



Resource Sharing Alliance
715 Sabrina Drive
East Peoria, IL 61611
866-940-4083 & 309-315-9123

WorkFlows Basic Circulation Workshop Guide

Last updated: July 7, 2026

There is a video to accompany this guide which can be found here:

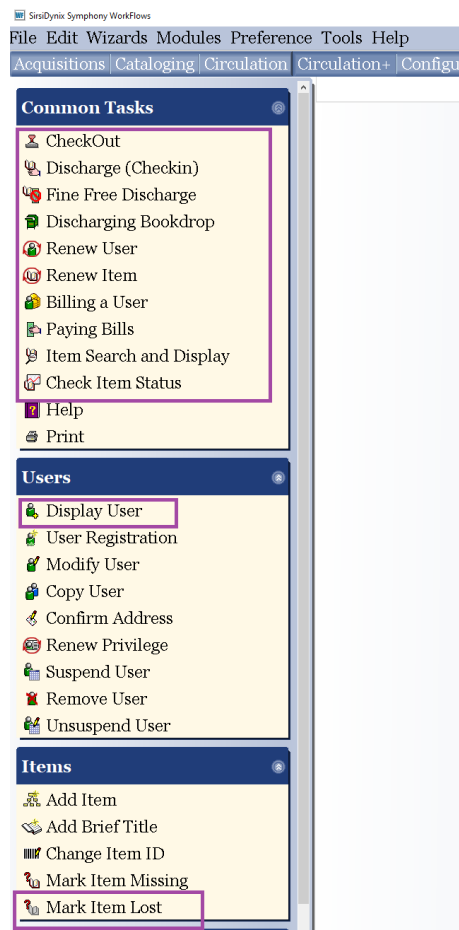
<https://www.youtube.com/watch?v=bz4cNWqcYYY>.

This workshop covers basic skills in using WorkFlows Circulation+. It does not cover patron registration or holds and how they work.

This workshop covers:

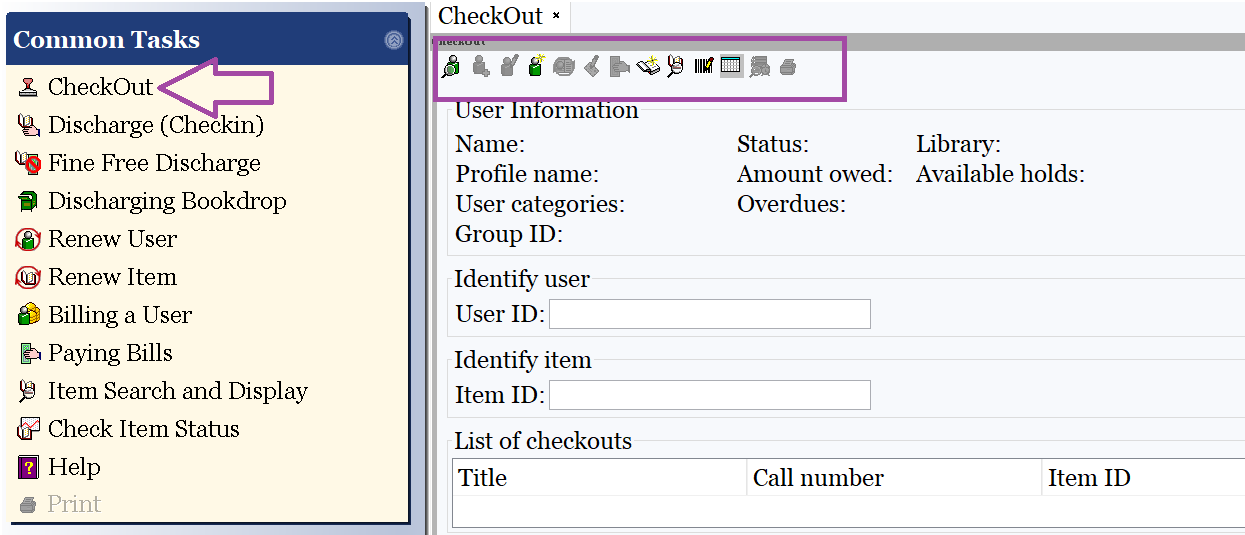
- Checkout
- Discharge (3 types)
- Renew User/Item
- Billing a User/Paying Bills
- Marking an Item Lost
- Display User
- Check Item Status

Resource Sharing Alliance



In the Common Tasks group, the first wizard that will be discussed is CheckOut. This is the main wizard used by Circulation front desk staff. An important thing to remember is that WorkFlows allows you to do the same thing in multiple places.

Once in the checkout wizard, the first thing to do is to click into the User ID box and scan the patron's library card. If they do not have their card with them, staff can look them up. They will do this with the User Search Helper (little green man with magnifying glass).



Common Tasks

- CheckOut
- Discharge (Checkin)
- Fine Free Discharge
- Discharging Bookdrop
- Renew User
- Renew Item
- Billing a User
- Paying Bills
- Item Search and Display
- Check Item Status
- Help
- Print

CheckOut

User Information

Name: Status: Library:

Profile name: Amount owed: Available holds:

User categories: Overdues:

Group ID:

Identify user

User ID:

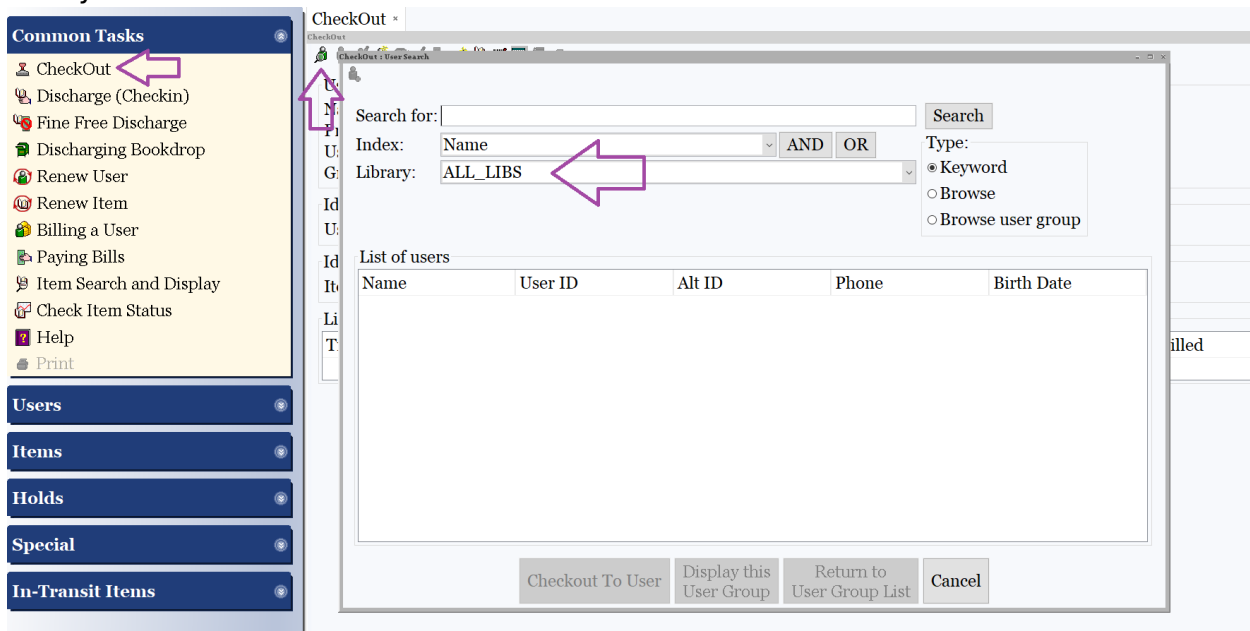
Identify item

Item ID:

List of checkouts

Title	Call number	Item ID
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One thing to make sure staff are looking for is whether they are searching all libraries for the patron, or just their library. This can be set to default to search All Libraries or a specific library.



