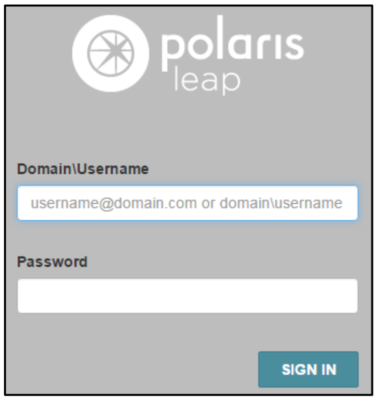
Polaris Leap

Image: https://www.iii.com/products/polaris/polaris-leap

LOGGING IN & OUT

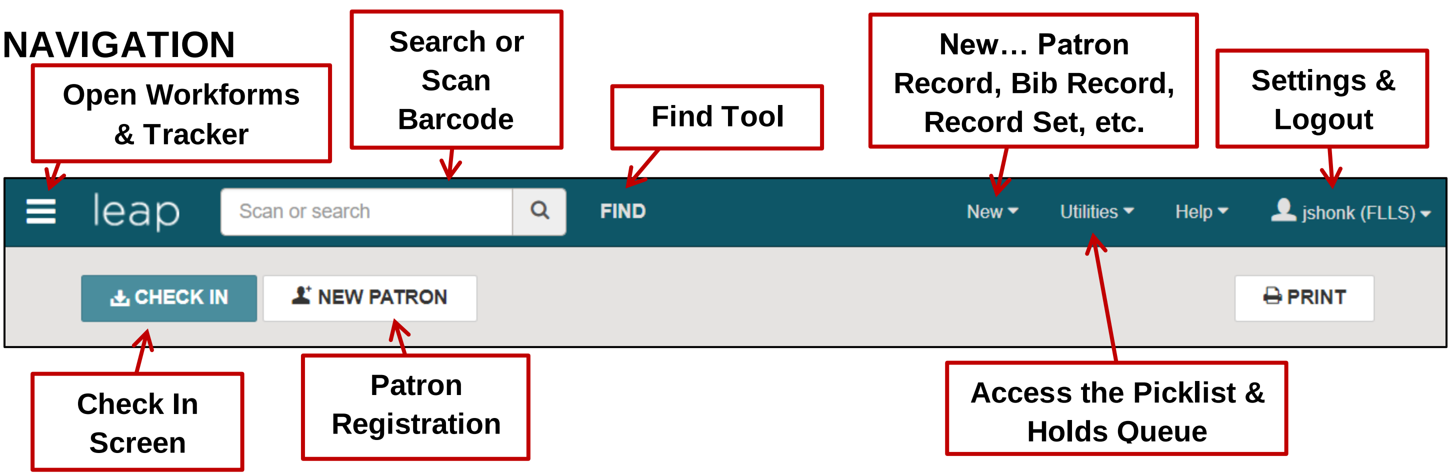
Visit https://fllsleap.flls.org/LeapWebApp/ and enter your unique username and password. Type the regular password for your Polaris client and click **SIGN IN** or hit enter on the keyboard.



Next, select a branch and workstation and click **Continue**.

To log out, go to the top right-hand corner of the screen and click on your username. Then select **Logout**. Logging out will close any workforms you may have left open.

NAVIGATION



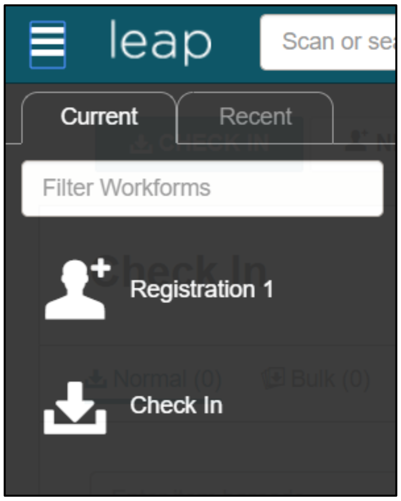
KEYBOARD SHORTCUTS & HELP

Access the list of shortcuts by clicking on **Help** and then **Keyboard**.

Click* on **Help** and then **Leap Topics** to learn more about Polaris Leap!

**Please note, replace “click” with “tap” for touchscreen devices.*

WORKFORMS



Workforms are the various screens you will see while using Leap. In the top right-hand corner of each workform, you will see a red **CLOSE** button. The workform will remain open until you click the close button.

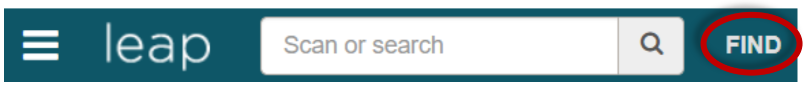
To see your open workforms, click on the menu symbol ☰. You may navigate between workforms using this Workform Tracker. Click on the pin to pin the Workform Tracker to the side of your screen. It is highly recommended that you PIN your workforms so you can see what records you currently have open.

