# How to process check out transaction?

- In Lesson 1, we explained how to add a new book: "Paris 1919", by Margaret Macmillan.
- In Lesson 3, we explained how to add a new patron: LastName, FirstName
- This lesson explains how to process check-out transactions manually with the above item's and patron's data.

#### Step 1: Open Check-Out transaction window

| Contrary Administra   | tor - Trial Versio          | n   |                                   |                 |               |  | - 🗆 X         |  |
|---|-----------------------------|---|-----------------------------------|-----------------|---------------|--|---------------|--|
| /1  |                             |   |                                   |                 |               |  | E <u>x</u> it |  |
| Main Add Item   | s/Borrowers                 | Edit/View Table Backu                           | p Mainter                         | nance Help      | Upgrade/Re    | egister  |               |  |
| <b>∬→</b> Check Out   | D Renew                     | / Library                                       |                                   | 🕘 Mana          | ge Loans      | Stions Options   |               |  |
|   |                             |   |                                   | () Manage I     | Reservations  | W Statistics   |               |  |
| 🖇 Check In  | <b>IV</b> Reserve           | 🟃 Borrowers                                     | ;                                 |                 |               |  |               |  |
| Home Page Repo  | orts Labels                 | Statistics                                      |                                   |                 |               |  |               |  |
| Your Li   | brary                       | Name  |                                   |                 |               |  |               |  |
| Address:  |                             | Logo, info                                      | ormation                          | n, descript     | Useful links  |  |               |  |
| Address Line 1<br>City, State, ZIP<br>Phone:<br>Phone Number                      |                             | Enter additi                                    | Enter additional information here |                 |               | <ul> <li>Manuals, Tutorial, Ho to start</li> <li>Library Supplies</li> </ul> | W             |  |
| Mon Thu.: 10 am - 6 pm<br>Fri Sat.: 10 am - 4 pm<br>Sun.: Closed                  |                             |   |                                   |                 |               |  |               |  |
| Librarian   | Name                        |   |                                   |                 |               |  | -             |  |
| I ibrarian  | Dhono                       |   |                                   |                 |               |  | F             |  |
|   | М                           | essages :                                       |                                   |                 |               |  |               |  |
| Total Items :<br>Total Copies :<br>Loaned Out :<br>Overdue :<br>Total Borrowers : | 10 A<br>12 N<br>2<br>1<br>3 | uto Backup will not be<br>Io Backup has been do | done on E<br>one yet              | xit - see Optio | ons/Maintenar | nce.   | •             |  |

• Click Check Out (1).

## Step 2: Select patron manually using Lookup feature

| 6 Circulation - Main Library  |   | - 🗆 X  |  |  |  |  |  |
|---|---|--|--|--|--|--|--|
| Main Add Items / Patrons Edit / View Database Maintenance Backup / Restore                    |   |  |  |  |  |  |  |
| Status: READY   |   |  |  |  |  |  |  |
| CHECK OUT CHECK IN RENEW RESERVE  |   |  |  |  |  |  |  |
| Enter, scan barcode:  |   | L Close  |  |  |  |  |  |
| Borrower  | Item  |  |  |  |  |  |  |
| ET  | •   | ✓ Check Out  |  |  |  |  |  |
| Doe, John<br>LastName, FirstName<br>Smith, John<br>Status:<br>Loans:<br>Overdue:<br>Reserved: | Item Details Lookup Copies Status: Copies Available: Reservations: Loan Date: Due Date: | Clear  Clear  Print Receipt  Preview,Print  Email Receipt  Options  Web Help |  |  |  |  |  |
|   |   |  |  |  |  |  |  |
| Active Loans(0) Loan History(0) Reservation   | n - Borrower(0)   Reservation - Item(0)   |  |  |  |  |  |  |
| Overdue       Renew       Renew All   |   |  |  |  |  |  |  |

- Click the Borrower **Lookup** (1) box in the Borrower section.
- Click on the name in the box.

Note: Entering a character into the Borrower lookup box will result in the immediate action: displays borrower's names that start with letters entered.

