

Leap for Public Services

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Leap for Public Services

- A general overview of Leap compared to the Polaris client
- New features with 7.4



What is Leap?

Leap is browser-based Polaris access. It provides innovative new ways of accessing and managing the data in Polaris.





Searching in Leap

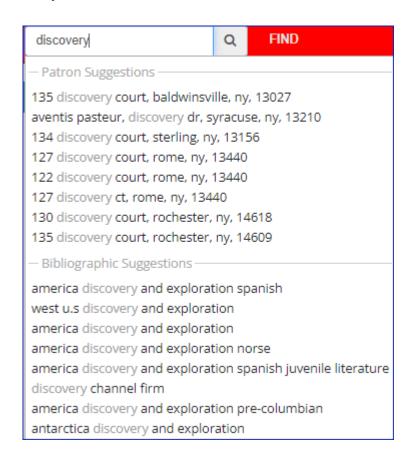
Leap offers two search options: quick search for convenient record retrieval and the find tool for a more comprehensive search experience.





Searching in Leap

Quick search does a keyword phrase search across several patron and bib data elements. This also provides predictive results as the terms are typed in.



Patron

- Barcode
- Name
- · Email
- Phone
- Last name + birth year

Bib

- Title
- Author
- Subject

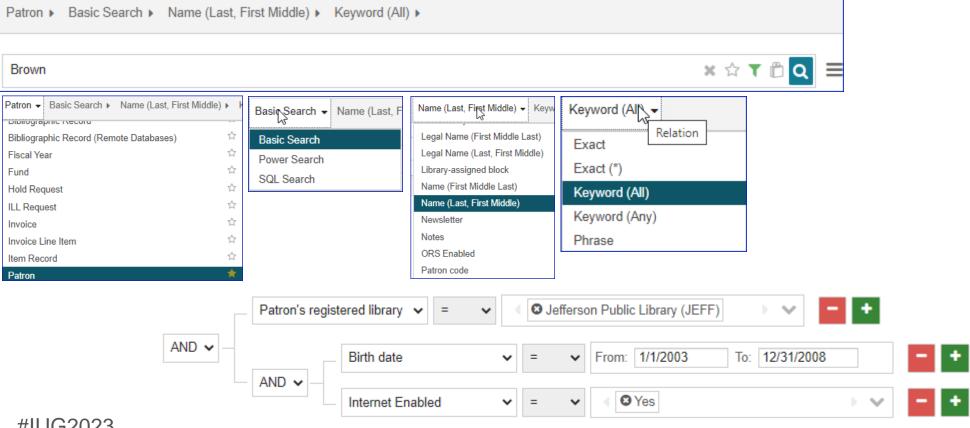
Item

Barcode



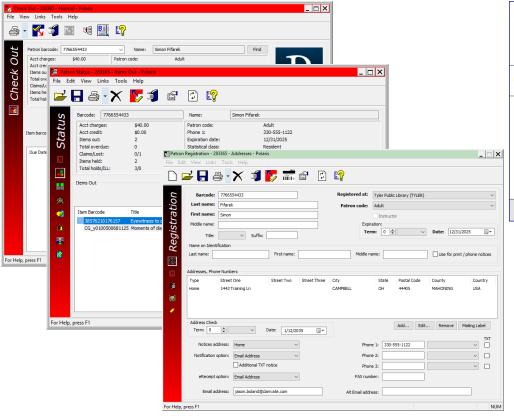
Searching in Leap

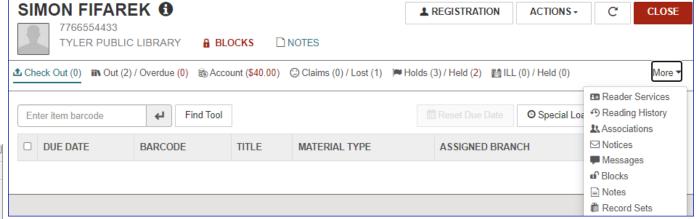
The find tool offers a unified search environment for all record types accessible in Leap. Multiple filters may be applied.