Common Tasks

- CheckOut
- Discharge (Checkin)
- Fine Free Discharge
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- Renew User
- Renew Item
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- Help
- Print

CheckOut - User Search

Search for: Search

Index: Name AND OR

Library: ALL_LIBS

Type: ☒ Keyword ☐ Browse ☐ Browse user group

List of users

Name	User ID	Alt ID	Phone	Birth Date
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Checkout To User Display this User Group Return to User Group List Cancel

Once the patron has been located, staff needs to make sure that the correct patron has been selected.

Common Tasks

- CheckOut
- Discharge (Checkin)
- Fine Free Discharge
- Discharging Bookdrop
- Renew User
- Renew Item
- Billing a User
- Paying Bills
- Item Search and Display
- Check Item Status
- Help
- Print

Users

Items

Holds

CheckOut •

User Information

Name: NASLUND, AMY Status: OK Library: AG_ALS-PDC
 Profile name: ADULT... Amount owed: \$0.00 Available holds: 0
 User categories: Y Overdues: 0
 Group ID: Privilege expires: 10/12/2025

Identify user

Street: 40 NAUGHTY CAT LN
 City, state: MEOWINGTON IL
 Zip: 48169
 Phone: 309-435-5228
 Email: CATNIPADDICT@KITTY.COM

User ID: SNDEMO2

Identify item

Item ID: []

List of checkouts

Title	Call number	Item ID	Date Due	Billed	Amount Paid Automatic...	Type

The next helper in the CheckOut wizard is the Display User Helper (little green man with + sign). This gives the staff the same information that they would find in the Users Group, Display User wizard. It shows all the information the system has on that specific patron.

Circulation+ | Configuration | GlobalMod | ILL | Offline

CheckOut ×

CheckOut

Display User

The next helper in the CheckOut wizard is the Modify User Helper (little green man with pencil). This gives the staff the option of updating the patron's account if needed. It also shows the same information that they would find the Users Group, Modify User wizard. If the patron is from another library, the only information staff can change is phone number, email address or pin, per the [User Card Policy](#).

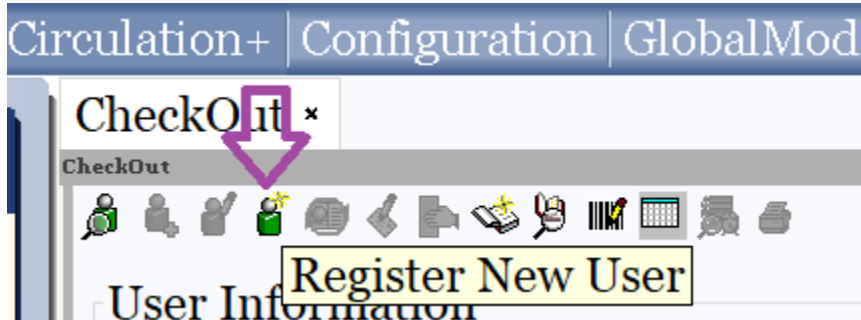
Circulation+ | Configuration | GlobalMod | ILL | Offline

CheckOut ×

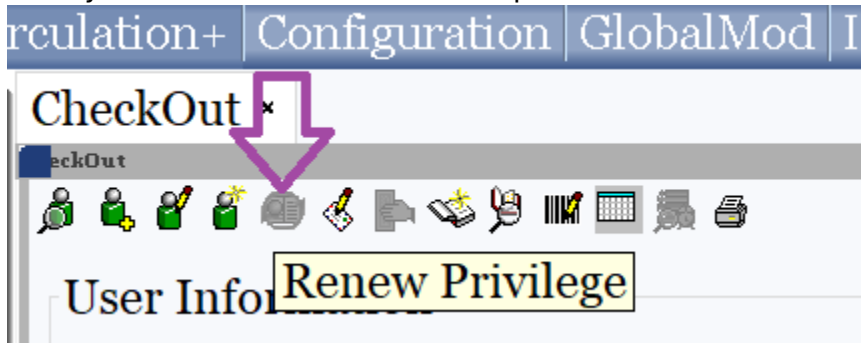
CheckOut

Modify User

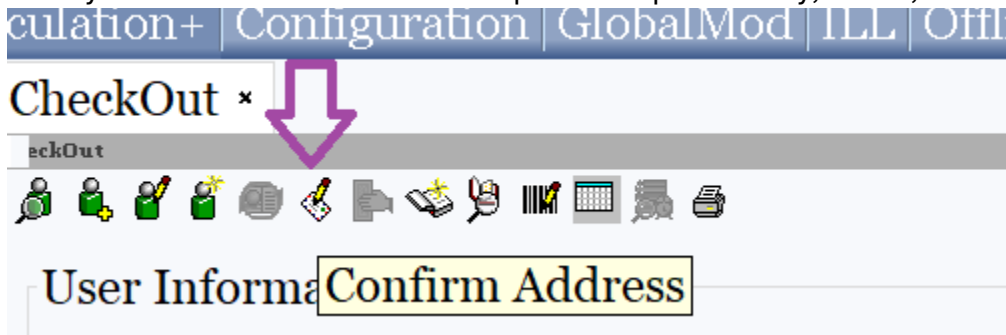
The next helper in the CheckOut wizard is the Register New User helper (little green man with star). This gives the staff the option to sign a new patron up for a library card. It is not suggested that staff use this helper. If a new patron would like a card, it is best to close out the CheckOut Wizard and open the Register New User Wizard in the Users Group.



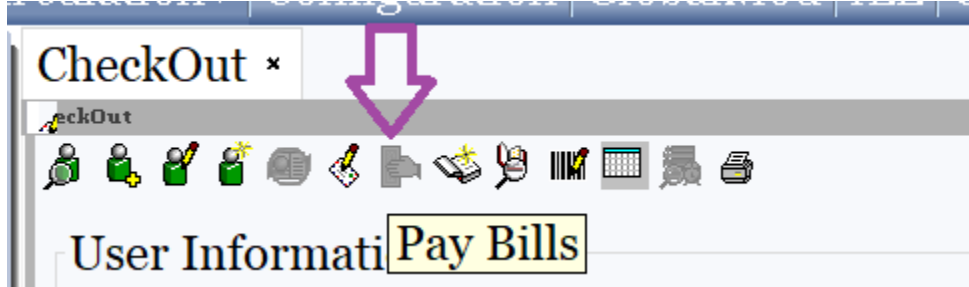
The next helper in the CheckOut wizard is the Renew Privilege helper (ID icon). This helper will be grayed out and unavailable for selection unless a patron's account is expired. This gives the staff the option of renewing a patron account like they would be able to do in the Modify User wizard in the Users Group.



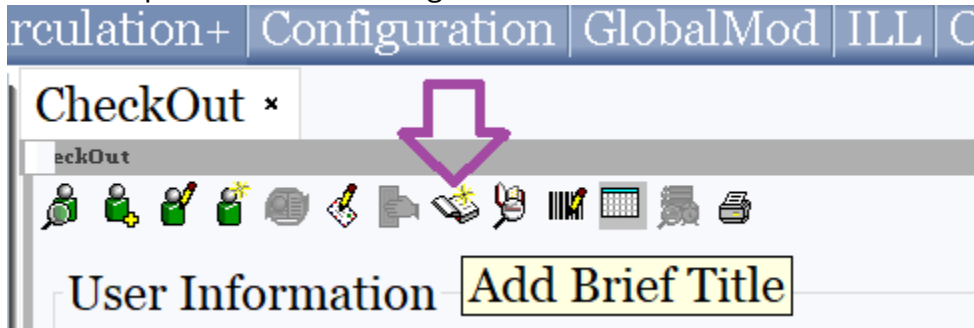
The next helper in the CheckOut wizard is the Confirm Address helper (envelope with pencil). This helper is used to confirm or update a user address while in the checkout screen. This gives the staff the same option to edit the information like they would in the Modify User wizard in the Users Group. This helper is rarely, if ever, used.



