WorkFlows
Learning to Use the Staff Client

Version 3.5

Contents

Basic Terms

SAILS

SAILS is a multi-library consortium headquartered in Middleborough. SAILS serves public, academic, and school libraries in Southeastern Massachusetts communities.

Symphony

Symphony is the name of the library management system used by SAILS libraries.

WorkFlows

WorkFlows is the portion of the Symphony system that library staff members use. The version of WorkFlows described in this manual is called the WorkFlows Java client .
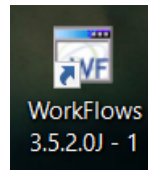
Enterprise

Enterprise is the name of the online public access catalog used by SAILS libraries.

Getting Started

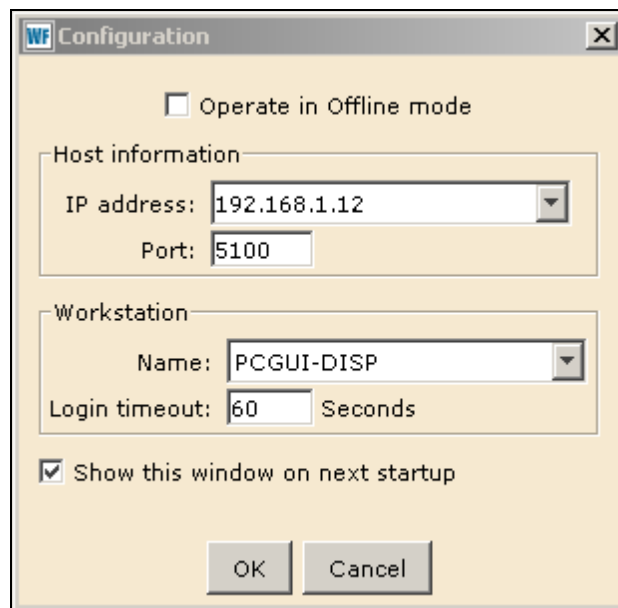## Logging into WorkFlows

To log into WorkFlows:
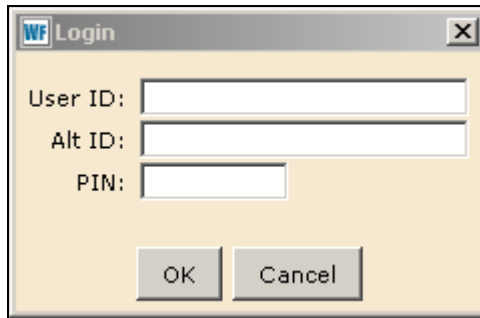
WorkFlows
3.5.2.0J - 1

1. Click on the WorkFlows icon located on your computer desktop.

    If the following screen appears, click **OK.** If it does not appear, do not be concerned about it.

The Login screen then appears.

2. Enter your library's **User ID** and **PIN**, and click **OK**.

If you do not know your library's User ID or PIN, contact an administrator at your library or contact SAILS.

The User ID and PIN serve several purposes, including:

- It defines what features of WorkFlows you can use.
- It identifies your computer to your library so that items are checked out following your library's circulation policies for loan period, fine rates, etc.

The WorkFlows screen

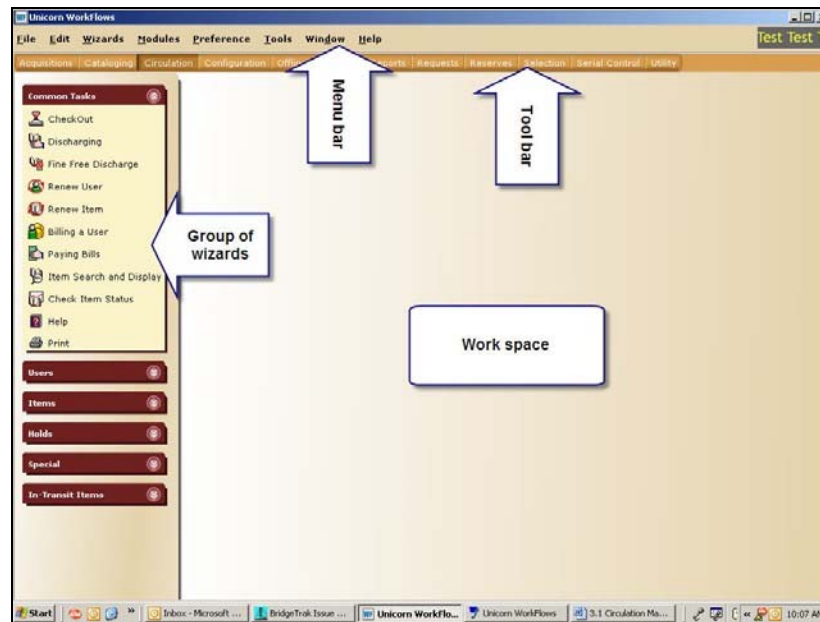After you enter your library's User ID and PIN, the computer starts WorkFlows. This may take a minute or two. Then, the WorkFlows screen appears.

