



# **WorkFlows Essential Procedures Manual**

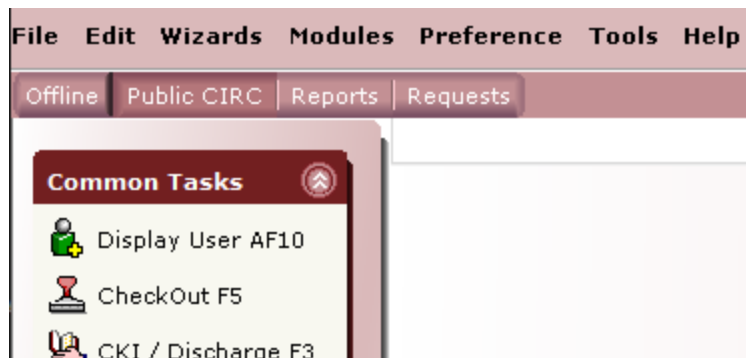
Last updated: July 21, 2023, by Kait McClary, Client Services Librarian

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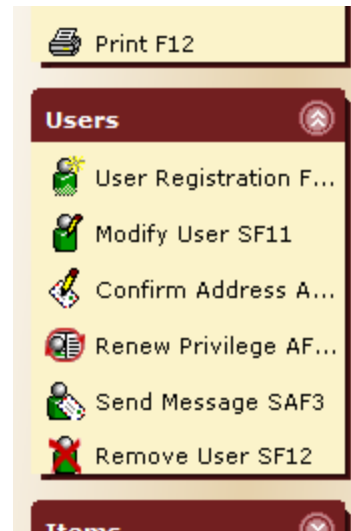
## Accessing / Logging into WorkFlows

1. You can open WorkFlows by double-clicking the WorkFlows icon on the desktop, or searching “WorkFlows” on your computer.
2. When you open WorkFlows, the first thing you will see is the “Configuration” box with host and workstation information. Click OK when this box pops up. The Login box will appear next; enter your User ID & PIN.
  - User ID: \_\_\_\_\_
  - PIN: \_\_\_\_\_
3. WorkFlows will now open.
4. When it appears on the screen, ensure that **Public Circ** is selected in the top left-hand menu bar.



## Registering a New Patron

1. From the left-hand menu, open the **Users** wizard group and click **User Registration**.
2. The **User Registration** box will appear
  - a. Select the appropriate Profile Name.
  - b. Scan the new library card's barcode.



3. The “User Registration” screen will now appear. There are several tabs and you need to click on several in order to record the patron’s information:

### a. Basic Info Tab

- i. Record the patron’s first name & last name.
- ii. Double check that the Library is correct (e.g. “SGIRV” for Irvine), and update if it is not.
- iii. Double check that the Profile name is the same one that you selected earlier.

### b. Privilege Tab:

- i. Make sure the expiration date is correct. If you need to change the expiration date, click the diamond shaped ‘gadget’ button next to the date and select a new one from the calendar that pops up. To change the date, you will need to enter the override password in the override box.
- ii. A PIN will be automatically generated. Ask the user if they wish to change the PIN to something else – if so, then enter the new PIN into the box. You will need to enter an override password for this.

- iii. The user will need the PIN number to log into their library account and to access eBooks and other electronic resources.

**c. Demographics Tab:**

- i. Under **User cat1**: Select the patron’s city or region from the dropdown box.
- ii. Under **User cat2**: Select the patron’s demographic from the list i.e. CHILD, ADULT, SENIOR, etc.
- iii. Birth date: Click the diamond button and select the user’s birth date from the calendar that appears.
- iv. Click OK when you are finished.