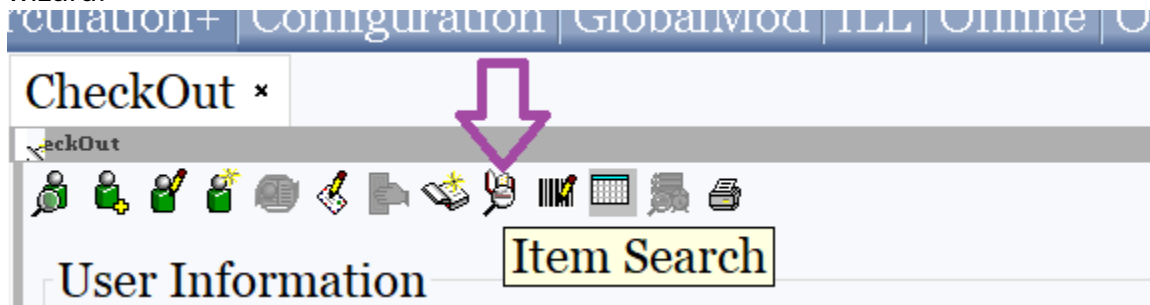
The next helper in the CheckOut wizard is the Pay Bills helper (money with hand). This helper will be grayed out and unavailable for selection unless the patron has a bill of some kind on their account. This gives staff the option to pay off any bills prior to checkout. This gives staff the same payment options as the Paying Bills wizard in the Common Tasks group.



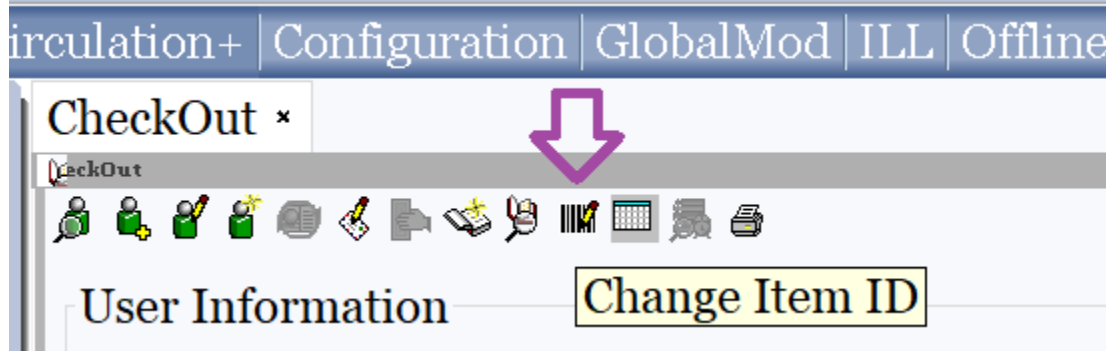
The next helper in the CheckOut wizard is the Add Brief Title helper (open book). This helper is for staff who have been given permission to add brief titles for items. This is helper for adding a record for an item on the fly during checkout and only should be used by those who have permission to catalog.



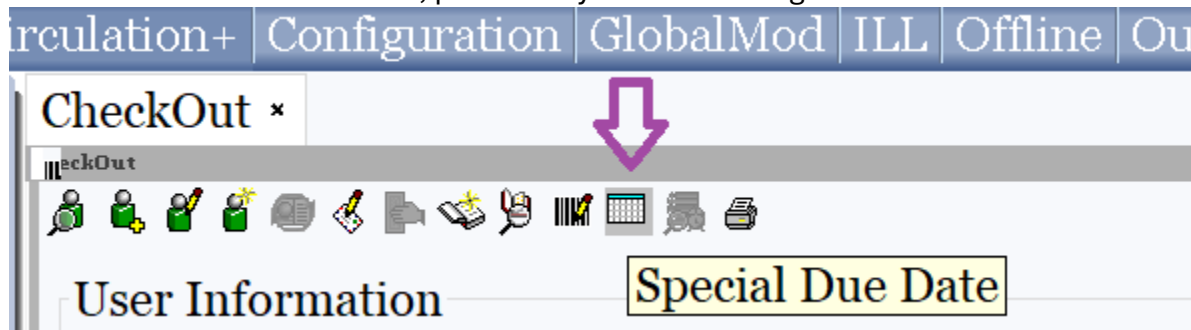
The next helper in the CheckOut wizard is the Item Search helper (book with magnifying glass). This helper should not be used by staff to search for items. It is very easy to accidentally check an item out to a patron from this helper. If staff needs to search for an item, they need to close the CheckOut wizard and open the Item Search and Display wizard.



The next helper in the CheckOut wizard is the Change Item ID helper (barcode with pencil). This helper, like the brief title helper, is for staff who have been given permission to modify item records. This is helper for replacing/updating a bad barcode for an item on the fly during checkout and only should be used by those who have permission to catalog.



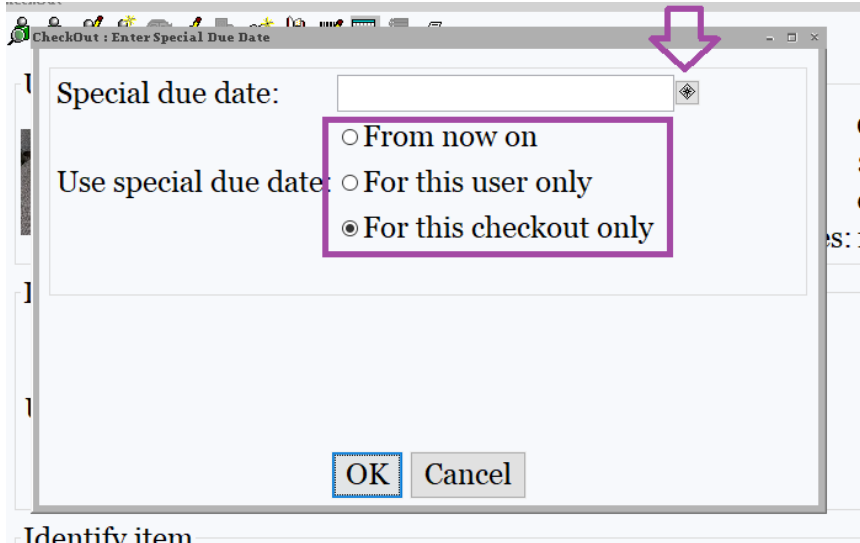
The next helper in the CheckOut wizard is the Special Due Date helper (calendar). This helper is for staff to set a nonstandard due date for a patron. Examples of when this could be used include giving extended time for a vacation, hospitalization, library closure, etc. It should be used in moderation, particularly when checking out other libraries' items.



There are 3 separate options for giving a patron a special due date:

- From now on
- For this user only
- For this checkout only

When selecting a date, make sure the time portion is always set to 23:59pm.



