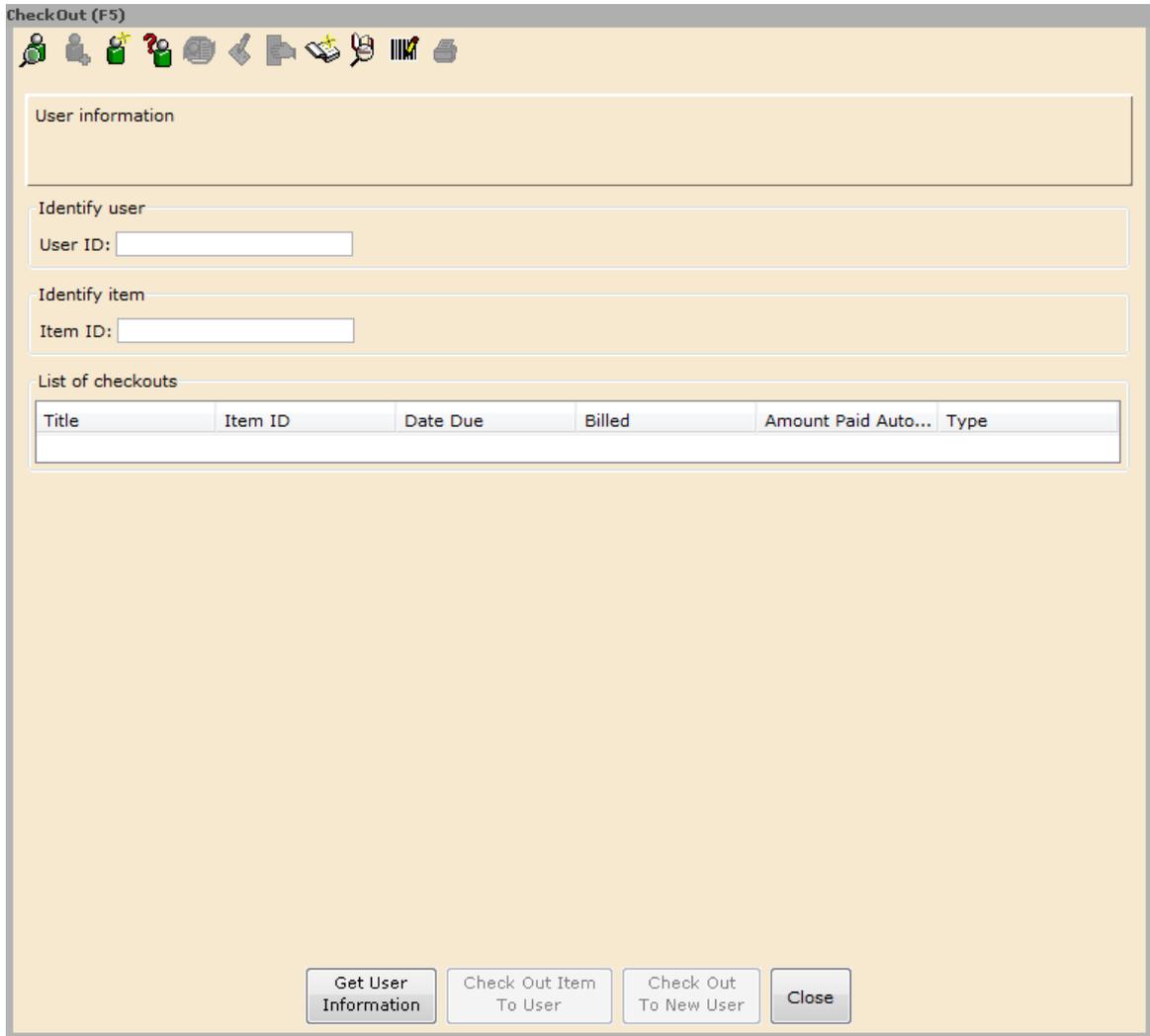


CheckOut Wizard

The **CheckOut** wizard checks-out an item (or several items) to users.