**d. Address Tab:**

- i. There are three Address fields; only use **Address 1**.
- ii. Fill in **STREET, CITPROV, POSTALCODE**, fields.
- iii. Also fill in **PHONE** and **EMAIL** fields if information is available.
- iv. See example of how this will look below:

 A screenshot of a form titled 'Address 1'. At the top left are three icons: a square with a plus sign, a square with a minus sign, and a square with a red 'X'. Below these are several rows of dropdown menus and text input fields. The data entered in the fields is as follows:
 

STREET	78 SOUTH RAILWAY AVE
ADDR_NOTE	
CITYPROV	IRVINE, AB
POSTALCODE	T0J 1V0
CARE/OF	
PHONE	403-123-4567
WORKPHONE	
CELL	
EMAIL	ronald007@gmail.com

**e. Extended Info tab:**

- i. NOTE: This is an optional field that your library can use. Anything you enter into a note field will appear on the checkout screen later. For

example, if a patron left their card at the library, you could record a note that says "Patron left card on shelf. Put it in the staff room filing cabinet with their name on it / Aug 14, 2015".

- ii. NOTIFY\_VIA: You must enter one of the following two notification options. Ensure you enter this in ALL CAPS, exactly as written below.
  - EMAIL : Patron will receive an email when holds arrive
  - PHONE : Patron will receive a phone call when holds arrive. Depending on your library, this step may be completed automatically, or staff may be required to phone the patrons.

The image shows two screenshots of a web form. The first screenshot shows a dropdown menu labeled 'NOTIFY\_VIA' with 'PHONE' selected. The second screenshot shows the same dropdown menu with 'EMAIL' selected. Both screenshots are highlighted with a pink border.

**f. User groups tab:**

- i. Currently, "Display charges" is selected by default. Please ask the patron if they want their borrowing history tracked or not. If they do not, please unselect this checkbox.
4. Complete the account creation: When you are finished entering the patron's information, click the **Check Duplicate User** button at the bottom of the screen. The system will look to see if this patron already exists in the database. If the patron already exists, that information will appear on the screen. If there are no duplicate users, you can then click the Save button at the bottom of the screen to register the patron. Give them their library card, and ask them to write/sign their name.

## Search for a Patron

1. This tool is available under a number of tasks- for example, **Display User**, **CheckOut**, **Renew by User**, **Paying Bills**, and a number of others. Any time that you would need to enter a patron's library card barcode, you can also use the **User Search** tool.
2. Please note that depending on your library's policy, patrons may need to show an ID if they do not have their library card with them.
3. Search for the patron by name via the User Search icon in the top-left corner:



4. You can search for the user by name, email, or various other fields.
5. Once you locate the user in the list, highlight their name and click "Renew Items for User" at the bottom.