#### **Step 3: Review borrower**

| Circulation - Main Library   |                  |  |               |        |          |       | _ 🗆 ×  |
|--|------------------|--|---------------|--------|----------|-------|--|
| Main Add Items / Patrons Edit / View Database Maintenance Backup / Restore                                   |                  |  |               |        |          |       |  |
| Status: CHECK OUT MODE; select Item  |                  |  |               |        |          |       |  |
| CHECK OUT CHECK IN RENEW RESERVE   |                  |  |               |        |          |       |  |
| Enter, scan barcode:   |                  |  |               |        |          |       | Close  |
|  |                  |  |               |        |          |       |  |
| Borrower   | Ite              | m  |               |        |          |       |  |
| LastName, FirstName  | \$               |  |               |        |          | \$    | ✓ Check Out  |
| Borrower Details Lookup  | Ite              | em Details   | Lookup        | Copies |          |       |  |
| LastName, FirstName<br>B00103<br>999-999-9999<br>Student<br>Status:<br>Loans: 0<br>Overdue: 0<br>Reserved: 0 | Sta<br>Co<br>Loa | atus:<br>opies Available<br>Reservations<br>an Date: | :<br>:<br>Due | Date:  | \$       |       | <ul> <li>Clear</li> <li>Print Receipt</li> <li>Preview, Print</li> <li>Email Receipt</li> <li>Options</li> <li>Web Help</li> </ul> |
| Active Loans(0) Loan History(0) Reservation - Borrower(0) Reservation - Item(0)                              |                  |  |               |        |          |       |  |
| Overdue TITLE  |                  | TYP  | E             | I_BARC | ODE LOAI | NDATE | LOANTIME   |
| Renew  |                  |  |               |        |          |       |  |
|  |                  |  |               |        |          |       |  |
| Kenew All  |                  |  |               |        |          |       | Þ  |

- The Borrower tab displays the borrower data.
- Review borrower information (1).

#### Step 4: Select item manually using lookup feature

| Circulation - Main Library  | _ ¬ ×  |  |  |  |  |  |  |
|---|--|--|--|--|--|--|--|
| Main Add Items / Patrons Edit / View Database Maintenance Backup / Restore      |  |  |  |  |  |  |  |
| Status: CHECK OUT MODE; select Item   |  |  |  |  |  |  |  |
| CHECK OUT CHECK IN RENEW RESERVE  |  |  |  |  |  |  |  |
| Enter, scan barcode:  | 1 Close  |  |  |  |  |  |  |
|   |  |  |  |  |  |  |  |
| Borrower  | Item   |  |  |  |  |  |  |
| LastName, FirstName   | € Check Out  |  |  |  |  |  |  |
| Borrower Details Lookup   | A passion for excellence   |  |  |  |  |  |  |
| LastName, FirstName<br>B00103<br>999-999-9999<br>Student                        | Pirats 1919 - six months that chalged the world<br>Pirates of the Caribbean: At World's End/2-Disc Limited Edition<br>The Apollo 13 mission :core events of a crisis in space /<br>The story of Jamestown /<br>Webster's Third New International Dictionary<br>What every student should know about citing sources with APA docume<br>What is acupuncture? How does it work?<br>Wisdom of the ancient one, The<br>Status |  |  |  |  |  |  |
| Loans: 0<br>Overdue: 0<br>Reserved: 0   | Copies Available:<br>Reservations:<br>Loan Date: Due Date:   |  |  |  |  |  |  |
| Active Loans(0) Loan History(0) Reservation - Borrower(0) Reservation - Item(0) |  |  |  |  |  |  |  |
| Overdue TITLE   | TYPE I_BARCODE LOANDATE LOANTIME   |  |  |  |  |  |  |
| Report  |  |  |  |  |  |  |  |
| Kenew   |  |  |  |  |  |  |  |
| Renew All   | Þ  |  |  |  |  |  |  |

- Click the Item **Lookup** (1) box in the Item section.
- Click on the item in the box.

Note: Entering a character into the Item lookup box will result in the immediate action: displays item's titles that start with letters entered.