By clicking on the "Recent" tab, you can reopen a closed workform.

To print a workform, click on the **PRINT** button in the top right-hand corner at any time.

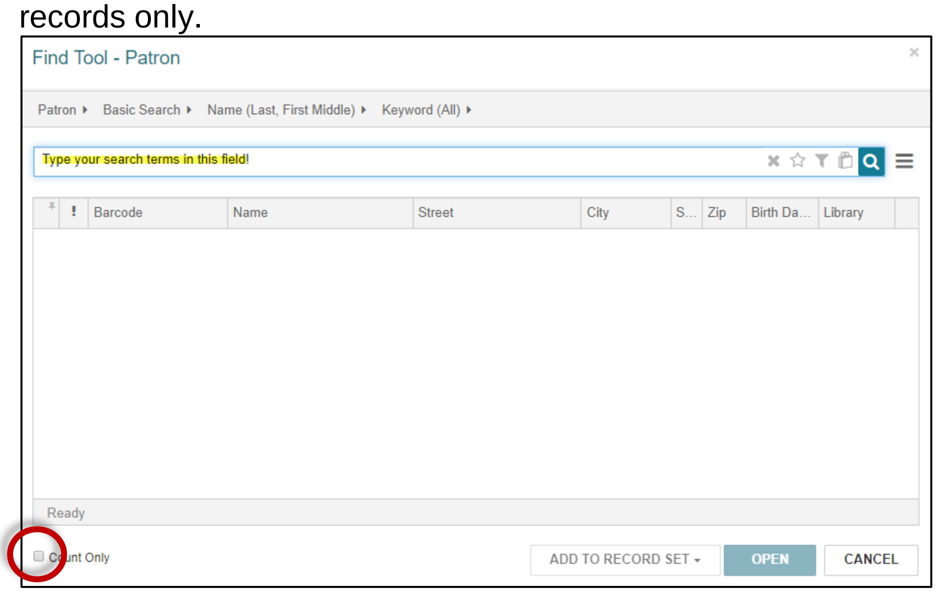
LEAP FIND TOOL

To access various types of records, click in the **Scan or search** field and scan a patron or item barcode to find a specific record. You can search for patron records by typing a patron's name, address, phone number, email address, or other identifying information. You can search for item or bib records by title, author, subject, keyword, and more. Auto suggestions will appear after you begin typing. Either type in your search query and press enter on the keyboard or choose a suggestion from the drop-down list.



Next, the Leap Find Tool will open with some results that match your search. Double click on the record you would like to open or click on the record and then on the **Open** button. The record will display on your screen and you can click on different links to access other parts of the record. Click on the red **CLOSE** button when you are finished.

Instead of using the **Scan or search field**, you can click on the **FIND** button to open the Find Tool. Click in the search field and enter your search term(s), then hit enter on your keyboard or click the search button. Your results will show up on the screen, double click on the record and then on open to access the record. You can check the Count Only box before searching to discover the number of records only.

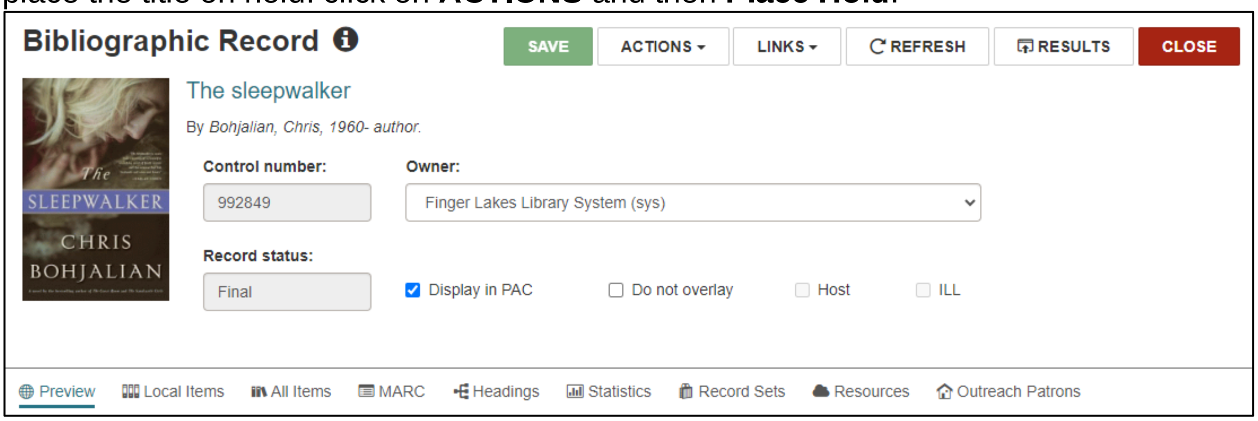


Choose your default Find Tool search: Bibliographic Record, Hold Request, Item Record, or Patron. Click on **Patron** to reveal your options, click the star to make your selection. Click on the Search Filter (looks like a funnel) and then **+ADD CONDITION** to narrow your search by Author, Title, Assigned Branch, etc. You will have different filter options depending on what kind of search you are performing.

