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Workflows Help (Online)

Menu Bar

File

Print – Click Print to print the current wizard window.
Print Preview – The Print Preview command only works with wizards/windows that have a defined print template.
Print Screen – The Print Screen option allows you to print the contents of the current wizard window.
Print Setup – Print Setup displays the following options that need to be configured before you can use print screen. (this link gives you instructions on how to do this, http://harringtonlc.org/workflows-help/report-session-configeration/)
a. Application to Dump Screen – what program do you want to use to view the screen in?
Click on the Gadget and navigate to the program you want to use.
b. Print to a Printer – Select a printer to be used for printing.
Click on the drop down arrow and select your printer.
c. Print to an Application – Use to print to an application. This allows you to view what you will be printing before you print it.
Click on the Gadget and navigate to the program you want to use.
Page Setup – Click Page Setup to display configuration options for paper size, print orientation, and margins. This does not apply to the Print Screen functionality.
Update Staff Client – Click Update Staff Client to update your client as needed.
Exit – Click Exit to display the halt the workstation dialog box (same as if you clicked the X in the upper right corner).

Edit

Cut – Ctrl + x
Copy – Ctrl + c
Paste – Ctrl + v

Wizards

All Wizards – Use All Wizards to display all wizards available on the system.
My Wizards – Use My Wizards to display all wizards available for your login.
Toolbar – Use Toolbar to find a wizard on the current toolbar quickly.

Helpers

The helpers menu provides an alternate method or accessing a helper. When you click Helpers, the helpers associated with the currently displayed wizard window are available from the menu.

Modules

Provides an alternate method for selecting toolbars and only appears when using Themes.

Preference

Configuration – Click Configuration and the Configuration window opens. This is where you can change the IP address or to use offline mode.
Peripherals – the following options display.
a. Receipt Printer – Use this to define receipt printer availability options.
b. Barcode Reader – Use this to define barcode scanner options. (typically you will not need to do this)

c. Barcode Configuration – Use to define barcode policies. (normally this is already done)
d. Smart Card Configuration – Use this to define the way the Mifare Smart Card reader is to be used. (we do not currently have this in place)
e. Mag Stripe Configurtion – Use this to define if a Mag Stripe reader is available (we do not currently use this).
f. RFID Pad Configuration – Use this to define if an RFID Pad is available and what type is to be used.
Desktop – the following options display.
a. Font Settings – Use this to change your workstation font.
b. Current Toolbar – use this to change the toolbar settings with the following submenu options.
1. Select – Used to select a toolbar from a Select List
2. Save As – To save the current toolbar to another directory, or with another name. (Use to save changes you might have made.)
3. Function Key Mapping – To map function keys to specific wizards.
4. Local Toolbar Management – you will not be using this.
c. Localization – Use to change your workstation language setting.
d. Desktop Setup – Use to change the following options.
1. Default Help Topic – the selected topic will display first when you click the Help button.
2. Proxy Server Configured – this option is not currently used.
3. Opening Wizard – the selected Wizard will be the first to display upon client startup.
4. Maximum Response Size – Used to specify how many characters are returned from the server before truncating the information retrieved. The default is 3,000,000 characters.
5. Display Date Format – The default is set to Server Specifies Format.
6. 24-Hour Clock Format – Select this option if you want the date and time gadget to display in military format.
7. Default Toolbar – The selected toolbar is used only if you switch servers, and the most recent toolbar you used is not available.
8. Themes – Used to select the desktop display for Workflows.
9. Multiple Windows Mode – Select this check box if you want to permit multiple wizards to be open at one time.
10. Tabbed Windows – Select this check box if you want to open multiple tabbed windows simultaneously in the Workflows client.
Switching between tabbed windows – Ctrl + Tab or Ctrl + Page Up to move to the next tabbed window. Ctrl + Shift + Tab or Ctrl + Page Down to move to the previous tabbed window.
To close a tab, simply click on the close icon on the right side of the tab or press Ctrl + W.
11. Tabbed Windows on Bottom – Select this to display the tabbed windows on the bottom of the client workspace.