Renew by User F7 : User Search

Search for:  
Name:  
DOUGLAS

Search for:  Search

Index: Name AND OR Type:  
 Keyword  
 Browse  
 Browse user group


Library: SGIRV  
Current: 454545454

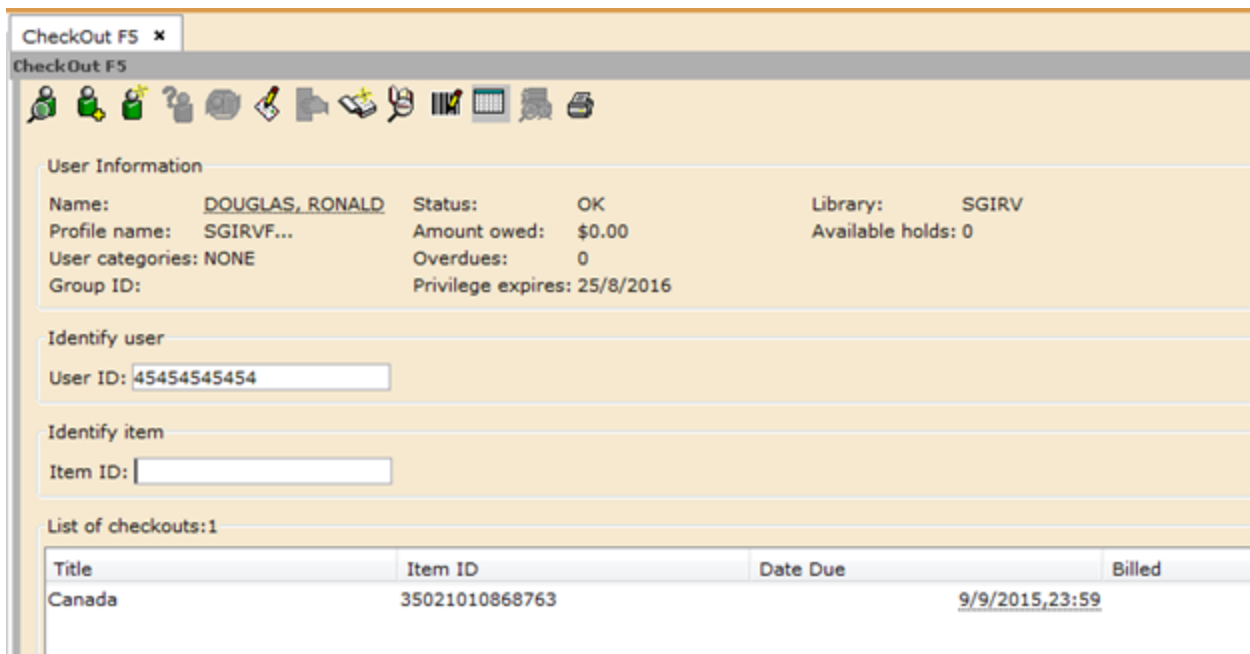
List of users

Name	User ID	Alt ID	Phone
DISCARD USER @...	SGIRVDISC		
DOUGLAS, RONALD	454545454		
Irvine Community ...	SGIRV		
SGIRV Circulation	ZCSGIRV		
SGIRV ILL user	SGIRV-ILL		
SGIRV Public user	SGIRVPUB		
SGIRV Technical S...	ZTSGIRV		
SGIRV WWW user	SGIRVWEB		
SHORTGRASS, IR...	25021000721040		
SLS TEST PATRON...	IRVINE_TEST		

Renew Items for User (b) Display this User Group Return to User Group List Cancel

# Check Out an Item

1. Under the **Common Tasks** wizard group, click **CheckOut F5**.
2. Scan or type in the patron's barcode number under the **User ID** field, or search for the user (see "How to Search for a Patron").
3. If you need to change the due date, click the calendar icon. Use the calendar to select which date the books will be due on instead of the default three weeks. Note: please only extend the due date for your library's books- avoid doing this for items sent from other libraries. 
4. Scan or type in the item barcode number under the **Item ID** field.
5. Checkout details will appear at the bottom of the screen under **List of checkouts**, and will show the following information: Title, Item ID (the barcode number assigned to the book), and the Date Due.
6. When books appear on that **List of checkouts**, they are on the patron's card. There is no need to click **Close** to complete the transaction, but it's best practice to do so regardless. If your library has a receipt printer, closing the window will trigger a notification to print the receipt of checkouts.



CheckOut F5

User Information

Name:	<u>DOUGLAS, RONALD</u>	Status:	OK	Library:	SGIRV
Profile name:	SGIRVF...	Amount owed:	\$0.00	Available holds:	0
User categories:	NONE	Overdues:	0		
Group ID:		Privilege expires:	25/8/2016		

Identify user

User ID:

Identify item

Item ID:

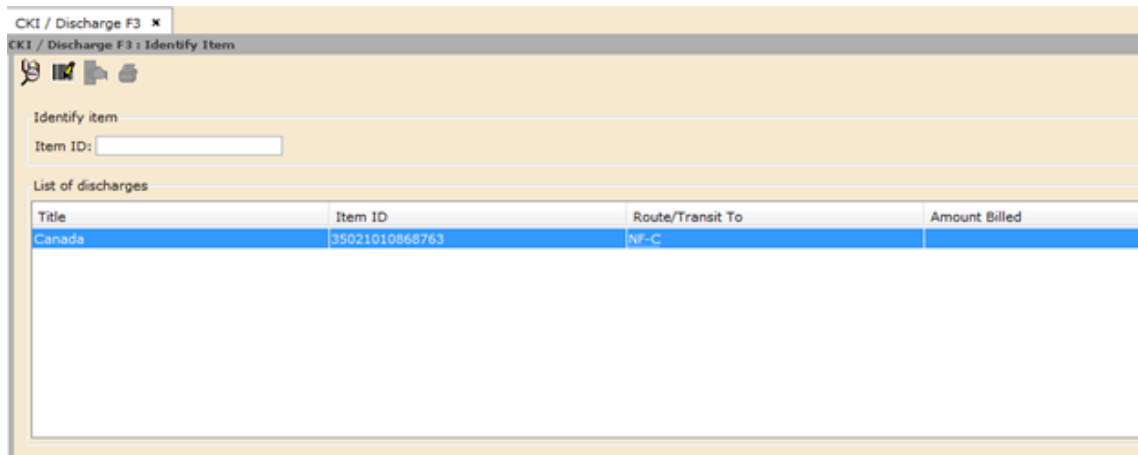
List of checkouts: 1

Title	Item ID	Date Due	Billed
Canada	35021010868763		<u>9/9/2015,23:59</u>

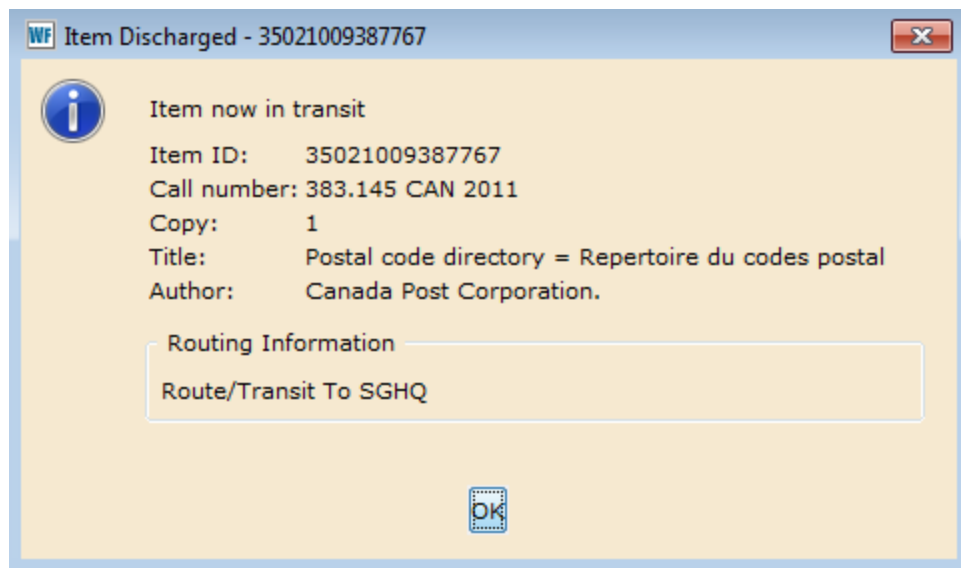


## Check In an Item

1. Under the **Common Tasks** wizard group, click **CKI / Discharge F3**.
2. Scan the item barcode or type in the barcode number in the **Item ID** box.
3. The item will be checked in. Any accrued fines will appear on the screen.
4. If it is an item owned by your own library and there are no holds on it, nothing further will happen and you can shelve it.



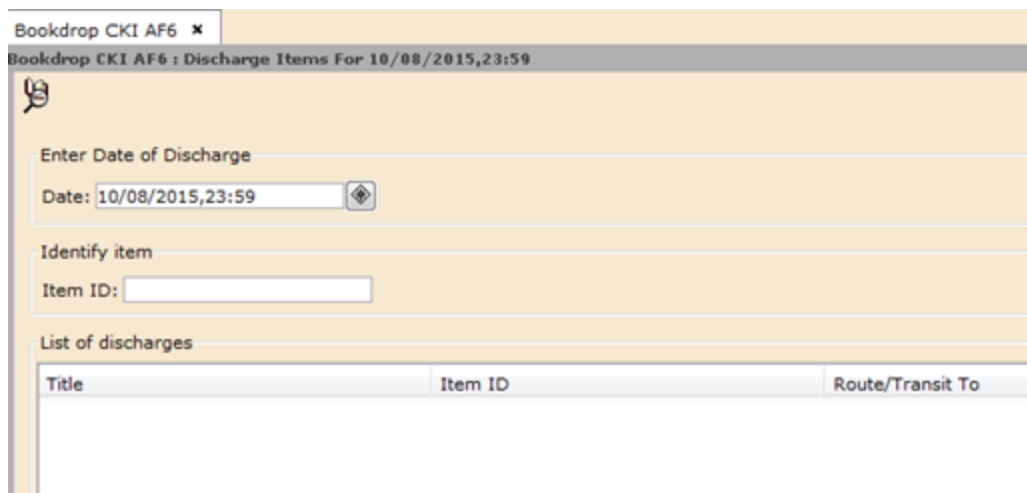
5. If the item belongs to another library, or if someone at another library has placed a hold on the item, then it will be placed in transit to that library. You must mark it for the Shortgrass driver to pick up on the next delivery date.