File Menu

The File menu can be used to print the contents of the current client window, preview the current client window, update the staff client, and end the client session. The following options are available.

- Print
- Print Preview
- Print Screen
- Print Setup
- Page Setup
- Update Staff Client
- Exit

Print

Click Print to print the current wizard window. Print templates are defined for some wizard windows. The print output will include the window title, the date the print job was generated, and the wizard window data. For some wizards, the print output will include data from multiple wizard tabs. The standard Windows Print window displays for you to modify as needed before printing the wizard window. If the current wizard window does not have a defined print template, the Print command will be unavailable. Use the Print Screen command instead. For a list of wizards that have defined print templates, see the Print Wizard topic.

You also have the option of adding the Print wizard (which functions the same as the Print command) to a toolbar.

The Print wizard must be included in the User Access List of your login for you to access either the Print command from the File menu or the Print wizard.

In cataloging wizards, the format for printing the current record is controlled by the Display Bibliographic Description helper properties and selecting File/Print Preview. For example, if you want the entry labels to print for a bibliographic record, be sure to select Display Descriptive Labels in this helper. Likewise, if you want the tag numbers to print, select Display Numeric Tags in this helper.

It is also possible to print glossaries in the Display Bibliographic Description helper.

On a Windows desktop, it is possible to screen print by pressing SHIFT+PRINT SCREEN, and pasting the image to a third-party application.

Print Preview

The Print Preview command only works with wizards/windows that have a defined print template. Click Print Preview to display the wizard data in a preview window. If you click the Print helper, the standard Windows Print window displays for you to modify as needed before printing the wizard window. If you click the Close helper, the preview window closes and the print function is not completed.

The Print Preview command is not available when using Print Screen.

The Print wizard must be included in the User Access List of your login for you to access the Print Preview command from the File menu.

Print Screen

The Print Screen option allows you to print the contents of the current wizard window. Click Print Screen, and the contents of the current wizard window are exported to the application specified in Print Setup for printing and modification (if the selected application is capable of editing an HTML file). If an application is not specified, the default Internet browser for the workstation will be used.

Print Setup

Click Print Setup to display the following printing options.

- Application to Dump Screen – You can use this option to select an application for viewing and modifying the contents of a screen print.

- Print to a Printer – Select a printer to be used for printing wizard data templates. Select a printer from the list. The value you select will be saved to your Desktop Preference. If you select a printer, the Print to an Application option becomes unavailable.
- Print to an Application – Use the Select File gadget to select an application for printing wizard data templates, such as Microsoft Word. If you select an application, the Print to a Printer option becomes unavailable.

> The Print wizard must be included in the User Access List of your login for you to access the Print Setup command from the File menu.
>
> This feature is not available when running the WorkFlows client in offline mode.

Page Setup

Click Page Setup to display configuration options for paper size, print orientation, and margins. Page Setup applies to printing from a print template. It does not apply to Print Screen functionality.

- Under Paper, select one of the following sizes from the list.
  - **Letter – Which is 8.5 x 11 inches in size.**
- Under Orientation, click either Portrait or Landscape.
- Under Margins, type values for the Right, Left, Top and Bottom margins, and be certain to select the appropriate Units from the list. If you selected a printer as a default printer in the File/Printer Setup menu, the client will try to determine the size and height of the paper being used in the selected printer and pre-set the margins. (You should verify this information is correct.)

