

## Circulation Helpers

Revision Date: November 2017

All wizards in WorkFlows contain a Helper Bar located across the top of each wizard. The helpers contained in each wizard provide easy access to information needed by the wizard currently opened.

Most helpers are shared by multiple wizards. The icons for the helpers match the wizards with the same name in the WorkFlows groups.

*Unavailable wizard are greyed out.*

User Search Helper:



The User Search Helper is used to identify a user.

Searches:

Keyword – Displays any user whose account contains the search information.

Browse – Displays an alphabetic list of users. Select the user needed.

Properties: Any changes to the User Search Helper properties will apply globally to the User Search Helper in all the wizards. Important: Changing the search library will affect the search library when checking for duplicate users in the User Registration wizard.

Wizards: CheckOut, Renew User, Billing a User, Paying Bills, Display User, Modify User, Copy User, Confirm Address, Renew Privilege, Suspend User, Remove User, Unsuspend User, Mark Item Lost, Place Hold, Display User Holds, Modify Holds for User, Remove User Hold, Place Research Holds, User Claims Returned, Modify Due Dates, Ephemeral

Display User Helper:



The Display User Helper is used to display information about a user. All tabs from a user's account is displayed except the Privilege tab. The Display User Helper does not allow information in the user's account to be changed.

Properties: No properties can be changed for the Display User Helper.

Wizards: CheckOut, Renew User, Billing a User, Paying Bills, Modify User, Copy User, Confirm Address, Renew Privilege, Remove User, Place Hold, Display User Holds, Modify Holds for User, Remove User Holds, Place Research Hold, User Claims Returned, Modify Due Dates, Ephemeral

Register New User:



The Register New User Helper is used to register a new user during checkout.

Properties: Any changes to the Register New User Helper properties will apply globally to the Register New User Helper in all the wizards.

Wizards: CheckOut, Place Hold, Place Research Holds, Ephemeral

Modify User:



The Modify User Helper is used to change information to an user's account.

Properties: No properties can be changed for the Modify User Helper

Wizards: Display User

Renew Privilege:



The Renew Privilege helper is highlighted when a user's privilege will expire within 30 days. Only the user's privilege can be extended with this helper. Other user information is not available to update. This helper contains the User Display Helper to allow staff access to user information including checkouts, bills and holds.

Privilege extended:

Normal – Defaults to 3 years for most users and 4 years for students

Special – Allows staff to select a new expiration date. If a special expiration date is selected, staff must enter the standard RSA override.

Properties: Any changes to the Renew Privilege Helper properties will apply globally to the Renew Privilege Helper in all the wizards.

Wizards: CheckOut, Renew User, Paying Bills, Place Hold, Place Research Hold, Ephemeral

Confirm Address Helper:

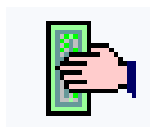


The Confirm Address Helper allows staff access to update the user's address information only. This helper contains the User Display Helper to allow staff access to user information including checkouts, bills and holds.

Properties: Changes cannot be made to the Confirm Address Helper defaults.

Wizards: CheckOut, Place Hold, Place Research Hold, Ephemeral

Pay Bills Helper:



The Pay Bills Helper is used to accept payment for bills during a circulation activity. This helper is only available if the user has unpaid bills. This helper will take staff to a screen where unpaid bills may be paid or canceled.

Properties: Any changes to the Pay Bills Helper properties will apply globally to the Pay Bills Helper in all the wizards.

Wizards: CheckOut, Discharge, Fine Free Discharge, Renew User, Renew Item, Display User, Place Hold, Place Research Hold, Ephemeral

Add Brief Title Helper:



The Add Brief Title Helper is used by staff to create a "on the fly" temporary record for an item that has not been cataloged. The Add Brief Title Helper is not to be used for permanent items in a library's collection. Items created using the Add Brief Title Helper are to be fully cataloged when the item is discharged.

Properties: Any changes to the Add Brief Title Helper properties will apply globally to the Add Brief Title Helper in all the wizards.

