

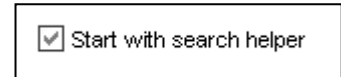
**Check Out Items**

The Checkout wizard guides you through the process of checking out materials to a library user.

1. **Click** on Common Tasks or Checkout, Checkin, Renewal... Wizard.
2. **Click** on the Checkout Wizard.



**NOTE:** If your checkout properties helper is set to "Start with search helper", your user search screen will display first.

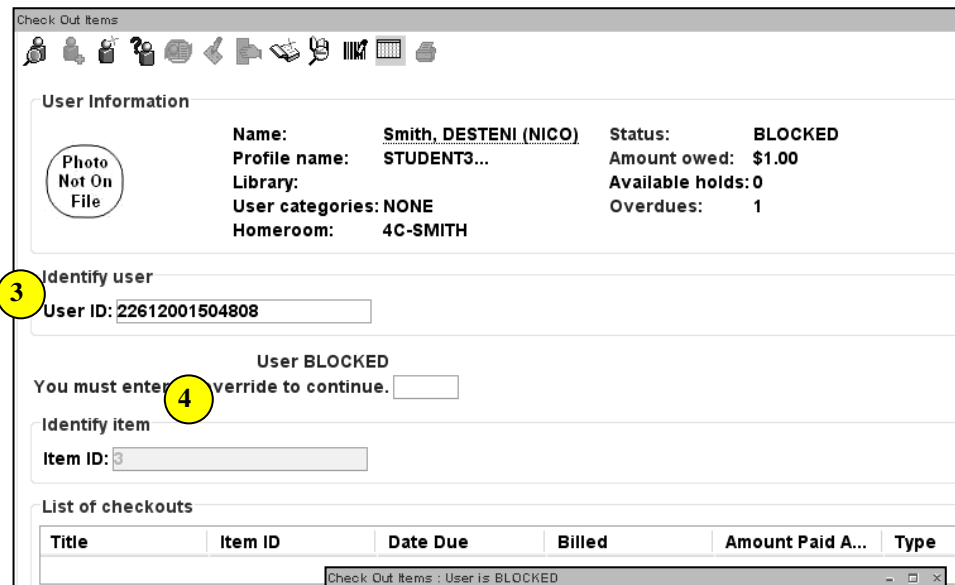


Checkout screen displays

3. **Locate** the **user** by scanning the user ID or using the User Search helper.
4. **Scan** the **item** ID or use the Item Search helper.

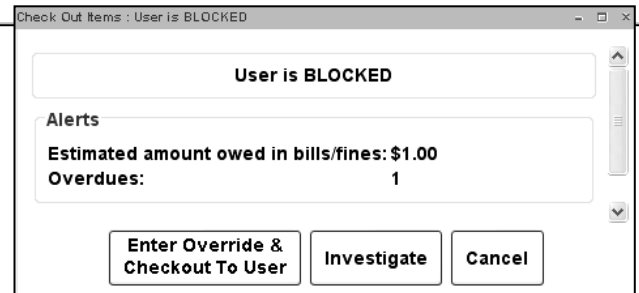
The checked out items will display on the List of Checkouts section.

5. **Continue** checking out items as appropriate.



**NOTES:** If a user is *delinquent* or *blocked*, a *User Alerts Display* screen may appear allowing investigation of the reason for the status. This pop up box can be turned on or off in Checkout properties. (Check or uncheck "Display user blocks in separate window.")

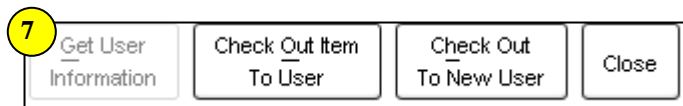
If a user is *blocked*, the override password is required to complete the checkout process.



If a user is *barred*, a popup window will display, regardless of the property setting, informing you of their status. You must change their status to OK in Modify User before they can check out.

6. When the first user's transactions are complete, **scan (or type)** in the next user's barcode number. *Checkout* screen for next user will display. **Scan** items for this user.