> The Print wizard must be included in the User Access List of your login for you to access the Print Setup command from the File menu.

Update Staff Client

Click Update Staff Client to update your client as needed. When the update file is successfully downloaded, you are given the choice to exit the staff client to continue updating, or install the update later.

Exit

Click Exit to display the following dialog box.

This will halt the workstation.Click Yes to quit the client, or click No to return to the workstation.

> If a toolbar or property has been changed and saved, these values will be retained for your next workstation session.

Edit Menu

The Edit menu can be used to manipulate selected text on the current screen. The following options are available.

- [Cut](#)
- [Copy](#)
- [Paste](#)

Cut

Click Cut to remove the selected information from the current screen and paste the text to the clipboard. In addition to the underlined shortcut key on the menu, a shortcut for this command is CTRL+X.

Copy

Click Copy to copy the selected information on the current screen and paste the copy of the text to the clipboard. The selected text remains on the current screen. In addition to the underlined shortcut keY.

Paste

Click Paste to put the previously cut or copied text into a field on the current screen. In addition to the underlined shortcut key on the menu, the keyboard shortcut for this command is CTRL+V.

Note If you copy and paste text that includes line feed and/or carriage return characters, the client will replace these characters with a couple of space characters

Help Menu

The Help menu can be used to display the Documentation page of the WorkFlows Help, the help topic associated with the current window, and information about the software. The following options are available.

- [Contents](#)
- [Context](#)
- [Key Enhancements](#)
- [Session Information](#)
- [About](#)

Contents

Click Contents to display the Documentation page of the WorkFlows Help.

Context

Click Context to enable context-sensitive help and display the help topic associated with the

current window. Context sensitive help can also be displayed by clicking the Help button (book with question mark) on a toolbar, by pressing the F1 shortcut key, or by right-clicking the mouse over a wizard icon and selecting Help from the shortcut menu.

It is important to consider the following:

- To display help for dialog boxes, press the F1 shortcut key. The Help button cannot be used to display help for dialog boxes.
- If you use the right-click method to access wizard properties, press the F1 shortcut key to display help.
- Context help cannot be displayed for a group wizard icon. Open the group wizard, open a wizard, and click the Help button for individual wizard topics.
- The Help wizard must be included in the User Access List of your login to access Help from the File menu or from the Help wizard.

Session Information

Click Session Info to display Login information and Host information about the current client session.

About

Click About to display the software version and the SirsiDynix copyright statement.

Toolbars

Each toolbar, such as the Circulation toolbar, consists of wizards, grouped into "groups of wizards." Select a toolbar by clicking the toolbar name at the top of the client window.

Wizards

A wizard is the feature of WorkFlows that you use to perform a specific task, such as check out an item, register a patron, or place a hold for an item.

WorkFlows arranges wizards that have similar functions into groups of wizards, such as Common Tasks, Users, Items, etc., on the left side of the screen. To open or close a group of wizards, click the open/close icon:
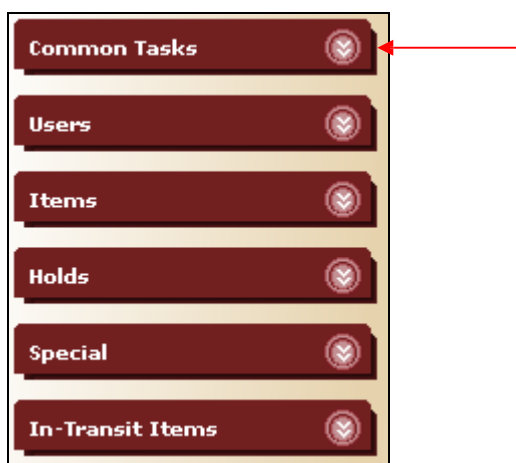
The Common Tasks group of wizards, for example, looks like this:

To use a wizard, click on the wizard icon or text within the group of wizards. If you are unsure what a wizard does, move your mouse over the image without clicking. Text will appear describing the function of that wizard. You may also click on a wizard and then click on Help and then Context.
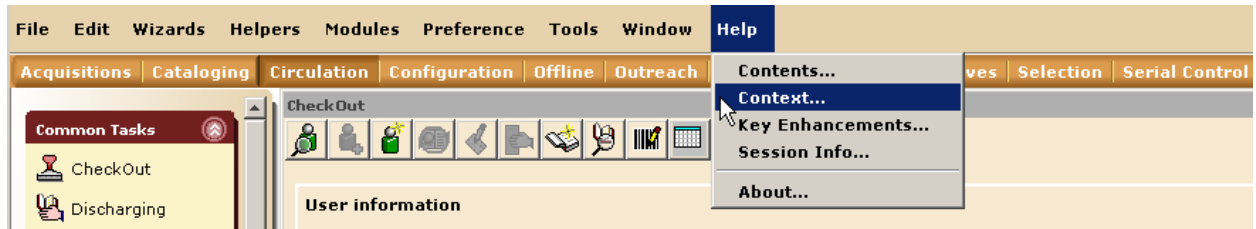
For example if you click on Checkout and click on Help – Context this screen will appear.

You are here: Circulation > Checkout Wizard

Checkout Wizard

The Checkout wizard is used to check out items to a library user. Depending on how wizard properties are set and if patron photos are configured to appear for your library, it can also be used to add a photo to the user's record. This wizard displays on the Circulation, Academic Reserves, and Outreach Services toolbars.

To check out items

1 Click the **Checkout** wizard.

2 Do one of the following.
   • If the **User Search** helper is set in properties to display as the first step of the wizard, search for the user. The helper will automatically fill in the **User ID** box with the ID you select using this helper.
   • In the **User ID** box, scan the user's ID.
   • If the **Current** button is available, click the button to select the last user record that was displayed, modified, or added.
   • Type the user ID in the **User ID** box, and click **Get User Information**.
   • Use the **User Search** helper to search for the user. If a list displays, select the user you want, and then click **Check Out to User**.

Note: If your library uses the barcode validation feature, a message appears if you type or scan a user ID with an invalid barcode format in the User ID field.

3 In the **Item ID** box, scan the item ID or barcode.

4 If **Cache Item IDs** is selected in behavior properties, you can scan multiple item IDs in this box. Click   **Check Out Item to User** to send all item IDs for check out.

5 In the **List of Checkouts** heading, the number of items checked out displays. Under **List of Checkouts**, the item's title, call number, item ID, date due, and item type display. If the item that is charged results in a

charge fee, the bill amount also displays. If the user has a patron credit account, and the wizard is configured to pay bills automatically with funds from the credit account, the amount paid from the credit account displays. Click the item ID glossary to view detailed information about the item.

If you select an item or group of items in the checkouts list and right-click, a circulation menu opens.

From this menu, you can perform a variety of circulation tasks. See [Right-click Menus](#).

6   Repeat step 3 (or 4) until all items are checked out.

7   If **Display Email Current Checkouts receipt button** is selected in behavior properties, you can click **Email Current Checkouts** to email the user a receipt containing information on the items checked out during this session.

Alternatively, if **Display Email All Checkouts receipt button** is selected in behavior properties, you can click **Email All Checkouts** to email the user a receipt containing information on all the items checked out to the user.

A confirmation dialog box displays. Click **OK**.

Note: WorkFlows returns an error message if the user does not have an email address in the user record.

For information on configuring checkout receipt emails, see the [Configuring Checkout Receipt Email Template Files](#) help topic.

If desired, you can add a photo to the user record, or replace the current photo with a new one. For more information, see [Adding or modifying a patron photo](#).

After you have checked out items to the library user, select one of the following options:

• **Check Out to New User** to check out items to a new user

• **Close** to exit the wizard

Properties

Each wizard has properties which provide window defaults and various control settings for each wizard. SirsiDynix provides a set of system properties. When a client session is started, the delivered properties are downloaded to the workstation. Any changes a user makes to properties are saved on that user's workstation. The changes will be displayed the next time the wizard is used.

Use these steps to display or modify properties for a specific wizard. Not every log-in will allow you to reset properties.