To check out an item

1. On the Common Tasks toolbar, click the **CheckOut** wizard . The following window appears:



CheckOut (F5)

User information

Identify user
User ID:

Identify item
Item ID:

List of checkouts

Title	Item ID	Date Due	Billed	Amount Paid Auto...	Type
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Get User Information Check Out Item To User Check Out To New User Close

2. Scan the barcode from the user's card, or type the **User ID** and tap **Enter** or click **Get User Information**.

3. Scan the barcode on the item, or type the **Item ID** and tap **Enter** or click **Check Out Item to User**.

NOTE: If a window pops up after a barcode is entered, read it and respond before continuing. It could be a piece count for multi-part items which needs an override

code that you will get from your supervisor, a hold notification that has a different override code, or another message that you may need to take action to clear.

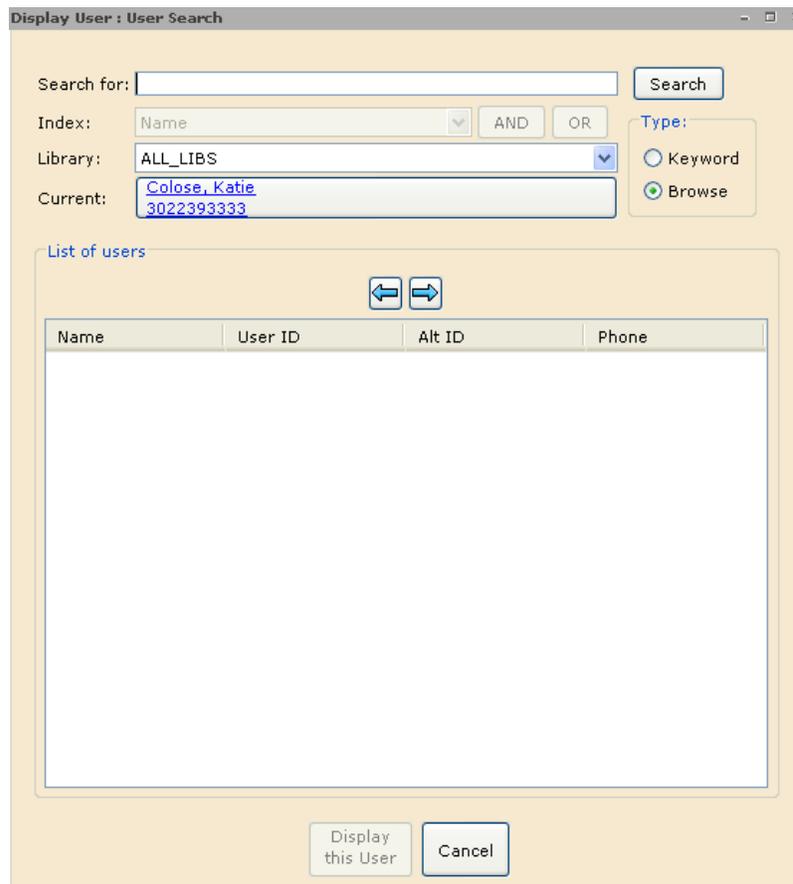
4. Continue entering barcodes until all items are checked out.
5. Click **Close** to exit this window or click **Check Out to New User** to prepare for the next transaction.
6. Depending on the set up at your library, a checkout receipt may print automatically or you may be prompted to print or cancel the receipt.

User Search Helper

The User Search helper is available from many windows in the Circulation module. You can use this helper to locate users when you do not have the User ID.

To locate a user when you do not have the User ID

Click the **User Search** helper  . The following window appears:



Search for: Search

Index: Name AND OR Type: Keyword Browse

Library: ALL_LIBS

Current: Colose, Katie
3022393333

List of users

Name	User ID	Alt ID	Phone
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Display this User Cancel

2. In the **Search for** box, type the name or other criteria to search. The **Name** search allows searching by last name. Truncation is implied only in a Browse search. For example, performing a search on JOH will list users like JOHNS, JOHNSON, or JOHNSTON. **Browse** only allows **Name Index** searching.