7. **Select** from options:





**TIP:** If you prefer checking out by name rather than scanning a barcode:

1. Right **click** on CheckOut Wizard.
2. **Select** properties.
3. **Click** on the Helpers Tab.
4. **Click** on User Search.
5. **Click** on the Defaults Tab.
6. Choose **keyword** for search type.
7. **Select** Name for Search Index, enter your library, and choose a sort option.
8. Put a **check** in the Start with search helper box.
9. **Click** OK.
10. Now when you click on the checkout wizard, this is what you will see.



**TIP:** If students come to the library by homeroom and you want to check out by name:

1. **Repeat** all the steps above, except set your search index to Homeroom or Teacher and sort by User Name.
2. When a class comes in, **click** on the Checkout Wizard and **search** for the room you wish. (Remember, homeroom or teacher must be typed exactly as it appears in the student record.)
3. A list of students will display. **Highlight** the student and **click** Checkout to User.
4. **Check out** items. When finished, **click** Checkout to new user.
5. This will return you to the class list. **Highlight** the next student's name and click Checkout to User.

List of users

Name	User ID	Alt ID
BEAIR, SONYA ELLEN	22620000656560	65656
GIBSON, TINA (L)	22620000610138	61013
RIVERA ROSARIO, JU...	22620000646512	64651
<b>SCHREIBER, MOLLY K</b>	<b>22620000625631</b>	<b>62563</b>
SEAY, MAURICE (D)	22620005500698	550069
SELBY, RYAN A	22620000635242	63524
SINIFF, THOMAS J	22620000630144	63014

Checkout To User    Cancel



**TIP:** If you wish to checkout multiple items to the same patron, turn on **Cache Item IDs**. This allows you to scan multiple items into a single Item ID window. You will need to click the Check Out Item to User button to select another patron.

1. Right **click** on CheckOut Wizard.
2. **Select** properties.
3. **Click** on the Behavior Tab.
4. Place a **check** in Cache Item ID's.
5. **Click** OK.
6. Click on Checkout Items, notice larger Item ID field.
7. **Scan** desired number of items.
8. When finished scanning, **click** the Check Out Item to User button.
9. All items scanned will be checked out to user.

**NOTE:** If an item cannot be checked out, an override password (obtain password from supervisor) will be required to complete the checkout process. When the password is entered, an *Alerts Display* screen will appear explaining the reason for the status and allowing you to complete check out.

**Behavior** Defaults Helpers

Configure

- Hide current user
- Extend user's library privilege
- Proxy checkout with cancel hold
- Automatically restart checkout on item ID error
- Cache Item ID's**
- Automatically renew items already checked out as seen
- Automatically renew items already checked out as unseen
- Do not automatically renew items already checked out

Check Out Items

Photo Not On File

**Name:** Cross, AMANDA MARIE  
**Profile name:** STUDENT3...  
**Library:** DLFN  
**User categories:** Y  
**Homeroom:** 2B-GERDING

**Identify user**  
 User block overridden!  
 Checkout limit overridden!  
 User ID: 22612001703004

**Identify item**  
 Item **6**

Get User Information **8** Check Out Item To User Check Out To New User Close



**TIP: Right-click menus**

Right-click menus are 'popup' or shortcut menus that contain commands and options that can be performed against a selected record or group of records. The right-click menus are available using a right mouse click in circulation lists (or tables), such as checkouts, bills, holds, and more.

Once in a right-click menu, click a circulation or print option to access that option.

**NOTE:** Not all options are available in all wizards. If a user does not have access to a wizard or wizard function, that option will not appear in the list. Additionally, not all options allow for multi-record selection.

List of checkouts: 1

Title	Item ID	Date Due	Billed	Amount Paid Automatic...	Type
Bad dog! : true tales of...	32612100098965	4/27/2012,23:59			

▼ Current user checkouts:3(\$0.00)

Title	Item ID	Date Checked Out	Date Due	Amount Paid Automatic...	Type
The 1900s	32612100082951	3/30/2012,14:12	4/27/2012,23:59		N
The 1920s	32612100083033	3/30/2012,14:12	4/27/2012,23:59		N
Bad dog! : true tales of trou...	32612100098965	3/30/2012,14:13	4/27/2012,23:59		N

- Bill User for Item
- Change Item ID
- Discharge
- Display Holds
- Display Item
- Display User
- Edit Item Note
- Modify Due Date
- Place Hold
- Print Checkout Slip

### Special Due Date Helper

When checking out or renewing an item, you can set a special due date before scanning the item(s).

