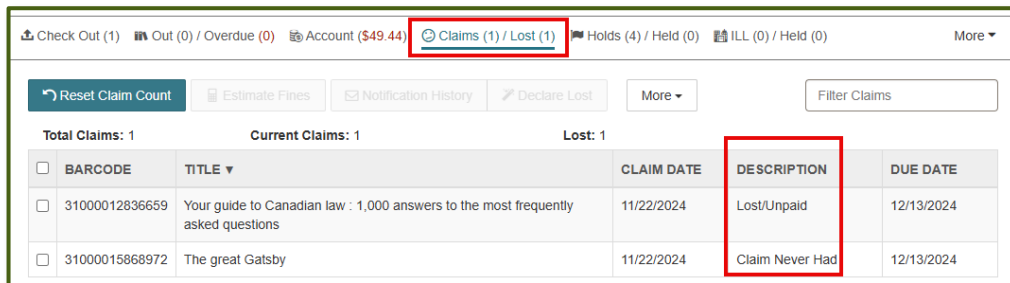
5. Complete the **Damaged Item Form** or [call the owning library to discuss how they would like to proceed](#). Then send the item to the owning library via van run or courier. Label the item as damaged.

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.

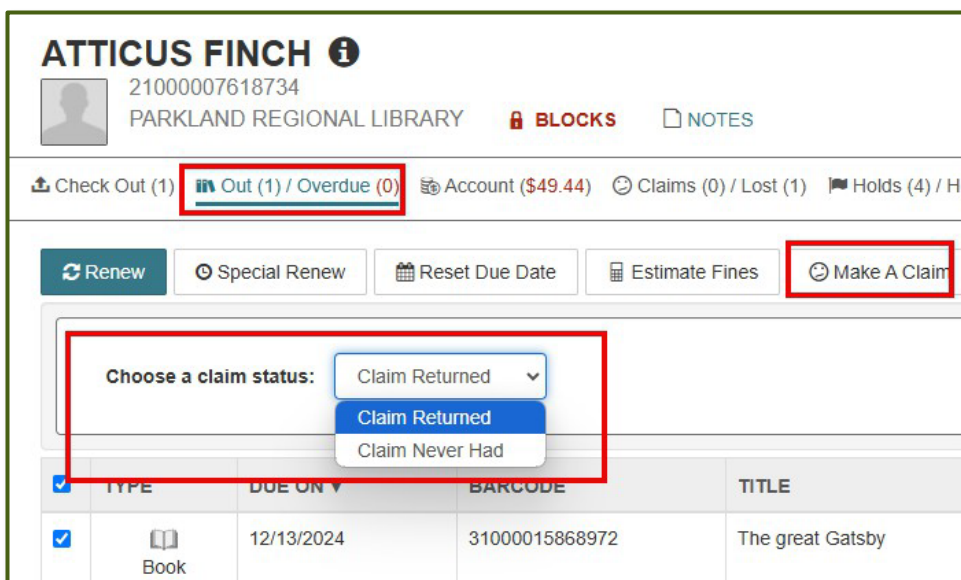


1. Open the patron's record and click the **Claims/Lost** tab.
2. The patron's Claims/Lost items will be listed.



BARCODE	TITLE	CLAIM DATE	DESCRIPTION	DUE DATE
31000012836659	Your guide to Canadian law : 1,000 answers to the most frequently asked questions	11/22/2024	Lost/Unpaid	12/13/2024
31000015868972	The great Gatsby	11/22/2024	Claim Never Had	12/13/2024

Note: A patron can make a claim against an item on their account. In the patron's record, click on the item in the **Out/Overdue** tab and click **Make a Claim**. They can declare either, "Claim Returned" or "Claim Never Had". Click **Claim**.



ATTICUS FINCH ⓘ
21000007618734
PARKLAND REGIONAL LIBRARY

Check Out (1) **Out (1) / Overdue (0)** Account (\$49.44) Claims (0) / Lost (1) Holds (4) / Held (0)

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

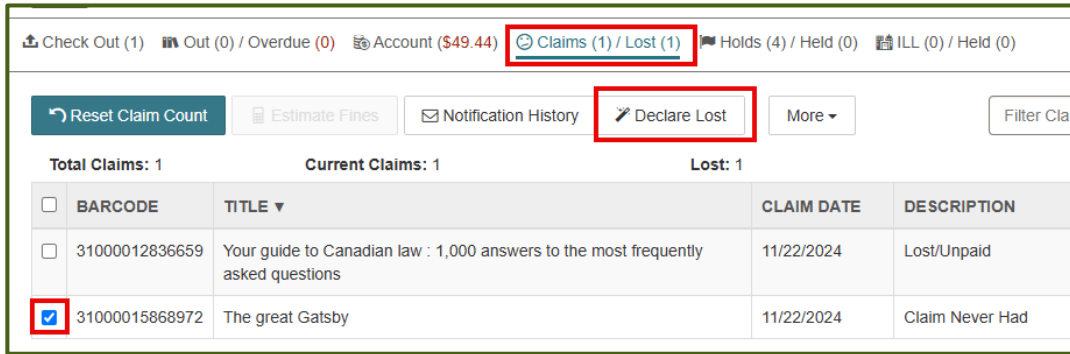
Choose a claim status: Claim Returned (selected)
Claim Returned
Claim Never Had

TYPE	DUE ON	BARCODE	TITLE
Book	12/13/2024	31000015868972	The great Gatsby

CLAIM CANCEL

You can also change a claimed item to a status of lost from the **Claim/Lost** tab in the patron's record.

- a) Go to the **Claims/Lost** list and select a claimed item in the list.
- b) Select the **Declare Lost** button.



