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SELF CHECKOUT

The self checkout profile is a limited account that only allows Check In, Check Out, Simple Search, and optionally, Homeroom Check Out.

INITIAL SETUP

CREATE A PATRON GROUP

1. Go to **Patron > Patron Groups**.
2. Click **New**.
3. Enter "Self Checkout" into the Name field.
4. Set the patron group as Staff.
5. Check the checkbox for Library Staff to allow the account to log into the ILS.
6. Click **Save**.

Patron > Patron Groups -- 0 Record(s) Found

Name: Security Level: Nickname:

☐ Student ☒ Staff ☐ Others ☐ Term due date: 10/29/2017

☐ Computer ☐ Allow Internal ILL ☒ Library Staff ☐ Search Mediagraphy
☐ Warn Textbook Checkout By Schedule ☐ Include in report ☐ Default
☐ Allow Search All Schools in OPAC ☐ Require Book Review Approval
☐ Local Group: ☐ OPAC Default Search Resource Manager
☐ Ask Librarian ☐ Locked, Do not update Patron info in this group
☐ Allow Publish Event ☐ Require Event Publishing Approval
☐ Allow Change Pickup Library For Reserves

Max Digital Size: MB Per File
Max Digital Upload: Files

Notes:

Group Working Libraries

Library ID	Library Name
0001	Insignia Library
0004	North Branch
9999	Online Resource
0005	Resource Center
0002	South Branch
0006	Textbook Warehouse

Editing History

Created	Created By	Last Modified	Last Modified By
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Patron Name:

CREATE THE SELF CHECKOUT ACCOUNT

1. Go to **Patron > Find/Add Patron**.
2. Click **New Patron**.
3. Enter a Last Name (i.e. Checkout).
4. Enter a First Name (i.e. Self).
5. Enter a Patron ID (i.e. sc####, the #s being the corresponding library ID).
6. Check the checkbox beside the Self Checkout patron group that was previously set up.
7. Click **Save**.
8. Click **Set Password**.
9. Enter the new password and confirm the password to be used to log into the Self Checkout account.



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Patron > Find/Add Patron - 1 Record(s) Found

Find Patron Patron Additional Info Additional Info II Family Links Notes History Reading Preferences Communication

Barcode: [Field] Patron ID: sc0001

Last Name: Checkout Staff ID: [Field]

First Name: Self Homeroom: (No Homeroom)

Middle Name: [Field] Issue Date: 10/20/2017

Nick Name: [Field] Expire Date: 10/20/2029

Gender: ☐ F ☐ M ☐ Prefer not to disclose Date Of Birth: [Field]

Patron Group: ☐ K12/LIB ☐ Mediography ☐ Public ☒ SelfCheckout ☐ Staff ☐ Standard Demo ☐ Student Search

Circ Type: Staff Status: Active

RM Circ Type: Staff rm Library: Insignia Library

Phone No: 7(80) - [Field] Pickup Library: [Field]

Cell Phone: [Field] Site: [Select a Site]

Email: [Field] Notes: [Field]

Address: [Field] Warning Information: [Field]

City: Edmonton State: TX

Country: USA

Zip Code: [Field]

Credit: \$0.00

Editing History: Created, Created By, Last Modified, Last Modified By

SET UP SECURITY PERMISSIONS

The Self Checkout patron group will need to have permissions set up to control what features the Self Checkout accounts have access to.

1. Go to **Administration > Security**.
2. Select Self Checkout from the Group dropdown menu.
3. Click **Edit**.
4. Click on the Others permission in the left grid.
 - 4.1. Check the checkbox beside Self Check out in the right grid.

Administration > Security

Groups Patrons

Group: SelfCheckout

Module: All

Permission Description: Other permissions to access specific features.

Feature Description: Enable to modify system based parameters in Administration > System > Parameters such as Material Type.

Permission	Read	Add	Edit	Deleted	Scope
Acquisitions					
Administration					
Assets					
Catalog					
Circulation					
Digital					
Global Changes					
Help					
Inventory					
Others					
Patrons					
Print Reports					
Search					
Textbooks					

Feature	
Change System Based Parameters	
Clone Quick Toolbar	
Discovery Layer Manager Change	
Insignia Discovery Layer Manager	
Kiosk	
Self Check out	

Buttons: Edit, Save, Cancel, Refresh, More...



5. To enable access to the Check In feature, click on the triangle beside Circulation in the left grid.
 - 5.1. Click Check In left grid.
 - 5.2. Check the checkboxes beside Asset Check In, Library Book Check In, and Textbook Check In in the right grid, depending on what types of items you would like this account to be able to check in.

Group	Module	Permission	Read	Add	Edit	Deleted	Scope	Feature	Save	Cancel	More...	
SelfCheckout	All	Acquisitions										
		Administration										
		Assets										
		Catalog										
		Circulation										
		Alerts										
		Check In							<input checked="" type="checkbox"/>			
		Check Out										
		Digital										
		Global Changes										
		Help										
		Inventory										
Others												
Patrons												
Print Reports												

6. To enable access to the Check Out feature, click on the triangle beside Circulation in the left grid.
 - 6.1. Click Check Out in the left grid.
 - 6.2. Check the checkboxes beside Asset Check Out, Library Book Check Out, and Textbook Check Out in the right grid, depending on what types of items you would like this account to be able to check out.
 - 6.3. Check the checkbox for Homeroom Check Out to allow this feature to appear in the Self Checkout account.
 - 6.3.1. To enable Homeroom Check Out to appear in Self Checkout accounts in general, go to **Administration > Library Setting > Configuration**, search for the setting called "Show Homeroom Checkout In Self Checkout" and enable it.
 - 6.4. Check the checkbox beside Print Receipt to allow receipts to be printed.
 - 6.4.1. To enable the printing of receipts in Self Checkout accounts in general, go to **Administration > Library Setting > Configuration**, search for the setting called "Allow Print Receipt In Self Checkout" and enable it.
7. Click **Save**.



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Administration > Security

Groups Patrons

Group: SelfCheckout
Module: All

Permission Description: Permissions to access Check Out feature.

Feature Description: Enable to allow Textbooks to be checked out through Circulation > Check Out.

Permission	Read	Add	Edit	Deleted	Scope	Feature	
Acquisitions						Asset Check Out	<input checked="" type="checkbox"/>
Administration						Claim Returned	<input type="checkbox"/>
Assets						Collect Fine	<input type="checkbox"/>
Catalog						Computer Booking	<input type="checkbox"/>
Circulation						External ILL	<input type="checkbox"/>
Alerts						Homeroom Check Out	<input checked="" type="checkbox"/>
Check In						Library Book Check Out	<input checked="" type="checkbox"/>
Check Out						New Patron	<input type="checkbox"/>
Digital						Print Receipt	<input checked="" type="checkbox"/>
Global Changes						Print Textbook Check Outs	<input type="checkbox"/>
Help						Search Local Patron Only	<input type="checkbox"/>
Inventory						SRP	<input type="checkbox"/>
Others						Textbook Check Out	<input checked="" type="checkbox"/>
Patrons						View Fine	<input type="checkbox"/>
Print Reports						View Fine History	<input type="checkbox"/>
						View Loan History	<input type="checkbox"/>
						Waive Fine	<input type="checkbox"/>

Save
Cancel
Refresh
More...