All results will display automatically without using **Ctrl Shift A**. When looking at a specific record, click on RESULTS to take you back to the search results.

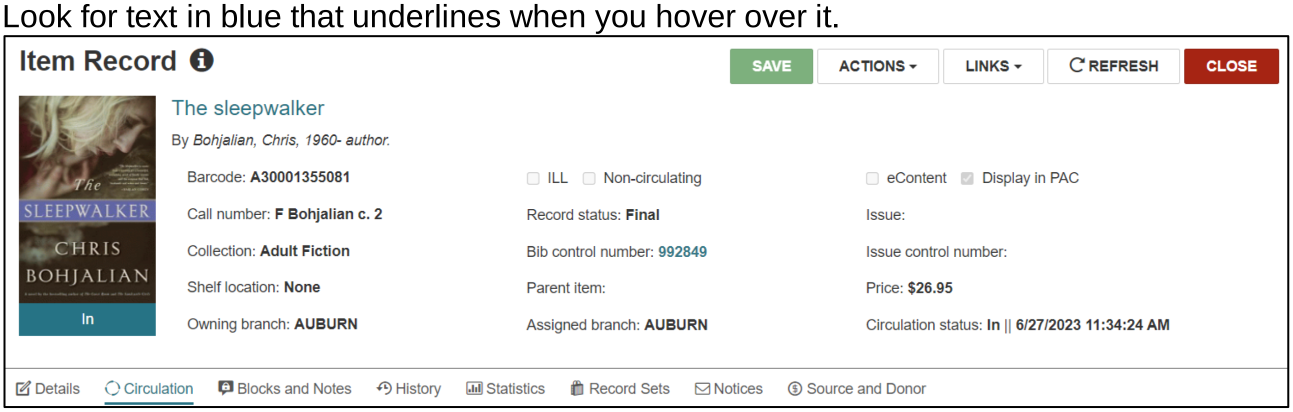
BIBLIOGRAPHIC RECORDS

You can preview the bib record and look at items, MARC, statistics, and record sets. You can also place the title on hold: click on **ACTIONS** and then **Place Hold**.



