EXERCISE 1: CHECK OUT ITEMS

Objectives: Check out items

Scenario: A patron needs to check out items.

Materials required: A patron barcode (use your own) and an item barcode.

1. Click **Circulation > Check Out**.
2. Enter the patron barcode and submit.
    1. If the patron has no alerts, the **Check Out** tab will activate automatically.
    2. If the patron has alerts, click the **Check Out** tab.
3. Move the cursor to the box next to **Barcode**. Enter the item barcode and click **Submit** or use the **Enter** key on your keyboard.
4. Items will appear in the lower half of the screen, as well as on the **Items Out** tab.
5. Click the **Done** button to complete the transaction.

Notes: ____

____

____

EXERCISE 2: CHECK IN ITEMS

Objectives: Perform Check In

Scenario: An item has been returned and needs to be checked in for shelving.

Materials required: Use the barcode you used in Exercise 1.

1. Click **Circulation > Check In**.
2. Enter the barcode you had checked out to your patron in Exercise 1 in the barcode box on the left side of the screen.
3. Click **Submit** or press the **Enter** key on your keyboard.
4. If you see a Transit or Hold message, read it and click **Do not Print** so the slip doesn't print.

Notes: ____

____

____

EXERCISE 3: CHECK OUT ITEM AND EDIT DUE DATE

Objectives: Check out items and change the checkouts to a specific due date and time.

Scenario: A patron will be traveling and tells you after you've checked out that they will not be able to return books until one month from today. You need to change the due date for the item.

Materials required: Use the patron barcode and the item barcode used in Exercise 1.

1. Click **Circulation > Retrieve Last Patron**.
    1. If the patron has no alerts, the **Check Out** tab will activate automatically.
    2. If the patron has alerts, read the alerts and click the **Check Out** tab.
2. Move your cursor to the box next to **Barcode**. Enter the item barcode and click **Submit** or use the **Enter** key on your keyboard.

3. The item will appear in the lower half of the screen, as well as on the **Items Out** tab.
4. Click the **Items Out** tab.
5. Click the selection box to the left of the item.
6. Right-click on the item and select **Edit Due Date**. A calendar will open. Choose a date 4 weeks from today. The calendar will close, and the due date will update.
   Note: You can also click the **Date Options** button *before* scanning the item to activate the drop-down and select **Specific Due Date**. Note that the **Date Options** button is now a different color. Click the calendar widget on the right side of the date to choose a new date.
7. Right-click on the item again and select **Print Item Receipt.** The print screen will open. Cancel printing the receipt.
8. Stay on this screen for the next exercise.

Notes: ____

____

EXERCISE 4: BILL A PATRON

Objectives: Manually apply a bill to a patron's account.

Scenario: You want to apply a bill to a patron's account.

Materials required: None

1. Use the account from Exercise 3 or go to **Circulation > Retrieve Last Patron** to retrieve the account of the patron you worked with earlier.
2. Click the **Bills** tab.
3. Click the **Bill Patron** button in the middle of the screen.
4. Use the drop-down for Billing Type to choose Misc for faxing and enter amount.
5. Click **Submit Bill**.
6. Stay on this screen for the next exercise.

Notes: ____

____

EXERCISE 5: PAY A BILL ON A PATRON'S ACCOUNT

Objectives: Apply a patron's payment to their account.

Scenario: The patron from Exercise 4 wants to pay their outstanding bill.

Materials required: None

1. Use the patron account from the previous exercise.
2. If the screen is not already in the Bills tab of the patron's account, go there now.
3. Use the checkboxes to select the bill(s) you want to pay.
4. Use the drop-down to select a **Payment Type**.
5. In the **Payment Received** box, enter a payment amount.
6. Click **Apply Payment**. If full payment is made, the Bills tab will show a zero balance.

Notes: ____
____

EXERCISE 6: CHECK IN AND BACK DATE AN ITEM

Objectives: Perform Backdated Check In

Scenario: An item was retrieved from the book drop and needs to be backdated to the previous day.

Materials required: Use the barcode you used in Exercise 3.

5. Click **Circulation > Check In**.
6. Click the calendar widget at the end of the box next to **Effective Date** and choose yesterday's date. A new header will appear as **Backdated Check In**.
7. Enter the barcode you had checked out to your patron in Exercise 3 in the barcode box on the left side of the screen. Click **Submit** or use the **Enter** key on your keyboard.
8. Click on the calendar widget again and click **Today** to return to today's date. Otherwise, all check-ins will be backdated.

Notes: ____
____

EXERCISE 8: REGISTER A PATRON

Objectives: Register a patron

Scenario: A new patron has requested to obtain a library card.

Materials required: None.

1. Go to **Circulation > Register Patron** to register an adult
2. Enter a barcode. Use the Tab key on your keyboard to move to and enter a first name, last name, primary ID Type, email address, daytime phone, profile group, user settings for notification, and address to fill in the fields on the registration form.
   Remember that all information, except for the email address, should be entered in CAPS. Phone numbers cannot have dashes or spaces.
3. When completed, click **Save**.
4. Click **Search > Search for Patrons** to search for your new patron.

