

Getting Started with Leap

This guide is an introduction to the following topics:

- Logging in to Leap
- Viewing a patron record

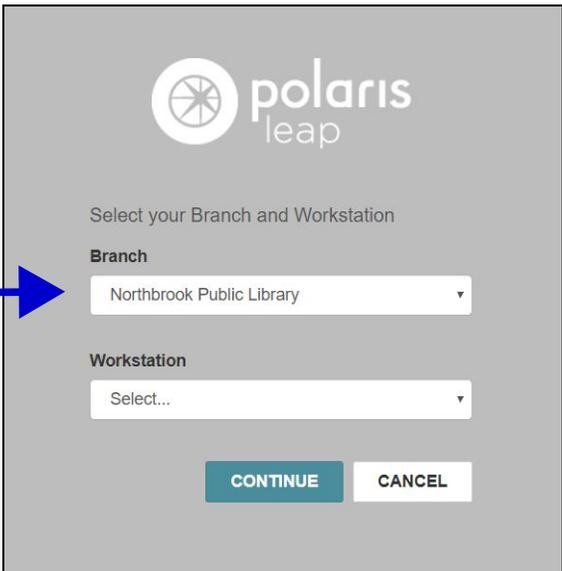


Part 1: Logging in to Leap

- 1.) Access the test database at: <https://ccs-training.polarislibrary.com/LeapWebApp>
 - Leap can be accessed from any web browser.
 - Bookmark the site or save a link to the desktop for easy access.
- 2.) Enter the domain **ccs**, followed by your username (for example: `ccs\nbkstaffname`).
- 3.) Enter your password.

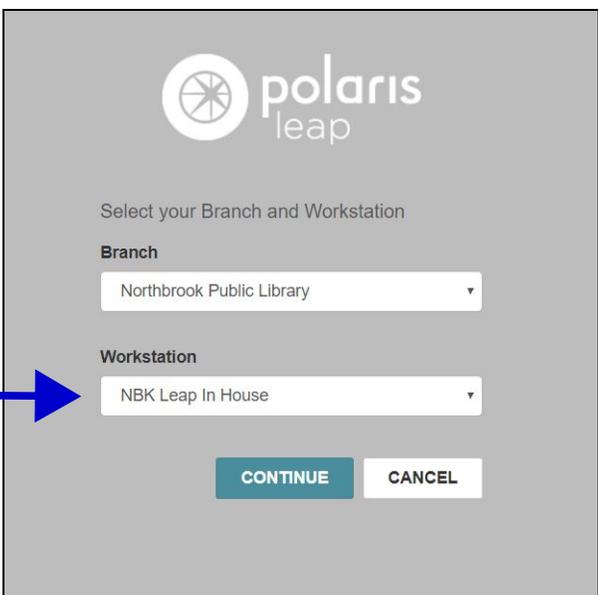
A screenshot of the Polaris Leap login interface. At the top left is the Polaris Leap logo. Below it, the text "Domain\Username" is followed by a text input field containing "ccs\nbkstaffname". Below that, the text "Password" is followed by a text input field. At the bottom right, there is a teal button with the text "SIGN IN" in white capital letters.

4.) Use the **Branch** drop-down menu to select your library or branch.



The screenshot shows the Polaris Leap logo at the top. Below it, the text "Select your Branch and Workstation" is displayed. Under the heading "Branch", there is a white drop-down menu with "Northbrook Public Library" selected. A blue arrow points to this menu. Below the "Branch" menu is the "Workstation" section, which has a white drop-down menu with "Select..." as the current selection. At the bottom of the form are two buttons: "CONTINUE" (teal) and "CANCEL" (white).

5.) Use the **Workstation** drop-down menu to select a workstation.