Wizards: CheckOut, Ephemeral

Item Search Helper:



The Item Search Helper is used to search for and display item information. The Item Search Helper can perform a Keyword, Browse or Exact searches.

Properties: Any changes to the Item Search Helper properties will apply globally to the Item Search Helper in all the wizards.

Wizards: CheckOut, Discharge, Fine Free Discharge, Renew Item, Billing a User, Check Item Status, Suspend User, Unsuspend User, Change Item ID, Mark Item Missing, Mark Item Lost, Place Hold, Display Title Holds, Display Item Holds, Remove Item Hold, Modify Hold for Item, Place Research Holds, Trap Holds, Change Item ID, Mark Item Used, Inventory Item, Ephemeral, Discharging Bookdrop

Change Item ID:

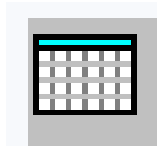


The Change Item ID Helper is used to replace a missing or damaged ID for an item during checkout.

Properties: Any changes to the Change Item ID Helper properties will apply globally to the Item Search Helper in all the wizards

Wizards: CheckOut, Discharge, Fine Free Discharge, Check Item Status, Renew Item, Trap Holds, Mark Item Used, Inventory Item, Ephemeral

Special Due Date Helper:



The Special Due Date Helper is used during checkout to increase or decrease the normal loan period. The Special Due Date Helper can be used on a single item or on all the items being checked out by a user.

Properties: No properties can be changed for the Special Due Date Helper.

Wizards: CheckOut, Renew User, Renew Item, Ephemeral

Charge History Helper:

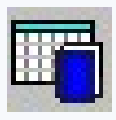


The Charge History Helper displays charge history information if a patron has requested the feature be turned on. If charge history has been turned on for a patron, this helper will be activated when the patron's account is accessed. The system starts recording history after the feature has been turned on. Prior history is not available.

Properties: No properties can be changed for the Charge History Helper.

Wizards: Checkout, Renew User

Limit List By Due Date



Helper:

The Limit List by Due Date Helper is used to limit displayed items by the due date. A gadget is used to limit a list of items due on or before a specific date.

Properties: Changes cannot be made to the Limit By Due Date Helper defaults.

Wizards: Renew User

Detailed Hold Count



Helper:

The Detailed Hold Count Helper provides hold counts for a specific library on a specific title.

Properties: Any changes to the Detailed Hold Count Helper properties will apply globally to Detailed Hold Count in all the wizards.

Wizards: Display Title Hold, Display Item Hold

Copy User Helper:



Properties: No properties can be changed for the Copy User Helper

Wizards: User Registration

Printer Helper:



The Print Helper is used to print information from the current wizard. In the CheckOut wizard the Print Helper allows staff to select the type of information to send to the printer.

Properties: No properties can be changed for the Printer Helper.

Wizards: CheckOut, Discharge, Fine Free Discharge, Display User,

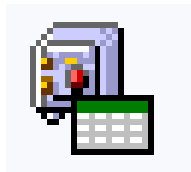
Select Another Library Helper:



Properties: No properties can be changed for the Select Another Library Helper.

Wizards: Onshelf Items, Pending Transits

Export Onshelf Holds



Helper:

Properties: No properties can be changed for the Export Onshelf Holds Helper

Wizards: Onshelf Items

## Unavailable Helpers:

Several wizards contain helpers for functions in WorkFlows not currently available to RSA member libraries.

Pay User Group Bills



Helper:

Wizards: Paying Bills

Display User Group Hold



Helper:

Wizards: Display User, Display User Holds

Remove User Group Hold:



Wizards: Remove User Hold

Display User Group Bills:



Wizards: Display User

Display User Group Charges:



Wizards: Display User

Display Full Credit Account Transaction History:



Wizards: Display User

Questions??

Contact the RSA help desk at [rsahelp@railslibraries.info](mailto:rsahelp@railslibraries.info) or RSA staff at 866-940-4083