MobileStaff Guide

Last updated: September 23, 2024

MobileStaff is a limited feature set mobile version of WorkFlows available to all RSA libraries. Due to security concerns, we can only install this product on library-owned Apple and Android devices (tablets, etc.). Popular uses for MobileStaff include inventory, outreach, patron registration, mark item used, and accessing the pick list. MobileStaff was previously called MobileCirc and has since been renamed.

To Install MobileStaff (Library Owned Devices Only):

Download the app from Apple App or Google Play Store. You must be connected to the internet to download the app and use MobileStaff. Unlike Workflows, your device does not need to be on a network IP allowed through RSA's firewall. MobileStaff works on any internet connection. To install the app, you will need to know the device's app store username and password (Apple ID or Google Username for Android devices.)

To Activate Your Device, Contact RSA Staff:

The app will not work after installation until the activation process is completed by RSA Support Staff members. On first launch, the app will stop at the License Activation screen. At this point you need to contact the RSA help desk to do a screen sharing session or bring the device to an event with RSA Staff in attendance. Once you have access to the activation barcode, on the far-right side of the Activation URL line, click the barcode symbol. Once the device camera is showing on screen, point if at the activation barcode with will auto-populate the required activation information and allow you to use MobileStaff.

MobileStaff 2.0 Feature Set:

- Check Out: Check out items to a patron. This feature is also available when using MobileStaff in Offline mode.

- Check In: Check in borrowed items returned by patrons. This feature is also available when using MobileStaff in Offline mode.

- Renew by User: Renew selected items borrowed by an individual patron.

- Renew by Item: Renew a borrowed item by typing or scanning an item ID or barcode. This feature is also available when using MobileStaff in Offline mode.

- <u>In-House Use</u>: Anonymously record the use of items within the library by typing or scanning an item ID or barcode. This feature is also available when using MobileStaff in Offline mode.

- <u>Holds by User</u>: Display, modify, or cancel selected holds for an individual patron.
- Add User: Register a new patron. This feature is also available when using MobileStaff in Offline mode.

- <u>Modify User</u>: Modify a patron's record.

- <u>Event</u>: Record a patron's attendance at a library event anonymously, or by typing or scanning a patron ID or barcode. Turn on self-service use of this feature, so that patrons can record their attendance without intervention by library staff.

- <u>Item Status</u>: Display an item's current location and status by typing or scanning an item ID or barcode.

- <u>Holds Pull List</u>: Produce an interactive shelf list of items in the stacks that need to be fetched to satisfy holds. From the list displayed, you can tap to select an option to *trap* the item before routing to the holds shelf, or to mark the item as missing.

- <u>Hold Shelf</u>: Manage items on the hold shelf. You can organize the list items displayed with filters and a "sort" function. From the list, you can process items to remove holds, mark items as missing, or process inactive holds. You can also modify items on the hold shelf to change details such as pickup library, pickup by date, expiration date, and suspension dates.

- <u>Inventory</u>: Perform inventory checking by typing or scanning item IDs/barcodes. This feature is also available when using MobileStaff in Offline mode. Optional audible alerts can notify you when an item is shelved incorrectly. This feature is only available when using MobileStaff while connected to the library system server.

- <u>Deselect</u>: Produce an interactive shelf list of items seldom or never borrowed, or which have not circulated since a specified date. From the list displayed, you can tap to select an option to withdraw an item from the catalog (check the item out to your discard user) or mark the item as missing.

- <u>One-tap access to current record:</u> Look up the last patron or item record accessed in various contexts using a single tap.

- <u>Catalog search</u>: Search the catalog by keyword when performing various operations.

- <u>Patron search:</u> Look up a patron record by ID/barcode or by alternate ID. Additionally, you can search for a patron record by other fields such as the patron's name.

- <u>Email receipts</u>: Send a Circulation receipt by email to a patron.

- <u>Print receipts</u>: Print a Circulation receipt for a patron using your portable Bluetooth receipt printer.

- <u>Patron photo capture</u>: Take a photo of the patron using the device camera and upload it to the patron's record.

- <u>Patron registration—duplicate record check</u>: Check to see if the patron being registered matches an existing patron record before saving the new record.

- <u>Patron registration from driver's license data</u>: Register a new patron quickly and accurately by scanning information from a U.S./Canadian driver's license using your Bluetooth barcode scanner or magstripe reader.

- <u>Kiosk mode</u>: Give trusted patrons the ability to check in or check out items independently, without intervention by library staff. Restrict the use of MobileStaff features so that patrons are prevented from gaining access to another patron's details.

- <u>Offline mode</u>: Use MobileStaff when you do not have a connection to the library system server or when there is no internet connection available. Limited features available. RSA does not recommend using this feature.

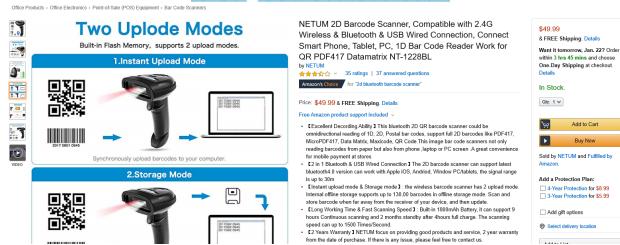**<u>Inexpensive Bluetooth Scanner For Use With MobileStaff:</u>**

RSA has procured and evaluated the following Bluetooth scanners with Apple devices. These are affordable options for making MobileStaff easier to use that also work as a backup scanner for your computers. The scanners come with a USB adaptor for use on computers or laptops without built-in Bluetooth. As of September 2024, these scanners cost around $50 on Amazon.

Scanner Info: NETUM 2D Barcode Scanner model NT-1228BL.

Amazon product link:
https://www.amazon.com/gp/product/B07CBS52KJ/ref=ppx_yo_dt_b_asin_title_o04_s00?ie=UTF8&psc=1

Scanner Info: Tera Wireless 1D2D QR Barcode Scanner model HW0002

Amazon product link: https://www.amazon.com/Tera-Wireless-Barcode-Scanner-Handheld/dp/B086VCBM25/