1. Place the cursor over a wizard's icon/name.
2. Click the right mouse button.
3. Click **Properties** to display each wizard's Set Properties window.

If you set properties using the right-click method, when exiting the client, you will be prompted whether or not to save changes to properties. If properties are set when using the wizard (a left mouse click), changes are not saved when exiting the client.

If you access properties using the right-click method, press the F1 shortcut key to display help. The Help button cannot be used to display help for dialog boxes.

Wizard Properties Tabs

Properties may contain the following tabs.

- **Behavior** – On the Behavior tab, you can preset selected field values and select which next steps and/or tabs will display with a specific wizard or helper. Some wizards will contain an At End of Wizard screen area, in which you can select which next step buttons display at the end of the wizard work flow or select which action the wizard should automatically perform as the last step of the wizard.
- **Defaults** – On the Defaults tab, you can preset field values and select which information will display with a specific wizard or helper.
- **Helpers** – On the Helpers tab, you can select which helpers will display with a specific wizard or helper. You can configure properties for helpers by clicking on the button under the helper name in wizard properties.

Administrators and supervisor-level staff have access to Behavior, Defaults, and Helpers properties. Other staff have access to only Defaults properties.

Helpers

A helper is a shortcut to a wizard from within another wizard. Helpers appear as small icons near the top of the screen (see figure). Different helpers appear when you access different wizards. If a helper is "grayed out," it is not available for use.
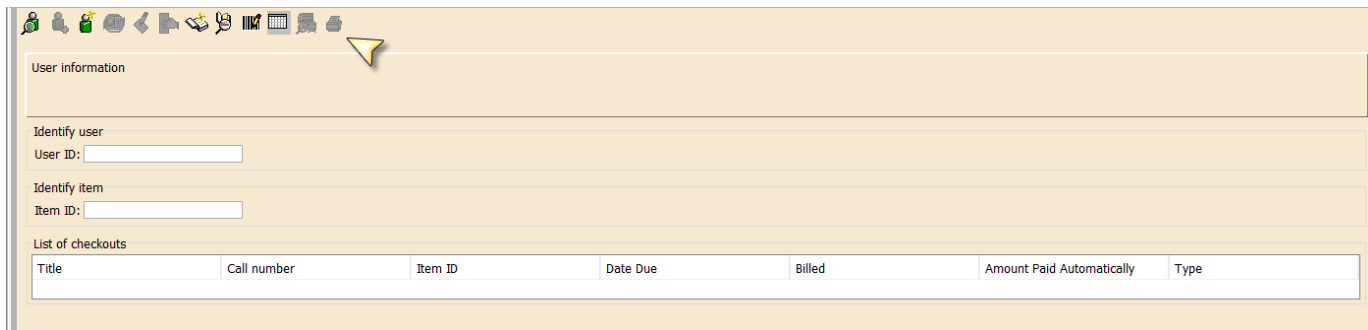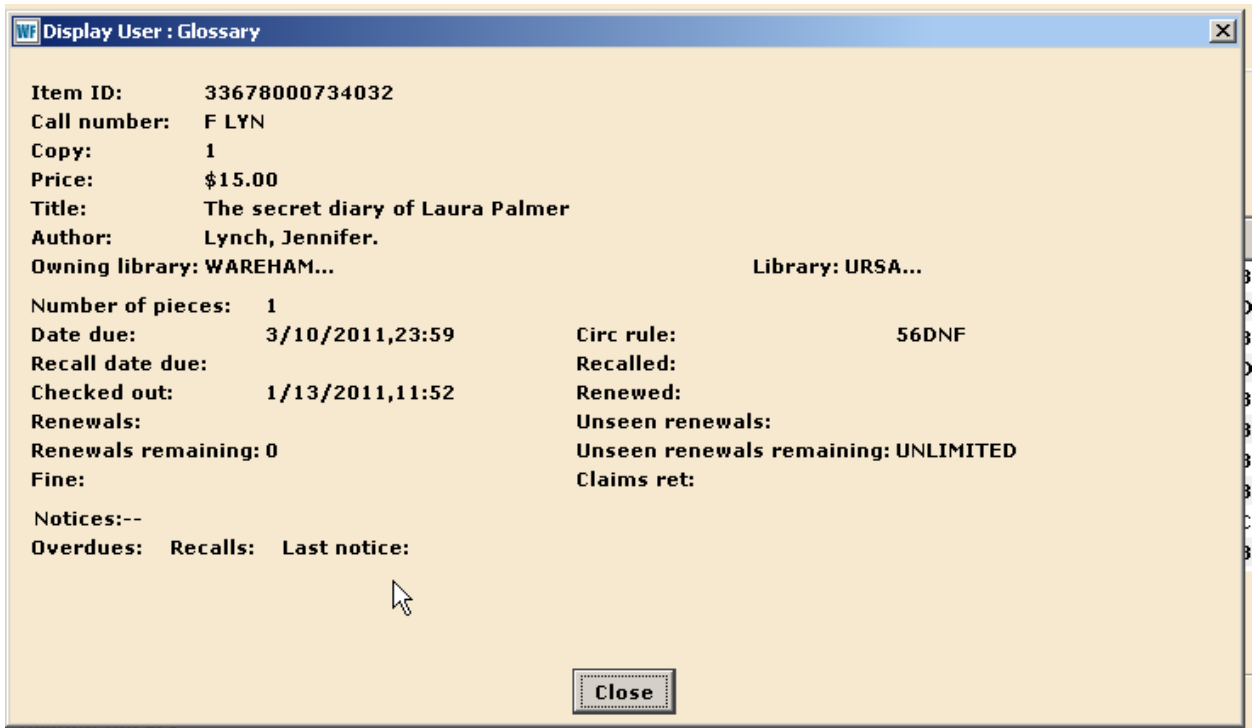
The Helper bar is positioned horizontally across the top of the WorkFlows client interface, just below the active window's title bar. Helpers listed on the left side of the bar primarily make it easier to access necessary information needed by the current wizard. For example, Checkout wizard uses the following helpers: Lookup User, Register New User, User Lost Card, Pay Bills, Add Temporary Title, Confirm Address, Replace Item Barcode, Special Due Date, and Renew Privilege. If a helper is grayed out then it is not applicable to the task you are performing.