## Check In Book Drop Items (Backdated Check-Ins)

When you check in book drop items, you need to backdate all checkins, to ensure that patrons aren't being fined when they did in fact return the book on it's due date- they were just after hours. This is especially important after you have been closed for the weekend, or if you are closed on a public holiday.

1. Under the **Common Tasks** wizard group, click **Bookdrop CKI AF6**.
2. Next to **Enter Date of Discharge**, click the diamond button and select a check-in date from the list.
3. Scan the item barcode or type the barcode number under the Item ID field to check in the item.



The screenshot shows a web application window titled "Bookdrop CKI AF6". Below the title bar, there is a subtitle "Bookdrop CKI AF6 : Discharge Items For 10/08/2015,23:59". The main content area is divided into several sections:

- Enter Date of Discharge:** A text input field containing "Date: 10/08/2015,23:59" and a diamond-shaped date picker button to its right.
- Identify item:** A section with the label "Identify item" and a text input field labeled "Item ID:".
- List of discharges:** A table with three columns: "Title", "Item ID", and "Route/Transit To". The table is currently empty.

# Renew Items

There are two methods for renewing items:

## 1. Renew a single checked out item:

- a. Under the **Common Tasks** wizard group, click **Renew by Item SF7**.
- b. Scan the item barcode or enter the number and click enter.
- c. If the item can be renewed, then the new due date will appear on the screen.

## 2. Renew multiple items for a patron

- a. Under the **Common Tasks** wizard group, click **Renew by User F7**.
- b. Scan or type in the patron's barcode number under the **User ID** field, or search for the user (see "How to Search for a Patron").
- c. Under the **Renew** column, check the box next to the item(s) you wish to renew. Then click the **Renew Selected Items** button at the bottom. If the item can be renewed, then the new due date will appear on the screen.

Note that not all items will be able to be renewed:

- If another patron has a hold on an item, then the item cannot be renewed. Please do not override renewals if this is the case; respect the other patron's hold.
- If a title has been renewed two times already, it cannot be renewed without an override code. It is best practice to have the patron bring the book into the library for you to check the condition, before overriding it and renewing the title.
- Depending on your library's procedures, once a patron has reached a certain fine threshold, they may not be able to borrow or renew books.

# Pay a Bill on a Patron's Account

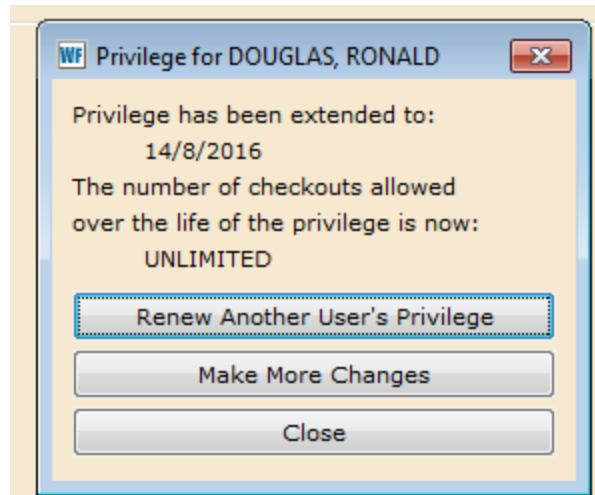
1. Under the **Common Tasks** wizard group, click **Paying Bills**.
2. Scan or type in the patron's barcode number under the **User ID** field, or search for the user (see "How to Search for a Patron").
3. A list of the user's bills will appear on the screen. You can make a lump-sum full or partial payment by entering an amount and payment type under **Total bills and payments**, or you can pay a specific bill by entering an amount and payment type on a particular line item under **Individual Bills and Payments**. Once this is entered, click the **Pay Bills** button at the bottom to pay the bill.
4. Most libraries just use the CASH payment type, unless the fine is being waived. In those cases, select Waived-Del from the list.