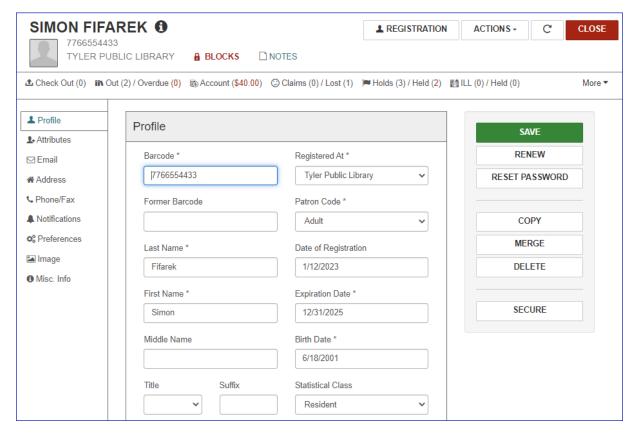
The patron workform is also unified in Leap.





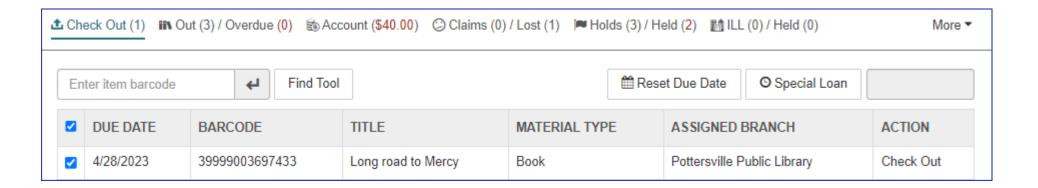


The patron registration form appears as a single scrollable page.



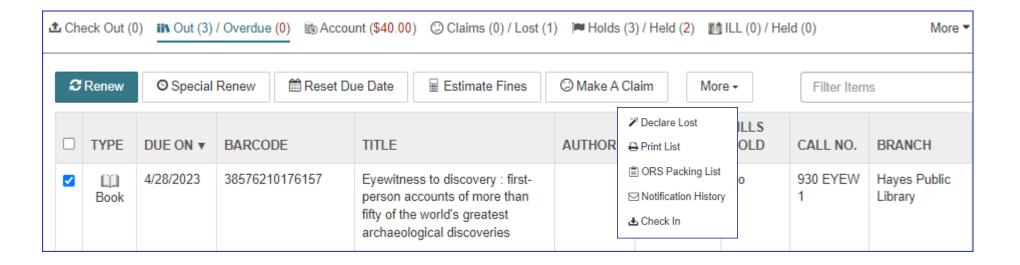


The checkout transaction offers options to change the due date.





Out / Overdue provides renewal options, claim returned and declare lost.





Account provides options for adding and removing charges.





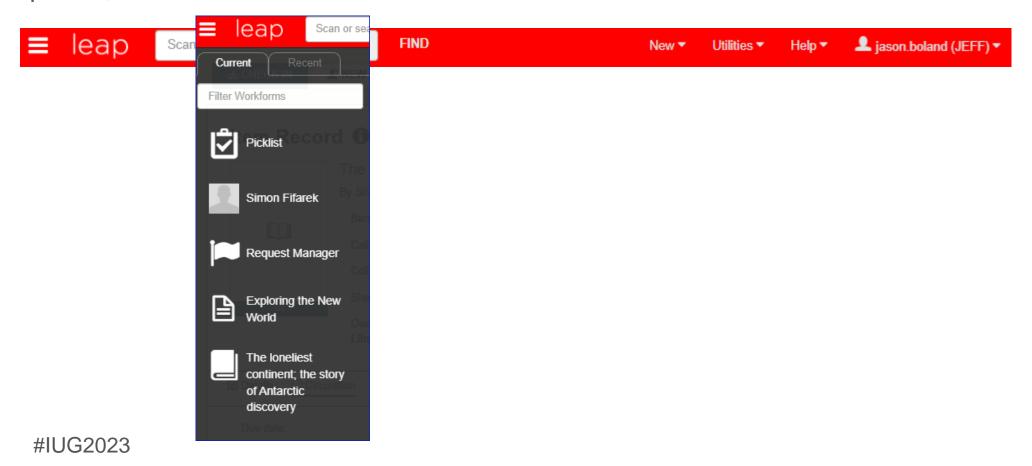
Holds/ Held provides functions for creating and managing holds.

| 1 Check Out (0) IN Out (3) / Overdue (0) Se Account (\$40.00) ○ Claims (0) / Lost (1) ► Holds (3) / Held (2) III LL (0) / Held (0) More ▼ | | | | | | | | | | |
|--|--------------------------|---------------------------|-----------|---------------------|-----------------|--------|-----------------------------|--------------|---------------|-------|
| •3 | New Hold © C | ancel 🖒 Reactiva | ite 🗎 Del | Delete Suspend/Reac | | More → | | Filter Holds | | |
| | AUTHOR ▼ | TITLE | FORMAT | CALL NUMBER | ACTIVATION DATE | STATUS | PICKUP BRANCH | QUEUE | HOLD UNTIL | GROUP |
| ~ | Heyer, Robert J. | Discovery in film | Book | 791.43 H615d | 1/12/2023 | Held | Jefferson Public Library | | 6/15/2023 | |
| | Schnapp, Alain, 1946- | The discovery of the past | Book | 930.1 SCHN 1 | 3/21/2023 | Held | Tyler Public Library | | 7/4/2023 | |
| | Stone, Lynn M. | Animal life in the desert | Book | | 1/12/2023 | Active | Jefferson Public | 1 | | |



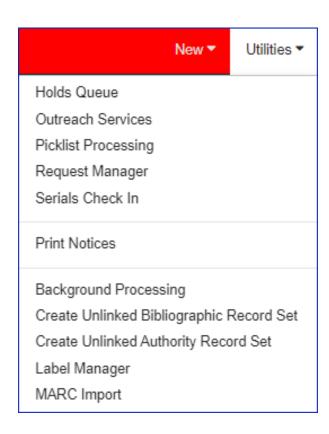
Workform tracker

The hamburger allows you to see and select any record/utility currently open or recently closed patron, bib and item records.



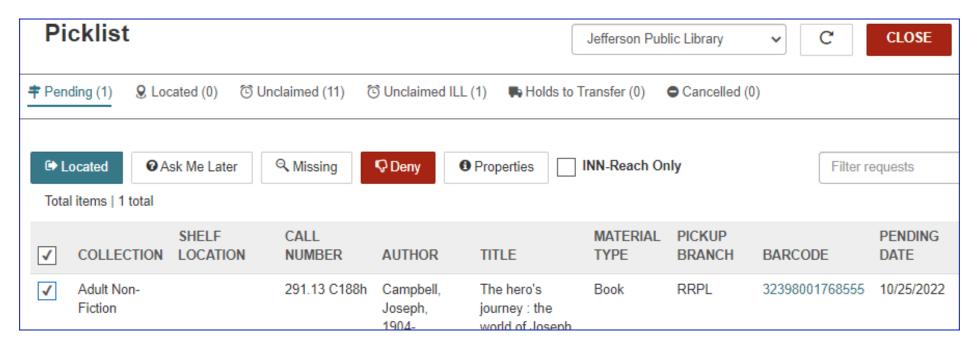


There are several utilities for public service workflow.



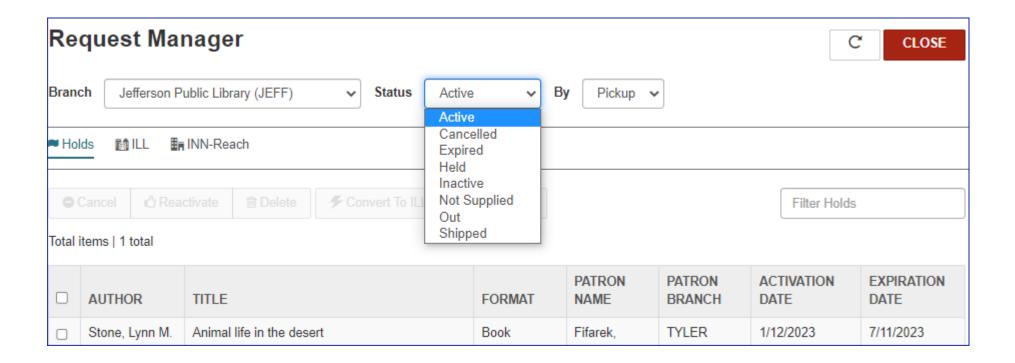


Picklist can print the list of items available on shelf, or it can be interactive. Also, unclaimed list, holds to transfer and cancelled holds.



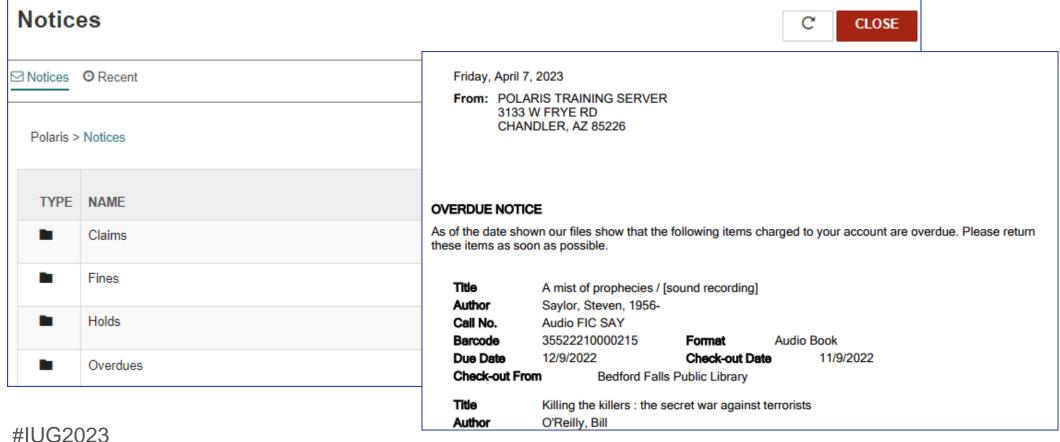


Request Manager will show all the holds for a given status at a select location.





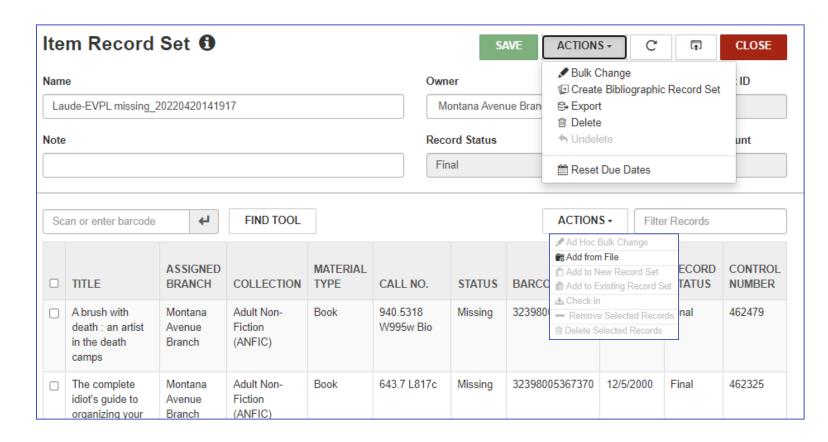
Print Notices will output the print circulation notices.





Record Sets and bulk functions

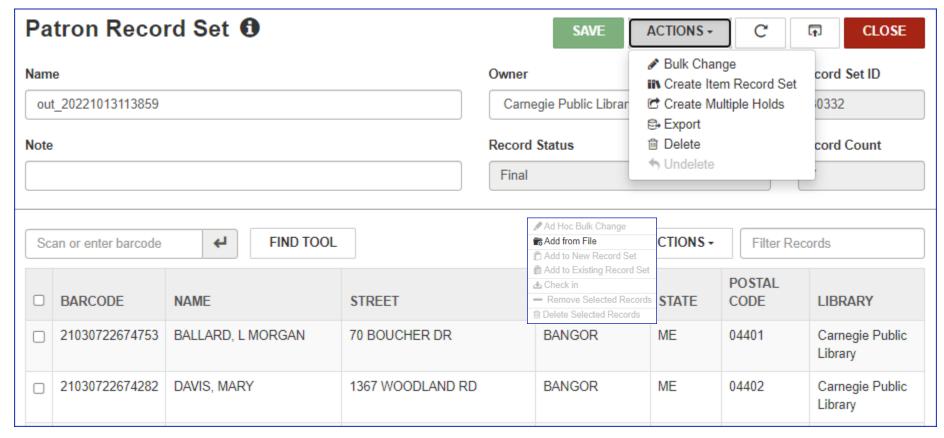
With record sets, Leap can bulk update records (including patrons in 7.4).





Record Sets and bulk functions

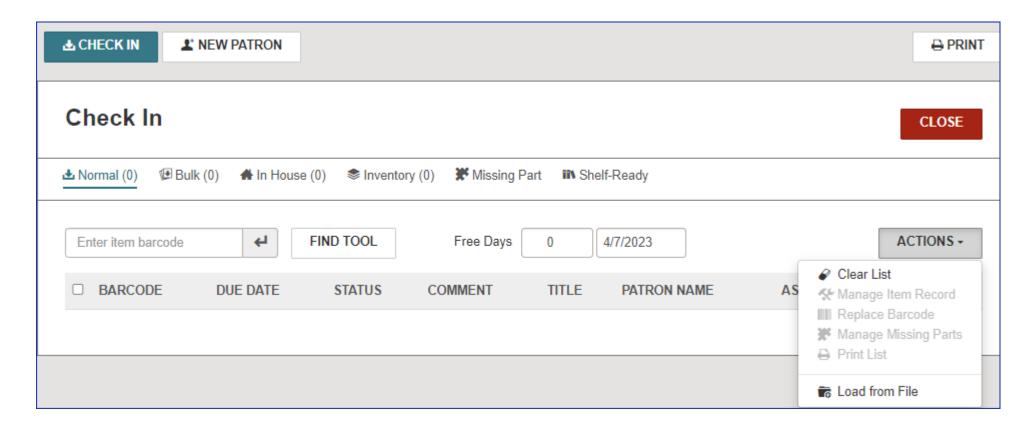
In a patron record set, generate holds on a bib record for all the patrons in the record set.





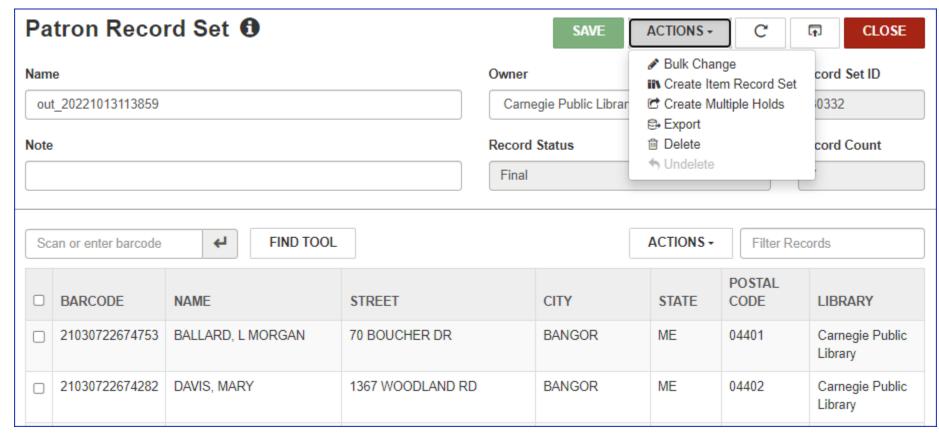
Record Sets and bulk functions

In Check In, a file of barcodes can be imported and checked in.





Making Bulk Changes to Patron Records



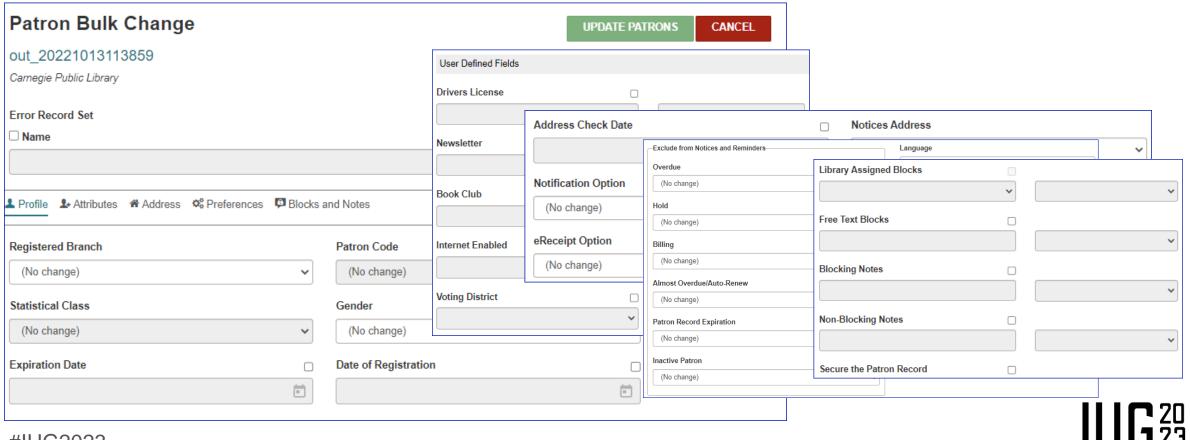


All 7.4 features described in full at https://documentation.iii.com/polaris/PolarisPDFGuides/PolarisLeapWhatsNew_7.4.pdf

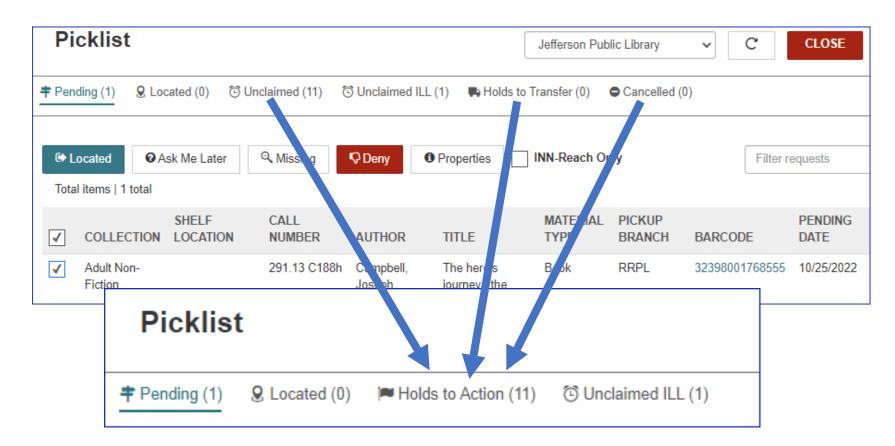




Making Bulk Changes to Patron Records

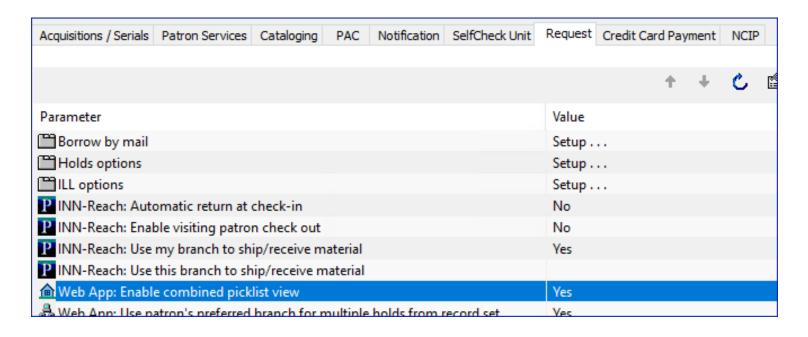


Combining Picklist Holds Views





Combining Picklist Holds Views



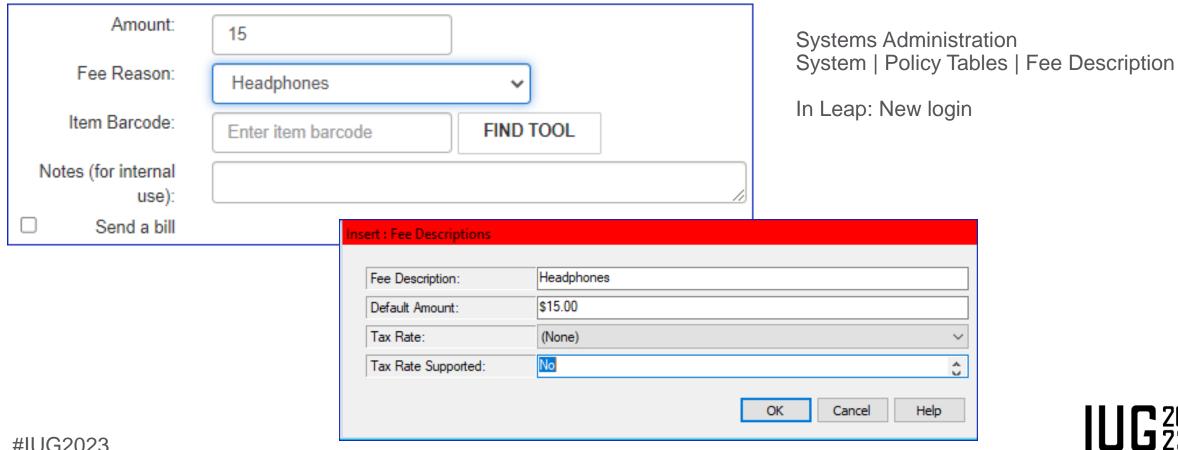
Systems Administration <level> | Parameters | Request | Web App: Enable combined picklist view

Level: System, Library, and Branch

In Leap: User Menu | Clear Cache

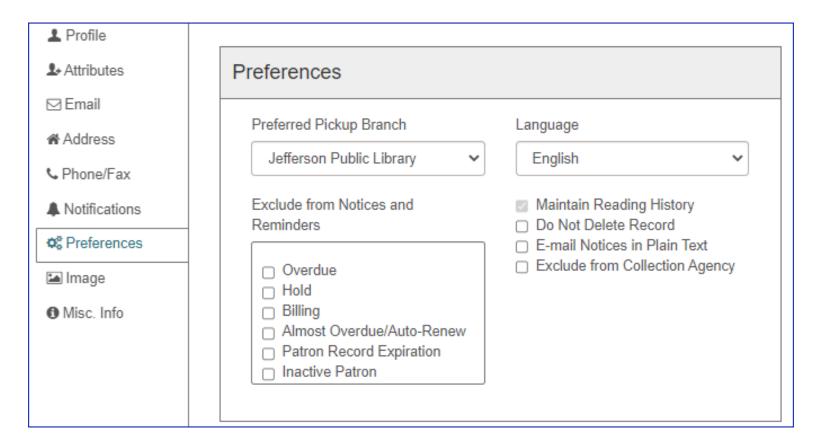


Adding Default Value for Fee Description



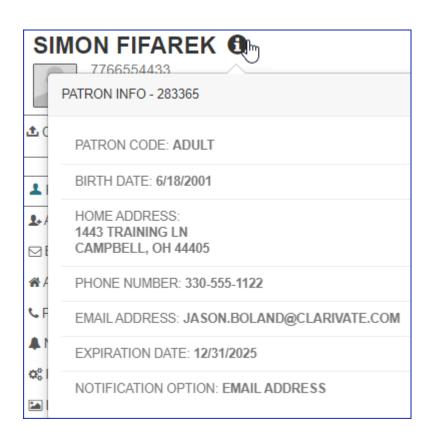


Setting or Viewing a Patron's Preferred Pickup Location in Leap





Showing Patron Age in Leap



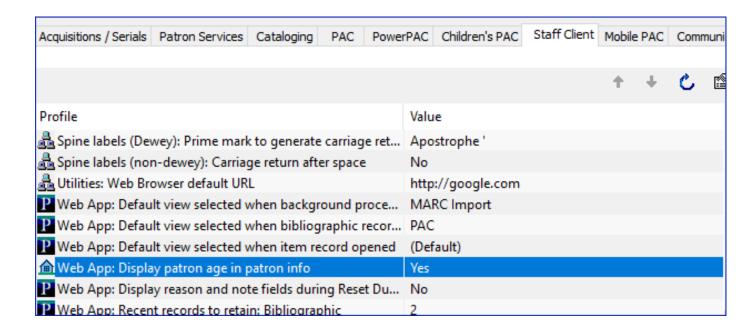
PATRON CODE: ADULT

BIRTH DATE: 6/18/2001 AGE: 21

HOME ADDRESS:
1443 TRAINING LN
CAMPBELL, OH 44405



Showing Patron Age in Leap



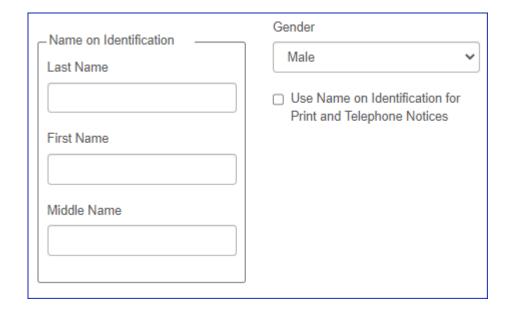
Systems Administration <level> | Profiles | Staff Client | Web App: Display patron age in patron info

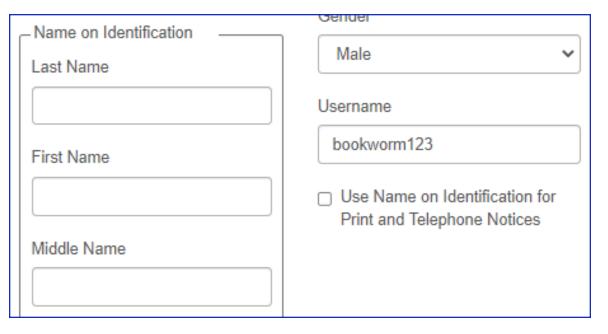
Level: System, Library, and Branch

In Leap: User Menu | Clear Cache



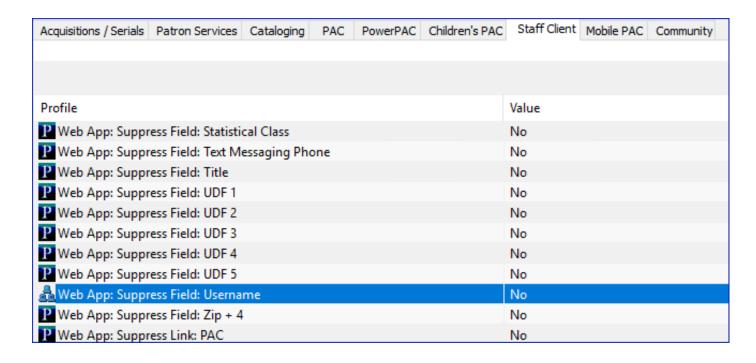
Showing Patron's Username in Leap







Showing Patron's Username in Leap

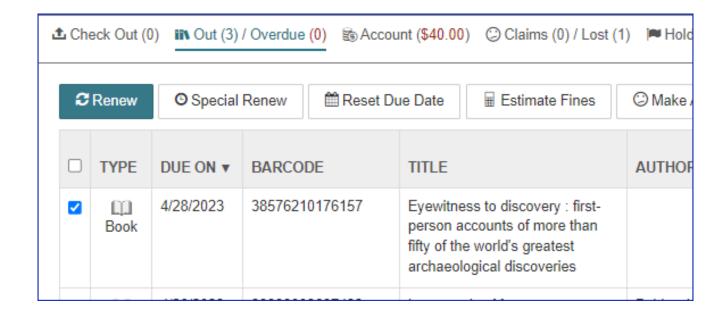


Systems Administration System | Profiles | Staff Client | Web App: Display patron age in patron info

In Leap: User Menu | Clear Cache

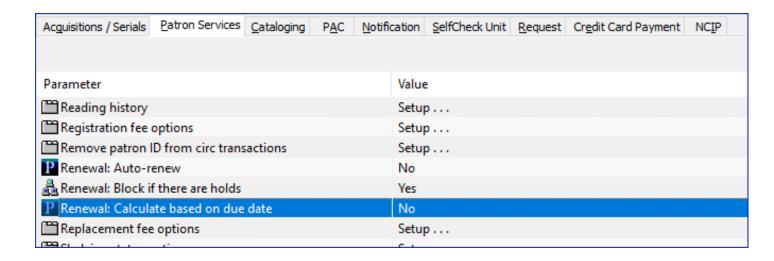


Configuring How Polaris Calculates Due Dates for Renewals: Choose between calculate from date checked out or date due.





Showing Patron's Username in Leap



Systems Administration
System | Parameters | Patron Services |
Renewal: Calculate based on due date

No: Based on renew date Yes: Based on due date

In Leap: User Menu | Clear Cache



Saving Patron Records with a Single Patron Name

Enabling QR Code Scanning in Leap

Charging Goods and Services Taxes





Questions?