



WorkFlows Circulation Quick Reference Cheat Sheet

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Help

1. When in doubt, look for a **Helper**. Helpers are the icons at the top of each Wizard screen
2. Click (F1) for **Help**. F1 will open the online help files specific to the task you have open.

Checkout

1. Select the Checkout Wizard (F5)
2. Scan or type the patron barcode
3. Scan or type item 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 type 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
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) for next checkout.

Checking In (Discharging)

1. Click the Discharge/Check-in Wizard
2. Scan or type barcodes of returned materials
3. Always make sure you clear any pop-up boxes before scanning the next item.

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
3. Click [*Extend Privilege*] to renew
4. If the address information needs correction, use the Confirm Address helper to update.

Renewing a “soon to expire” Library Card from Checkout

1. Scan patron card. A box saying “User Privilege will expire xx/xx/xxxx” 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. Find item in catalog and click [*Change Item ID*]
3. Place new barcode on book and scan or enter