

Exercises for the Circulation Module Evergreen Release 1.6

Exercise 1: Check out an item

Objectives: Check out an item, and edit a due date.

Scenario: A patron has brought an item to the desk for check out. You need to check the item out, and edit the due date.

1. Log into the staff client
2. Use the Toggle Button Bar or the Circulation menu to access the Check Out screen
3. Open a new tab. Search for any patron and copy his barcode.
4. Enter the patron's barcode into the Checkout screen. Write down this patron barcode. You will use it in a future exercise.
5. Now, draw a barcode out of the hat.
6. Select an option to change the due date. This is a drop down menu on the right side of the screen (adjacent to Normal U).
7. Enter the item barcode, and click Submit.

Notes: _____

Exercise 2: Check in an item

Objectives: Check in an item, and back date it.

Scenario: An item has been pulled out of the book drop and needs to be dated the day before.

1. Log into the staff client.
2. Use the Toggle Button Bar or the Circulation menu to access the Check In screen
3. In the top right corner of the screen, change the effective date to yesterday. Note the date format
4. Search for an item in the catalog, and copy the barcode. Paste it into the Check In screen.
5. Enter the barcode in the box, and click submit.

Notes: _____

Exercise 3: Register a patron

Objectives: Register a patron and her family.

Scenario: A patron wants to register herself and her family.

1. Open the menu to register a patron.
2. Create a fictional adult patron and fill in all of the blanks that you can.
3. When you are finished filling in the information, click Save and Clone User.

4. Then create a fictional juvenile patron and fill in all of the blanks that you can.
5. Save your new user.

Notes: _____

Exercise 4: Mark a patron card lost

Objectives: Mark a card lost

Scenario: A patron wants to report that his card has been lost.

1. Retrieve the patron record that you just created.
2. Click the Edit button
3. Click the Mark Lost button next to the barcode
4. Enter the new barcode number
5. Save the change in the user's account

Notes: _____

Exercise 5: Marking Items Claimed Returned

Objectives: Mark an item claimed returned

Scenario: A patron claims that he has brought back an item that is still checked out to him.


1. Enter the patron's barcode from the first exercise.
2. Retrieve the item that he has checked out to him.
3. The patron claims that the item has been returned.
4. Use the column picker to mark the item claim returned.
5. Note: The number of items that a patron has claimed returned will automatically update on the his registration form. To view the total number of items claimed returned, click Edit and look at the Contacts? Screen.

Notes: _____

Exercise 6: Placing and Editing Holds

Objectives: Place a hold through a patron's record.

Scenario : A patron asks you to place an item on hold for him. You scan in his barcode to open his patron record. You can use the holds tab to search the catalog and place the hold.

1. Go to **Search**  **Search for Patrons** and enter the patron's barcode that you entered in the first

exercise into the search screen.

2. Enter the Holds area of the patron's record.
3. Search the staff client that appears for a title by your favorite author.
4. Place a hold on the item.
5. After you have placed the hold, refresh the screen by selecting **Reload**.
6. Select the hold, and click the column picker at the right side of the screen to display the option to edit the hold.
7. Edit the hold date to display tomorrow's date.

Notes: _____

Exercise 7: Capturing Holds

Objectives: Capture a hold

Scenario: A hold has been placed, and you need to capture the item and transit the item to the pickup destination.

1. Open the **Pull List for Holds Requests**
2. Open the patron record and view the hold that is **Waiting for Capture**
3. Right click the hold and copy the barcode to the clipboard
4. Open the Capture Holds Screen
5. Enter the barcode
6. The item should appear on the screen with a status of "in transit," "put on holds shelf", etc...

Notes: _____

Exercise 8: Add a note to a patron's record

Objectives: Add a note to a patron's record.

Scenario: A patron has left his umbrella in the library, and you want to make a note for him to pick it up later.

1. Search for the patron barcode that you retrieved earlier.
2. Open the patron record and click the tab labeled, **Other**.
3. Add a note that the patron has left his umbrella in the library and that it can be retrieved at Lost and Found. Make it visible to the patron.
4. Click the **Reload** button to refresh the screen. Notice in the top left corner beneath the patron's name the message to **(See Notes)**.

Notes: _____