Glossaries

Information underlined with a dashed line will display a glossary when you click it.

. For example, when looking at a list of items checked out to a patron a list of item id's display. When one of the items is clicked, a brief checkout displays.

Title	Item ID	Date Charged	Date Due	Recall Date Due	Status	Type
The book of Thoth : ...	32777001410658	7/22/2009,8:17	9/16/2009,23:59		Overdue	BOOK
Batman beyond. Se...	32035012121289	3/26/2007,10:41	5/21/2007,23:59		Overdue	DVD
Rules	31462001898100	8/10/2010,13:11	10/5/2010,23:59		Overdue	BOOK-JUV
Ed, Edd, n Eddy. The...	31658002677563	9/17/2010,15:14	11/12/2010,23:59		Overdue	DVD
The secret diary of ...	33678000734032	1/13/2011,11:52	3/10/2011,23:59		Overdue	BOOK
Restructuring educa...	32777001444756	2/11/2011,14:03	4/8/2011,23:59		Overdue	BOOK
Maximum Ride : sav...	32034003264687	3/2/2011,9:08	4/27/2011,23:59			BOOK
Zorro : a novel	32040001507639	3/4/2011,14:27	4/29/2011,23:59			BOOK
Stress relief [sound...	35899000936652	3/4/2011,14:38	4/29/2011,23:59			CD
Earthing : the most i...	32034003369767	3/10/2011,9:21	5/5/2011,23:59			BOOK

```
WF Display User : Glossary                                                    ×

Item ID:        33678000734032
Call number:    F LYN
Copy:           1
Price:          $15.00
Title:          The secret diary of Laura Palmer
Author:         Lynch, Jennifer.
Owning library: WAREHAM...                              Library: URSA...

Number of pieces:   1
Date due:           3/10/2011,23:59        Circ rule:              56DNF
Recall date due:                           Recalled:
Checked out:        1/13/2011,11:52        Renewed:
Renewals:                                  Unseen renewals:
Renewals remaining: 0                      Unseen renewals remaining: UNLIMITED
Fine:                                      Claims ret:

Notices:--
Overdues:   Recalls:   Last notice:



                                    ╔════════╗
                                    ║ Close  ║
                                    ╚════════╝
```

Gadgets

Indicated by the gadget icon 🔾, these tools make selecting field values easier. These gadgets can be used to select information such as date and time ranges, policy values, or monetary amounts. You may use a gadget by clicking the gadget icon with the mouse or by pressing the TAB key to select the gadget and then pressing ENTER to open it. Gadgets also have context-sensitive help links.