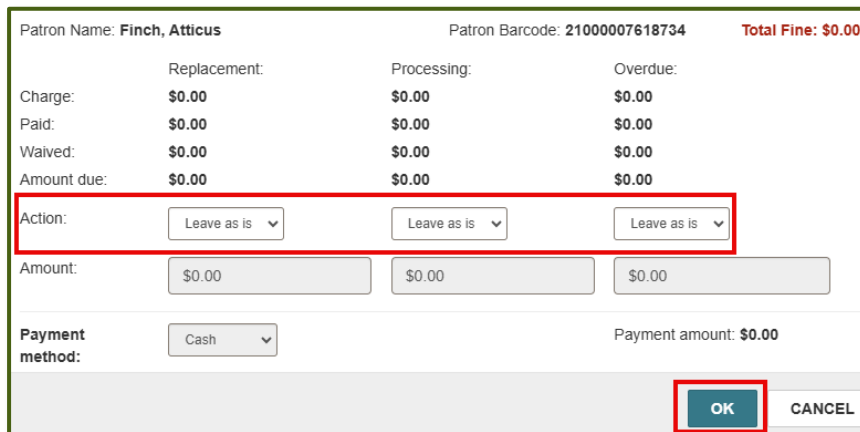
Check Out (1) Out (0) / Overdue (0) Account (\$49.44) **Claims (1) / Lost (1)** Holds (4) / Held (0) ILL (0) / Held (0)

Reset Claim Count Estimate Fines Notification History **Declare Lost** More Filter Claim

Total Claims: 1 Current Claims: 1 Lost: 1

<input type="checkbox"/>	BARCODE	TITLE ▼	CLAIM DATE	DESCRIPTION
<input type="checkbox"/>	31000012836659	Your guide to Canadian law : 1,000 answers to the most frequently asked questions	11/22/2024	Lost/Unpaid
<input checked="" type="checkbox"/>	31000015868972	The great Gatsby	11/22/2024	Claim Never Had

- c) A dialog box will open. The **Action** option is a default of "Leave as Is". Click **OK**.



Patron Name: **Finch, Atticus** Patron Barcode: **21000007618734** Total Fine: **\$0.00**

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

Action:

Amount:

Payment method: Payment amount: **\$0.00**

OK CANCEL

- d) The item has been declared "Lost" on the item record but will no longer be on the patron's account.

Hold

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.

Hold Statuses

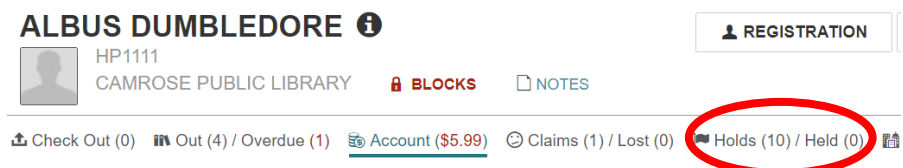
Hold statuses change automatically. It is important to check in **all** items received in the library, including new materials, as this causes the item status to update.

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.

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 ▸ **Choose search criteria**

Mr. Mercedes

#	Title	Author	Format	Lin.	...
1	Mr. Mercedes : a novel	King, Stephen, 19...	Book	30	16
2	Mr. Mercedes : a novel	King, Stephen, 19...	Audio ...	17	15
3	Mr. Mercedes : a novel	King, Stephen, 19...	Audio ...	7	0
4	Mr. Mercedes	King, Stephen, 19...	Large ...	4	0
5	Mr. Mercedes : a novel	King, Stephen, 19...	Eaudio...	1	*
6	Mr Mercedes : roman	King, Stephen, 19...	Book	1	0
7	Mr. Mercedes : a novel	King, Stephen, 19...	Book	88	0
8	Mr. Mercedes	King, Stephen, au...	Audio ...	2	0
9	Mr. Mercedes : a novel	King, Stephen, 19...	Book	2	1

Ready 9 result(s)

Count Only

OPEN **CANCEL**

Click on a column header to sort

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.

Find Tool - Bibliographic Record

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

scrappy little nobody

✓	Title	Author	Format	Lin...	Hol...	Publ...	Call Number	Consol...
✓	Scrappy little nobody	Kendrick, Anna, a...	Book	23	0	2016	792.02/8092	1434329
	Scrappy Little Nobody	Kendrick, Anna	Eaudio...	4	*	2016		1435266
	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.

SAVE

ACTIONS ▾

LINKS ▾

Place Hold

Create Item

Delete

Undelete

Add to New Record Set

Add to Existing Record Set

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.

Find Tool - Patron

Patron ▸ Basic Search ▸ Name (Last, First Middle) ▸

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

Find Tool - Patron

Patron ▶ Basic Search ▶ Name (Last, First Middle) ▶ Keyword (All) ▶

gold, marina

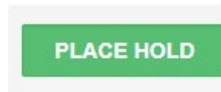
	Barcode	Name	Street	City	...	Zip	Birth Da...	Library
<input checked="" type="checkbox"/>	20400002396305	Gold, Marina	710 2nd Street	Strathmore	AB	T1...		Marigold...

Ready 1 result(s)

Count Only

OPEN CANCEL

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.

ALBUS DUMBLEDORE ⓘ

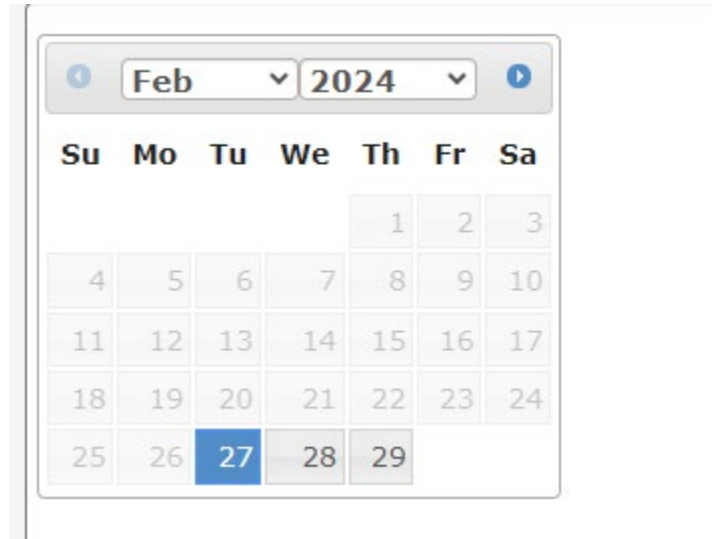
HP1111
CAMROSE PUBLIC LIBRARY

 **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)

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.

ALBUS DUMBLEDORE ⓘ

HP1111
CAMROSE PUBLIC LIBRARY

REGISTRATION ACTIONS

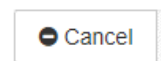
BLOCKS NOTES

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

2. 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.