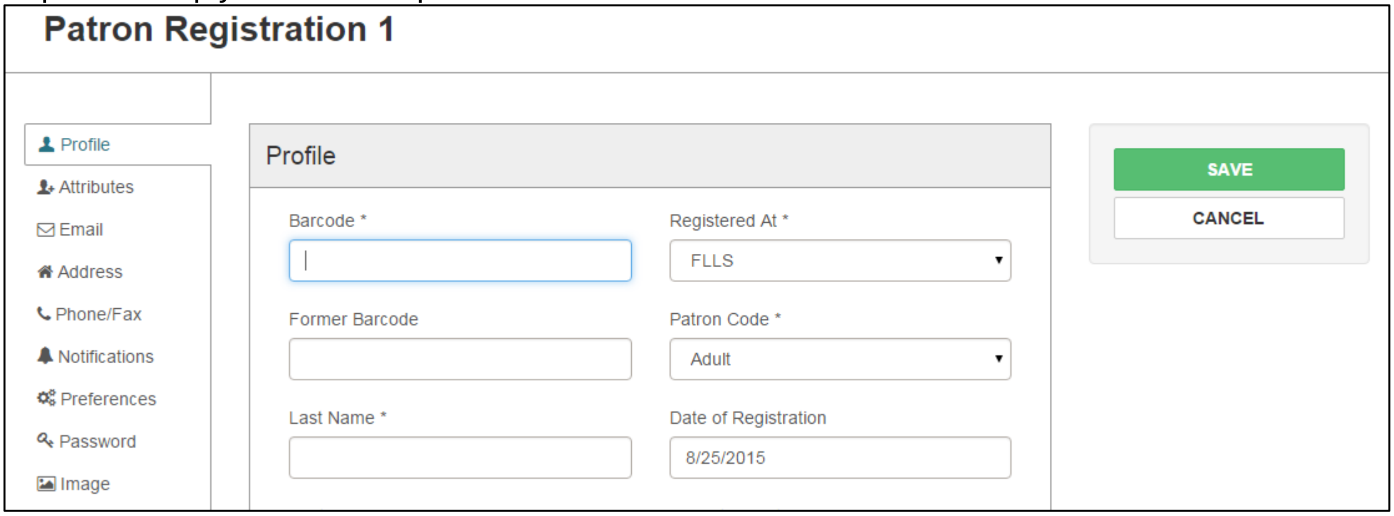
ITEM RECORDS

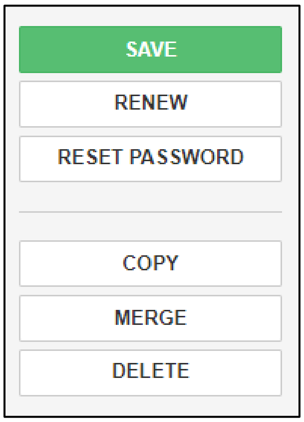
You will find circulation information, control information, blocks and notes, history, statistics, and record sets. Click on the headings to access the information. Click **ACTIONS** and then on **Check In** to check in that specific item or click on **Place Hold** to place a hold on the item. If you have your library's item open, you can also edit that item. There are record links that will connect you to other records. For example, if you click on the Bib control number you will be taken to that item's Bib record. You can also click on the previous borrower's card number to access that patron's record. Look for text in blue that underlines when you hover over it.



PATRON REGISTRATION

Click on the **NEW PATRON** button to open a new patron registration workform. Selecting the options on the left will scroll your screen down to the appropriate section. Items marked with an asterisk are required. Simply enter the required information and click on **SAVE**.



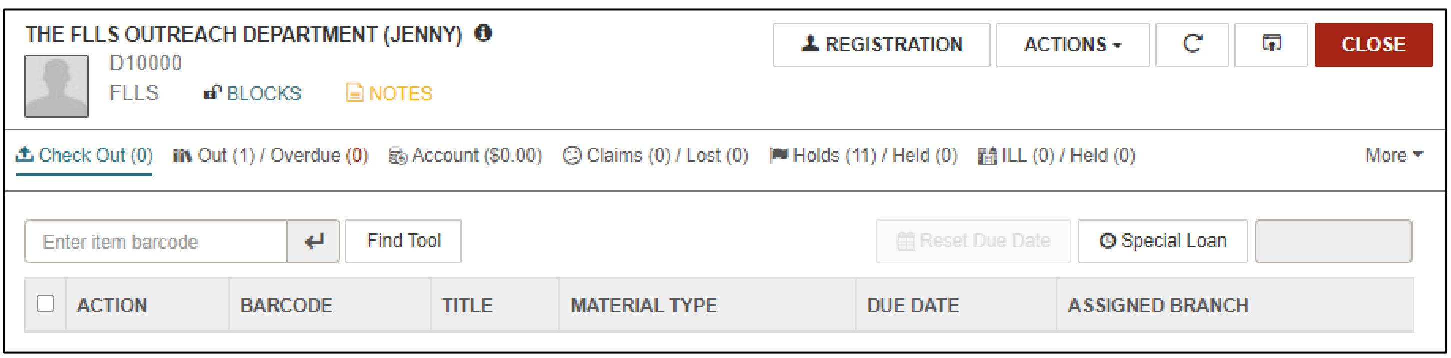


If you have a Datalogic QD 2D scanner you can scan the 2D barcode on the back of a NYS License to fill in most of the Patron Registration form.

After saving, you can also choose to **RENEW**, **COPY**, **MERGE**, or **DELETE** the record. You can also **RESET PASSWORD.** These functions are similar to the actions in the Polaris Client. Follow the prompts to complete these functions in Polaris Leap.

RENEW will open a new window with the dates for renewal automatically supplied. Click **Continue** to finish. **COPY** and **MERGE** are very similar to the Polaris Client.

