

## Checking Out & Renewing Lab – 1

## Checking Out

For this Lab, you will be practicing checking out items. In order to complete this lab, you will need:

- 1 patron record. Use a patron record registered to your own library who does not have a hard block on their account (such as: registration expired or owes money over the max fee limit).
  - You can use your own patron or staff account,
  - Use a test user account you have created,
  - Or use an existing patron record.
- 5 item records. Where and how you are performing the lab activity may dictate how you access the item records. For both options, make sure the items are ones that may be renewed.
  - If in the library, you can pull items from the shelf to scan. Make sure the items are older and not newly acquired copies - new items may not have records in the training database.
  - If performing the lab from home or remote location, use the Find Tool to select item records to use with the activity. You can then copy-and-paste or type in the barcodes to check out and renew.
- Additionally, if your library charges overdue fines, please pull or select 2 additional items to use with this activity.

### 1 – Log In

- 1.1 Navigate to training Leap (<https://ccs-training.polarislibrary.com/leapwebapp>)
- 1.2 Sign in and select the appropriate branch and workstation.

### 2 – Checking Out

- 2.1 Open the patron record.
- 2.2 If the patron's record does not open right to the CHECK OUT tab, navigate to the CHECK OUT tab.
- 2.3 Check out the first item. Scan, type, or paste in the item barcodes in the box labelled, "Enter item barcode."
- 2.4 If any soft blocks appear (such as the patron has a hold ready for pickup or they owe money under the max fine limit), click CONTINUE to proceed with the check out.
- 2.5 Check out two (2) more items. The patron should now have a total of three (3) items checked out.
- 2.6 Proceed to Section 3. Do not complete the transaction.

### 3 – Special Loan

- 3.1 While still in the CHECK OUT tab, click the SPECIAL LOAN button.
- 3.2 Select a due date from the calendar.



- 3.3 Select the button, "APPLY TO ALL ITEMS FOR THIS PATRON."
- 3.4 Click OK.
- 3.5 Double-check that the select date displays in the box next to the Special Loan button.
- 3.6 Check out two more (2) items. The patron should now have a total of five (5) items checked out.
- 3.7 Proceed to Section 4. Do not complete the transaction.

#### **4 – Reset Due Date**

- 4.1 While still in the CHECK OUT tab, select the checkbox next to two (2) items.
- 4.2 Click the RESET DUE DATE button.
- 4.3 Select a due date from the calendar.
- 4.4 Click RESET DUE DATE.
- 4.5 Double-check that the revised due date displays for the two selected items.
- 4.6 If part of a fine free library, click COMPLETE to finish the checkout transaction.
- 4.7 If your library charges fines, proceed to section 5.

#### **5 – OPTIONAL FOR FINE LIBRARIES**

In order to generate fines during the Renewals Lab, we will use Special Loan to create overdue items.

- 5.1 While still in the CHECK OUT tab, click the SPECIAL LOAN button.
- 5.2 Select a due date at least one week in the past.
- 5.3 Select the button, "APPLY TO ALL ITEMS FOR THIS PATRON."
- 5.4 Click OK.
- 5.5 Double-check that the select date displays in the box next to the Special Loan button.
- 5.6 Check out the final two (2) items. The patron should now have a total of seven (7) items checked out.
- 5.7 Click COMPLETE to finish the checkout transaction.