ALBUS DUMBLEDORE ⓘ

HP1111
CAMROSE PUBLIC LIBRARY

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. 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		

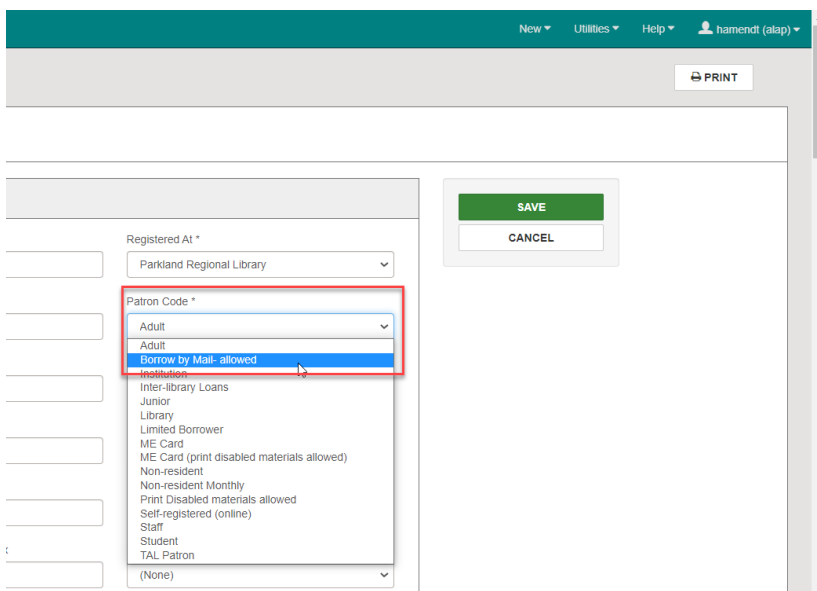
3. Click on the DELETE button.



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.



Registered At *
Parkland Regional Library

Patron Code *
Adult
Adult
Borrow by Mail- allowed
Institutions
Inter-library Loans
Junior
Library
Library
Limited Borrower
ME Card
ME Card (print disabled materials allowed)
Non-resident
Non-resident Monthly
Print Disabled materials allowed
Self-registered (online)
Staff
Student
TAL Patron
(None)

SAVE
CANCEL

- The patron must place holds via the Public Access Catalogue (PAC) on the library's website.
- 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.

Barcode: *****7655

Username: hamendt

Pickup Library:

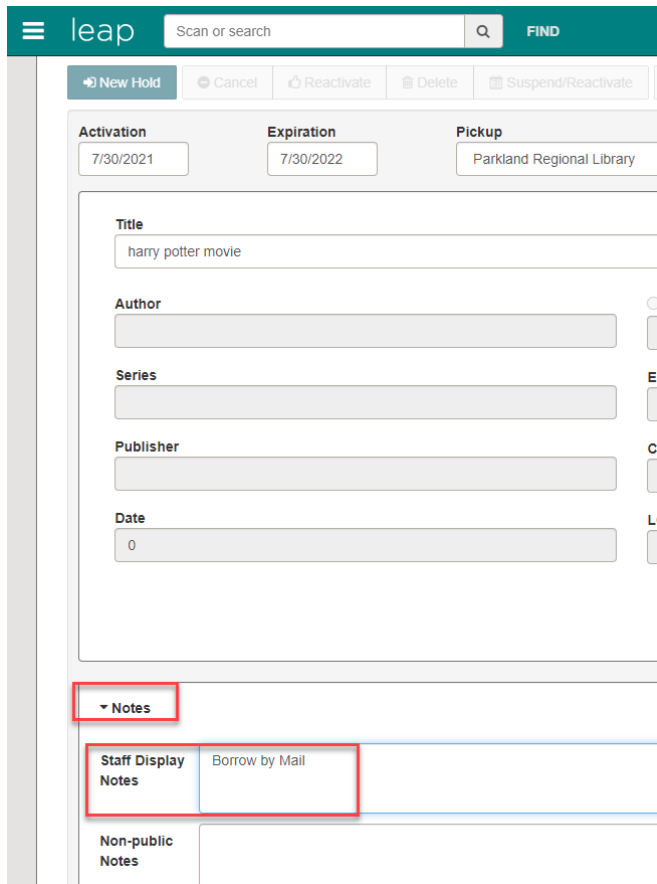
Please mail this to me.

Activation Date:
(ex: m/d/yyyy)

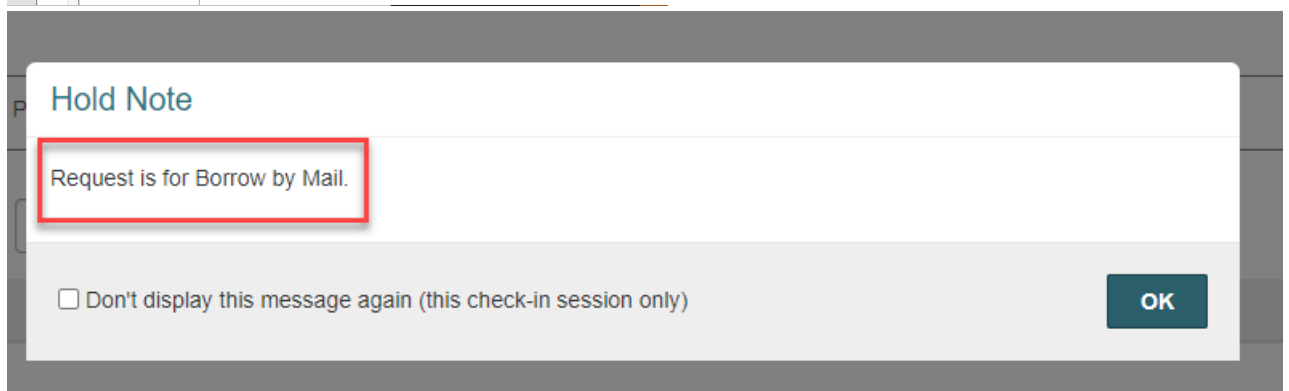
- Library staff will see BORROW BY MAIL hold on the Picklist as it is identified by an envelope icon. Library staff will check in the hold as usual.

<input type="checkbox"/>	<input checked="" type="checkbox"/>	Ankle high and knee deep : women reflect on Western rural life	Book
--------------------------	-------------------------------------	----------------------------------------------------------------------	------

- 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.



