

CHECKIN – CHECKOUT CHEAT SHEET

Make sure you are on the CIRCULATION Tab at the top

Checking out to a user

Click on the **CheckOut Wizard**

Search for the user by clicking on the User Search Helper (Green man with a Magnifying glass in the upper left corner)

Search for the patron by name

If a box pops up answer any of the questions, you might have to put in the override of Bart.

Now scan the item ID's

Once you have all of the Item ID's scanned click on Check Out to New User (at the bottom of the screen)

The Printer Box will pop up

Click OK and your receipt will print or Click Cancel to cancel the print job. (If you have a receipt printer)

Checking Items In

Click on the **CheckIn Wizard**

Scan your items

Paying Bills

Click on the **Paying Bills Wizard**

If you are paying a bill for a user you just checked out to or checked items in for, click on the Button with their name and user ID.

OR Search for the user by clicking on the User Search Helper (Green man with a Magnifying glass in the upper left corner)

OR Type or scan in their barcode If you are paying all bills owed by the patron you can put the amount being paid in the top Payment data well (include the decimal – 1.00)

Choose your payment type

Click Pay Bills at the bottom

Click Close or Make Payments for Another User

You can also pay the bills from the checkout Wizard. If the current patron has bills to pay the Pay Bill Helper will be available in the Checkout Wizard, it is the 7th icon from the left, Hand with money in it. Click on it and make the payments as instructed above.

You can also pay the bills from the check in (Discharging) Wizard. If the current patron has bills

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to pay the Pay Bill Helper will be available in the Discharging Wizard, it is the 3rd icon from the left, Hand with money in it. Click on it and make the payments as instructed above.

Marking an Item Used (use when a book is used in library, but not checked out -allows system to show use so that the book will not be weeded due to no checkouts)

Click on the **Mark Item Used Wizard**

Scan in the Item ID

When you are done, close the Wizard

Registering a new user

You can register a new user from the Checkout Wizard by clicking on the **Register New User** Helper, the 3rd Icon from the left, Green man with a star or you can click on the **User Information and Maintenance** at the left then click on the User Registration Wizard.

Scan in the new user id

On the **Basic Info Tab** fill in the following:

First Name

Middle Name (or Initial)

Last Name

Alt ID (state ID or DL if available)

On the **Privilege Tab** you will only need to give them their Pin, you shouldn't need to make any changes.

On the **Demographics Tab** fill in the following;

User Cat 1 (it doesn't matter what you put here as long as you put something)

Birth date (if you would rather put the birth date on the Extended info tab you can, but it must be somewhere in the record).

On the **Address Tab** fill in the following;

Care/OF (if the patron is under the age of 16 otherwise you can leave blank)

Street (address or P.O. Box)

CITYSTZIP (City, State Zip)

PHONE (you can use any of the phone fields that you would like)

EMAIL (if you want to send overdue notices to your patrons by email put their email address here).

On the **Extended Info Tab** if you put information in the ALT ID field on the Basic Tab and if you put the Birth Date on the Demographics Tab you don't need to fill anything in.

User Groups Tab is only used if you want to group a family together, it is not necessary.

Renewing Users Privilege

If a user's privilege has expired you will receive an Error box at the time of checkout that gives

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you several options, if you just want to update the privilege simply click on the **Update Privilege** button.

If a user's privilege is about to expire there will be a Renew Privilege Helper available in the User Checkout Wizard, Paper with a head and a red circle around it, 5th icon from the left, Click on it to renew the privilege, then click on Extend Privilege at the bottom.

OR you can **Click on User Information and Maintenance** on the left side then click on the **Renew Privilege Wizard**. Find your user by user id or by searching using the **User Search Helper**. Click Extend Privilege at the bottom.