

Self-Study Module # 5

Looking Up Checkouts and Overdues for a Patron

Real Life Library Scenario	Patron approaches the circulation desk and inquires what books they have checked out. They do not have their card with them.
Assignment	Using the Display User and the User Search helpers , identify all items patron has checked out and/or overdue
Instructions	<ol style="list-style-type: none">1. Open and login to Workflows. Because the Circulation desk usually has the checkout wizard open, we will do this search from within the checkout wizard. Open the CheckOut wizard2. Find the User Search helper at the top left of the CheckOut wizard screen and open it.3. Search for your practice user by entering their name in LastName, Firstname format. Locate them on the list and double-click on their name.4. You should have returned to the CheckOut screen with the User ID entered. Notice that the Display User helper is now active. Click on it.5. The Display User screen offers the most comprehensive look at all data pertaining to your patrons. Feel free to explore the various tabs on this page to see what they contain. For today's assignment, click on the "Checkouts" tab.6. You should see that all items checked out are listed, in order of date checked out. By clicking on any of the title headings, you can sort the list. Click on Title to sort alphabetically.7. Because your computer is not fully set up, I do not recommend printing from this page. When we are fully functional, you will be able to print a list for the patron if needed.8. Now go to the Bills tab to see if they have any outstanding fines.9. Click [Close] to close the Display User screen. If applicable, the patron could continue with checkout at this point.

Terms and Definitions:
Helper A Helper is an icon (small picture) located at the top of the screen when you open a wizard. The helper allows you to complete a specific task without closing the wizard.