**BLUEcloud Circulation Checklist and Guided Notes**

**Use this Guide for the following lessons in the BLUEcloud Circulation Training Class:**

* How to Navigate BLUEcloud
* Patron Search
* Patron Registration
* Check In
* Check Out
* Renew
* Special Circulation Functions
* View and Pay Bills
* Viewing and Placing Holds

**Fill in the blanks in the text below using words from the training site.**

**How to Navigate BLUEcloud**: Your BLUEcloud Central login is \_\_\_\_\_\_\_\_\_\_\_ the same as your Workflows login. After you log in, you need to select your \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ before you enter Circulation. The Staff menu will list the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ you have access to. Changing your BC Central password does not change your \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ password.

**Patron Search:** To access patron information, make sure your search \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ is on “Patron Search.”Click on the words \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ to access a full patron record.From the patron record, you have access to the patron’s \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, \_\_\_\_\_\_\_\_\_\_\_\_\_\_, and \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

**Patron Registration:** On the Add New Patron window, you can immediately \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ or \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ after you have entered a new patron's information.

**Check In:** Click the check-in quick link to access check-in from \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ within Circulation. To check an item in, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ or type the item barcode you have in hand.If there are any special instructions, such as items going into \_\_\_\_\_\_\_\_\_\_\_\_\_ or \_\_\_\_\_\_\_\_\_\_\_\_, those will appear.

**Check Out:** To check out an item, you will need to first pull up the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ account.Make sure the search \_\_\_\_\_\_\_\_\_\_\_\_\_\_ is on “Patron Search.”Click on \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ to check out an item.On the Check Out screen \_\_\_\_\_\_\_\_\_\_\_\_\_\_ or \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ the item barcode.The item(s) you just checked out are now listed under \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ with “New” next to each one.

**Renew an Item:** Renewing items can be done through the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ record of the patron who has checked out the item(s) in question.When renewing, users have the option of selecting whether the renewed items were \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ or \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.Items renewed through \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ or \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ stations are marked as being renewed unseen.Be sure to select the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ next to each item you want to renew.If one or more renewals \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, the dialog box gives a reason for the failure.If the patron would like a receipt with their new due date, select the items before choosing \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ to print a receipt.

**Special Circulation Functions**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_makes it easy to know what to do with items that have been left out or left behind.

Sometimes items are using in the library without being checked out. With \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, library staff can note usage even without the item(s) being checked out.

With Receive Items in Transit, it is easy to \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ items to their intended \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

**View and Pay Bills:** To pay a bill, locate the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ account and select \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.Select a bill from the list, choose \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. Select a \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Type from the drop-down list. This field is \_\_\_\_\_\_\_\_\_\_\_\_\_\_. In the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ box, type the payment amount. This field is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. Payments recorded against an \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ bill only apply to that bill. If the amount tendered exceeds the amount owed, the user receives change but may still owe for other bills.

**Viewing and Placing Holds:** You can place a hold in two different ways: from the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ record or from the catalog.

To place a hold from a patron record, locate the \_\_\_\_\_\_\_\_\_\_\_\_\_\_ who you want to place a hold for. Select \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. Choose \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Hold. Complete the fields as required. Choose \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Hold to place the hold.

To place a hold from the catalog, locate the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ you want to place a hold on. Choose \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Hold. Complete the fields as required. Choose \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Hold to place the hold.

Please keep in mind that if \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ in Workflows do not allow Holds to be placed, the hold will \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ be placed in BLUEcloud Circulation.