3. You can change the search Type to **Keyword** and then search other indexes such as telephone and street. In the **Index** box, select the Index you want to search after you change the Type to Keyword.

4. In the **Library** box, if you are in a multi-library setting, you can qualify the search by a single library or all libraries.

5. Click **Search**. All user records fitting the criteria you entered will display in the **List of users**:

Search for:
Name: COLOSE

Search for: Search

Index: Name AND OR Type: Keyword Browse

Library: ALL_LIBS

Current: COLOSE II, PAUL A.
23910001739872

List of users

Name	User ID	Alt ID	Phone	User Lost C...	Birth Date
COLORADO, ...	23910003779...		302-784-5656		12/9/2008
COLOSE, ALI...	23910004050...		302-475-2221		6/2/2004
Colose, D E	DECOLOSE		3027394748		
COLOSE DIANN	23313000058...		412-398-209...		2/26/1965
Colose, Diann	DICOLOSE		3027394748		
COLOSE, DIA...	23910001739...		302-475-222...		2/26/1965
COLOSE II, P...	23910001739...		302-475-222...		6/13/1971

Checkout To User Cancel

6. Depending on the wizard you are using at the time you click the User Search helper, you will have different options.

7. You may sort the columns by clicking on the header bar. Multiple clicks resorts them lowest to highest and back.

Parts of the CheckOut Screen

The Checkout Screen has up to 4 active sections depending on the activity in the patron record. These actions will be described later in this workbook.

1. **List of checkouts** where items currently being checked out are accumulated.
2. **Current user checkouts** lists items that the patron has borrowed previously. Items can be renewed, checked in, marked lost, claims returned or checked for holds among other actions with a right-click in this section.
3. **Bills** lists the amounts owed and the reasons for the bill. Bills can be paid with a right-click in this section.
4. **Holds** contains items that the patron has placed on hold along with information about their status, expiration and suspension. Holds can be modified to change their pickup location, their expiration date or to suspend them or cancel them with a right-click in this location.

CheckOut (F5)

Alerts Notes

Name: COLOSE, DIANN E. - DDL STAFF
 Id: 23910001739815
 Group ID: COLOSE
 Profile name: STAFF...

Identify user
 User block overridden!

User ID:

Email: decolose@netscape.net
 Home phone: 302-475-2221 EMAIL
 Street: 1906 HARWYN ROAD
 CITYSTZIP: WILMINGTON, DE 19810

Identify item
 Item ID:

List of checkouts

Title	Item ID	Date Due	Billed	Amount Paid Automatic...	Type				
▼ Current user checkouts:3(\$0.00)									
Title	Item ID	Date Charged	Date Due	Recall Date Due	Status	Type			
Harry Potter and the...	33910020150422	3/2/2012,17:25	2/4/2013,23:59			JUVCDBOOK			
Harry Potter and the...	33910037916039	3/2/2012,17:25	2/4/2013,23:59			NCC-BKJUV			
Lasher : lives of the ...	33910039662763	5/31/2012,14:07	2/4/2013,23:59			PAPERBACK			
▼ Bills:1(\$2.00)									
Title	Item ID	Reason	Owes	Billed	Date				
Lasher : lives of the May...	33910039662763	BARCODE	\$2.00	\$2.00	1/14/2013				
▼ Holds:4									
Title	Item ID	Level	Status	Placed	Pickup at	Pickup by	Expires	Suspended	Unsuspened
Things your d...	33806006308...	TITLE	(unavailable)	4/4/2012	BRANDYWINE		4/4/2013	4/4/2012	4/13/2012
The quilter's ...	33813001304...	TITLE	(unavailable)	4/18/2012	BRANDYWINE		4/18/2013		
Library 2.0 : ...	33806001596...	TITLE	(unavailable)	8/1/2012	DESTATELIB		8/1/2013		
Library and in...	33313100116...	TITLE	(unavailable)	8/1/2012	DESTATELIB		8/1/2013		

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