CheckOut: Enter Special Due Date

Special due date:

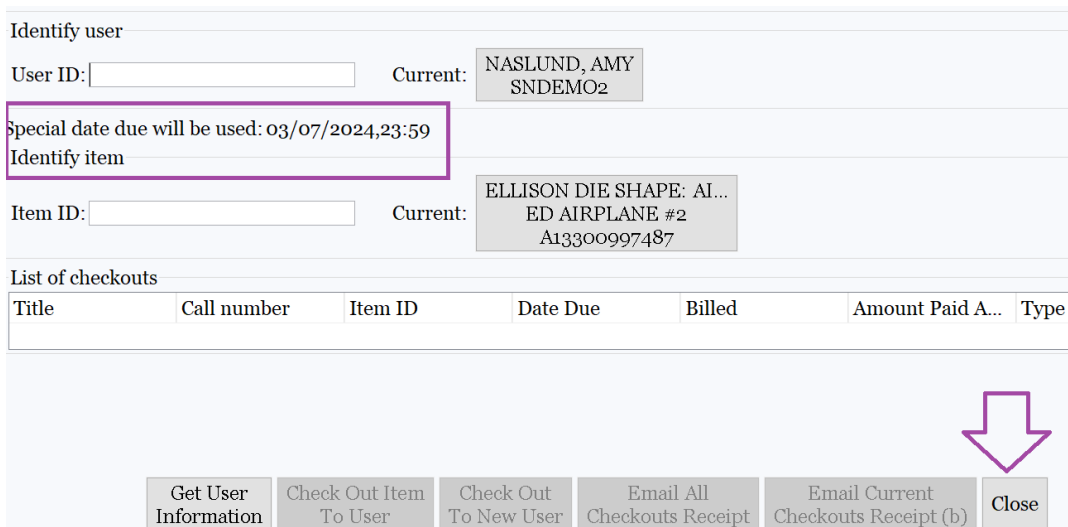
Use special due date: ☐ From now on
☐ For this user only
☒ For this checkout only

OK Cancel

For this checkout only will give only the next item checkout to the patron the special due date. It works for only a singular item.

For this user only will give that specific patron the special due date. It will include everything they checkout after the date is selected. Once that patron is finished checking out, the date will reset to the standard checkout times for the next patron.

From now on will give the selected due date to every patron that checks out until the CheckOut wizard is closed.



Identify user

User ID: Current: NASLUND, AMY
SNDEMO2

Special date due will be used: 03/07/2024,23:59

Identify item

Item ID: Current: ELLISON DIE SHAPE: AI...
ED AIRPLANE #2
A13300997487

List of checkouts

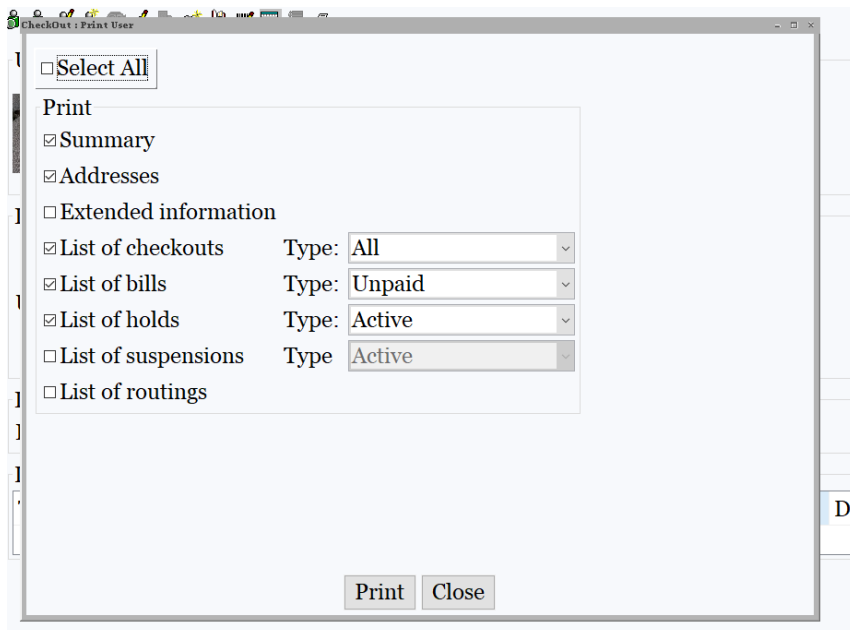
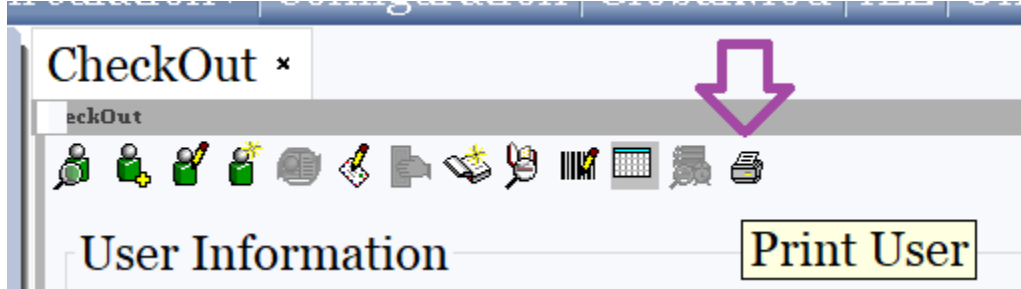
Title	Call number	Item ID	Date Due	Billed	Amount Paid A...	Type

Get User Information Check Out Item To User Check Out To New User Email All Checkouts Receipt Email Current Checkouts Receipt (b) Close

The next helper in the CheckOut wizard is the Charge History helper (stack of books with magnifying glass). This helper will be grayed out and unavailable for selection if the patron does not have their charge history turned out. If they do have active charge history, it will give a list of the patron's history.



The next helper in the CheckOut wizard is the Print User helper. This helper gives a menu of options to print from the patron's account.



Once an item has been checked out to the patron, it will appear in the List of checkouts section. This will display the Title, Call Number, Item ID, Due Date and Item Type.

CheckOut *

User Information

Name: NASLUND, AMY Status: OK Library: AG_ALS-PDC
 Profile name: ADULT... Amount owed: \$0.00 Available holds: 0
 User categories: Y Overdues: 0
 Group ID: Privilege expires: 10/12/2025

Identify user

User ID: SNDEMO2

Identify item

Item ID:

Street: 40 NAUGHTY CAT LN
 City, state: MEOWINGTON IL
 Zip: 48169
 Phone: 309-435-5228
 Email: CATNIPADDICT@KITTY.COM

List of checkouts: 1

Title	Call number	Item ID	Date Due	Billed	Amount Paid Automatic...	Type
ELLISON DIE SHAPE: A...	ED AIRPLANE #2	A13300997487	3/14/2024,23:59			EQUIP-MISC

The next Wizards in the Common Tasks group are the discharge wizards. Discharge is what the system calls returning/checking in items. There are three types of checking in: Discharge, Fine Free Discharge and Discharging Bookdrop. All three work in the same way but have specialized uses.

Common Tasks

- CheckOut
- Discharge (Checkin)
- Fine Free Discharge
- Discharging Bookdrop
- Renew User
- Renew Item
- Billing a User
- Paying Bills
- Item Search and Display
- Check Item Status
- Help
- Print

The Discharge (Checkin) wizard is the general check in wizard. This wizard is used for general returns. When an item is scanned, it will show up in the List of discharges and display the patron's information. It is very important to pay attention when returning items. If a box pops up to show a hold notification or transit information and staff scans the next item (instead of accepting the pop up), the item scan will close the pop-up box but not discharge the item. This is how items get back on the shelf while still checked out to patrons.