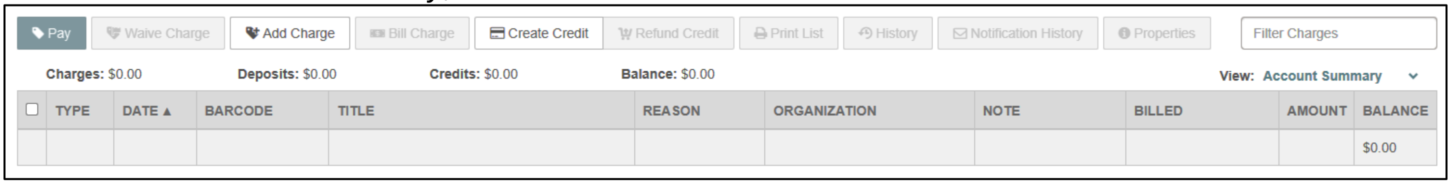
PATRON RECORDS



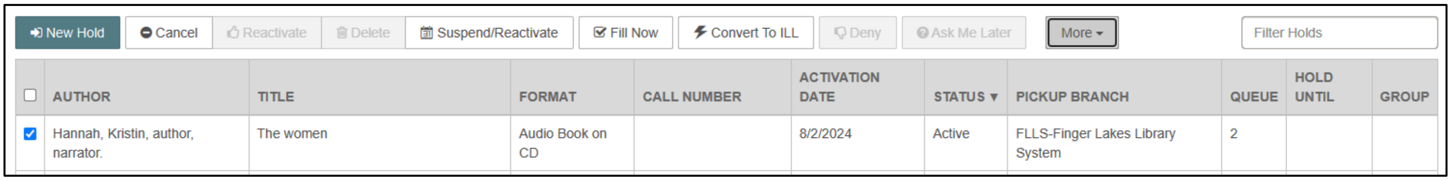
There are several actions you can perform in a patron record. First, use the Find Tool or the search field to find the patron record you are looking for. Open the record by click on it. Once the record is open, you can…

- **Check Out** items to the patron;
- View the items the patron already has out on the **Out/Overdue** tab. In this tab you can renew items, choose a special renew, reset due date, estimate fines, claim an item, or declare an item lost;

- View their **Account**. You can waive charges, accept payment, add charges, create credits, and view the transactions summary;



- View **Claims/Lost** items;
- View a list of the patron's holds in the **Holds/Held tab.** While in this tab you can create a new hold, cancel a hold, reactivate a hold, delete a hold, and fill a hold.

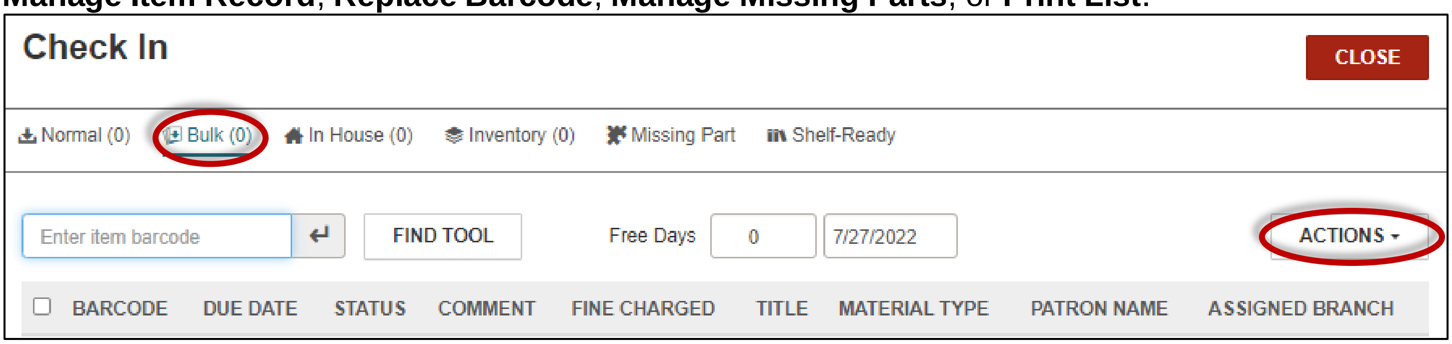


- View **Blocks** or **Notes**;
- Click **More** to see further options that may not be displaying, depending on the size of your screen.
- Click to view more information about the patron;
- Click **REGISTRATION** to view the patron registration form, make changes, and **RENEW**, **COPY**, **MERGE**, or **DELETE** the record.

CHECK IN

Click on the **CHECK IN** button to check in returned items. Either scan the barcode in the field or type the item barcode and press enter on the keyboard or the arrow key on the screen. You have the option of typing in free days and changing the date of check in. Click **CLOSE** when you are finished.

You can perform a Normal, Bulk, In House, Inventory, Missing Part, or Shelf-Ready Check In. **Bulk** is the recommended way to check items in. After checking in there are some options for you. Click on **ACTIONS** and then choose **Clear List**. Or, check an item in and click **ACTIONS** and choose to **Manage Item Record**, **Replace Barcode**, **Manage Missing Parts**, or **Print List**.



