


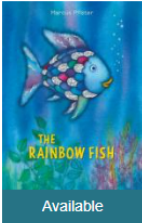
## Overview of the Item record in LEAP

In this presentation we will cover all the aspects of the item record, including the settings that control circulation, holds, and blocks. All the settings that appear in the LEAP interface are also available in the client.

The **top header** part of the item record displays details about the item record- Title, author, barcode, collection, owning and assigned branch, record status and circulation status. This section of the display stays the same when you click on the tabs below to display different areas of the item record below.

By clicking on the “i” you can see the item record id which is a control field, the barcode, and the date the item record was created and modified.

**Item Record** 



Available

**The rainbow fish**  
By Pfister, Marcus.

Barcode: **33150000111686**

Call number: **ER FIC PFI 02**

Collection: **Easy Reader Fiction**

Shelf location: **None**

Owning branch: **Napoleon School Library**

☐ ILL ☐ Non-circulating

Record status: **Final**

Bib control number: **133472**

Parent item:

Assigned branch: **Napoleon School Library**


☐ eContent ☒ Display in PAC


Issue:


Issue control number:


Price:


Circulation status: **Available** || 2/12/2021 2:00:15 PM


 Details


 Circulation


 Controls


 Blocks and Notes

 History

 Statistics

 Record Sets

 Notices

 Source and Donor


The **Actions** menu contains the following options:


- Check in
- Place hold
- Copy
- Delete
- Add to a new or existing record set


**SAVE**


**ACTIONS** ▾


**LINKS** ▾





 Check In


 Place Hold


 Copy

 Delete

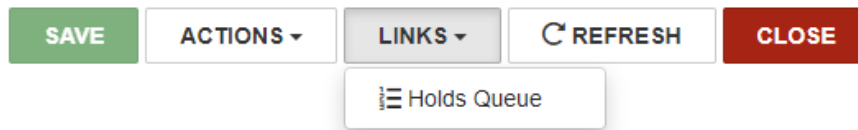
 Undelete

 Print Label

 Add to New Record Set

 Add to Existing Record Set

The **Links menu** provides a link to the holds queue for this item.



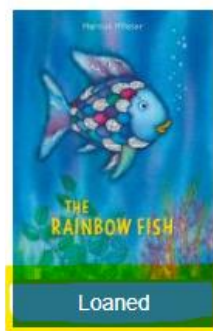
If you used the Find Tool to find this item, there will also be a link to the search results with a **“Results” button**.



The **Details View** – If you have permission to modify item records you can change information in the details view that will change the item record’s header information.

A screenshot of a 'Details View' form. At the top is a horizontal menu with options: Details (selected and highlighted in yellow), Circulation, Controls, Blocks and Notes, History, Statistics, Record Sets, Notices, and Source and Donor. The form contains several input fields and dropdown menus: 'Barcode' (33150000111686), 'Owning Branch\*' (Napoleon School Library (br)), 'Bib Control Number\*' (133472), 'Collection' (Easy Reader Fiction (FICER)), 'Assigned Branch\*' (Napoleon School Library (NAP)), 'Parent Item' (empty), 'Shelf Location' ((None)), 'Price' (empty), 'Non-circulating' (checkbox, unchecked), 'Temporary Location' (empty), 'Circulation Status' (Available), and 'Display in PAC' (checkbox, checked).

- The **owning branch** indicates which library owns the item and therefore staff with permission from that owning branch are the only ones who can modify the item.
- **Circulation status**- The circulation statuses help staff to understand what is happening with the item record- whether it is lost or missing, or in-process.
  - Also, the circulation status will affect whether the item appears in the PAC or not.
  - The circulation status is reflected in a **banner** on the cover image.



- Circulation status **Lost** is slightly different. An item that is overdue a certain number of days has a status changed to Lost and the patron is billed. Staff may also declare an item

lost, and that is done from the items attached to a patron record not from the item record.

The **Circulation View** - here you will find information about the item's most recent circulation transaction.

Details	Circulation	Controls	Blocks and Notes	History	Statistics	Record Sets	Notices	Source and Donor
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Due date: 6/23/2022 11:59:59 PM	Current borrower: 44	Check-out date: 6/16/2022 2:37:34 PM
Renewals taken: 0	Loaning branch: Grand Forks Public Library	Original due date: 6/23/2022 11:59:59 PM
Renewals limit: 1	Held for:	
Renewal date:	Held at:	
Last location	Last use	In-transit/Transferred
Check-in at: Napoleon School Library	Borrower: [REDACTED]	From:
Ck-in date: 2/12/2021 2:00:15 PM	Loaning branch: Napoleon School Library	Sent:
Wkstn/user: NAP-LibDesktop/NAPCIRC	Circ date: 6/16/2022 2:37:34 PM	To:
		Received:

**Controls View** – many settings for the item appear in the controls view.

- In the top box you will find settings that control circulation- Material type in combination with patron type determine loan limits such as the number of items a patron can have out. Loan period, fine code and renewal limit are self-explanatory. Home branch should be the same as “Owning branch” and we disregard the “Do not float” check box in our consortium.

Details	Circulation	Controls	Blocks and Notes	History	Statistics	Record Sets	Notices	Source and Donor
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<b>Material Type*</b>	<b>Loan Period*</b>	<b>Renewal Limit*</b>
Book	7 Days	1
<b>Statistical Code</b>	<b>Fine Code*</b>	<b>Home Branch*</b> <input type="checkbox"/> Do not float
(None)	No Fine	Napoleon School Library (NAP)

- The middle box down contains the call number information for the item, including volume and copy information.

<b>Call Number Scheme*</b>	<b>Cutter</b>	<b>Volume</b>
Other		
<b>Prefix</b>	<b>Suffix</b>	<b>Copy</b>
ER FIC		02
<b>Classification</b>		<b>Name of Piece</b>
PFI		

- The last box contains hold information:

<input checked="" type="checkbox"/> Loanable outside system <input type="checkbox"/> Do not mail to patron <input checked="" type="checkbox"/> Holdable	Hold Limited To: <input type="checkbox"/> Pickup at <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	<input type="checkbox"/> Patrons from this library and branches <input type="text" value=""/> days past first available <input type="checkbox"/> Patrons from this branch only <input type="checkbox"/> Preferred borrowers
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- Click **Loanable outside system** if you want to lend this item on interlibrary loan
- If the check box, **Do not mail to patron** is checked, the item cannot be mailed to a patron.
- Select **Holdable** if you want to allow holds to be placed on the item.
  - **Pickup at:** limits the item to filling hold requests only by patrons from specified branch. Only one branch can be selected.
  - **Patrons from this library and branches-** when you select this option, you can also select the number of days past available. This sets the number of days a new item is available only to the assigned library's patrons. During the specified number of days patrons from all libraries can still find the item and place a hold. After the specified number of days, holds on the new item placed by patrons from other libraries can be filled.
  - **Patrons from this branch only** – Limit the item to filling hold requests only from patrons registered at the item's assigned branch.
  - **Preferred borrowers** – Limit the item to filling hold requests only where the pick-up library is on the preferred lender list of the item's assigned branch. This option is not used by the ODIN consortium.

## Blocks and Notes View – displays blocks and notes associated with the item

Details

Circulation

Controls

**Blocks and Notes**

History

Statistics

Record Sets

Notices

Source and Donor

Library Assigned Block

Check DVDs

Free Text Block

Check for disc in back pocket

System Block

Public Note

Emmy nominated series

Non-Public Note

Permanent collection, do not weed

Physical Condition

Water damaged insert

Special Item Check-In

- Library assigned block – these are pre-defined blocks. They appear when the item is checked in. The blocks do not change the circulation status of the item.
- Free Text block – This block is free-text up to 255 characters. It also appears when the item is checked in and does not change the circulation status of the item.
- System Block – system generated blocks are applied and removed automatically by Polaris. Examples are: “Item has missing parts” “Item was created by interlibrary loan” and “Item was created on the fly”
- Public Note – The notes will be displayed in the PAC for this
- Non-public note – The notes are intended for library staff only
- Physical condition Note – The notes describe the physical condition of the item
- Special Item Check-In – When a patron returns an item with a missing part
  - Use the Missing parts tab on the check-in screen, you can do this during check-in or after check-in

- Click Missing Part, scan in the barcode, add a note “Missing Disc 3” (the option Make item unavailable, just changes the circulation status of the item to unavailable)

## Check In

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

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### Manage Missing Parts

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Barcode: 33108007027438

Material Type: DVD

Status: **Loaned**

Patron: **Chester Tester**

Title: **Brooklyn nine-nine. Season five**

☒ Missing part: block & notify  
 Special item check-in note (will appear on the patron notice and on the item record)

☐ Make item unavailable

OK

CANCEL

- If item is never returned, you can bill for the item from the patron record.
- When the item is returned: Scan the item at check in, a pop up appears letting us know that it has an “Item has missing parts block.”

### Item is blocked

Do you want to continue with this operation?

**Brooklyn nine-nine. Season five**

ITEM RECORD

CONTINUE

CANCEL

- Click on the Item Record button, view the blocks and notes tab

- Delete the Special Item Check-In note and save the item record

### Special Item Check-In

Missing disc two, please return

- Close the item record, and it returns you to the check-in box
- Click continue. The block and the note are removed from the item record, and the block is removed from the patron record.

**History View** – displays the item history – circulation status changes and transactions

<a href="#">Details</a>	<a href="#">Circulation</a>	<a href="#">Controls</a>	<a href="#">Blocks and Notes</a>	<a href="#">History</a>	<a href="#">Statistics</a>	<a href="#">Record Sets</a>	<a href="#">Notices</a>	<a href="#">Source and Donor</a>
DATE	ASSIGNED BRANCH	STATUS	ACTION	LOCATION				
6/16/2022 2:37:34 PM	Napoleon School Library	Available -> Loaned	Checked out	Grand Forks Public Library				

**Statistics View** – Circulation statistics appear in this view

<a href="#">Details</a>	<a href="#">Circulation</a>	<a href="#">Controls</a>	<a href="#">Blocks and Notes</a>	<a href="#">History</a>	<a href="#">Statistics</a>	<a href="#">Record Sets</a>	<a href="#">Notices</a>	<a href="#">Source and Donor</a>
Year-to-date circulation: 1			Year-to-date in-house use: 0			Inventory date: 5/19/2021		
Previous year-to-date circulation: 1			Previous year-to-date in-house use: 0					
Lifetime circulation: 16			Lifetime in-house use: 0					

**Record Set View** – Shows the record sets this item belongs to

<a href="#">Details</a>	<a href="#">Circulation</a>	<a href="#">Controls</a>	<a href="#">Blocks and Notes</a>	<a href="#">History</a>	<a href="#">Statistics</a>	<a href="#">Record Sets</a>	<a href="#">Notices</a>	<a href="#">Source and Donor</a>
NAME	OWNER	TOTAL RECORDS	CREATION DATE					
Colorful books	Napoleon School Library	1	6/16/2022					

**Notices View** – shows dates and times notices were issued for the item

<a href="#">Details</a>	<a href="#">Circulation</a>	<a href="#">Controls</a>	<a href="#">Blocks and Notes</a>	<a href="#">History</a>	<a href="#">Statistics</a>	<a href="#">Record Sets</a>	<a href="#">Notices</a>	<a href="#">Source and Donor</a>
Reminder:			1st overdue:			Bill:		
			2nd overdue:			Hold:		
			3rd overdue:					

**Source and Donor View** – shows system supplied information from acquisitions processes in the top box. The bottom box has information for eContent items. The middle box has information about donors.

<b>Purchase Order</b>	<b>PO Release Date</b>	<b>Price</b>
<input type="text"/>	<input type="text" value="12/7/2009 12:00:00 AM"/>	<input type="text"/>
<b>Invoice</b>	<b>First Available Date</b>	
<input type="text"/>	<input type="text" value="12/7/2009 12:00:00 AM"/>	

<b>Funding Source</b>		
<input type="text"/>		
<b>Donor First Name</b>	<b>Middle</b>	<b>Last Name</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Donor Organization</b>		
<input type="text"/>		

<b>Import Date</b>	<b>Import Bib Control Number</b>	<b>Import Source</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Vendor Account</b>	<b>Resource Group</b>	
<input type="text"/>	<input type="text"/>	