The screenshot shows the 'Paying Bills AFS' interface. It is divided into several sections:

- User Information:** Name: DOUGLAS, RONALD; Status: DELINQUENT; Library: SGIRV; Profile name: SGIRVF...; Amount owed: \$2.00; Available holds: 0; User categories: NONE; Overdues: 0; Group ID: (empty).
- Identify User:** User ID: 454545454 (entered in a text box).
- Total bills and payments:** Total bills: 1; Total owed: \$2.00; Still owes: \$2.00; Credit balance: none; Payment type: CASH (selected in a dropdown menu).
- Individual Bills and Payments:** A table with columns: Title, Item ID, Reason, Owes, Payment Type, and Pay. One row is visible: Reason: BEHAVIOUR, Owes: \$2.00, Payment Type: CASH.

## Renew a Patron's Privilege

1. Under the **Users** wizard group, click **Renew Privilege**.
2. Scan or type in the patron's barcode number under the **User ID** field, or search for the user (see "How to Search for a Patron").
3. Click the extend privilege button at the bottom to renew the membership for 1-year from today's date. A confirmation box will pop up and display the new expiry date.



## Check / Change a PIN Number

1. Under the **Users** wizard group, click **Modify User**.
2. Scan or type in the patron's barcode number under the **User ID** field, or search for the user (see "How to Search for a Patron").
3. Click the **Privilege** tab, and look at the PIN number.
4. If you need to change the PIN, you can do so by replacing the existing PIN number, then entering your Override code.

Privilege expires:	<input type="text" value="0/12/2023"/>	<input type="button" value="v"/>
PIN:	<input type="text" value="1234"/>	Override: <input type="text" value="*****"/>
Status:	<input type="text" value="DELINQUENT"/>	<input type="button" value="..."/>

## Change a Patron's Address or Other Information

1. Under the **Users** wizard group, click **Modify User**.
2. Scan or type in the patron's barcode number under the **User ID** field, or search for the user (see "How to Search for a Patron").
3. You will be brought to a screen similar to the user registration screen. Change information as required and click the Save button at the bottom when you are done.

Name: DOUGLAS, RONALD  
Id: 454545454  
Group ID:  
Profile name: SGIRVF...

---

Identify User

User ID:

---

Basic Info | Privilege | Demographics | Addresses | Extended Info | User groups

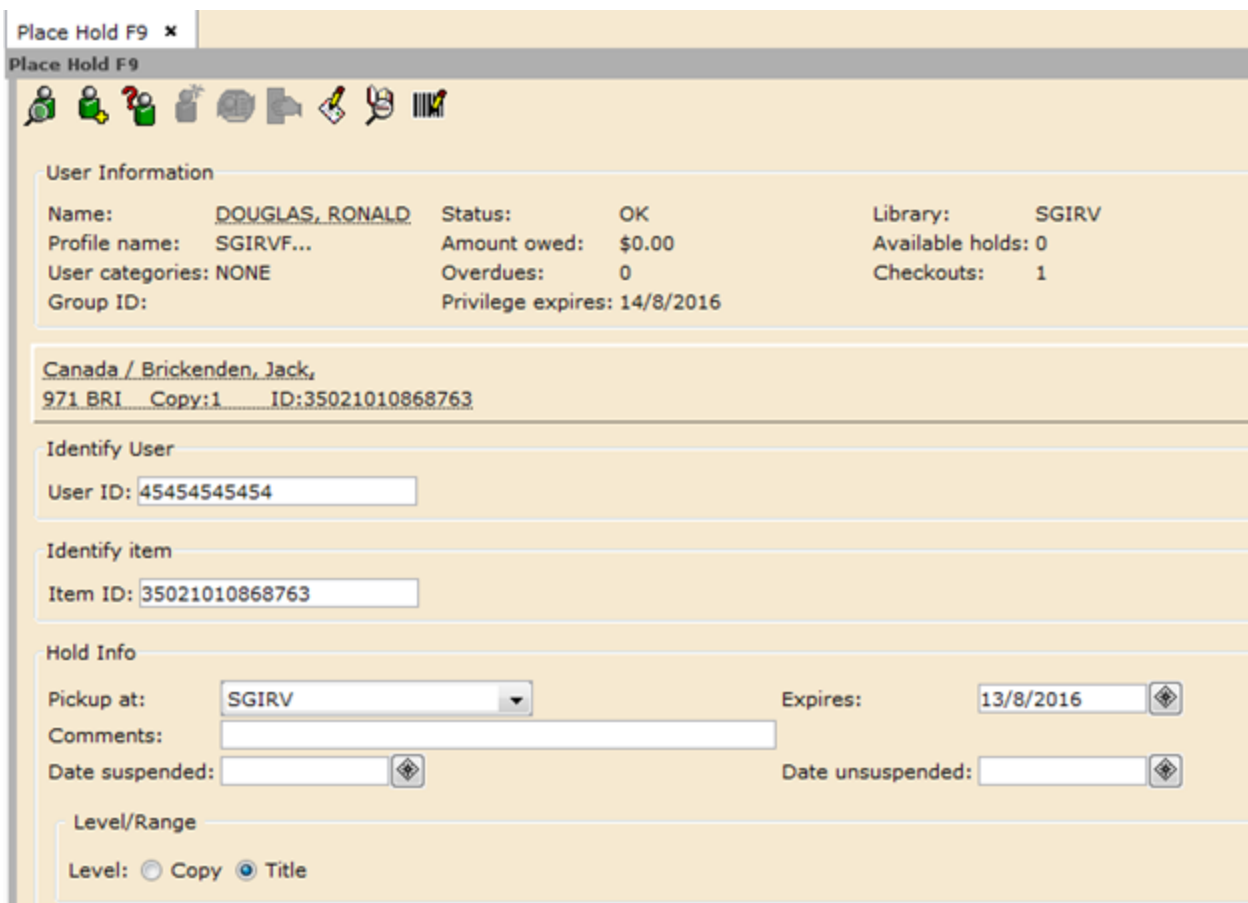
Title:   
First name:   
Preferred name:   Use preferred name  
Middle name:   
Last name:   
Suffix:   
User ID:   
Alt ID:   Allow routing  
Group ID:   
Library:   
Profile name:   
Charge history rule:

# Place a Hold on an Item

1. Under the **Holds** wizard group, click **Place Hold F9**.
2. Scan or type in the patron's barcode number under the **User ID** field, or search for the user (see "How to Search for a Patron").
3. Under **Identify Item**, scan the item barcode if you have it, or click the **Item Search** icon at the top to find the item:



4. Click the **Place Hold** button at the bottom of the screen.



The screenshot shows the 'Place Hold F9' application window. It features a toolbar with various icons at the top. The main content area is divided into several sections:

- User Information:** A table-like section displaying user details.

Name:	<u>DOUGLAS, RONALD</u>	Status:	OK	Library:	SGIRV
Profile name:	SGIRVF...	Amount owed:	\$0.00	Available holds:	0
User categories:	NONE	Overdues:	0	Checkouts:	1
Group ID:		Privilege expires:	14/8/2016		
- Canada / Brickenden, Jack,**  
971 BRI Copy:1 ID:35021010868763
- Identify User:** A text input field containing '45454545454'.
- Identify item:** A text input field containing '35021010868763'.
- Hold Info:** A section with several fields:
  - Pickup at: A dropdown menu showing 'SGIRV'.
  - Expires: A date field showing '13/8/2016'.
  - Comments: A large empty text area.
  - Date suspended: An empty date field.
  - Date unsuspended: An empty date field.
- Level/Range:** A section with radio buttons for 'Level', where 'Copy' is selected and 'Title' is unselected.



## Daily Hold Pickup Lists

When a patron places a hold on an item in your library, you need to retrieve it. There are two methods for doing this.