Tools
Symbol Table – Used for inserting special characters and diacritics.
Loaded Character Sets – Allows you to select only those character sets you will be dealing with on the desktop.

Window - this is not available when you have selected Tabbed Windows.
Tile – Displays all open windows in a grid arrangement.
Cascade – Displays all open windows in a cascading arrangement.
Horizontal – Displays all open windows in non-overlapping horizontal titles.

Vertical – Displays all open windows in non-overlapping vertical titles.
Active – Displays all active wizards.

Help

Contents – to display the Documentation page of the Workflows help.
Context – to enable context-sensitive help and display the help topic associated with the current window.
Key Enhancements – to display summaries of new, cool features available in this release.
Session Info – displays Login information and Host information about the current client session.
About – displays the software version and the SirsiDynix copyright statement.

Toolbar

When setting properties within the wizards, right click on the wizard, go to properties, make your changes, click ok. If you do not right click on the wizard the properties will not save and you will have to change them each time you log in to Workflows.

Common Tasks

Tip (When setting properties you will need to right click on the wizard in order for the system to save the properties when you log in next time).

1. Checkout – If you have the patron's library card, simply scan it in, then scan the item ID. If you don't have the patron's library card use the **User Search Helper** to search for your user by name, address, alt id, etc.
To register a new user within the Checkout Wizard use the **Register New User Helper.**
To mark a card lost use the **User Lost Card Helper**, click on the helper, search for the user, then click on Assign New Card and scan in the new library card number.
To renew the patron's privilege use the **Renew Privilege Helper.** Select either Normal or Special. This helper is only available if the patron's privilege has expired or is about to expire.
You can use the **Confirm Address Helper**, use this to modify the address if needed.
To pay bills use the **Pay Bills Helper**, this helper is only available if the patron has bills.
If you need to search for an item you can use the **Item Search Helper.**
If you need to change an item barcode use the **Change Item ID Helper.** Click on the helper, search for the title, click on Change Item ID (at the bottom of the screen), Scan in the new item id.
If you need to set a special due date use the **Special Due Date Helper** (this helper has three options).
Use the **Print User Helper** to print information about the user.
From now on – means until you close the Checkout Wizard.
For this user only – means for all items this user will be checking out.
For this checkout only – means for just this one item.

2. Discharging (check in) – scan in the item id.
If you need to search for an item you can use the **Item Search Helper.**
If you need to change an item barcode use the **Change Item ID Helper.** Click on the helper, search for the title, click on Change Item ID (at the bottom of the screen), Scan in the new item id.
To pay bills use the **Pay Bills Helper**, this helper is only available if the item has bills.

3. Renew User - scan in the patron's library card or use the **User Search Helper** to find the user. Select All or Select all seen or uncheck both and select the individual items to be renewed. (be sure that you do not renew another libraries items).
You can use the **Limit List By Due Date Helper** to limit to the items due on a certain date.
You can use the **Special Due Date Helper** to set a special due date for all items selected.
Once you have all items selected you wish to renew, click on Renew Selected Items.

4. Renew Item - scan in the item to be renewed or search for the item using the **Item Search Helper.**
You can use the **Special Due Date Helper** to set a special date before scanning the item.

5. Billing a User - scan in the user ID or use the **User Search Helper** to find your user.
Reason or bill: Select a reason; if you select a reason that is associated with an item you will be required to put in an item id.
Amount: put in the dollar amount, be sure to include the decimal (example: 2.00)
Item ID: this data well will be grayed out if an item ID is not required.
Payment type: can be left as defaulted unless the patron is paying the bill at the time, then you should select the correct payment type.
A **NOTE** field is now available for your bills.
Click on **Bill User** if you are just billing the user.
Click on **Pay Now** if the user is paying at the time the bill is being created.