Drop-down Lists

1. Indicated by the arrow icon 🔽 , drop-down lists make selecting field values and policy values easier. The lists present valid values for the wizard fields. Click the arrow button.
    2. Click one of the values in the list to select it.
    3. Or, if you start to type a value name, the wizard jumps to that value in the list. Click the value to select it.

When you start to type a value name, the drop-down list behaves in a standard Windows manner. When you type a partial match that will always result in a list (for instance, if you type one letter), you will start in the list at that letter. If you type in three letters, you will start in the list at the first match for those three letters and be able to scroll down the list from that point. If you type a whole text string, you would still be able to see the text strings following it.

For example, these policy names are available: AAA, ABA, ABB, ABC, ABD, and BCD.

- When you type A, the list starts at AAA.
- Next, type B, and the list selects ABA.

Notes and Alerts

When WorkFlows displays patron information, any **notes** from the patron's record or **alerts**, such as those about money owed, appear near the upper left in red.
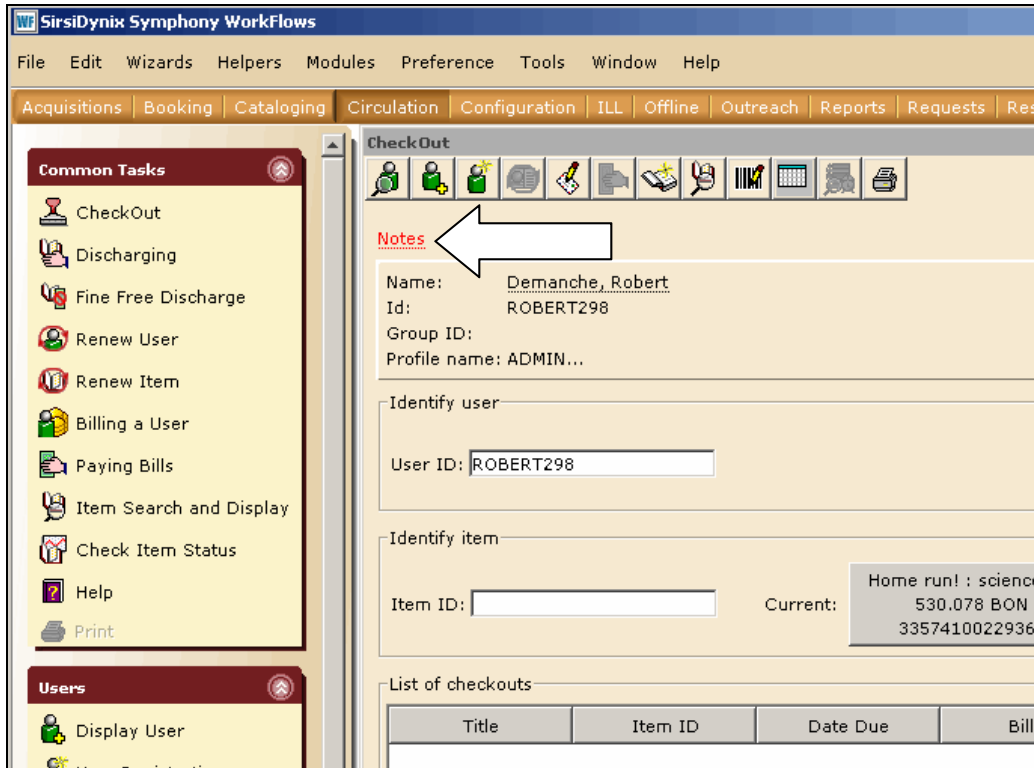
Click the <u>Notes</u> or <u>Alerts</u> to display this information.