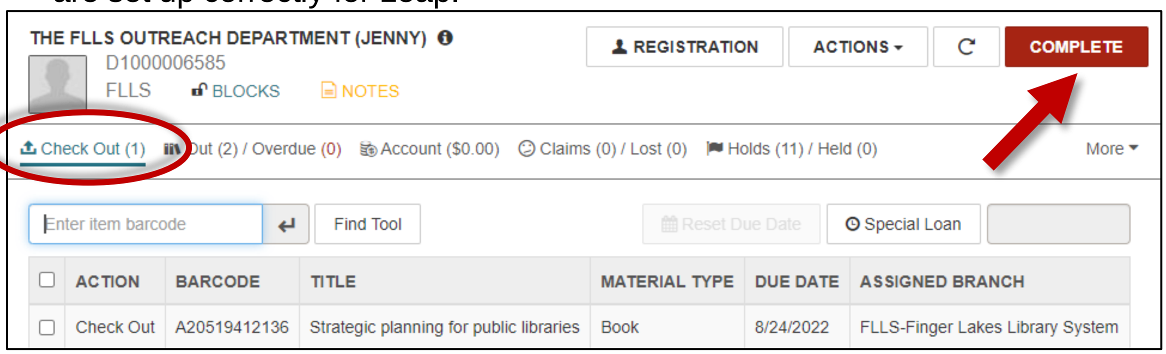
After an item is checked in, check the box next to the barcode and then click **ACTIONS → Manage Item Record** to make changes to the record. You will be able to change collection codes, shelf location, material type, circulation status, and add notes or blocks to specific item records from this screen. Just click on the box by the category, make a selection from the drop-down list or enter your note, and click **OK**.

CHECK OUT

Checking Out Regular (In-System) Items

This process is slightly different in Polaris Leap as compared to the Polaris Client. To check out, you must locate your patron first. ***Please Note:*** *Blocks will pop up after the first item is scanned.*

- In the search/scan field, type in your patron's name/barcode or scan their library card.
- When you have located the patron's record, **Check Out** should already be selected. You are ready to check out.
- Scan or enter the item's barcode in the field that says "*Enter item barcode*." A green window will appear at the top of the screen that says, "Checkout successful."
- To finish the transaction, click on the red **COMPLETE** button. An alternative to clicking on the red Complete button is to press **Ctrl Shift .** [*period key*]. This will complete the transaction and prompt you to print a receipt. ***Please note:*** with the CNS Department to make sure your receipt printers are set up correctly for Leap.

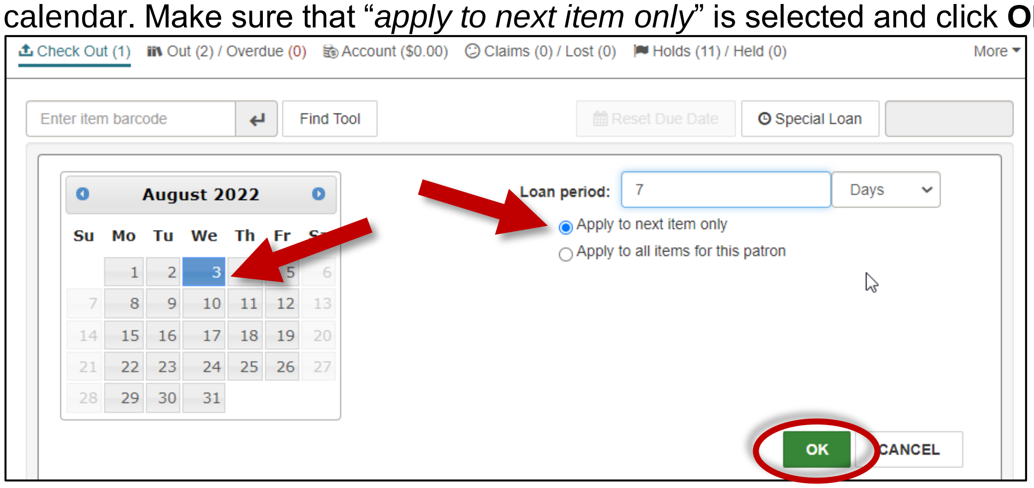


Checking Out an Out-of-System Interlibrary Loan (ILL) Item

Out-of-System Interlibrary Loan items will have a different loan period than regular items. The process below should be completed BEFORE you scan the item.

Please Note: *Do not renew ILL items. If a patron would like to renew an ILL item, the member library should contact ill@flls.org to request a renewal. If the request is approved by the lender, the ILL department will update the due date. Please direct all ILL emails to ill@flls.org to ensure you receive a timely response.*

- Locate the patron's record and click **Check Out**.
- Click on the **Special Loan** button in the Check Out screen.
- Locate the correct due date on the item's yellow book band. Select the due date using the calendar. Make sure that "*apply to next item only*" is selected and click **OK**.