## Step 5: Review selected item

| 🙆 Circulation - Main Library _ 🗆 🗆 X   |        |   |          |  |  |  |  |  |  |
|--|--------|---|----------|--|--|--|--|--|--|
| Main Add Items / Patrons Edit / View Database Maintenance Backup / Restore                                   |        |   |          |  |  |  |  |  |  |
| Status: CHECK OUT MODE   |        |   |          |  |  |  |  |  |  |
| CHECK OUT CHECK IN RENEW RESERVE   |        |   | 2        |  |  |  |  |  |  |
| Enter, scan barcode:   |        |   | 2        | Close  |  |  |  |  |  |
|  | , U, M |   |          |  |  |  |  |  |  |
| Borrower   | _      | Item  |          |  |  |  |  |  |  |
| LastName, FirstName  | \$     | 🗧 🖌 Check Out   |          |  |  |  |  |  |  |
| Borrower Details Lookup  |        | Item Details Lookup Copies(1)   |          |  |  |  |  |  |  |
| LastName, FirstName<br>B00103<br>999-999-9999<br>Student<br>Status:<br>Loans: 0<br>Overdue: 0<br>Reserved: 0 |        | Paris 1919 : six months that changed the         L000113         MacMillan, Margaret         MAC 940. 3/141         Book         Status: Available         Copies Available: 1/1         Reservations: 0         Loan Date:       Due Date:         07/20/2021       \$ | RIS      | <ul> <li>Clear</li> <li>Print Receipt</li> <li>Preview, Print</li> <li>Email Receipt</li> <li>Options</li> <li>Web Help</li> </ul> |  |  |  |  |  |
| Active Loans(0) Loan History(0) Reservation - Borrower(0) Reservation - Item(0)                              |        |   |          |  |  |  |  |  |  |
| Overdue TITLE  |        | TYPE I_BARCODE  | LOANDATE | LOANTIME   |  |  |  |  |  |
| Renew  |        |   |          |  |  |  |  |  |  |
|  |        |   |          |  |  |  |  |  |  |
| Renew All  |        |   |          | Þ  |  |  |  |  |  |

- The Item tab is activated with the item information.
- Review item information (1).
- Click Check Out (2) to finalize the transaction.

## Step 6: Item is checked out

| 🛞 Circulation - Main Library 💶 🗆 🗙   |                                   |  |   |            |   |  |
|--|-----------------------------------|--|---|------------|---|--|
| Main Add Items / Patrons Edit / View Database Maintenance Backup / Restore                                   |                                   |  |   |            |   |  |
| Status: CHECK OUT MODE   |                                   |  |   | 4          |   |  |
| CHECK OUT CHECK IN RENEW RESERVE   |                                   |  |   |            |   |  |
| Enter, scan barcode:   |                                   |  |   |            | Close   |  |
|  |                                   |  |   |            |   |  |
| Borrower   | Ite                               | em   |   |            |   |  |
| LastName, FirstName  | \$                                |  |   | \$         | ✓ Check Out   |  |
| Borrower Details Lookup  | It                                | tem Details Lookup   | Copies(1)   |            |   |  |
| LastName, FirstName<br>B00103<br>999-999-9999<br>Student<br>Status:<br>Loans: 1<br>Overdue: 0<br>Reserved: 0 | Pa<br>L00<br>Ma<br>Bo<br>St<br>Cc | aris 1919 : six mont<br>00113<br>acMillan, Margaret<br>AC 940. 3/141<br>bok<br>tatus: Checked Out<br>Reservations: 0<br>oan Date: Du<br>7/20/2021 \$08 | hs that changed t<br>2<br>2<br>3<br>e Date:<br>/03/2021 = | he world   | Clear  Print Receipt  Preview,Print  Email Receipt  Options  Web Help |  |
| Active Loans(1) Loan History(4) Reservation - Borrower(0) Reservation - Item(0)                              |                                   |  |   |            |   |  |
| Overdue TITLE  |                                   | TYPE   | I_BARCODE   | LOANDATE   | LOANTIME  |  |
| Renew Paris 1919 . six months that   | changed                           | the wor Book   | L000113   | 07/20/2021 | 13:12   |  |
| Renew All  |                                   |  |   |            | Ð   |  |

Item is checked out:

- The Active Loans table (1) lists the item.
- Status of the item changes to **Checked Out** (2).
- Copies Available decreases by one (3).
- Click Close (4).

# Note: How to display Item/Borrower Lookup boxes in the Check In-Out Window?

| Ø Options - Trial Version  | _ 🗆 X      |
|--|------------|
| General Maintenance Check In/Out Loan Options Fine Options Email Options Users             |            |
| Check In / Check Out Receipt Heading:  | Save       |
|  | X Cancel   |
| Display Auto Processing option   | ? Web Help |
| Barocde Scanning Mode :<br>Timer ENTER key Barcode Options                                 |            |
| Display Check Out Notes Field  |            |
| Display Additional Item Field :  |            |
| Display Additional Borrower Field :  |            |
| Display Check Out Extra1,2 Fields  |            |
| Don't display Check In/Out AutoProcessing Warnings   |            |
| Display Item/Borrower Name Lookup Dropdowns  |            |
| Check In/Out Utility Options:<br>Allow:<br>Loans and Returns<br>Loans Only<br>Returns Only |            |

- In the Options/Check In-Out section, select Display Item/Borrower Name Lookup Dropdowns.
- Click Save.