The screenshot shows the Leap library system interface. At the top, there is a search bar with the text "Scan or search" and a "FIND" button. Below the search bar are several action buttons: "New Hold", "Cancel", "Reactivate", "Delete", and "Suspend/Reactivate". The main form area contains fields for "Activation" (7/30/2021), "Expiration" (7/30/2022), and "Pickup" (Parkland Regional Library). Below these are fields for "Title" (harry potter movie), "Author", "Series", "Publisher", and "Date". A "Notes" section is visible at the bottom, with a red box highlighting the "Staff Display Notes" section, which contains the text "Borrow by Mail".




The screenshot shows a "Hold Note" dialog box. The title is "Hold Note". The main text area contains the message "Request is for Borrow by Mail.", which is highlighted with a red box. Below the message is a checkbox labeled "Don't display this message again (this check-in session only)". An "OK" button is located in the bottom right corner.

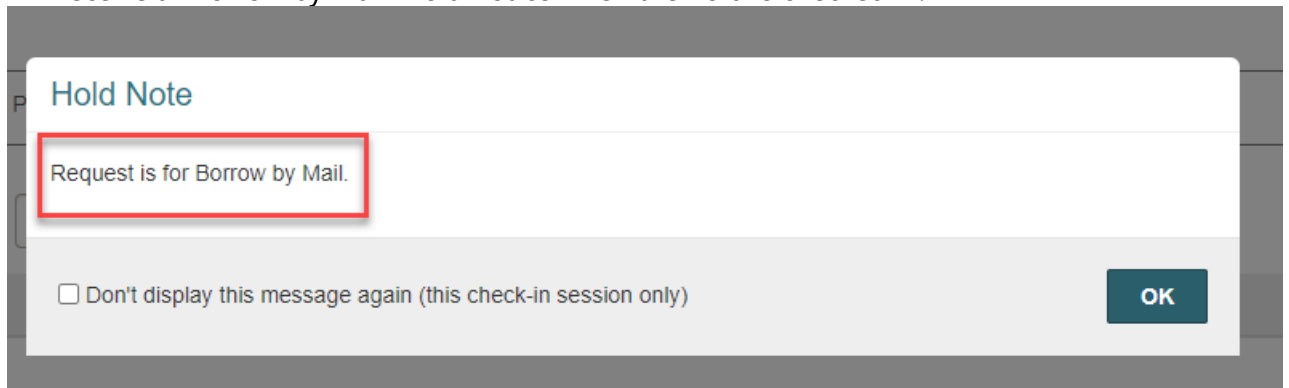
6. This item will be transferred to the patron's registered library. This process is unchangeable within the Polaris software.

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

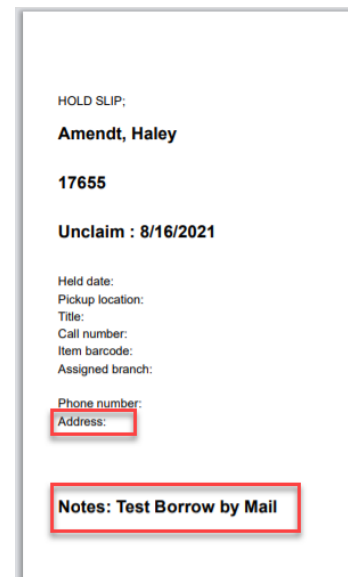
To mail items directly:

- 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.

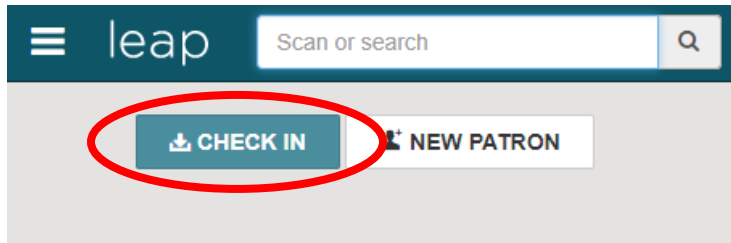


8. The hold slip print display will contain the patron's information including patron name, item information, phone and address information, and the Borrow by Mail hold notes.



Checking In Items

Item CHECK IN is done from the Leap homescreen.



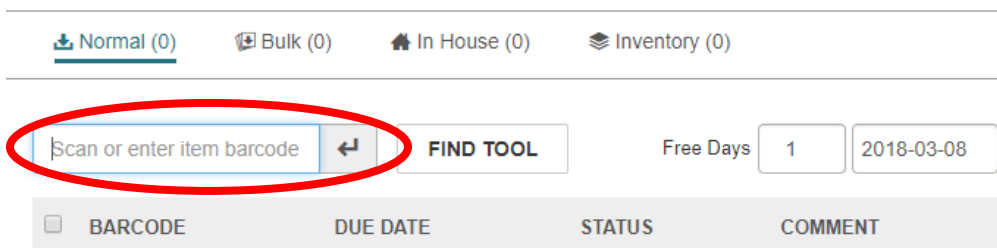
The default mode is 2 FREE DAYS which allows for a two-day grace period for items that are returned late. If grace days are exceeded, the fine is calculated as if there were no grace period. If it is necessary to add additional free days contact IT at helpdesk@prl.ab.ca.

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.

Check In



The screenshot shows the 'Check In' screen. At the top, there are four tabs: 'Normal (0)', 'Bulk (0)', 'In House (0)', and 'Inventory (0)'. Below the tabs, there is a search bar with the text 'Scan or enter item barcode' and a magnifying glass icon. The search bar is circled in red. To the right of the search bar is a 'FIND TOOL' button. Further right, there are two input fields: 'Free Days' with the value '1' and a date field with the value '2018-03-08'. Below these fields is a table with the following 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

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 **UTILITIES** 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.

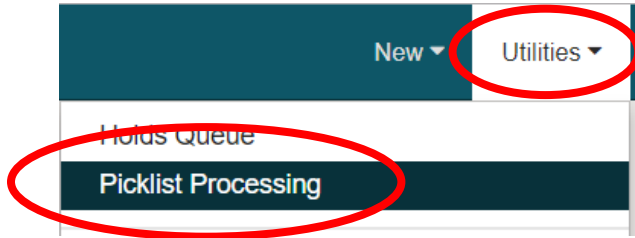
Processing Serials

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.

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 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.