6. Paying Bills - scan in the User ID or use the **User Search Helper** to find your user.
Payment: put in the amount being paid.
Payment type: select the type of payment.
Individual Bills and Payments – if you pay in the Total bills and payments do not pay the bills here.
Pay User Group Bills Helper – can be used to pay a User Groups Bills.

7. Mark Item Used - is used to mark an item as Used. Items retrieved from various areas of the library, such as the Reference section, can be marked as used for statistical purposes. These items are not actually charged.

8. Call Number and Item Maintenance – you will need to search for the item (see the instructions for **Item Search).** When you find the title you want click on Modify. You will use this wizard to add and modify Call Numbers, add and modify Items, including Item Type, Home Location, Item cat 1, Item cat 2, Number of pieces, Total charges, Price, Permanent, Circulate, Shadow item, and Extended information. You can also use this wizard to remove items and call numbers (do not use this wizard if you have the last item attached to the title).
List the Catalog by Call Number Helper – used to display call number records in your library's system that share the same call number or portion of a call number.
Show/Hide Circulation Information Helper is used to show or hide the circulation information in the lower left corner.
Label Helpers are available but require configuration. (ask for assistance if you wish to use these and you have a label printer attached to your computer).

9. Global Item Modification – allows you to create a template of changes to be made to selected items, and globally apply these changes to all items whose IDs are scanned. If you do not want the price to be changed in your item record you will need to right click on the wizard, go to properties, click on the Behavior tab, uncheck Price, click Ok. Then open the wizard again.

10. Report Session (this is covered in the reports training section, if you need a copy please ask)

11. Schedule New Reports (this is covered in the reports training section, if you need a copy please ask)

12. Finished Reports (this is covered in the reports training section, if you need a copy please ask)

13. Item Search – used to identify a specific title in your library and display information at the title, call number, and item level.
Configure Option for Item Search Helper – allows you to set options to limit your search. If you limit it to a home location or item type that you use in your library and limit it your library it will generate a list that of titles that you can print.

Advanced Search Helper – allows you to search using multiple criteria. This is very useful when searching for a one word title.
Show/Hide Search Pane Helper – allows you to show/hide the search pane so you can see more of the hit list.
Show/Hide View Pane Helper – allows you to show/hide the view pane so you can see more of the hit list.
Show/Hide Circulation and Extended Information Helper – allows you to show/hide circulation and extended information about the item.
Search tips:
Keyword - locates and displays records that contain the terms you entered. (Indexes normally searched on keyword; Author, Contents, General, ISBN, ISSN, LCCN, OCLC, Periodical Title, PUB #, Series, Subject, Title).
Browse - produces a list in the alphabetic vicinity of the term you typed. The second item in the list—the closest match—will be highlighted, and from that point you can browse forward or backward in the list. (Indexes normally searched on browse; Call Number, Set ID, Title Control #. Indexes also searchable on browse; Author, Contents, General, Series, Subject, Title)
Exact - displays a single record of the search index you used. This option is best for specific number or code searches. (Indexes normally searched on exact; Item ID. Indexes also searchable on exact; Author, Call Number, Contents, General, Periodical Title, PUB #, Series, Set ID, Subject, Title, Title Control #) When using exact the system searches exactly what is typed, no variances are searched.
When searching titles that have **Boolean Operators or Positional Operators** it is best to put quotes around the operator or the entire title. (**Boolean Operators;** AND, NOT, OR, XOR) (**Positional Operators;** SAME, WTH, NEAR, ADJ)
You can use **Relational Operators** when searching in workflows. (**Relational Operators;** < less than, > greater than, = equal to, < > not equal to, <= less than or equal to, >= greater than or equal to)
When searching for a term put single quotes around the term, example 'American History'
When using a **Specified Entry** put the mark tag in brackets, example Dickens {100}
Stop Words can be left out (**Stop Words;** A, AN, AS, AT, BE, BUT, BY, DO, FOR, IF, IN, IT, OF, ON, THE, TO)
Substitution and Truncation - the symbols ? and $ to be used to represent substitution and truncation. Use the ? symbol as a substitute for a missing character in a search term. Use the $ symbol to truncate a search term. These two symbols can be used together or separately. These symbols may only be used at the middle or end.
Substitution example – wom?n, locates the appropriate records containing either "woman" or "women".
Truncation example - Jame$ in the search field, SirsiDynix Symphony locates records containing the terms: Jame, James, Jameson, and Jamerton.
Searching Numbers in a List - you must type a space between each number. SirsiDynix Symphony searches numbers separated by commas as if the numbers were not separated. For example, SirsiDynix Symphony searches 1,2,3,4,5 as a single term, but SirsiDynix Symphony searches 1 2 3 4 5 as 1 SAME 2 SAME 3 SAME 4 SAME 5. SirsiDynix Symphony searches 5000 and 5,000 as the same term.
Within the Item Search display – Click on the Call Number/Item tab, this gives you the following tabs;
Item Info – Displays Call number, Item ID, Type, Location, Item cat1, Item cat2, price, etc.
Circ Info – Displays various counters
Bills – Displays unpaid bills and the user information that owes them.
Checkouts – Displays current checkout information; User ID, User name, Status and Date due.
Holds – Displays current holds; User ID, User name, Level and Status.
Print Screen – if you want to print a list of titles, conduct your search, click on Show/Hide Search Pane, click on Show/Hide View Pane, then you can lick on Print Screen and it will print all titles in the hit list.