Discharge (Checkin) - Identify Item

User Information

User ID: SNDEMO2
 Name: NASLUND, AMY
 Profile name: ADULT...
 User categories: Y
 Group ID:

Status: OK
 Amount owed: \$0.00
 Overdues: 0
 Privilege expires: 10/12/2025

Library: AG_ALS-PDC
 Available holds: 0

Identify item

Item ID:

List of discharges

Title	Item ID	Route/Transit To	Amount Billed	Amount Paid Automatically	User
ELLISON DIE SHAPE: AIRPL...	A13300997487	EQUIP			SNDEMO2

Examples of Hold and Transit Pop up boxes:

Library:
 Available holds:

Item Discharged - A66701671805

Hold is available

Item ID: A66701671805
 Call number: YA FIC COL
 Copy: 2
 Title: The Hunger Games
 Author: Collins, Suzanne author.

Routing Information

Make Hold Available

Item on hold for:

User ID: SNDEMO1
 Name: NASLUND, RORY E
 Phone: 309-435-5228

OK

Item Discharged - A66701671805

Item now in transit

Item ID: A66701671805
 Call number: YA FIC COL
 Copy: 2
 Title: The Hunger Games
 Author: Collins, Suzanne author.

Routing Information

Route/Transit To W1_WASHSUN

OK

The Fine Free Discharge wizard is for libraries that charge late fees. This type of discharge can be used for special occasions such as amnesty weekends, unexpected closures, food for fine events, etc. It removes the actively accruing late fines. If a late fee had been previously stopped due to renewal, that charge is “completed” and will not be removed. Only those that are actively being accrued are affected by this type of discharge.

Fine Free Discharge *

Fine Free Discharge : Identify Item

User Information

User ID: SNDEMO2
 Name: NASLUND, AMY Status: OK Library: AG_ALS-PDC
 Profile name: ADULT... Amount owed: \$0.00 Available holds: 0
 User categories: Y Overdues: 0
 Group ID: Privilege expires: 10/12/2025

Identify item

Item ID:

List of discharges

Title	Item ID	Route/Transit To
ELLISON DIE SHAPE: AIRPLANE #2	A13300997487	EQUIP

The Discharge Bookdrop wizard is to be used when the library wants to back date when items are returned. With this wizard, staff can select a different date and the system will return the items with that date instead of the current date. This is used for items returned overnight, on weekends or for unexpected closures. For example, a library that is closed on Sundays would use this wizard on Monday morning while returning items in the return bin. They would set the date to the previous Saturday and patrons would not be charged late fees for days the library is not open.

Discharging Bookdrop *

Discharging Bookdrop : Discharge Items For 02/22/2024

Enter Date of Discharge

Date: 02/22/2024

User Information

User ID: SNDEMO2
 Name: NASLUND, AMY Status: OK Library: AG_ALS-PDC
 Profile name: ADULT... Amount owed: \$0.00 Available holds: 0
 User categories: Y Overdues: 0
 Group ID: Privilege expires: 10/12/2025

Identify item

Item ID:

List of discharges

Title	Item ID	Route/Transit To	Amount Billed
ELLISON DIE SHAPE: AIRPL...	A13300997487	EQUIP	

Discharging Bookdrop *

Discharging Bookdrop : Discharge Items For 02/22/2024

Enter Date of Discharge

Date: 02/22/2024

User Information

User ID:

Discharging Bookdrop *

Discharging Bookdrop : Discharge Items For 02/22/2024

Gadget : Day and Time

Date

February...

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29		

Time

11 : 59 PM

OK Cancel

Discharging Bookdrop *

Discharging Bookdrop : Discharge Items For 02/20/2024,23:59

Enter Date of Discharge

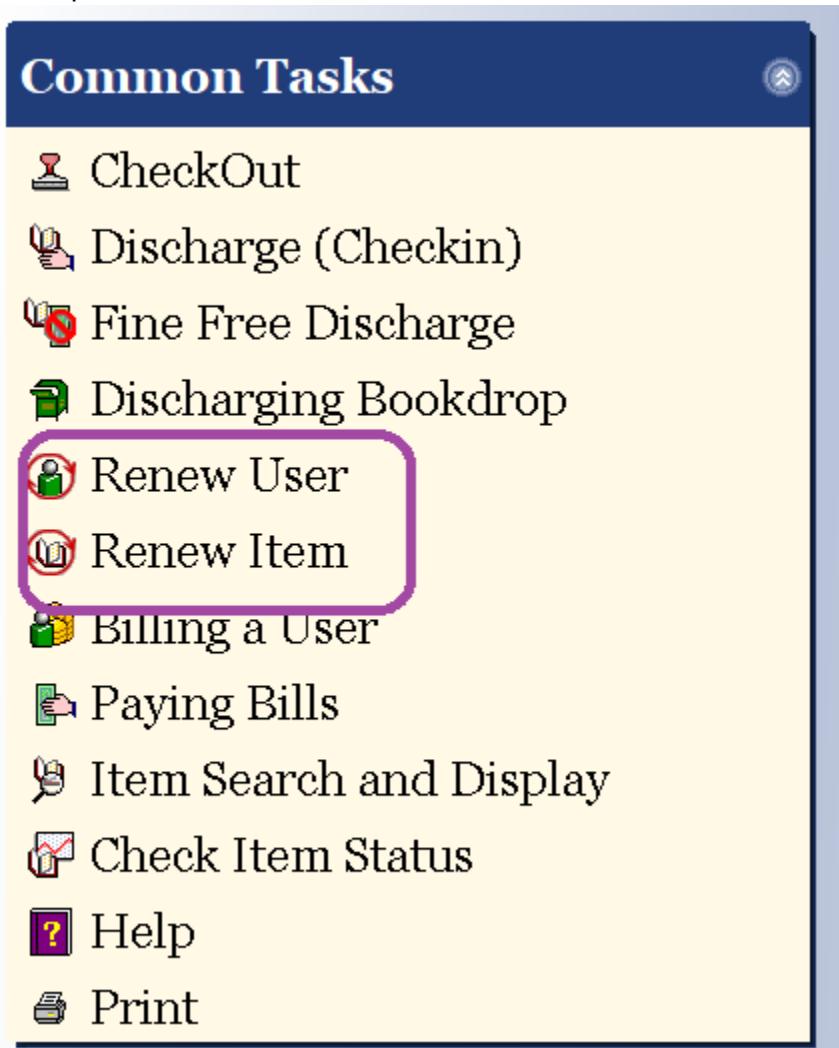
Date: 02/20/2024,23:59

User Information

User ID:

Name: Status: Libr

The next wizards in the Common Tasks group are the renewing wizards. These wizards are for the renewal of items either as a whole on a user's account, or individually as items. In this instance, Renew User is referring to renewing the items on the user account, and not the expiration date of the user's account.



The Renew User wizard is to be used to renew items on a patron account when the patron is standing in front of them, or have called in. Using this wizard will pull up the patron's account and show all the items they have checked out.

