

BLUEcloud Circulation Exercises



Exercises are meant to help you better learn how to use BLUEcloud circulation. There may be some exercises that you cannot complete because your library does not use that feature.

Exercise #1 – Patron Search

Search and display your own patron record.

Exercise #2 – Patron Registration

Note: Before you add a new patron, please consult with your INFOhio Provider. If your district participates in nightly patron updating, you may create a duplicate patron. For this reason, it is best to contact your INFOhio Provider to determine whether you should manually add patrons.

Create a test patron with the following information

Patron ID: AUTO

Patron Type: [your choice]

First Name: My

Last Name: Tester

Library: [choose your library]

Click "Proceed to Contact Info" to save your new patron OR click "Check Out Items" and move to the next exercise.

Exercise #3 – Check-Out an Item

Grab an item off the shelf and check it out to your My Test patron or to your own patron record.

If you are not immediately proceeding to the next exercise, hang on to this item or jot down the title and barcode until you are ready to move on.

Exercise #4 – Check-In an Item

Check-in the item you checked out in exercise #3.

You may also want to use this exercise to check in other items that have been returned to your library.

Exercise #5 – Renew an Item

This exercise will require you to use a patron that currently has an item or items checked out. If you do not have an existing patron to use, consider checking items out to your own patron record or the My Tester record and come back to this exercise later.

- A. Renew an item as Unseen
- B. Renew an item as Seen

Exercise #6 – Viewing and Paying Bills

This exercise will require you to use a patron that currently owes fines or fees. If you do not have an existing patron to use, consider creating a bill (in WorkFlows) on your own patron record or the My Tester record.

- A. Display a patron who has a bill on their record.
- B. Make a partial payment on a patron record.
- C. Make a full payment for the remainder of this patron's bill.

Exercise #7 – Searching the Catalog and Placing Holds

Skip this exercise if your library does not use holds. This exercise will require you to use an item that is currently checked out. If you do not know of a title currently checked out, consider checking an item out to your own patron record or the My Tester record. After completing Exercise #8, you will need to use WorkFlows to remove the hold(s) if needed.

- A. Search the catalog and place a hold for your own patron record or for the My Tester record.
- B. Please a hold from your own patron record or from the My Tester record.

Exercise #8 – Viewing Holds

Skip this exercise if your library does not use holds.

Using the patron from Exercise #7, display the item(s) they have placed a hold on.

You will need to log into WorkFlows to remove this hold if needed.