1. Use the Calendar gadget to **select a date** in the Special Due Date field.
2. Select how long you want this date effective.
  - **From now on** – the date selected will remain in effect for all users until the Checkout wizard is closed or the Clear Date action button is pressed. This date will display on the checkout screen.
  - **For this user only** – the date selected will affect all the items this user checks out.
  - **For this checkout only** – the date selected will affect only this one item.
3. After returning to the checkout or renewal process, **scan** the item's barcode in the Item ID field. The special due date will display above that field for all users until the date is cleared.

### Using Circ Notes

Circ notes will display when an item is checked in and checked out if “Display Circulation note” is checked in properties for those wizards.

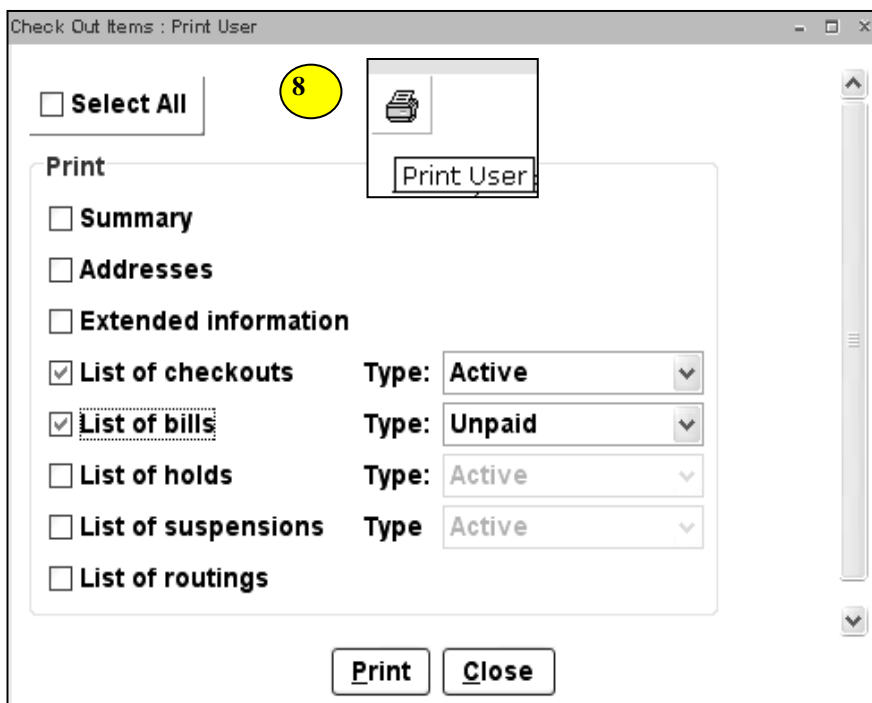
You can enter the circ note on an item's record under Extended information.

Extended information	
Tag	Contents
CIRCNOTE	companion CD at desk
PUBLIC	
STAFF	

## Printing User Information

**Print User** information by selecting the **PRINT USER** helper. This allows for printing of user information from inside the wizard. The helper allows printing All user information, or selecting from the following options.

- **Summary** — Prints user information from the Summary tab of user record.
- **Addresses** — Prints all user address information.
- **Extended Information** — Prints all user extended information.
- **List of Checkouts** — By default, prints all Active checkouts. To change, select from the list options Active, All, Claims Returned, Inactive, Overdue, Recalls, Renewals.
- **List of Bills** — By default, prints all Unpaid bills. To change, select from the list options Unpaid, Paid, All.
- **List of Holds** — By default, prints all Holds. To change, select from the list options All, Available, Recalled, and Reserve.
- **List of Suspensions** — Prints all Active suspensions for the user
- **List of Routings** — Prints all bookings for the user (Materials Booking), not currently supported.



**NOTE:** You can also use the Print function from the Printer icon in the Common Tasks toolbar; but if you do, you can only print the entire record. There is no option to print a specific screen.

**HINT:** If information is wrapping, try changing the page setup to Landscape (before printing, look at the print preview (toolbar →file → print preview)).

**NOTE:** For more detailed information or specific questions, use **HELP** wizard.