Renew User *

Renew User

User Information

 Name: NASLUND, AMY Status: OK Library: AG_ALS-PDC
 Profile name: ADULT... Amount owed: \$0.00 Available holds: 0
 User categories: Y Overdues: 0
 Group ID: Privilege expires: 10/12/2025

Identify User

User ID:

Street: 40 NAUGHTY CAT LN
 City, state: MEOWINGTON IL
 Zip: 48169
 Phone: 309-435-5228
 Email: CATNIPADDICT@KITTY.COM

Current user checkouts

Items eligible for renewal: 1

☐ Select All ☒ Select all seen

Renew	Seen	Title	Item ID	Date Due	Item Status	Type
☐	☒	ELLISON DIE S...	A13300997487	3/14/2024,23:59		EQUIP-MISC

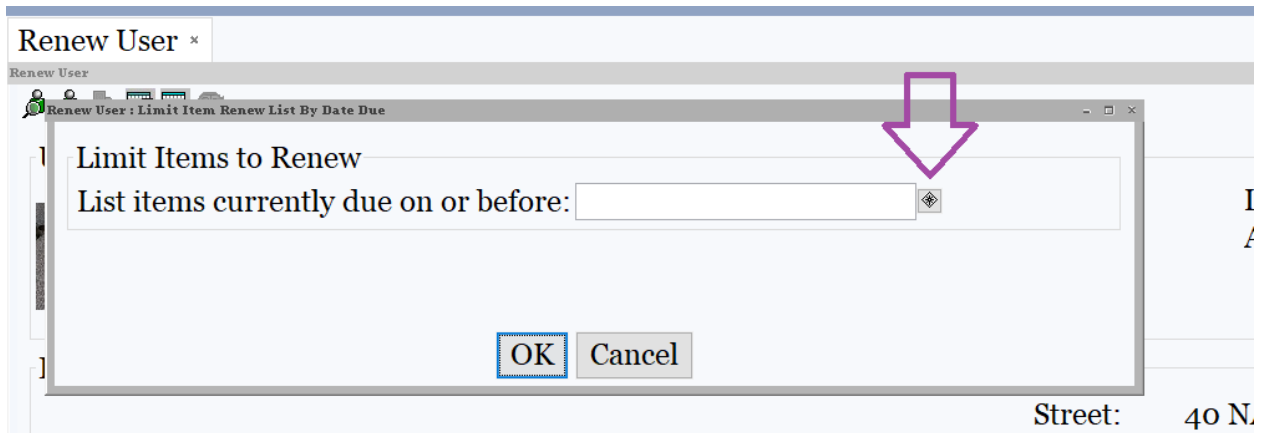
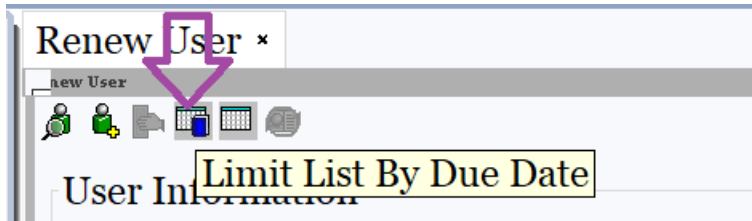
The same user search and display user helpers are available.

Renew User *

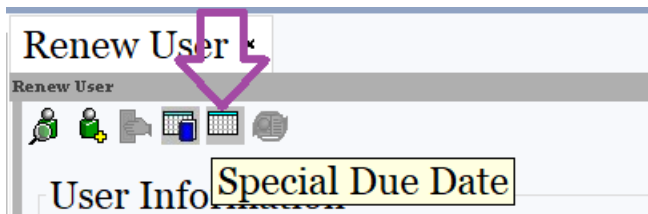
Renew User

The Renew User wizard has two new helpers: Limit List by Due Date and Special Due Date. Limit List by Due date allows staff to sort out items when a patron has multiple checkouts. For example, a homeschool patron comes in everything Friday to check out items. They only want to renew the things that are immediately due. Instead of scrolling and looking for all those items, staff can select the due date they would like to search by and only those items will show up.



The Special Due Date helper works in the same way in this wizard as it does in the checkout wizard. It grants a special renewal date.



Renew User x

Renew User : Enter Special Due Date

Special due date:

OK Cancel

Renew User x

Renew User : Enter Special Due Date

Gadget : Day and Time

☐ No date ☒ Specific date

Date

February...

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29		

Time

11 : 59 PM

OK Cancel

Renew User x

Renew User

User Information

Name: NASLUND, AMY Status:

Profile name: ADULT... Amount owed:

User categories: Y Overdues:

Group ID: Privilege expires

Identify User

Special date due will be used: 02/22/2024,23:59

User ID: SNDEMO2

The Renew Item wizard is to be used when a patron walks in and hands staff an item to be renewed, over when they call in and want to read off the item barcode. This wizard is specifically for renewing one item at a time. It has the same helpers as seen in the CheckOut wizard and the Renew User wizard.

Renew Item *

new Item

Identify item

Item ID:

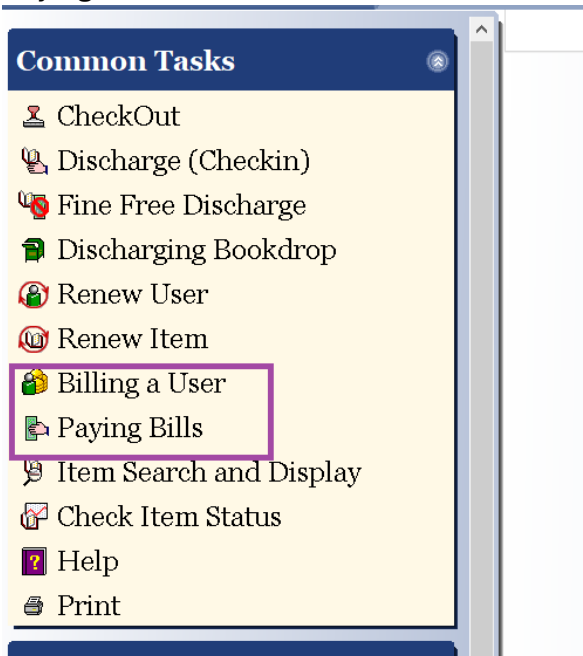
☒ Mark Item as Seen

Item(s) Renewed

☒ Select All

Title	Name	Date Due	A
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The next wizards in the Common Tasks group are the billing wizards: Billing a User and Paying Bills.



Billing a User is to be used for smaller or partial bills, for example, copies, faxing, book sale, partial damage, etc. This is not to be used to bill for replacement of an entire item. The dropdown menu options for Reasons for bill and Payment type can be modified to what the library specifically uses.

Billing a User *

Billing a User

Identify User

User ID:

Enter Item & Bill Information

Reason for bill:

Amount:

Item ID:

Note:

Payment type: CASH

List of Bills

Title	Item ID	Reason
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When billing a patron using the Billing a User wizard, what reason staff chooses as the reason for the bill will determine what information is needed. When something that is NOT an item is selected, the Item ID blank will be grayed out.

Enter Item & Bill Information	
Reason for bill:	COPIES
Amount:	
Item ID:	
Note:	
Payment type:	CASH
List of Bills	



When something that IS an item is selected, an item ID is required before a bill can be placed.

Enter Item & Bill Information	
Reason for bill:	DAMAGE
Amount:	
Item ID:	
Note:	
Payment type:	CASH
List of Bills	

It is highly recommended that a note is added to the bill with the date of billing and staff initials just in case questions come up in the future. Once the appropriate things have been selected, there are two finishing options: Bill User and Pay Now.

Bill User automatically places the bill on the patron account, which puts the patron into Delinquent status.

Enter Item & Bill Information

Reason for bill:

Amount:

Item ID:

Note:

Payment type:



List of Bills

Title	Item ID	Reason	Billed	Bill Status
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Get User
Information

Bill User

Pay Now (d)

Bill
Another User (g)

Close

Billing a User *



User Information

Name: NASLUND, AMY
 Profile name: ADULT...
 User categories: Y
 Group ID:



Status: DELINQUENT
 Amount owed: \$0.50
 Overdues: 0
 Privilege expires: 10/12/2025

Library: AG_ALS-PDC
 Available holds: 0
 Checkouts: 1

Identify User

User ID:

Street: 40 NAUGHTY CAT LN
 City, state: MEOWINGTON IL
 Zip: 48169
 Phone: 309-435-5228
 Email: CATNIPADDICT@KITTY.COM

Enter Item & Bill Information

Reason for bill:

Amount:

Item ID:

Note:

Payment type:

List of Bills

Title	Item ID	Reason	Billed	Bill Status	Note
		COPIES	\$0.50 Billed		

Enter Item & Bill Information

Reason for bill:
Amount:
Item ID:
Note:
Payment type:

List of Bills

Title	Item ID	Reason	Billed	Bill Status

Get User Information

Bill User

Pay Now (d)

Bill Another User (g)

Close

Enter Item & Bill Information

Reason for bill:

Amount:

Item ID:

Note:

Payment type: **CASH**

List of Bills

Title	Item ID	Reason	Billed	Bill Status
		COPIES	\$0.75	Paid
		COPIES	\$0.50	Billed

The Paying Bills wizard is used to pay off bills. All bills, singular bills or partial bills can be paid from here. If a patron is paying off all bills, put the total being paid in the top Payment box. Partial payments can also be entered here. The bills will be paid off, oldest first. If the patron only wants to pay specific bills, find those bills in the bottom box and fill out the payment amount. Once all the payment information has been entered, click Pay Bills.