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

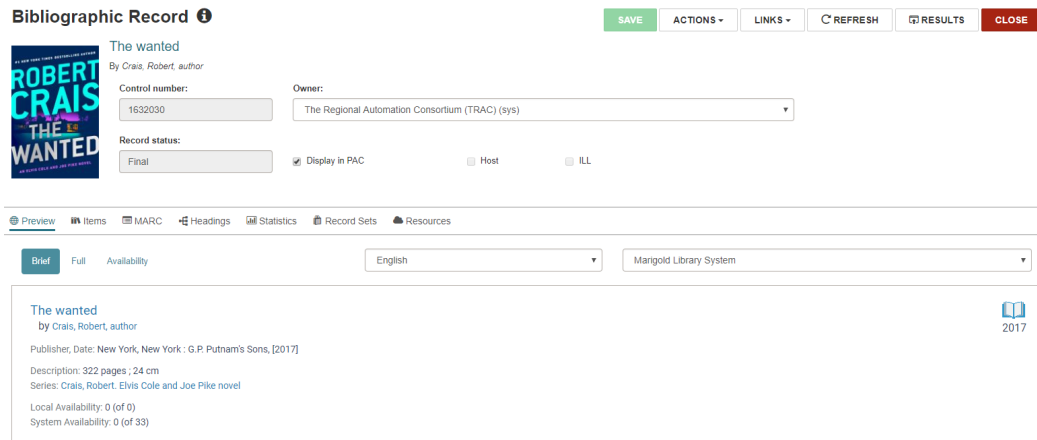
<input type="checkbox"/>	AUTHOR	TITLE	MATERIAL TYPE	PATRON NAME	PATRON BRANCH	ITEM BARCODE	UNCLAIMED DATE
<input type="checkbox"/>	Gardner, Erle Stanley, 1889-1970.	The case of the caretaker's cat	Large Print		alap	31000045474841	3/27/2019

Bibliographic and Item Records

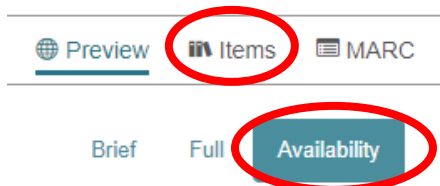
All library materials have a BIBLIOGRAPHIC (BIB) RECORD and an ITEM RECORD.

Bibliographic Records

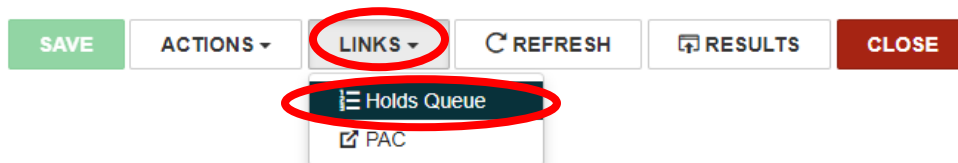
A BIBLIOGRAPHIC RECORD is used for cataloguing purposes and is the main record that individual ITEM RECORDS are attached to.



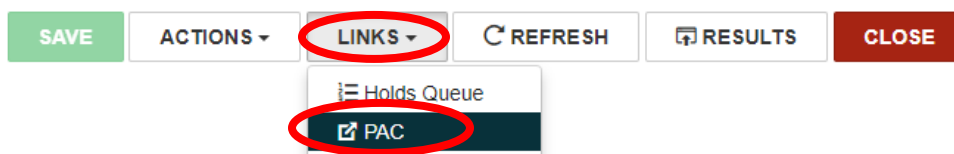
To see if there is a copy in your library, click on either the ITEMS tab or the AVAILABILITY link.



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



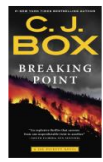
To view the PAC record, click on the LINKS drop-down menu and choose PAC (the record will open in PAC web server in a new tab).



Item Records

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

Item Record ⓘ



Breaking point

By Box, C. J., author

Barcode: 30400022023515

Call number: M BOXC BREA 80

Collection: Paperback

Shelf location: LZU

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:

Last location

Check-in at: Marigold Library System
 Ck-in date: 2018-03-09 2:25:32 PM
 Wkstat/user: LEAP Access Computer/MLSchaworth

Current borrower:

Loaning branch:

Held for:

Held at:

Last use

Borrower: 20400002396305
 Loaning branch: Marigold Library System
 Circ date: 2018-03-09 9:59:06 AM

Check-out date:

Original due date:

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.

