

Place Hold Wizard Helpers

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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 additional information possibly 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 a list of users in alphabetic order by last name. Select the user needed.

Properties: Any changes to the User Search Helper properties will apply globally to the User Search Helper in the wizards listed below.

Wizards: CheckOut, Renew User, Billing a User, Paying Bills, Display User, Modify User, Copy User, Confirm Address, Renew Privilege, Suspend User, Send Message, 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, User Lost Card, Modify Due Dates, Ephemeral

Display User Helper:



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

Properties: There are no properties available to change for the Display User Helper.

Wizards: CheckOut, Renew User, Billing a User, Paying Bills, Modify User, Copy User, Confirm Address, Renew Privilege, Send Message, 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 the wizards listed below.

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

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. When selecting the special expiration date 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 the wizards listed below.

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

Confirm Address Helper:

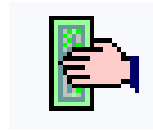


The Confirm Address Helper allows staff access to update the user's address information only. This helper contains the User Display Helper to allow staff access to user information including checkouts, bills and holds.

Properties: Do not make changes 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 the wizards listed below.

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

Item Search Helper:



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

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

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, User Lost Card, Inventory Item, Ephemeral, Discharging Bookdrop

Questions ?? Contact the RSA help desk at rsahelp@railslibraries.info or RSA staff at 866-940-4083.