Paying Bills *

User Information

Name: NASLUND, AMY
 Profile name: ADULT...
 User categories: Y
 Group ID:

Status: DELINQUENT
Amount owed: \$0.50
 Overdues: 0
 Privilege expires: 10/12/2025

Library: AG_ALS-PDC
 Available holds: 0

Identify User

User ID: SNDEMO2

Street: 40 NAUGHTY CAT LN
 City, state: MEOWINGTON IL
 Zip: 48169
 Phone: 309-435-5228
 Email: CATNIPADDICT@KITTY.COM

Total bills and payments

Total bills: 1
 Total owed: \$0.50
 Still owes: \$0.50
 Credit balance: none

Payment:
 Payment type: CASH
 Change:

Individual Bills and Payments

Title	Item ID	Reason	Owes	Payment Type	Payment	Change	Billed	Date	Note
		COPIES	\$0.50	CASH			\$0.50	2/22/2024	

Total bills and payments

Total bills: 1
 Total owed: \$0.50
 Still owes: \$0.50
 Credit balance: none

Payment:
 Payment type: CASH
 Change:

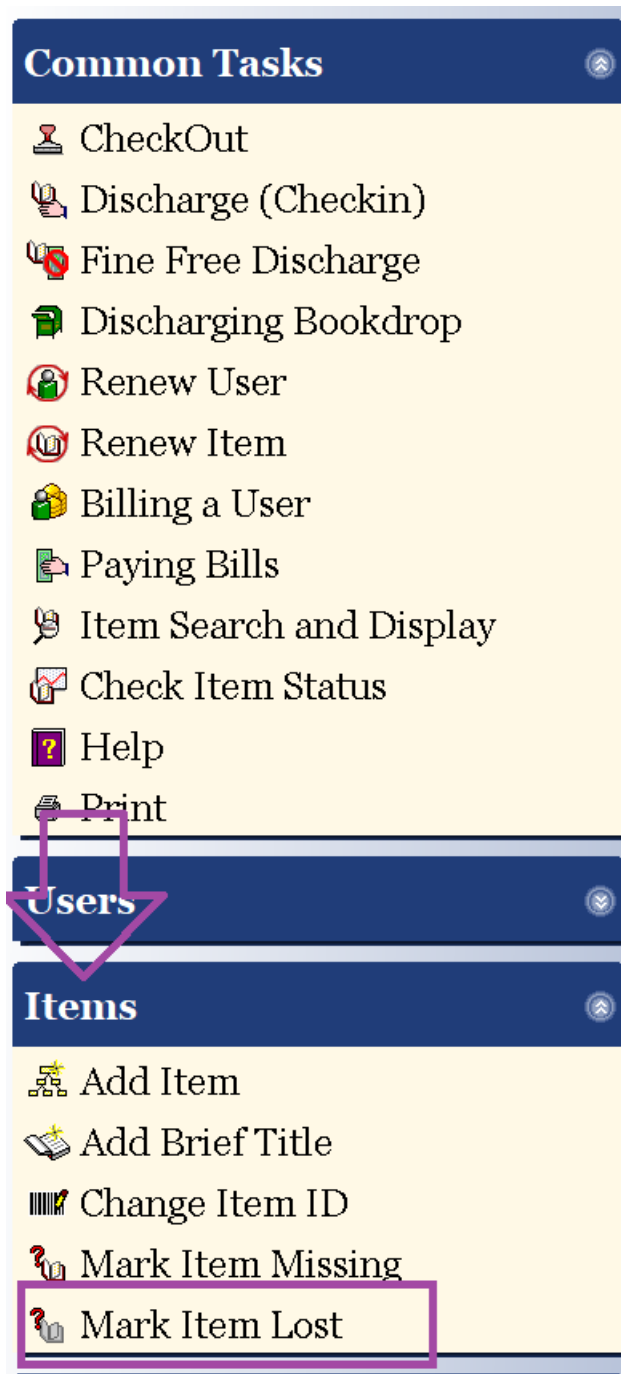
Individual Bills and Payments

Title	Item ID	Reason	Owes	Payment Type	Payment	Change	Billed	Date	Note
		COPIES	\$0.50	FORGIVEN			\$0.50	2/22/2024	

Get User Information **Pay Bills (0)** Pay More Bills Make Payments for Another User Close

If a patron has lost an item and would like to pay for the replacement cost, that needs to be managed differently. There are two options: the patron can leave the item on their account and allow the system to process the bill in the library's time frame. Or the patron can request the item be removed immediately so a bill can be paid off.

In order to charge a patron for the full cost of replacing an item, staff needs to go to the Items group and select the Mark Item Lost wizard.



The easiest way to find the correct item, is to look up the patron using the Item Search helper. This will pull up the patron account and show all their active checkouts.

Mark Item Lost *

Mark Item Lost

Item information

Identify item

Item ID:

List of Items

Item id	Title
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Once the correct patron is found and the lost item is selected, select Mark Item Lost.

Mark Item Lost : User Search

Search for: **Search**

Index: **AND** **OR**

Library:

Type:

- ☒ Keyword
- ☐ Browse
- ☐ Browse user group

List of users

Name	User ID	Alt ID	Phone	Birth Date
NASLUND, AMY	SNDEMO2			

Current user checkouts

☐ Select All

Select	Title	Item ID	Date Due	Type
☐	ELLISON DIE SHA...	A13300997487	3/14/2024,23:59	EQUIP-MISC

Mark Item Lost **Display this User Group** **Return to User Group List** **Cancel**

The selected item will populate the item information. Select Mark Item Lost.

Mark Item Lost ×

Mark Item Lost

ELLISON DIE SHAPE: AIRPLANE #2
ID: A13300997487

Identify item
Item ID:

List of Items

Item id	Title	Curr
---------	-------	------

↓

Get Item Information Mark Item Lost Close

A popup box will appear showing the User information, Item information and Billing information. If that is all correct, staff can select Bill User to place the bill, or if the patron wants to pay immediately, select the appropriate Payment Type and click Pay Now.

Mark Item Lost ×

Mark Item Lost : Billing for Lost Item/Processing Fee

Billing user
User ID: SNDEMO2
Alt ID: NASLUND, AMY

For lost item
Item ID: A13300997487
Title: ELLISON DIE SHAPE: AIRPLANE #2
Price: \$40.00

Billing info
Amount
Lost item: \$40.00
Processing fee: \$0.00

Payment type:

Bill User Pay Now (b) Cancel Lost Item Bill

This item will now show as LOST-CLAIM and be removed as an active checkout from the patron account and moved over as a bill.

Mark Item Lost ✕

Mark Item Lost

Item information

Identify item

Item ID:

List of Items

Item id	Title	Current location
A13300997487	ELLISON DIE SHAPE: AIRPLANE #2	LOST-CLAIM

This information can be seen in the Users group, in the Display User wizard. This wizard is incredibly useful as it shows all the information about the patron.

