



Checking In in Leap: Bulk Mode

Bulk Mode is meant for use when checking in large amounts of items such as, for example, from return bins. This mode assumes you are not working directly with a patron when checking in items.

To access, select the **Check In** button from the Leap home screen and select the **Bulk** tab.

The image shows two screenshots of the Leap library system interface. The top screenshot is the home screen with a red header containing the 'leap' logo, a search bar, and a 'FIND' button. Below the header are two buttons: 'CHECK IN' (highlighted with a blue box) and 'NEW PATRON'. The bottom screenshot shows the 'Check In' screen after clicking the 'CHECK IN' button. It features a 'Check In' title, four tabs: 'Normal (0)', 'Bulk (0)' (highlighted with a blue box), 'In House (0)', and 'Inventory (0)'. Below the tabs are input fields for 'Scan or enter item barcode', 'FIND TOOL', 'Free Days' (set to 0), and a date field (set to 10/30/2017). At the bottom is a table header with columns: BARCODE, DUE DATE, STATUS, COMMENT, FINE CHARGED, and TITLE.

If backdating or applying fine free days, you can either:

- Enter the amount of fine free days in the box below,
- Select a date on the calendar,
- Or key in a date in the formatted date box.

This screenshot shows the 'Check In' screen with the 'Bulk (0)' tab selected. A calendar overlay is visible, showing the month of October 2017. Blue arrows indicate the workflow: one arrow points from the 'Free Days' input box to the calendar, and another points from the date field (10/30/2017) to the calendar. The calendar shows the date 30th as selected.



Scan or key the item barcode into the box. If the item does not have a barcode, use the Find Tool to locate the item's record.

leap Scan or search FIND

CHECK IN NEW PATRON

Check In

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

33090005115177 FIND TOOL Free Days 0 10/30/2017

BARCODE	DUE DATE	STATUS	COMMENT	TITLE
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A pop-up message will appear if the check in was successful.

leap Scan or search FIND

CHECK IN NEW PATRON

Check-in successful

Check In

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

Scan or enter item barcode FIND TOOL Free Days 0 10/30/2017

BARCODE	DUE DATE	STATUS	COMMENT	TITLE
33090005115177	11/20/2017	Checked Out -> Available		Casper

Unlike Normal Mode, Bulk Mode automatically applies overdue fees to the patron's record. Staff will not see a dialogue box for each overdue item. Dialog boxes *will* appear if the item fills a local hold or if the item is in-transit to another library.

leap Scan or search FIND

CHECK IN NEW PATRON

Check In

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

Scan or enter item barcode FIND TOOL

BARCODE	DUE DATE	STATUS
33090003128479	11/8/2017	Checked Out -> Available

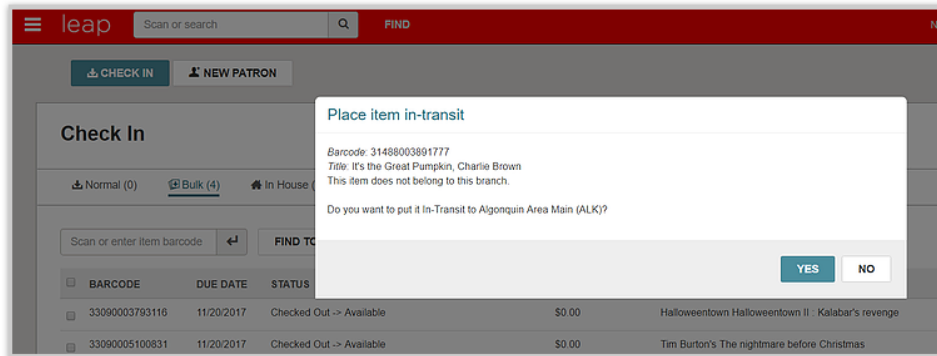
Fill hold request

Hocus pocus
Barcode: 33090003787308

satisfies a hold request for:
Patron: Test
Barcode: test054

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

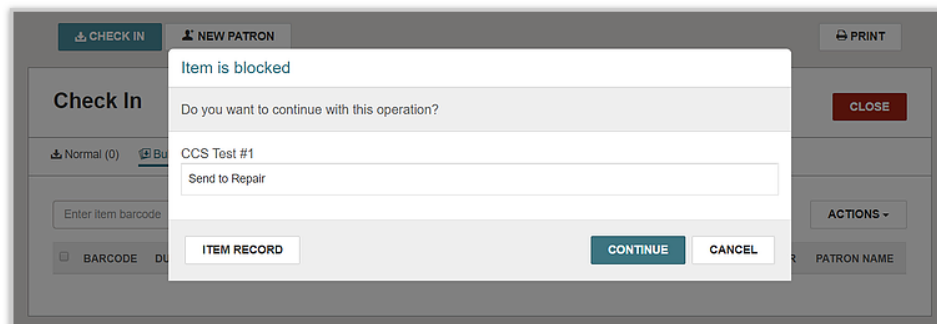
YES NO CANCEL



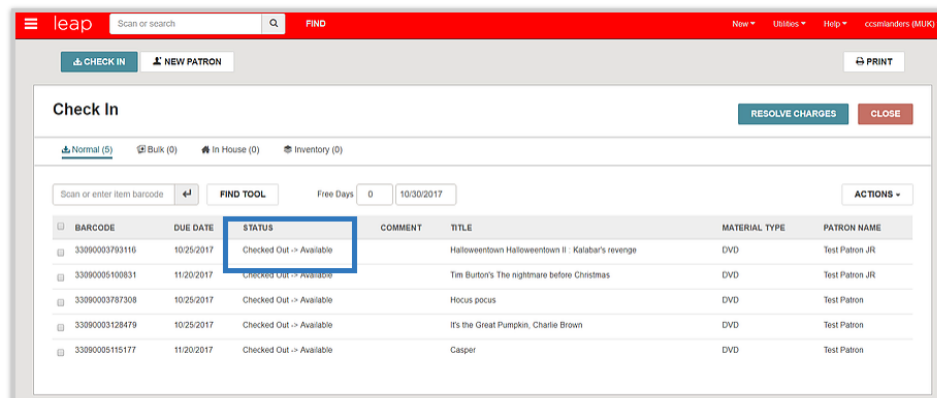
Dialog boxes will also alert staff if there are any blocks on the item record. Staff can:

- Select **Continue** to check the item in,
- **Cancel** to stop the check in process,
- Or **Item Record** if they wish to inspect the item's full record.

*It's very important for staff to read block messages before taking action!



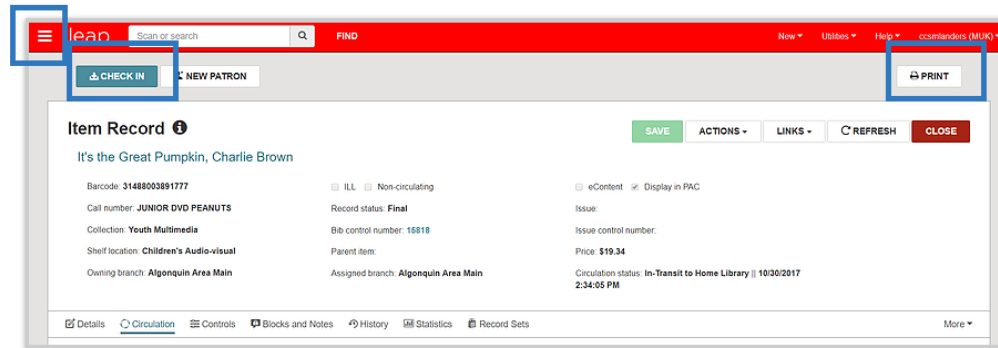
The most recent item scanned will appear at the top of the list. The workform will also list the status change of each item and/or routing or hold information.



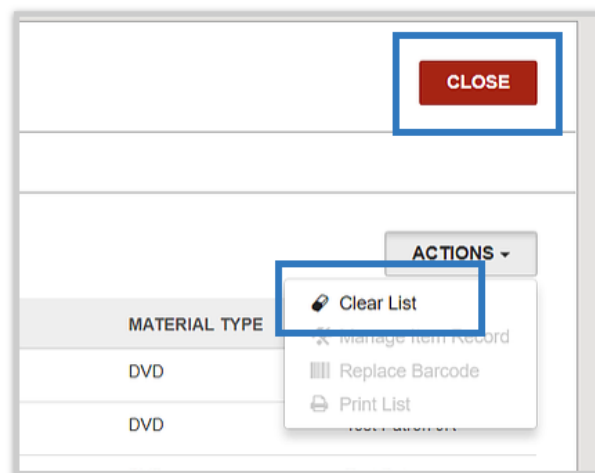


Clicking on an item from the list will take you to the item's record. The check in workform will remain open in the background. To return to the check in workform, you can:

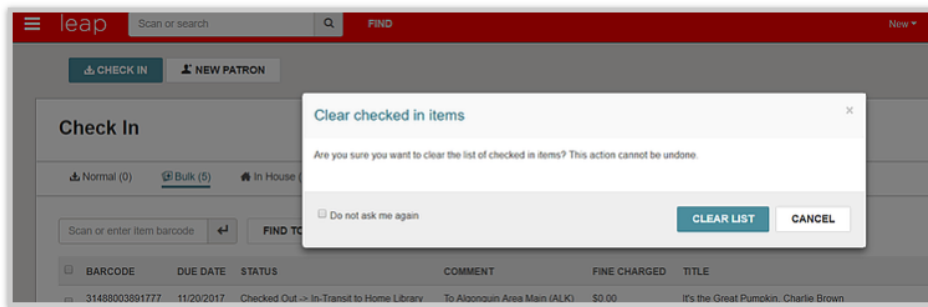
- **Close** out of the item record,
- select the **Check In** button at the top of the page,
- or navigate to the check in workform by using the **Workform Tracker**.



Once the items are all checked in, you can either select **Clear List** from the Actions menu or select **Close** to exit out of the Check In workform.



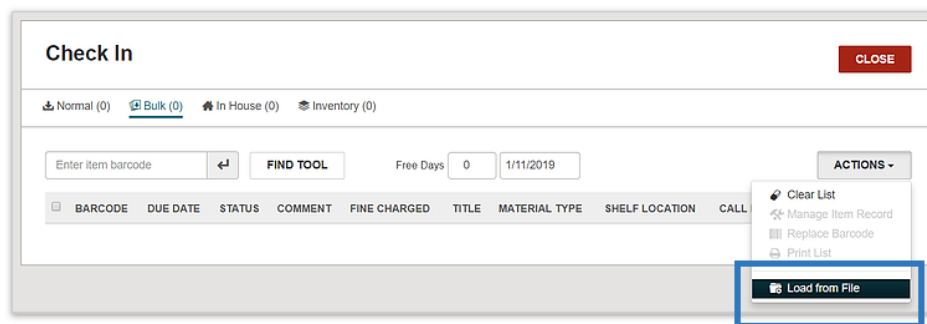
After clicking Clear List, you may see a dialog box asking if you are sure you wish to clear the list. This dialog box gives staff one more opportunity to make sure items they checked in are going to the proper spot - whether it's to be reshelved, sorted into routing bins, or to the hold shelf. Select "Do not ask me again" if you want to deactivate this dialog box.



Check In Items from an Excel File

A new feature in Polaris is the ability to check in items by uploading a file of barcodes. This method is available in all check-in modes: Normal, Bulk, Inventory, or In-House. The barcode file must be in one of the following formats: .txt, .csv, or .xls/.xlsx.

To check in from a barcode file, open the **Actions** drop-down menu and select **Load from File**.



As the items are checked in, you will see either a message confirming the check in or a dialog box if further action is needed for each item (for example, if the item has a hold, is in-transit, has blocks, etc.). If the item record is not found, a "No matching item record was found. Check the item barcode." error message appears, and the item is skipped.