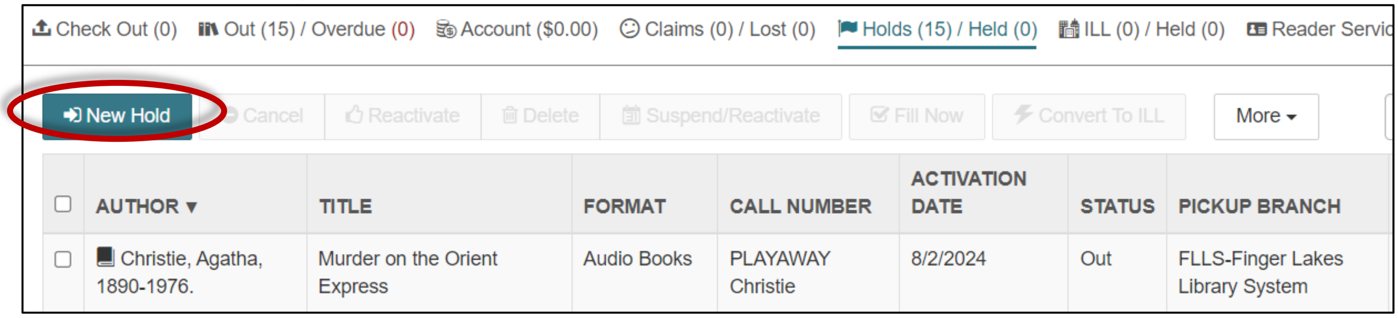


- Scan your item. You may now check out regular items for the patron or click on the red **COMPLETE** button to finish the transaction.

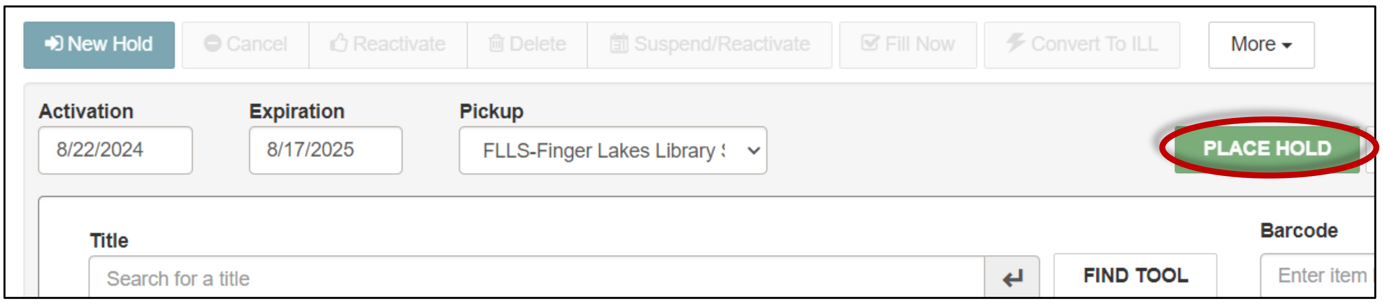
HOLD REQUESTS

Much like in the Polaris Client, there are several ways to create hold requests:

- In a Patron's record, click on **Holds/Held** and then **New Hold**.

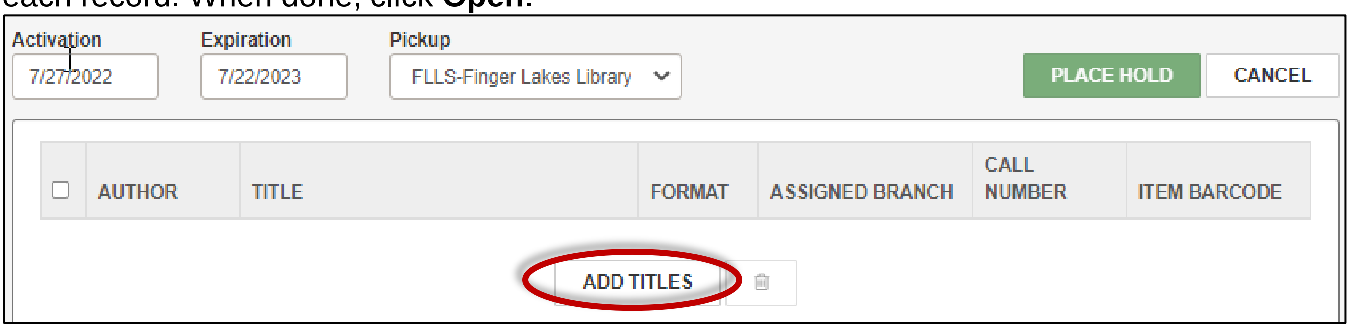


- The hold request workform will appear and you can search for a specific title using the Find Tool and then click **PLACE HOLD**.



- In an Item or Bibliographic record, click on **ACTIONS → Place Hold**. A workform will not appear, but the Find Tool window will pop up. If you already have a patron record open, Polaris Leap will show a prompt asking you if you would like to place a hold for that person.