Users

- Display User
- User Registration
- Modify User
- Copy User
- Confirm Address
- Renew Privilege
- Suspend User
- Remove User
- Unsuspend User

Display User ✕

Alerts

Name: NASLUND, AMY
Id: SNDEMO2
Group ID:
Profile name: ADULT...

Identify user

User ID:

Street: 40 NAUGHTY CAT LN
City, state: MEOWINGTON IL
Zip: 48169
Phone: 309-435-5228
Email: CATNIPADDICT@KITTY.COM

Summary Addresses Extended Info Bills Checkouts Holds Routings Suspension Charge History User Groups

Primary: 1
Address 1

Street	City, state	Zip	Phone	Email
40 NAUGHTY CAT LN	MEOWINGTON IL	48169	309-435-5228	CATNIPADDICT@KITTY.COM

Here is an example of what bills look like in the Bills tab of the Display User wizard.

Summary	Addresses	Extended Info	Bills	Checkouts	Holds	Routings	Suspension	Charge History	User Groups
Unpaid bills:2(\$40.50)									
Title	Item ID	Reason	Owes	Billed	Date	Payment lib...	Note		
		COPIES	\$0.50	\$0.50	2/22/2024				
ELLISON DIE S...	A13300997487	LOST	\$40.00	\$40.00	2/22/2024				

If staff would like to see previous bills that have been removed from a patron account, they can scroll to the bottom of the page and select Paid or All in the Display option.

Summary	Addresses	Extended Info	Bills	Checkouts	Holds	Routings	Suspension	Charge History	User Groups
Display options Library: All libraries Bills: Unpaid									

This will show all previously paid bills, when they were billed and where they were paid.

Summary	Addresses	Extended Info	Bills	Checkouts	Holds	Routings	Suspension	Charge History	User Groups
Paid and unpaid bills:21(\$40.50)									
Title	Item ID	Reason	Owes	Billed	Date	Payment lib...	Note		
Legacy	A66702444049	LOST	\$0.00	\$16.00	10/12/2022	Wo_WASH-...			
		COPIES	\$0.00	\$2.00	10/12/2022	AG_ALS-PDC			
Waking the witch	A66701972023	BARCODE	\$0.00	\$3.00	10/12/2022	AG_ALS-PDC	returned missing...		
Waking the witch	A66701972023	LOST	\$0.00	\$10.00	10/12/2022	Wo_WASH-...			
		COPIES	\$0.00	\$0.50	10/17/2022	Wo_WASH-...	MADE 5 COPIE...		
		MISC	\$0.00	\$1.04	11/28/2022	AG_ALS-PDC	training		
		BOOK SALE	\$0.00	\$0.00	11/28/2022	NW_WIND	3 BOOKS		

If an item has been marked as lost using the Mark Item Lost wizard, and it is found, it can be discharged like a normal item. This will give a warning pop up box.

Discharge (Checkin) *

Discharge (Checkin): Identify Item

User ID:
 Name: Status: Library:
 Profile name: Amount owed: Available holds:
 User categories: Overdues:
 Group ID:

Identify item

Item ID: Current: ELLISON DIE SHAPE: AI...
 ED AIRPLANE #2
 A13300997487

List of discharges

Title	Item ID	Auto...	User
ELLISON DIE SHAPE: AI...	A13300997487		

Discharge (Checkin): Error

Warning!!! This item was reported as lost or assumed to be lost.
 Item Id: A13300997487

OK

Once staff selects OK, that item will go back into circulation like normal and the lost bill will be removed from the patron's account.

Discharge (Checkin) *

Discharge (Checkin): Identify Item

User Information

User ID: SNDEMO2
 Name: NASLUND, AMY
 Profile name: ADULT...
 User categories: Y
 Group ID:

Status: DELINQUENT
 Amount owed: \$0.50
 Overdues: 0
 Privilege expires: 10/12/2025

Library: AG_ALS-PDC
 Available holds: 0

Identify item

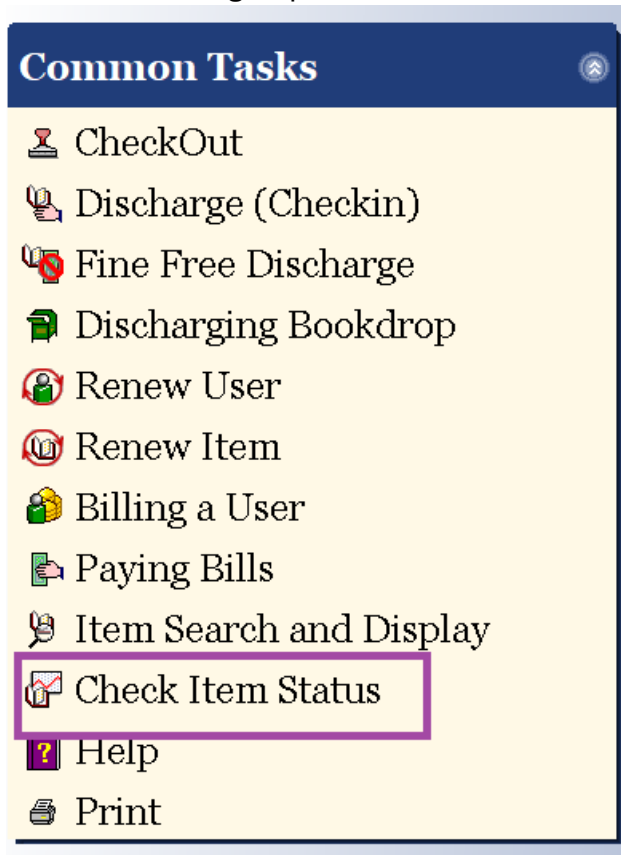
Item ID:

List of discharges

Title	Item ID	Route/Transit To	Amount Billed	Amount Paid Auto...	User
ELLISON DIE SHA...	A13300997487	EQUIP			SNDEMO2

If the patron has already paid for this item, it will not tell staff anything about possible refunds needed. It also will not discharge if the record has already been deleted.

The last wizard covered in this workshop is the Check Item Status wizard. This is in the Common Tasks group.



The Check Item Status wizard shows everything that should be and immediately happened to an item:

- Where is currently should be
- If it needs to be going somewhere
- If it is on hold for someone
- Date created, charged & returned
- Inventory information
- The last patron to have this item checked out

Check Item Status x

Check Item Status : Current Status Of Item A13300997487

ELLISON DIE SHAPE: AIRPLANE #2
ED AIRPLANE #2 Copy:1 ID:A13300997487

Proposed action
Route to EQUIP

Status
On shelf: EQUIP...

Check Another Item Close

Check Item Status : Current Status Of Item A13300997487

ELLISON DIE SHAPE: AIRPLANE #2
ED AIRPLANE #2 Copy:1 ID:A13300997487

Check Item Status : Glossary

Title: ELLISON DIE SHAPE: AIRPLANE #2

Call number: ED AIRPLANE #2

Copy: 1

Item ID: A13300997487

Price: \$40.00

Home location: EQUIP...

Item cat1: EQUIPMENT...

Item cat3: EQUIPMENT...

Item cat5: DIE-ELLISN...

Date created: 12/7/2023

Date last charged: 2/22/2024

Last discharged: 2/22/2024,10:36

Date inventoried: NEVER

Times inventoried: 0

(circulation summary)

Type: EQUIP-MISC...

Current location: RESHELVING...

Item cat2: EQUIPMENT...

Item cat4: DIESHAPE...

Media desk:

Previous user ID: SNDEMO2

Last activity: 2/22/2024

Total checkouts: 4

In-house uses: 0

Close

Please contact the RSA Help Desk at help@librariesofrsa.org or 866-940-4083.