14.Check Item Status - used to display the current status of an item.

15. Help – displays help on all wizards, helpers, etc.

16. Printer – use to print information from the current wizard.

17. Library Calendar – use to set your closed dates. Click on the gadget, click on the first date you will be closed in the Closed From calendar, click on the last date you will be closed in the Until calendar, click Add. When you are done selecting all closed dates click ok, then click save.

User Information and Maintenance

1. Display User – used to display information about an existing user. Scan in the user ID, if you don't have the user ID use the **User Search Helper** to search for your user by name. When searching by name if you are looking for the last name only set the type to Browse. When you find your user in the list select the name and click ok.
Helpers available in this wizard; **User Search, Pay Bills, Modify User, Display User Group Bills, Display User Group Charges, Display User Group Holds, Display Credit Account Transaction History, Print User.**

2. User Registration – (before registering a user you should set your properties, right click on the User Registration Wizard, click on properties, click on the Defaults tab, set your library, profile name, and at least a User Cat1) scan in the user ID, change the Profile name: if needed. Fill in the required information.
The following was decided on by the Circulation Taskforce then voted on by HUG. (I suggest you search for the user first before registering to verify they don't have a record already in the system)
User Groups – when creating User Groups the Group name needs to be unique (don't use the address or the parent's name), only one user should have the Responsibility policy of PARENT, the other users should have CHILD. The Notice master must be checked on one record only.

HLC Standards For Registering a User

Basic Info

Last Name, First Name Middle Name (optional)
Alt ID: Drivers license (TX00000000) (No Dashes or Spaces)
Student Id (No Dashes or Spaces with your assigned letter of the school district in front, ex. A000000)

Demographics

User Cat1: Must be supplied.
Birthdate: MM/DD/YYYY

Address

CTYSTZIP: City, State Zip Code
Phone: Area Code included 000-000-0000 (Dashes included)

Extended Information

Birthdate: MM/DD/YYYY (if you put the birthdate on the Demographics tab you don't need to enter it here)
Note: Site Code-Staff Initials/MM-DD-YYYY: Text
Do not Choose STUDENT_ID from the drop down list.

When you have completed filing in the information click on Check Duplicate User, if any users are found investigate to see that none of them are the same as the user you are registering, click Ok, click Save.