1. Email report, sent to you twice daily:
  - a. The “List Onshelf Items with Holds” report runs twice daily (7:15 am and 4:00 pm).
  - b. This will be delivered via email to the account you have designated for this.
  - c. You can print this list out, or simply make note of which books are on hold.
  - d. Go through the library and collect all the books that appear on this list.
2. Onshelf items, which you can access at any time:
  - a. Under the **Holds** wizard group, click **Onshelf Items**.
  - b. This will generate a list of all titles in your library for which patrons have placed a hold.
  - c. You can print this out, or simply make note of which books are on hold.
  - d. Go through the library and collect all the books that appear on the list.

Once you have collected all the pending holds, return to WorkFlows. Under the **Holds** wizard group, click **Trap Holds SF3**.

1. Scan the item barcode, or enter the item ID.
2. A popup notification will tell you where the book needs to go.
  - a. If you have a receipt printer, you may be able to select to print a receipt listing the receiving library. Insert the slip into the book, or attach it with an elastic band.
  - b. If you do not have a receipt printer, record the receiving library on a piece of paper or sticky note, and attach it to the item.
3. The item status will change to “in transit”.
4. Place the item in the red Shortgrass delivery bin/bag for the intended library.

**NOTE: if for any reason an item cannot be sent, please email the requesting library.**

## Receiving Holds

1. When you receive your red shipping bins, check in all items. You should do this by clicking **CKI / Discharge** in the **Common Tasks** menu, then checking in the books (as explained in “How to Check In an Item”).
2. Most of the items you receive in your red bins will fall into one of three categories:
  - a. Brand-new items sent to you by Shortgrass;
  - b. Your items being returned from other libraries;
  - c. Holds that your patrons have placed, that have been sent from other libraries.
3. Items that belong to your library and are *not* on hold will simply show up as returned items, and can be shelved.
4. Items that your patrons have on hold will show a pop-up when scanned. Follow whichever steps are applicable for your library (for example, print out the hold receipt, place the book on the hold shelf, and call the patron to let them know the book has arrived).
5. Some items may immediately go back in transit. This may be because one of your patrons cancelled their hold before the book reached your library, or it may be because a returning title is already on hold again. If a newly arrived book says that it is in transit, please send it on its way.

## Update Item Status to Claims Returned

1. If a patron is certain that they returned a book, but you cannot find it in the library, you can mark it as “claims returned”.
2. Under the **Special** wizard group, click **User Claims Returned**.
3. Scan or type in the patron’s barcode number under the **User ID** field, or search for the user (see “How to Search for a Patron”).
4. The patron’s current checkouts will display here. Look for the book they are claiming to have returned, then click on the diamond button and select the date.
  - a. Note: it will depend on your library what date you select- it may be today’s date, it may be the date that the item was due, or it may be the date the patron claims to have returned the item.
5. The item will remain listed on the patron’s account, and a note will be added to their account that they have claimed to return an item. If the item is returned in the future, it will be removed from the account, but the note stating that they had claimed to have returned an item will remain. The total number of “claims returned” items will always be listed on a patron’s account.

## Discard an Item

1. Under the **Common Tasks** wizard group, click **CheckOut F5**.
2. In the **User ID** field, type in your library's DISCARD user ID.
3. Scan or type in the item barcode number under the **Item ID** field.
4. Checkout details will appear at the bottom of the screen and will show a list of titles and Item ID numbers.
5. Ensure that you complete any other discarding steps as applicable at your library - for example, blacking out the Item ID with a sharpie, crossing out your library's name.
6. The items will be removed once a month, to complete the discarding process.
7. **Note: Under no circumstances should you discard another library's item. If it is damaged, please let your patron know that you need to communicate with the library to decide how to proceed. It is up to the library that owns the item to decide if they want to continue circulating a title.**

User Information			
Name:	DISCARD USER @ IRV	Status:	OK
Profile name:	DISCARD...	Amount owed:	\$0.00
User categories:	NONE	Overdues:	0
Group ID:		Privilege expires:	NEVER
Identify user			
User ID:	<input type="text" value="SGIRVDISC"/>		
Identify item			
Item ID:	<input type="text"/>		

