Check in items

Learn how to perform a standard check in.

Standard check in

1. On the left panel click Check In.
2. The default Check in Mode should be at Auto.
3. Optional. Set the Branch Location to a specific pickup location. See Set the Branch Location at check in.
4. Select a Receipt Option.
5. Scan or enter the barcode into the Item Barcode field. If using a scanner it typically reads and processes the check in with each scan. If typing in the barcode you will need to press Enter or click the Check In button.
6. Scan or type additional items.

Each item appears in the Check In list, including the name of the patron each item was on loan to.

Note: The Action column tells you what you need to do with the item next.

The Hold or routing slip prints, if the printing option is chosen and the item needs to be held or routed. The Email Preview window will appear if the email option is selected.

(Optional). Click Clear to clear the list of returned items from the Check In screen.

Configure columns

Note: Preferences are retained per your user account.

You can choose the columns that appear on the Check In screen.

1. On the right side of the screen, click the User Preferences button (⚙).
2. In the Show Columns window, check or uncheck the columns you want to show or hide.
   - The columns you checked or unchecked are shown or hidden.
   - Select All to configure all the column headings for display.
   - Copy Number information will only display for LHR items that were created or updated after 18 September 2022.
3. Close the Show Columns window by clicking anywhere outside it.

Set the Branch Location at check in

Optionally update an item’s last seen statistics to specify a location inside a branch while checking the item into the
system.

The system will continue to fulfill holds and item schedules if the item is checked in at the pickup branch.

- If your library has more than one pickup location per branch, consider checking in items at the specified pickup location to ensure that the Clear Hold Shelf report can list items at each location. The Clear Hold Shelf report provides each item's last-seen location.

Note: Checking in an item from any other interface will set the item's last-seen statistics at the branch level only. Any previously recorded branch location or free text value will be removed. This includes check-ins and pulling items using Digby, RFID-enabled book returns, and sorting machines.

Any user with a Circulation or Student Worker role can set a Branch Location from the Check In screen. By default, the current Branch will display. To specify a more exact location for the check in, use the Edit button to open the editing options.

From the Check In screen:

1. Use the Edit button next to Branch Location. Options include:
   1. Select any Branch Location currently configured for your branch.
   2. Enter a one-time, custom location value up to 50 characters in length.
   3. To update the last seen location to your current branch only, leave the entry box blank. This will clear any previously selected location.
2. Click Update.

**Watch a video**

Check in (4:46)

In this five-minute video, you’ll learn how to check in materials in WorldShare Circulation, including printing or emailing a check in receipt, and processing items that fulfill a hold or need to be routed to another branch.

**Check in mode**

The standard check in above uses the Auto (default) mode. You can choose another check in mode:

- **Auto (default):** Use for normal transactions. Auto mode performs all of the normal actions associated with check-in (removes the item from the patron record, triggers a hold, sends the item to a shelving or pickup location, etc.).
- **Non-loan Return:** Use to check in items that were used, but not checked out (items from the reference collection, items that are on reserve, or items found in a reading room). This mode updates the item’s Soft Issued Count on the item Statistics screen.
• **Inventory**: Use when conducting an inventory (for example, you are performing a shelf-read and scanning barcodes of items that are present). This mode updates the item’s Inventoried Count and Last Inventoried date on the item Statistics screen. Refer to Inventory for more information.

• **Delete Hold**: Use to delete a hold on an item that is on the pickup shelf, but has not yet expired. This mode checks the item in and cancels the hold for the patron that had been notified that the item was ready for pickup.

### Print or email receipt (Optional)

#### Select a Receipt Option

- **Do not print**: Check in items without printing HOLD, SCHEDULE, or ROUTING receipts.
- **Email**: Use to email CHECK_IN receipts.
- **Printer**: (network or receipt printer, if available): Use to print CHECK_IN, HOLD, SCHEDULE, or ROUTING receipts.

#### Print HOLD, SCHEDULE, or ROUTING receipts

The following receipts are automatically available for printing when the item is checked in:

- **HOLD receipt**: The item is needed to fulfill a hold at the current branch.
- **SCHEDULE receipt**: The item is needed to fulfill an item schedule at the current branch.
- **ROUTING receipt**: The item needs to be routed to a different branch.

Note: The HOLD, SCHEDULE, and ROUTING receipts cannot be emailed.

#### Print or email CHECK_IN receipts

The CHECK_IN receipt is not automatically available for email or network printing when an item is returned by a patron. To email or print the CHECK_IN receipt in the staff interface:

1. Select **Email** or **Network Printer** as the **Receipt Option**.
2. Select the items by clicking the check box next to the item’s Title. To select all items, click the check box at the top of the first column.
   - The email option will only display if all items selected are for a single patron.
3. Click **Receipt**. A confirmation screen appears to Print or Email the receipt.

As an alternate to printing or manually emailing check-in receipts to patrons, enable the Automatic Checkin Receipt Notification. See Additional Patron Notifications.

Libraries using ZFL-Server integration may also print the Shipping Receipt from the Check In screen for items that need to be shipped to a different institution. As with the CHECK_IN receipt, the staff user must select one or more items from the Check In table and then click the Shipping Receipt button. See Integration Workflow for more information.
Notes on emailing a receipt

- Receipts use the email address provided in the patron's record.
- If there is no email address in the patron record, the Email field will be empty. In order to send the patron an email receipt, you must add their email address to their patron record and then resend the receipt.
- If the patron wants the email to be sent to a different email address, you can edit the email address on the Email Preview window.
- Changing the email address on the Email Preview window does not change the email address in the patron record.

For more information on receipts, see Circulation Receipts.

Backdate check in (Optional)

Backdating the check in date of items will remove any accruing fines a patron incurred after that date. Reasons for backdating may include a facility emergency, weather related closing, or a staff in-service day.

Note: To avoid the need to backdate the check in date, enter regular and special hours in the WorldCat Registry. See Open Hours for more information.

1. Click the calendar button next to the Check In Date.
2. In the calendar window, click a date to select the new check in date.
3. Optional. Click the time box below the calendar to select a new check in time.
4. The window closes and the system displays the date you selected.
   ◦ The specified check in date remains in effect until changed.
5. After specifying the date and time, check in the items to be backdated.

Status of checked-in items

Checked-in items have the status Recently Returned for the length of time set in Service Configuration (WorldShare Circulation > Collection Type Policy). For more information, see Collection Type Policy. For more information on statuses, see Item statuses.