



Discharging (Check In) Items Cheat Sheet

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There are several wizards in WorkFlows that can be used to discharge (check in) library materials.

There is a video guide accompanying this cheat sheet which can be found here:
<https://www.youtube.com/watch?v=ajgP5mte-7U>.

The Common Tasks toolbar in the Circulation Module contains two discharge wizards.

1. In the Common Tasks toolbar, the second wizard is the **Discharge** wizard. Use this wizard for:
 - Any routine discharge of items
 - Closely watch the screen for popups
 - Holds
 - Intransits
 - Bills
 - Lost Items
 - Special notes
 - Fines will be assessed for overdue materials
Use this wizard for your daily discharges.
2. The third wizard in the Common Tasks toolbar is the **Fine Free Discharge** wizard. Use this wizard for:
 - Discharging items without adding fines to the patron's account
 - Closely watch the screen for popups:
 - Holds
 - Intransits
 - Lost Items
 - Special notes
 - Fines will not be assessed for overdue materials.
Use this wizard for amnesty events, items found on the shelf, and forgiving fines for items kept late under special circumstances (illness, snow storm, etc.).

The Special toolbar contains one discharge wizard.

3. The **Discharging Bookdrop** wizard is the sixth wizard in the Special toolbar. This wizard is fourth in the Common Tasks toolbar if you are in the Circulation+ module (as opposed to just Circulation). The Discharging Bookdrop wizard contains a gadget to allow backdating of discharged items.
 - Use for discharging items placed in the library bookdrop overnight.
 - Closely watch the screen for popups:
 - Holds
 - Intransits
 - Bills
 - Lost items
 - Special notes
 - Fines will be assessed for overdue materials.
Use this wizard anytime you need to use a previous date for discharging items. This wizard is used for items in the bookdrop, unexpected library closed dates due to weather, electrical problems, etc.
4. If a wizard contains Enhanced Circulation, placing the cursor on any information for an item and right clicking the mouse will expand a drop-down menu with several options.
 - Select a single item or a group of items from the patrons Current Checkout list.
 - Right click the mouse to receive a drop-down menu.
 - Select “Discharge” from the drop-down menu.
 - A confirmation box will popup. Select ‘OK’”
 - The item will disappear from the Current User checkout screen.
 - If the item has a hold, a hold popup box will appear.
 - If the hold is for one of your library’s patrons:
 - Print hold receipt or record the information.
 - Follow your library’s procedures for notifying patrons of holds
 - If the hold is for a patron at another library:
 - Print a hold receipt or record the information.
 - Follow your library’s procedures for ILL delivery.

Important:

Keep watching the discharge screen. If a box pops up during discharge and it is not addressed, the next scan will close the popup box and discharge the first item. The second item scanned in this case *will not discharge*.

Each time an item is scanned, there is an audible beep. Scanning an item that closes a box will also produce a beep.

Contact the RSA help desk at help@rsanfp.org or call 866-940-4083.