

Workflows Circulation Quick Reference Guide

Revised May 2022

Check-out

1. Select the Checkout Wizard (F5)
2. Scan or type the customer barcode
3. Scan or type items barcodes
4. Click [Check out to New User] (Alt-k) to return to step 2 above.

Renewing a Single Item

1. Select the Renew Item wizard ([Shift]+F7)
2. Scan or enter the barcode of the item to be renewed.

Renewing Multiple Items for a Patron

1. Select the Renew User wizard (F7)
2. Scan or type the patron barcode to see a list of materials charged out.
3. Select materials to be renewed and click [Renew Selected Items] (Alt-o)

Checking out a Patron w/o Library Card

1. Select the Checkout Wizard (F5)
2. Click on the User Search helper at the upper left of the Checkout screen
3. Enter patrons name (Last, First) and hit [Enter]
4. If multiple patrons have the same name, choose the correct patron from the resulting list

Paying Bills (Fines)

1. Click the Paying Bills wizard [Alt-F8]
2. Scan or enter patron barcode (User ID)
3. Enter Payment amount in 0.00 format
4. Select payment type (normally Cash)
5. Hit [Enter] or click [Pay Bills] (Alt-o) to complete payment

Paying Bills (fines) from Discharging/Check-in

1. Scan in item barcode
2. Select Paying Bills helper from top of discharging screen
3. Enter Payment amount in 0.00 format
4. Select payment type (normally Cash)
5. Hit [Enter] or click [Pay Bills] (Alt-o) to complete payment

Paying Bills (fines) from Checkout Wizard

1. Scan or type the customer barcode
2. If patron owes \$\$, a box will display showing them as “delinquent” or “blocked”
3. Click on [Pay Bills] (Alt-i)
4. Enter Payment amount in 0.00 format
5. Select payment type (normally Cash)
6. Hit [Enter] or click [Pay Bills] (Alt-o)
7. Click [Checkout to User] (Alt-k) to return to checkout.

Checking In (Discharging)

1. Click the Discharge/Check-in wizard
2. Scan or type barcodes of returned materials

Renewing an Expired Library Card from Checkout

1. Scan patron card. A box saying “Privilege has expired” will appear.
2. Click [Review User Record] to review address information.
3. Click [Extend Privilege] to renew
4. If errors were found in address information, use Confirm Address helper to update.

Renewing a “soon to expire” library card from Checkout

1. Scan patron card. A box saying “User Privilege will expired xx/xx/2007” will appear
2. Click [OK] or [Enter]
3. Select Renew Privilege helper from top of Checkout screen
4. Select “normal” or select a “special” privilege expiration date using calendar gadget
5. Click [Extend Privilege] or [Enter]

Replace a Missing Barcode on book/item

1. Select Change Item ID wizard [Shift]-F6
2. Locate item in catalog and click [Change Item ID]
3. Place new barcode on book and scan or enter

Quick Tips

- In **Discharge**, keep an eye on the screen and always make sure you clear any pop-up boxes before scanning the next item
- When in doubt, look for a **Helper**. Helpers are the icons at the top of each wizard screen and are very important in completing tasks in Workflows
- Tap the **F1 key for Help**. F1 will open the online help files specifically to whatever task you have open

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