3. Modify User – scan in the user ID or search for the user.
Make any changes necessary, click Save.
Helpers available; **User Search, Display User, User ID Manager, Remove Group Membership**
If **User ID Manager** is not available right click on Modify User, go to properties, click on the Helpers tab, put a

check in User ID Manager, click OK. **User ID Manager** allows you to add and remove active ID’s. **Remove Group Membership** is only available if the current user is part of a group.

4. Copy User – search for the existing user you wish to copy, select the user from the hit list, click on Clone/Copy User, fill out any missing information (the address tab should already be populated). When you are finished click Save.

5. Renew Privilege – scan in the User ID or search for the user. Select Normal or Special, if you choose Special you will need to provide the date and the override. Click Extend privilege.

6. Confirm Address – scan in the User ID or search for the user. Make any changes necessary to the address, click Confirm Address.

7. Remove User – scan in the User ID or search for the user, click Remove User (if the user has bills or charges the system will not allow the user to be removed).

Item Information and Maintenance

1. Label Designer – used to create label templates to print spine labels and book labels as well as user & item barcodes (this has not been tested for HLC). This is also where you will select your default label template.

2. Add Brief Title – used for adding paperbacks to the system or items that need cataloging but you want to be able to check the item out.
ISBN: put in the 13 digit ISBN when available
Local call number: leave blank
Personal Author: Last Name, First Name. example Wilson, Troyce.
Title: Capitalize the first word and any proper nouns, leave off leading stop words. Example; Harry Potter and the prisoner of Azkaban
Local Note: put in the type of item you have
Fill in the Call number and copy info
Click Add Brief Title

3. Change Item ID – search for the item, select the item from the hit list, click Change Item ID, place new Item ID on the item, scan in the new Item ID.

4. Mark Item Missing – use this to mark an item missing when you cannot find it anywhere and it is not checked out to a patron. Search for the item, select the item from the hit list, click Mark Item Missing, Click Mark Item Missing (on the second screen)

5. Mark Item Lost – use this to mark an item lost when it is checked out. Search for the item or user, select the item from the hit list, click Mark Item Lost, you will have the opportunity to bill the patron at this time, click Mark Item Lost (on the second screen)

6. Delete Title, Call Numbers or Items – use this when you want to completely remove an item. Search for your item, select the item you want to remove, click Delete. If you want to remove your call number also select the call number, if you want to remove the entire title select the title, click Delete and then you will be required to confirm.

Holds Information and Maintenance

1. Place Hold – scan in the User ID or search for the user. Search for the item. Select a Pickup at: library. Put in an Expires: date if you want.
Level: can be set to copy or title
Range: should be set to Library or Group

2. Display User Holds – scan in the User ID or search for the user. This will display all of the users holds.

3. Modify Holds for User – scan in the User ID or search for the user. Select the hold to modify, click Modify, make your changes then click OK.

4. Remove User Hold – scan in the User ID or search for the user. Select the hold to remove, click on Remove Holds.

5. Display Title Holds – search for the title. This will display all holds for the title searched.

6. Display Item Holds – search for the item. This will display all holds for the item searched.

7. Modify Holds for Item – search for the item. Select the user you wish to modify, click Modify, make your changes, click OK.

8. Remove Item Hold – search for the item. Select the user you wish to remove the hold for, click Remove Holds.

9. Trap Holds – normally is only used when you have more than one branch and you need to send the item to another branch.

10. Place Blanket Holds – used to place a hold on multiple types of one title, etc. DVD, Large Print, Regular Print. If the patron doesn't care what the material type is they just want a certain title use this wizard. Scan in the User ID or search for the user. Fill in the appropriate boxes, you can leave the Blanket ID set to New, you must put in Copies needed and an Expires: date, click OK. Search for the Title, Select the title from the hit list and click on Add Items to Item List, Click on Add to List, go back to your search screen and continue until you have all of the items you need. Then Click on Place Blanket Hold. When the hold is filled and the item is checked out all other holds for the Blanket Hold will be removed automatically.