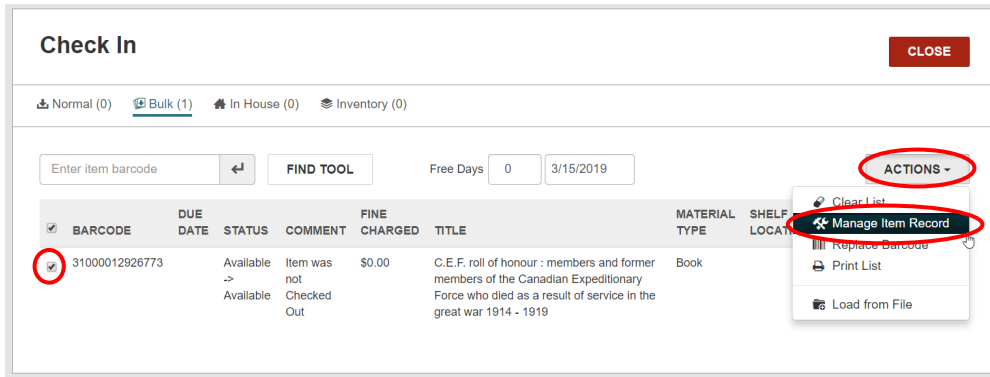
Check In
CLOSE

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

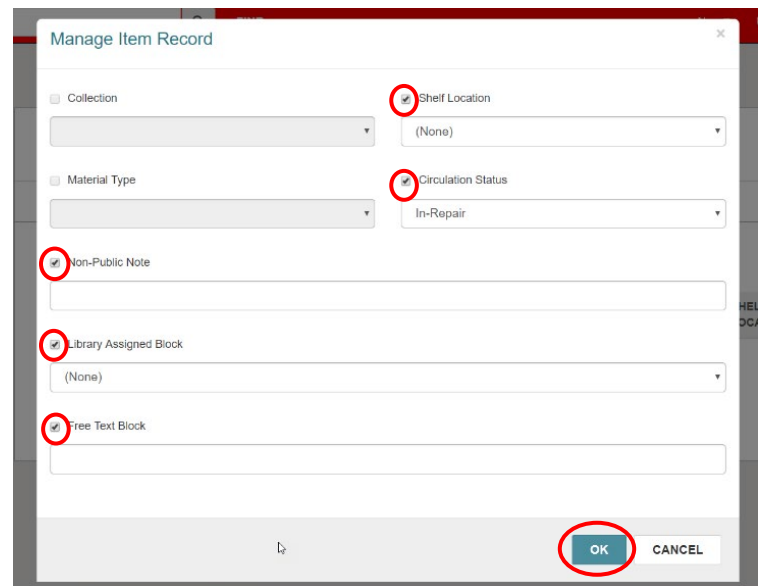
Enter item barcode FIND TOOL Free Days 0 3/15/2019 ACTIONS ▾

<input type="checkbox"/>	BARCODE	DUE DATE	STATUS	COMMENT	FINE CHARGED	TITLE	MATERIAL TYPE	SHELF LOCATION	PATRON NAME	COLLECTION
<input checked="" 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)

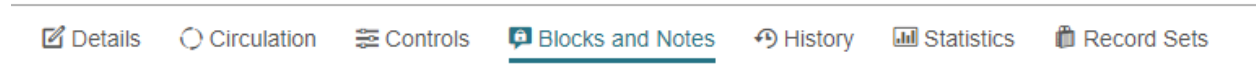
2. Check the box beside the item you wish to adjust and then select MANAGE ITEM RECORD from the ACTIONS drop-down menu. This must be done one item at a time.



3. 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.



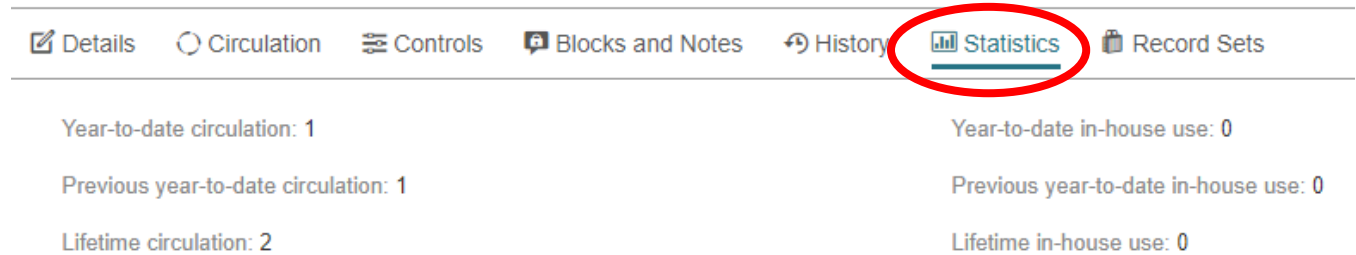
BLOCKS and NOTES should be used as follows:

- 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 by making a FOIP request.

Item Statistics

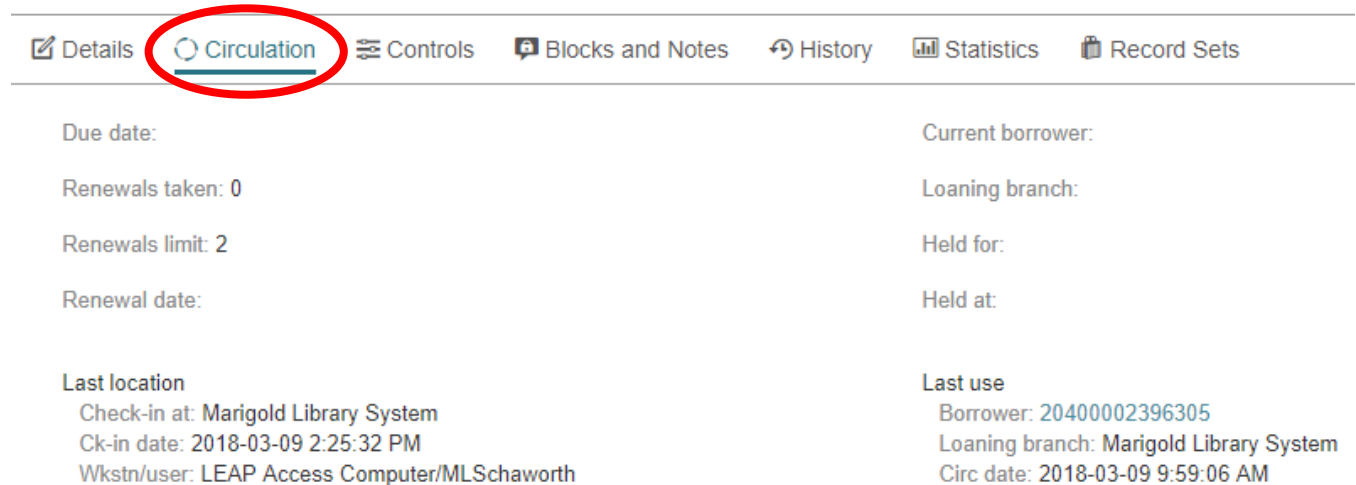
To view statistics for the item, click the statistics tab in the item record.



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

To 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	Last use					
Check-in at: Marigold Library System	Borrower: 20400002396305					
Ck-in date: 2018-03-09 2:25:32 PM	Loaning branch: Marigold Library System					
Wkstn/user: LEAP Access Computer/MLSchaworth	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.