- You may also place multiple holds at once. This function could be used for a patron who would like multiple books by the same author or books of the same genre or subject. Go to the patron's account, click on the Holds section. Then, click on **More → Multiple Holds**.
- A hold request workform will open. Click on **ADD TITLES**. The Find Tool will open, allowing you to search for records and select multiple records to place on hold. Simply click in the box next to each record. When done, click **Open**.

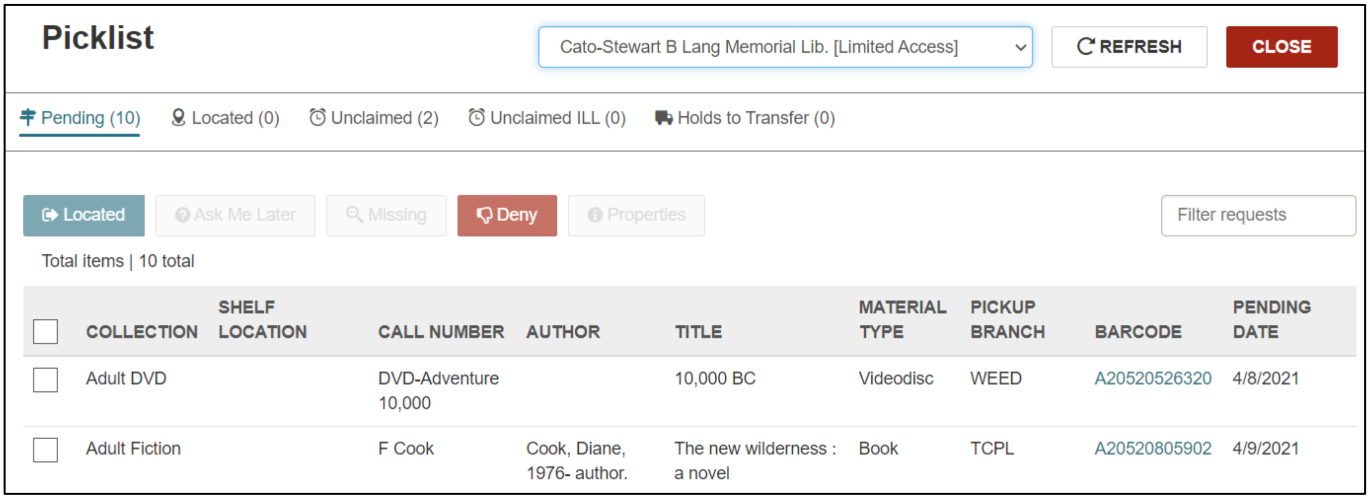


- The titles will now appear in the workform. You can change activation/expiration dates and pickup location. Click on **PLACE HOLD** to place these titles on hold.

- You can also view the Holds Queue very easily in Polaris Leap. At the top right of the screen, you will see the **Utilities** menu. Click on that menu and then **Holds Queue**. The Find Tool will pop up and you can perform a search to view the number of holds for specific bib records. Search for a title by name and double click on the title when it appears in the results. Make sure to pay attention to format.

USING THE PICKLIST

The Request Manager in Polaris Leap will not show pending requests so it cannot be used in the same way as in the Polaris Client, instead use the Picklist when locating items that fill requests at other libraries. In the upper right-hand corner, click on **Utilities → Picklist Processing**. You will be presented with a list of items that have been requested at other libraries. You can view **Pending**, **Located**, **Unclaimed**, and **Holds to Transfer**.



To manage an item on the Picklist, click in the box next to the item to select it and then click on a specific command button.

Command Button	Action
Located	Indicates that the item has been selected and is on the way to a processing location where it will become held for the patron or go in-transit. The pending request moves to the Located list, which you can view by selecting **Located** at the top of the page. The items would then have to be checked in at a regular Polaris workstation or in Polaris Leap.
Ask Me Later	The hold request is removed from the pending list, and it moves to the next step in the Request to Fill (RTF) process.
Missing	The item is set to Missing because it cannot be located.
Deny	The hold request is denied, and it is removed from the pending list. *You should never use the Deny function as this request will never return to your library.
Properties	Provides you with information like the hold status, patron, pickup branch, and more.

You can also print the Picklist, locate the items in the library, and simply check them in as you would with the Request Manager in the Polaris Client. The **PRINT** button is located in the top right corner, just under your username.

FINGER LAKES LIBRARY SYSTEM

***Questions? Comments?* Contact:**

Computer Network Services Department
1300 Dryden Rd., Ithaca, NY 14850
(607) 273-4074 x237 or efranks@flls.org