In-Transit Items

1. Pending Transits – lists any items that are pending transit to your library. If you wish to see transits to other libraries click on **Select Another Library Helper** and choose the library you wish to see. To receive in-transit items select the item can click on Receive Item.

2. Receive Transit – used to receive items in-transit when you have them in hand. Simply scan the barcode.

Special Circulation Functions

1. User Claims Returned – scan in the User ID or search for the user. Select the item you wish to mark claims returned, set the date Claims Returned to the due date or the date before. Click on Mark Items Claimed Returned.

2. User Lost Card - search for the user, then click on Assign New Card and scan in the new library card number.

3. **Modify Due Dates** – scan the User ID or search for the user, select all items you wish to modify, set the Due date: (use the gadget), click on Modify User Due Dates.

4. Inventory Item – before you inventory your collection you will need to call the HLC office so the Set Inventory Date can be run. Then you simply go to your shelves and scan your items.

5. Discharging Bookdrop – use when you need to back date the day of discharging. Date: use the gadget to set the date you want to have as the discharging date. Scan your items. Example; if it snows and you are closed for a day or two you might want to set the date back to the first day you should have been open, this way fines will not be charged.

Offline

To use Offline mode you must put a check box in Operate in Offline Mode at the log in screen.

Offline Session

User access: (choose SUPERVISOR)
Library: (choose your library if not defaulted)
Current date: (leave as defaulted)
Current time: (leave as defaulted)
Default due date: (leave blank unless you really want a different date)
Log directory: (leave as defaulted)
Leave the check in Use user delinquent list file

User Registration

User information tab
Fill in all fields

User address tab
Fill in appropriate fields under user address 1

User extended information
Fill in only the fields you use

Checkout

Scan in the user id
Scan in the item id
Leave the Alt due date blank unless you really want an alternate due date
When you are ready to check out to a new user click on Check Out to New User

Discharging

Scan in the Item ID
Leave the Date of discharge as defaulted
When you are done click OK

Renew Item

If you renew an item you must have the item id
Scan or type in the Item ID
Leave the Alt due date blank unless you really want an alternate due date
When you are done click OK

Once you are back on line call the HLC office so the Load Offline Transactions report can be run.

Workflows Help (Online)

www.harringtonlc.org mouse over Workflows Help

1. **Add a Brief title –** step by step instructions on how to add a brief title in Workflows.
2. **Barred Patrons –** reasons to bar a patron.
3. **Cataloging Documents –** packet instructions, packet forms, and instructions for sending packets by email.
4. **Circulation Procedures –** step by step instructions for Checkout, Check-in, Paying Bills, Mark Item Used, Registering a User, Renewing Users Privilege.
5. **Download Workflows –** (password protected, call the HLC office), has the download file for workflows along with step by step instructions for the download process.
6. **Offline Mode –** instructions on how to use the Offline Mode (this should be looked at while you have internet access).
7. **Print Screen Instructions –** step by step instructions for printing the screen in Workflows.
8. **Report Session Configuration –** has 3 links; For Internet Explorer, For Wordpad, For Microsoft Word. Select the program you wish to use to view your finished reports and click on the appropriate link. Follow the step by step instructions.
9. **Setting Your Properties –** has 3 links for the most used wizards; Property Settings for Checkout Wizard, Property Settings for Discharge Wizard, Property Settings for Registration Wizard. Click on the link you wish to use and follow the step by step instructions for setting your properties.
10. **StaffWeb Reports -** (password protected, call the HLC office), has step by step instructions on how to log in.
11. **Standards for Registering a User –** has the standards for registering a user that were voted on an approved by the HUG membership.
12. **Workflows Support FAQ's –** there are several FAQ's here that you should look at.
13. **Workflows Tutorials –** there are some tutorials here for the most used wizards. There are HTML Versions (movies that you can just watch to learn how to use the system). PDF Versions (screen shots of the step by step instructions that you can print).