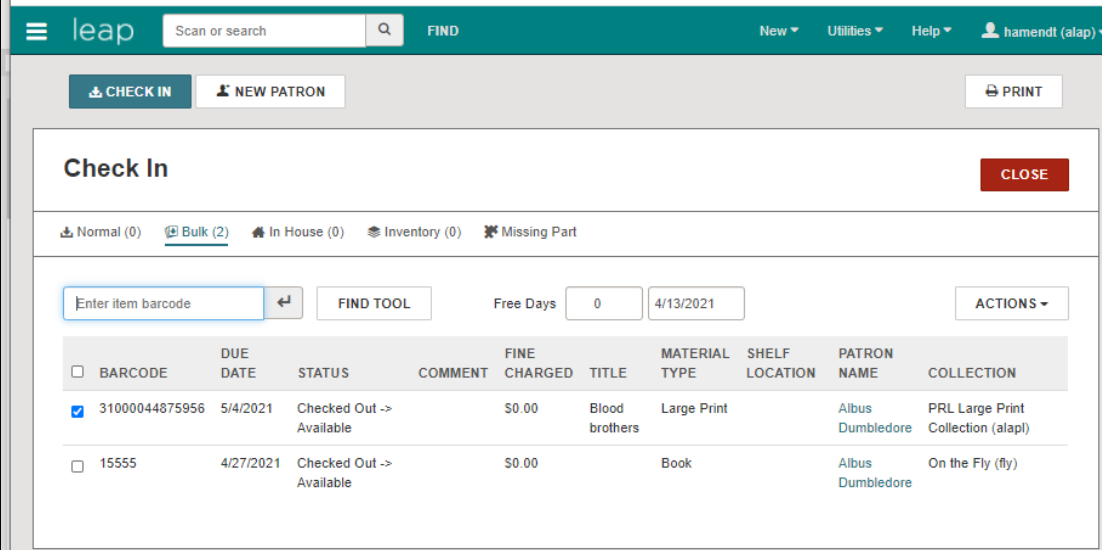
Withdraw an Item with an Odd Status

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.



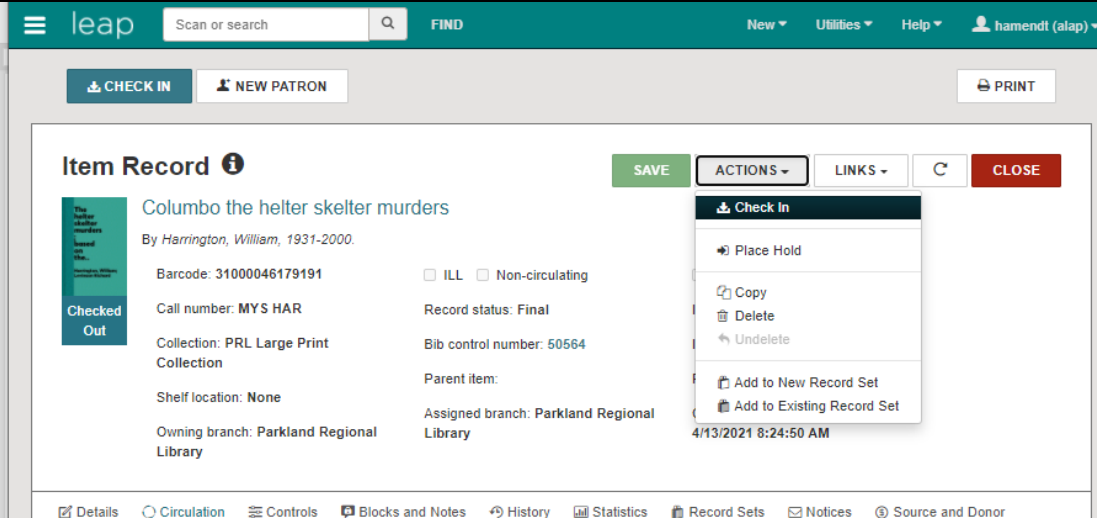
Check In CLOSE

Normal (0) **Bulk (2)** In House (0) Inventory (0) Missing Part

Enter item barcode Free Days ACTIONS ▾

<input type="checkbox"/>	BARCODE	DUE DATE	STATUS	COMMENT	FINE CHARGED	TITLE	MATERIAL TYPE	SHELF LOCATION	PATRON NAME	COLLECTION
<input checked="" type="checkbox"/>	31000044875956	5/4/2021	Checked Out -> Available		\$0.00	Blood brothers	Large Print		Albus Dumbledore	PRL Large Print Collection (alapl)
<input type="checkbox"/>	15555	4/27/2021	Checked Out -> Available		\$0.00	Book			Albus Dumbledore	On the Fly (fly)

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



Item Record SAVE ACTIONS ▾ LINKS ▾ ↻ CLOSE

Columbo the helter skelter murders
By Harrington, William, 1931-2000.

Barcode: 31000046179191 ILL Non-circulating

Call number: MYS HAR Record status: Final

Collection: PRL Large Print Collection Bib control number: 50564

Shelf location: None Parent item:

Owning branch: Parkland Regional Library Assigned branch: Parkland Regional Library

4/13/2021 8:24:50 AM

Check In

- Place Hold
- Copy
- Delete
- Undelete
- Add to New Record Set
- Add to Existing Record Set

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

2. Deny and reactivate any holds.

a. Click **No** to reject filling the hold.

Fill hold request

Nine cemeteries in Camrose, Bawlf, Round Hill district
Barcode: 31000011254300

satisfies a hold request for:
Dumbledore, Albus
Barcode: 21000007618734

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

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

Reactivate hold

Do you want to reactivate the hold request for this patron?

Name: Dumbledore, Albus
Barcode: 21000007618734

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.

Check In

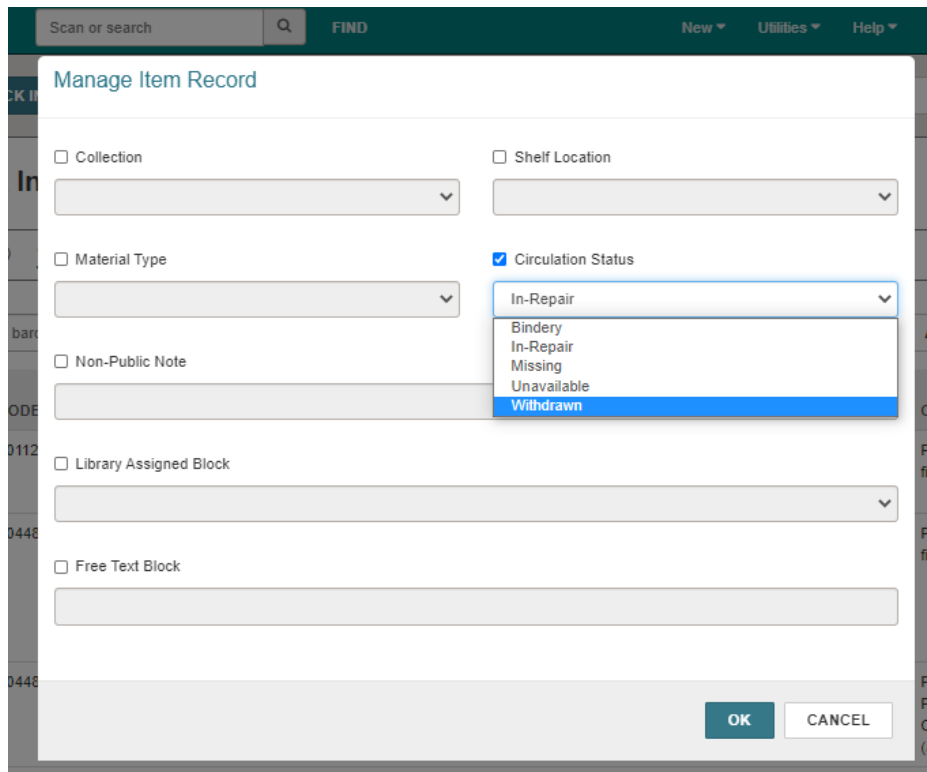
Normal (0) **Bulk (4)** In House (0) Inventory (0) Missing Part