Notes: ____

EXERCISE 9: REPLACE A LIBRARY CARD BARCODE (MARK A LIBRARY CARD LOST)

Objectives: Replace a library card barcode (mark a card inactive).

Scenario: The patron you created in the previous exercise lost their library card. Update the barcode in the patron record to give them a new card.

Materials required: Use the name of a patron from the previous exercise.

1. Click **Search > Search for Patron** to find patron's account by name.
2. Retrieve patron by double-clicking on the line with the patron's information.
3. When the account is opened, click the **Edit** tab.
4. Click **Replace Barcode** and enter a new 14-digit barcode ID, starting with the numbers 2100387000.
5. The OPAC/Staff Client User Name field will not be updated with the new barcode. This is to prevent changing a username that has been updated by the patron in their OPAC account. For this exercise, update the field manually with the new barcode number.
6. Click **Save.** Then click the **See All** button next to Replace Barcode to view the previous and current barcodes for this patron account.

Notes: ____
____

EXERCISE 10: ADD AN ALERT TO A PATRON'S ACCOUNT

Objectives: Add an alert to a patron's account that displays when their account is viewed by staff.

Scenario: A patron has given permission for their spouse to use their library card. You would like to create an alert to appear to library staff when their account is viewed in the staff client.

Materials required: Use the patron barcode from Exercise 9.

1. Go to **Circulation > Retrieve Last Patron.** When the record loads, click the **Notes** tab.
2. Click **Create a Note** and select **Alert**.
3. In the title field, enter the text of the alert - include your 3-letter library code and your initials. (WLS-A.P.) Additional information may be entered in the **Note Text…** field. Click **OK**.
4. To remove an alert, go to the **Notes** tab and right-click the alert you entered. Choose **Archive Note**.
5. Stay in this account for the next exercise.

Notes: ____
____

EXERCISE 11: ADD AN OPAC-VISIBLE NOTE TO A PATRON'S ACCOUNT

Objectives: Add a note to a patron's account that is visible in the OPAC.

Scenario: A patron you created earlier left their cell phone behind. You need to post a note on the patron's account that they will see when they log in to their public catalog account.

Materials required: Use the patron from the previous exercise.

1. Use the patron from the last exercise or go to Circulation > Retrieve Last Patron.
2. Click the **Notes** tab.
3. Click the **Note** tab and select the **Patron Visible** box. In the **Title**, enter "Patron left their cell phone in the library." In **Note Text…**, add, "It can be retrieved at Lost and Found." Click **OK**.
4. Open a new tab in your browser and enter the URL for the OPAC. (https://catalog.westchesterlibraries.org/eg/opac/home)
5. Use the patron's barcode and password to log in to the patron's OPAC account and view your note.
6. In the staff client, retrieve the patron record. Go to the **Other** tab and **Message Center**. When the information populates, you will be able to see if and when the patron read the message and if they deleted it.

Notes: ____

____

EXERCISE 12: MARKING ITEMS CLAIMED RETURNED

Objectives: Mark an item claimed returned.

Scenario: Your patron claims that they already returned an item on their account. You want to remove the item from their Items Out and mark it as Claimed Returned.

Materials required: Use the name and/or new barcode for the patron who's card you replaced in the previous exercises and your item barcode.

1. Retrieve the account for your patron.
2. Go to the **Items Out** tab to view the item. If the record does not have an item out, use your item barcode to check out to the patron (see Exercise 1).
3. Right-click on the item and select **Mark Claimed Returned** from the dropdown menu.
4. Enter the item's due date when the item was claimed returned. Click **Submit**.
5. The item has now moved to the **Other/Special Circulations** tab.
6. To view the number of items claimed returned, open the patron's account and click the **Edit Tab**. Look for the **Claims-returned Count**.

Notes: ____

____

EXERCISE 13: PLACING HOLDS IN THE STAFF CLIENT

Objectives: Place a title level hold in the staff client and suspend the hold.

Scenario: A patron is returning from vacation 3 weeks from today and wants to place and suspend a hold.

Materials required: The patron barcode for a patron created earlier.

1. Search the catalog for a title and click the **Place Hold** button.
   *Highlight and copy (Ctrl + C) item barcodes. You will use that barcode in the next exercise.
2. Enter the patron barcode or Search for the patron and click Select to enter the patron barcode.
3. Verify the pick up location and notification information.
4. Click the checkbox by Suspend Hold. Use the calendar or enter a date three weeks from now in MM/DD/YYYY format.
5. Click **Place Hold(s)**.

EXERCISE 14: CAPTURE A HOLD AND VIEW IT ON THE HOLDS SHELF

Objectives: Capture a hold and then view it on the Holds Shelf in the staff client.

Scenario: You need to let Evergreen know that a book has been pulled to be placed on the holds shelf.

Materials required: Use the item barcode you copied in the previous exercise.

1. Click **Circulation > Capture Holds.** You can also capture holds by checking an item in.
2. In the Barcode box, enter the item barcode from the previous exercise.
   The hold has now been captured and will appear on the Holds Shelf for your library.
3. Go to **Circulation > Holds Shelf** to view your item on the Holds Shelf.

Notes: ____

____