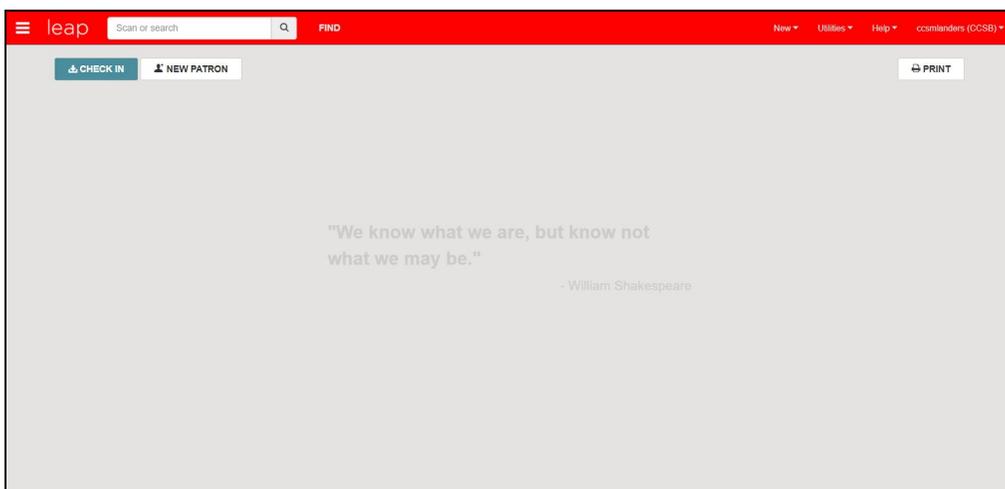


The screenshot shows the Polaris Leap logo at the top. Below it, the text "Select your Branch and Workstation" is displayed. Under the heading "Branch", there is a white drop-down menu with "Northbrook Public Library" selected. Below the "Branch" menu is the "Workstation" section, which has a white drop-down menu with "NBK Leap In House" selected. A blue arrow points to this menu. At the bottom of the form are two buttons: "CONTINUE" (teal) and "CANCEL" (white).

6.) A message will appear to alert you that this is the training server. Select **continue**.

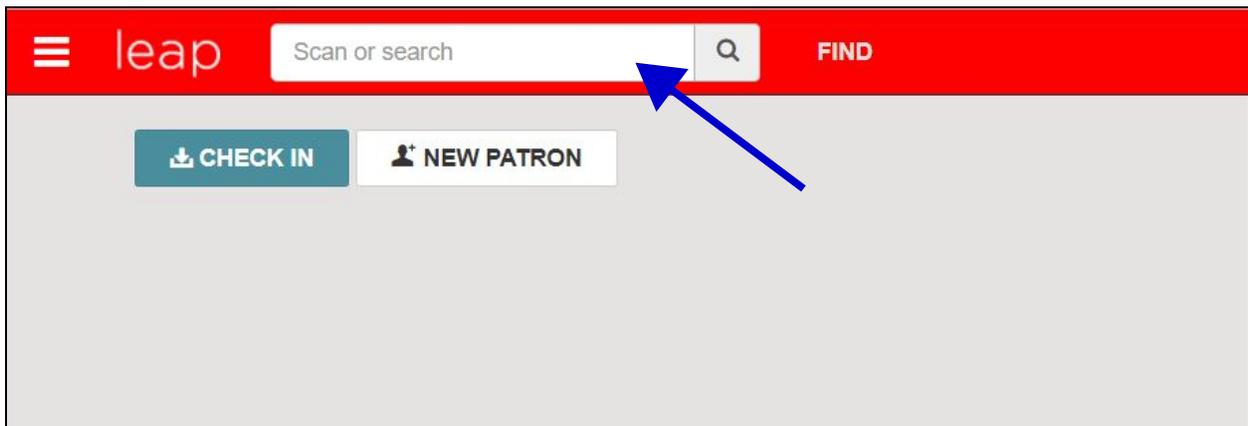


7.) You are now logged in and viewing the Leap home screen!

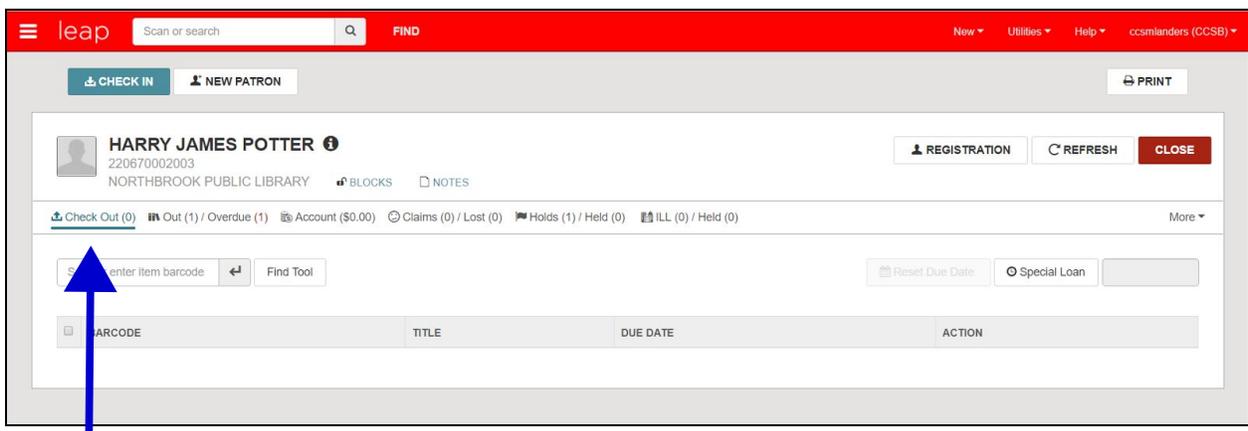


Part 2: Viewing a Patron Record

To look up a patron record, use the top search bar and scan a library card, key in the barcode, or type in the patron's name.

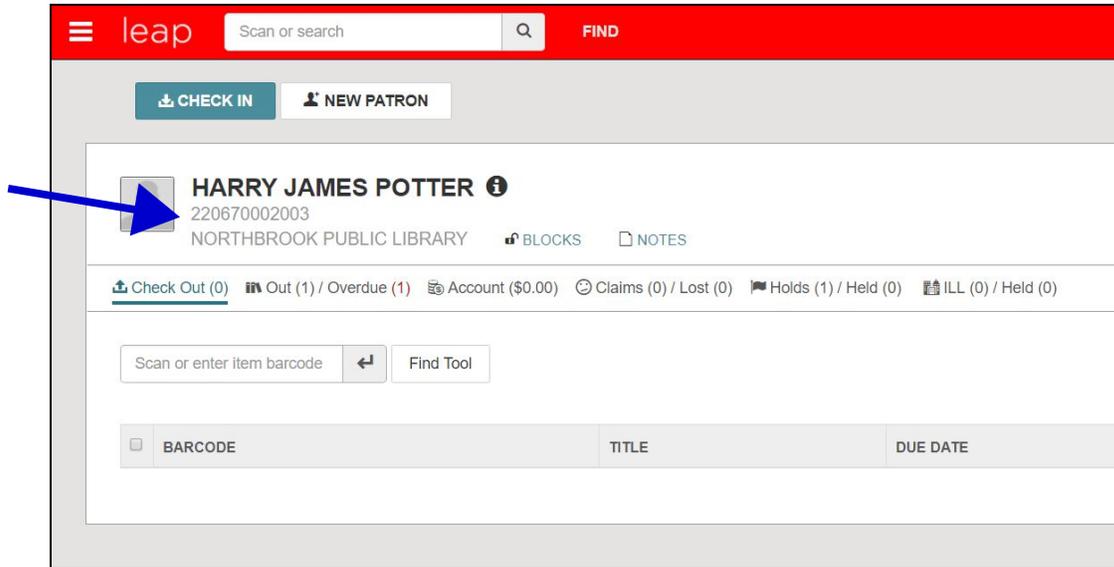


When Leap opens a patron's record, it will default to Check Out mode.

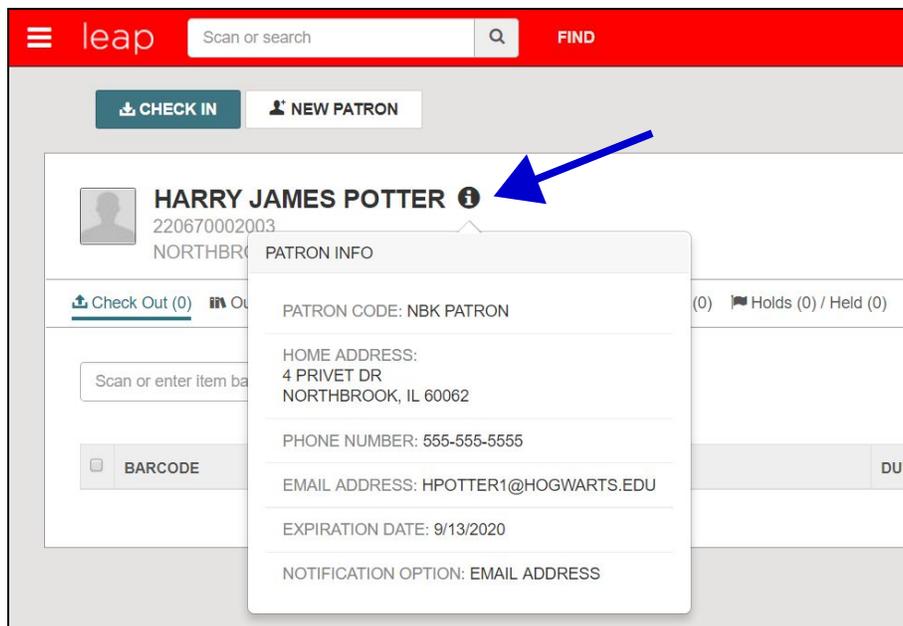


The patron's name, barcode, and home library appears at the top of their record.

- **Note:** The data in the test database (items checked out, fines and fees, holds, etc.) is from the end of July when Polaris extracted CCS's data from Symphony.



Clicking on the "i" next to the patron's name will display extended patron information, including their patron code, address, phone number, email, card expiration date, and notification preference. Patron Codes are a new feature in Polaris. To learn more about patron codes, go to <https://www.learning.ccslib.org/patron-codes>.



The **Out / Overdue** tab displays items the patron currently has checked out. (Again, this data is from the end of July and will be outdated.)

The screenshot shows the Leap library system interface for a patron named HARRY JAMES POTTER. The interface includes a search bar, navigation buttons for 'CHECK IN' and 'NEW PATRON', and a summary of the patron's account. The 'Out (1) / Overdue (1)' tab is selected, and a blue arrow points to this link. Below the summary, there are buttons for 'Renew', 'Special Renew', 'Reset Due Date', 'Estimate Fines', 'Make A Claim', and 'Declare Lost'. A table lists the checked-out items:

TYPE	DUE ON	BARCODE	TITLE	AUTHOR	REN	LEF
Book	7/21/2017	31123011066761	Fantastic beasts & where to find them	Rowling, J. K., au...	3 of	

The **Account** tab shows if the patron owes any money, including the reasons for the fines or fees and any associated notes.

The screenshot shows the Leap library system interface for the same patron, HARRY JAMES POTTER. The 'Account (\$0.00)' tab is selected, and a blue arrow points to this link. The interface displays a summary of the account balance and a table of charges. The summary shows: Charges: \$0.00, Deposits: \$0.00, Credits: \$0.00, and Balance: \$0.00. The table below is empty:

TYPE	DATE	BARCODE	TITLE	REASON	ORGANIZATION	NOT

The **Claims / Lost** tab displays any items the patron has claimed to return or has lost and needs to reimburse the library for replacement costs.

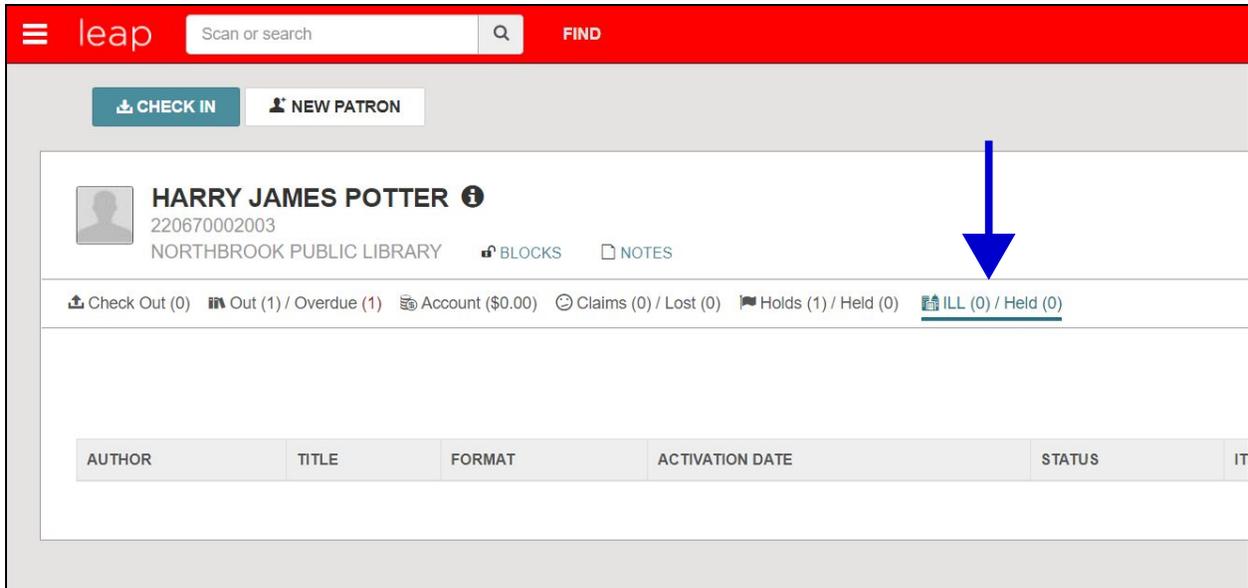
- You will see Claims data *only if* your library currently tracks claims returns using the Symphony database.

The screenshot shows the Leap library system interface for a patron named HARRY JAMES POTTER (ID: 220670002003) at NORTHBROOK PUBLIC LIBRARY. The interface includes a search bar, navigation buttons for 'CHECK IN' and 'NEW PATRON', and a navigation bar with links for 'Check Out (0)', 'Out (1) / Overdue (1)', 'Account (\$0.00)', 'Claims (0) / Lost (0)', 'Holds (1) / Held (0)', and 'ILL (0) / Held (0)'. A blue arrow points to the 'Claims (0) / Lost (0)' link. Below the navigation bar, there are buttons for 'Reset Claim Count', 'Estimate Fines', 'Notification History', and 'Declare Lost'. A summary section shows 'Total Claims: 0', 'Current Claims: 0', and 'Lost: 0'. A table with columns 'BARCODE', 'TITLE', and 'CLAIM DATE' is partially visible.

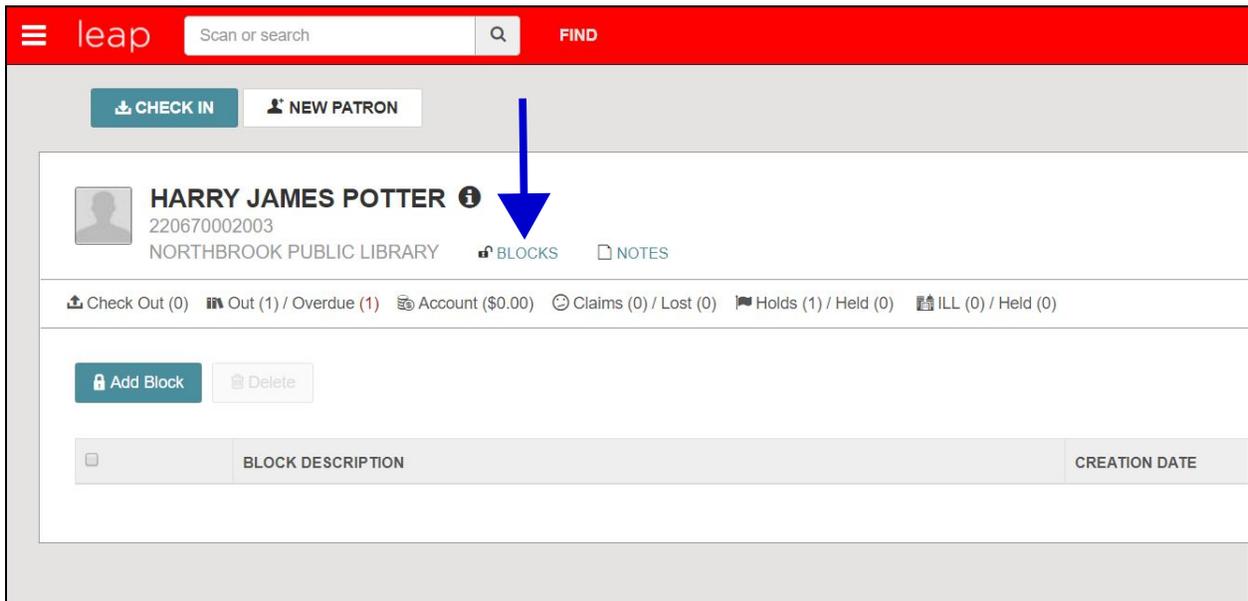
If the patron is on the hold list for any titles, they will be listed under the **Holds / Held** tab.

The screenshot shows the Leap library system interface for the same patron, HARRY JAMES POTTER. The interface is similar to the previous screenshot, but the 'Holds (1) / Held (0)' link in the navigation bar is highlighted with a blue arrow. Below the navigation bar, there are buttons for 'New Hold', 'Cancel', 'Reactivate', 'Delete', 'Fill Now', 'Deny', 'Ask Me Later', and 'More'. A table with columns 'AUTHOR', 'TITLE', 'FORMAT', 'CALL NUMBER', 'ACTIVATION DATE', and 'STATUS' is visible, showing a hold for 'Quidditch through the ages' by Rowling, J. K., with an activation date of 9/20/2017 and a status of 'Active'.

The **ILL / Held** tab is a new feature in Polaris. Since there is not a Symphony equivalent, it will not be populated with any data. In the future, this will display out-of-system interlibrary loan requests.



Blocks displays patron alerts such as if money is owed, registration has expired, or the patron's information needs to be verified.



Finally, **Notes** displays free-text notes entered by staff.

The screenshot shows the 'leap' library system interface. At the top, there is a red navigation bar with a search box and a 'FIND' button. Below this, there are buttons for 'CHECK IN' and 'NEW PATRON'. The main content area displays the patron's name 'HARRY JAMES POTTER' with a profile icon, ID number '220670002003', and library name 'NORTHBROOK PUBLIC LIBRARY'. There are tabs for 'BLOCKS' and 'NOTES', with a blue arrow pointing to the 'NOTES' tab. Below the tabs, there is a summary of the patron's status: 'Check Out (0)', 'Out (1) / Overdue (1)', 'Account (\$0.00)', 'Claims (0) / Lost (0)', 'Holds (1) / Held (0)', and 'ILL (0) / Held (0)'. The bottom section is divided into two columns: 'NON-BLOCKING NOTES' and 'BLOCKING NOTES', both of which are currently empty.

To close out of the patron's record, select **Close** on the right-side of the page.

This screenshot shows the same patron record as the previous one, but with additional options visible. On the right side of the patron information, there are three buttons: 'REGISTRATION', 'REFRESH', and 'CLOSE'. A blue arrow points to the 'CLOSE' button. Below the status summary, there is a search bar with the text 'Scan or enter item barcode' and a 'Find Tool' button. To the right of the search bar are buttons for 'Reset Due Date' and 'Special Loan'. At the bottom, there is a table header with columns for 'BARCODE', 'TITLE', 'DUE DATE', and 'ACTION'.