Enter item barcode Free Days ACTIONS ▾

<input type="checkbox"/>	BARCODE	DUE DATE	STATUS	COMMENT	FINE CHARGED	TITLE	MATERIAL TYPE	SHELF LOCATION
<input checked="" type="checkbox"/>	31000011254300	5/4/2021	Checked Out -> Available		\$0.00	Nine cemeteries in Camrose, Bawlf, Round Hill district	Book	
<input type="checkbox"/>	31000044877879	5/4/2021	Checked		\$0.00	The Buffalo Lake	Book	

-
-
-
-
-
-

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.

Find Tool - Item Record

Item Record ▶ Basic Search ▶ Circulation status ▶ Exact ▶

Unavailable

Title	Assig...	Colle...	Mater...	Shelf ...	Call ...	V...	Status	Barcode	Last Activit...	R...	Con...
<input checked="" type="checkbox"/> The Oxford picture d...	Allianc...	Adult ...	Book		423.1 ...		Unavail...	31000037107458	3/16/2010	Fi...	304...
<input checked="" type="checkbox"/> Taking care of mom,...	Allianc...	Adult ...	Book		306.8...		Unavail...	31000015898896	1/24/2007	Fi...	209...

Ready Filtered to 2 of 1,063 result(s)

Count Only

ADD TO RECORD SET ▼ OPEN CANCEL

New Existing




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**.

Record set test_20190423112836 has been created (224 records).
Do you wish to open it now?

YES NO

Record Set Options

Send Results to a New Record Set

Name

Owner
 hamendt ▼

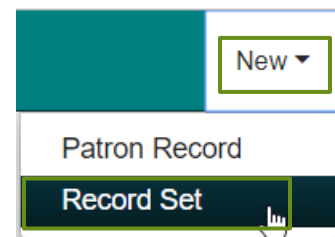
Warning Size Threshold

APPLY CANCEL

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.

FIND TOOL

Viewing record sets:

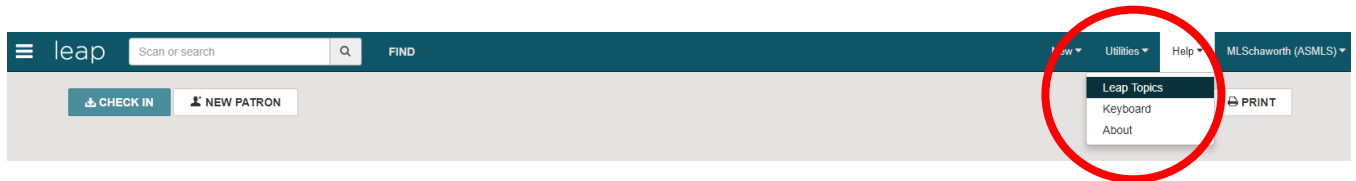
1. Perform a **record set search in the find tool** and click the result to open and view a record set. You can only open and edit record sets created by your library.
2. Once in the record set you can export the content by selecting **export** from the action drop down menu.

If you have bulk changes that need to be made contact your consultant with the name of the record set and the changes that need to be made.

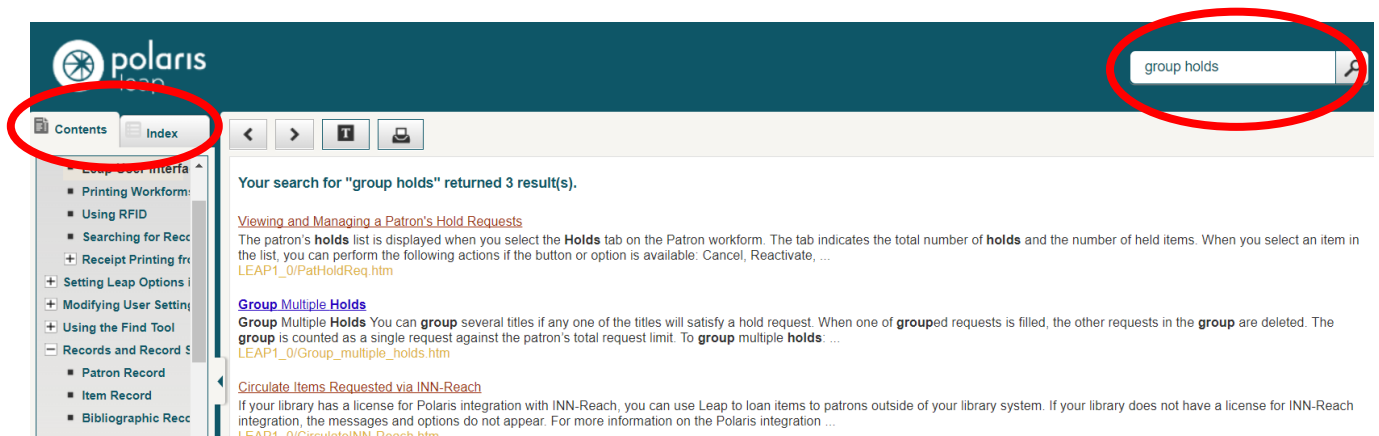


Leap Help Menu

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:

