

Checking out

The basic checkout procedure involves entering two barcodes—the patron's and the copy's.

Retrieving a patron by barcode or keyword

If you have the patron's barcode, open the **To Patron** tab.

Type or scan the patron barcode in the **Find** box and click **Go!**.

If you don't have a barcode, enter the patron's first or last name (or part of the name, followed by *).

Then, click **Find Patron**.

Find **Go!** **Find Patron** **Find Copy** **Add Title**

Only my patrons Only search

Anderson, Laura (Student: [P 4](#)) **Edit Patron**

Checked Out Library: 2 **Grade Level** Mr. Jones

Overdue Library: 0 **Homeroom** Jones

Holds 0 **Ready**

Fines Library: \$0.00 / Textbooks: \$0.00 **Receipt**

Checked Out

The adventures of Curious George (Copy: [T 87046](#)) **Due** 4/5/2007 **Renew**

Items Out

Due Date	Title	Call Number	Price	Checked Out	Renew
4/5/2007	Pippi Longstocking (Copy: T 87036)	[Fic]		3/22/2007	Renew Lost

Renew All

Browsing a patron list

If you click **Find Patron** without entering a name or barcode, or your search doesn't find an exact match, a patron list for the site appears. The closest match to the name you enter appears bolded.

To change the sort order of names and/or jump to a specific name, select an option in the **Sort by** list, and/or enter a complete or partial name in the **jump to** box and click **Go!**.

Patron "andersen" not found.

Sort by & jump to **Go!** **Close**

Only my patrons

Landers, Jeremy J **→**

Name	Barcode	Homeroom	Grade Level
Adams, Maria M	P 11	Mr. Ancrum	
Administrator, Site	SITEADMIN		
Ancrum, Lee S	21230000123602		
Anderson, Laura	P 4	Mr. Jones	
Batten, Jerome A	21230000123669	Mr. Edwards	
Brooks, Stewart H	21230000123586	Mrs. Santiago	
Brown, Alex	P 7	Mrs. Lewis	
Burke, James T	21230000123487	Miss Lamsa	
Christie, Chad	21230000123503	Miss Lamsa	
Davis, Elizabeth	P 9	Mr. Slater	
Davis, William	21230000123867	Mr. Sensley	
Donner, Nicole E	21230000123917	Mr. Slater	

To include patrons from a different site in your district, clear the **Only my patrons** check box.

Retrieving a patron by homeroom

To view an entire class, open the **By Homeroom** tab.

First, select a homeroom from the list and click **Select Patron**.

When the Homeroom list appears, select a patron by clicking the name or picture.

To Patron **By Homeroom**

Homeroom **Select Patron**

Homeroom: Mr. Jones

Anderson, Laura	Smith, Jim	Williams, Mike

Checking out a copy

After the patron record appears, type or scan the copy barcode in the **Find** box. You can also search for the copy by keyword.

The checked out copy then appears in the **Checked Out** section of the page.

As you check out other items to the same patron, the previous checkout moves to **Items Out**.

Changing a due date for a checkout

After checking out the item, click next to **Due** under **Checked Out**. Select the correct option and the desired date on the calendar, and click . The Special Date prompt then appears in front of the date.

If it's listed under **Items Out**, the user must renew it and then select a new due date.

To mark a copy Lost, click next to the copy, or open the **Copy Status** page and scan the barcode.

To renew a copy, click next to the copy, or open the **Renew** page and scan the barcode.

If you get a block message at the top of the page, this means that the patron has reached one of the limits for his patron type, such as the number of checkouts or holds. You must address the block condition or override it before you can continue.

To dismiss the message and proceed with the transaction, you'll need to enter the override username and password or have the "Override Blocks" permission in your Access Level.

If the title isn't in the database, the message **Copy [number] is not cataloged. Do you want to check it out?** appears. To add a new title record, click **Yes** to the message.

You must enter at least a barcode and title. Use the other fields as needed.

If this will be a permanent record, be sure to clear the **Title is deleted when checked in** check box. NOTE: You will need to enter a call number.

If you leave the check box selected, making it a temporary item, it is marked with a **T** in all lists and is automatically deleted upon checkin.

If you know the title doesn't exist, click to open this dialog box.

Checking in

The basic checkin procedure involves entering the copy barcode:

Type or scan the copy barcode in the **Find Copy** box and click **Go!** on the page or press Enter on the keyboard.

The item then appears in the **Most Recently Checked In** section of the page. This section holds the last 10 checkins.

Find Copy **Go!** Record in-library use

Most Recently Checked In

Mugwumps : public moralists of the gilded age (Copy: T 351236)	Due 5/20/2004 303.48 TUC	
Checked out 5/6/2004 to Cleveland, Grover (Student: P 23)		
Tom Swift and his big tunnel or, The hidden city of the Andes (Copy: T 1787)	Due 5/20/2004 FIC App	
Checked out 5/6/2004 to Brown, Capability (Student: P 11)		
The bathwater gang (Copy: 32935001052868)	Due 5/21/2004 Hold	
Checked out 5/7/2004 to Fillmore, Millard (Student: P 65)		
The absent-minded toad (Copy: 32935001044022)	Due 5/21/2004 F RON	
Checked out 5/7/2004 to Hoover, Herbert (Student: P 26)		
Comet's nine lives (Copy: 32935001013332)	Past Due 5/3/2004 F BRE	
Checked out 5/7/2004 to Hoover, Herbert (Faculty: P 26)		

If you don't have a barcode, enter a keyword from the title (or part of a word, followed by *), then click **Go!**.

Locate the title in the list and click **Copies**, then click the correct barcode number.

To charge a fine for a checkin:

If it's under **Most Recently Checked In**, click the **Create Fine** icon next to it. Then select the reason, enter the amount, and click **Save**.
If not, retrieve the copy in **Fines**.

If a copy is overdue, and your library calculates fines automatically, a fine is assessed to the patron. Click [Pay/Waive Fine](#) to pay, waive, or apply a partial payment to the fine.

Please note...

- Overdue item "Comet's nine lives" (Barcode: 32935001013332) is 4 days overdue. Herbert Hoover has been charged an overdue fine of \$0.20. [Pay/Waive Fine](#)

If the copy has a hold on it, the message displays the waiting patron's name. The hold is now made Ready. You'll need to place the copy on the hold shelf and notify the patron. To view the hold information, click the copy barcode.

Please note...

- This copy of "The bathwater gang" should be held for Ulysses S. Grant (Barcode: P 82). Please notify the patron that this hold is ready to be picked up.

In the **Most Recently Checked In** list, the hold is indicated by on the right.

If the copy had been marked Lost, a message appears and the copy's status changes back to Available.

Please note...

- "Tom Swift and his big tunnel or, The hidden city of the Andes" (Barcode: T 1787) had been marked as lost. The fine assigned to Capability Brown (Barcode: P 11) has been deleted.

To clear the information on the page, click **Reset** on the sidebar.

Getting more information

To view a patron's checkouts, fines, or holds, or to create a fine or a hold for a patron, switch to the **Patron Status** page, or click the patron's hyperlinked barcode number.

To mark a copy lost, view copy information and holds, or view the current and previous borrowers of a copy, switch to the **Copy Status** page and retrieve the copy, or click any hyperlinked copy barcode.