Sorting

To sort a list of items, click the column heading that you want to sort by. To sort the column in the opposite direction, click the column heading a second time.

After sorting, the results would appear as follows:

Right-click Menus

The WorkFlows supports **right**-click menus for wizards and other WorkFlows functions. These **right**-click menus are popup or shortcut menus that contain commands and options that can be performed against a selected record or group of records. The **right**-click menus are available using a mouse **right**-click in circulation lists (or tables), such as checkouts, bills, holds, bookings, and more.

Once in a **right**-click menu, you can **click** a circulation or print option, or use CTRL+ the underlined character to access an option.

Which right-click menus are available in the WorkFlows client?

The following wizards/functions will display a menu when the user **right**-clicks within the circulation lists (tables).

List type	Wizards	Menu options
Bill	Billing a User CheckOut Display User Renew User User Lost Card	• Change Item ID
		• Display Item
		• Edit Bill Note
		• Edit Item Note
		• Pay Bill
		• Place Hold
Bill	Paying Bills	• Change Item ID
		• Display Item
		• Edit Bill Note
		• Edit Item Note
		• Place Hold
Booking	Display User	• Create Booking
		• Display Item
		• Edit Item Note
		• Modify Booking
		• Modify Booking Due Date
		• Remove Booking
Checkin	Discharging Discharging Bookdrop	• Bill User for Item
		• Change Item ID
		• Display Holds
		• Display Item
		• Display User
		• Edit Item Note
		• Mark Item Missing
		• Mark Item Used
		• Place Hold
Checkin	Fine Free Discharge	• Change Item ID
		• Display Holds
		• Display Item
		• Display User
		• Edit Item Note
		• Mark Item Missing
		• Mark Item Used
		• Place Hold
Checkout	Display User User Lost Card	• Bill User for Item

		• Change Item ID
		• Claims Returned
		• Discharge
		• Display Holds
		• Display Item
		• Edit Item Note
		• Mark Item Lost
		• Mark Item Missing
		• Modify Due Date
		• Place Hold
		• Print Checkout Slip
		• Renew As Seen
		• Renew As Unseen
Checkout	Ephemeral	• Bill User for Item
		• Display Item
		• Edit Item Note
		• Modify Due Date
		• Print Checkout Slip
Checkout	Renew Item	• Bill User for Item
		• Change Item ID
		• Discharge
		• Display Holds
		• Display Item
		• Display User
		• Edit Item Note
		• Modify Due Date
		• Place Hold
		• Print Checkout Slip
Checkout	Renew User	• Bill User for Item
		• Change Item ID
		• Claims Returned
		• Discharge
		• Display Holds
		• Display Item
		• Display User
		• Edit Item Note
		• Mark Item Lost
		• Mark Item MIssing
		• Modify Due Date
		• Place Hold
		• Print Checkout Slip
Current	CheckOut Paying Bills	• Bill User for Item
		• Change Item ID
		• Claims Returned
		• Discharge
		• Display Holds
		• Display Item
		• Display User
		• Edit Item Note
		• Mark Item Lost

		• Mark Item Missing
		• Modify Due Date
		• Place Hold
		• Print Checkout Slip
		• Renew As Seen
		• Renew As Unseen
List of	CheckOut	• Bill User for Item
		• Change Item ID
		• Discharge
		• Display Holds
		• Display Item
		• Display User
		• Edit Item Note
		• Modify Due Date
		• Place Hold
		• Print Checkout Slip
Hold	CheckOut	• Bill User for Hold
	Display Item Holds Display Title Holds Display User Holds Paying Bills	• Display Item
	Renew User	• Display User
		• Edit Item Note
		• Modify Hold
		• Place Hold
		• Remove Hold
		• Reorder Hold Queue
Hold	Display User User Lost Card	• Bill User for Hold
		• Display Item
		• Edit Item Note
		• Modify Hold
		• Place Hold
		• Remove Hold
		• Reorder Hold Queue
Onshelf Items	Onshelf Items	• Mark Item Missing
		• Trap Hold
		• Unfill Hold

Keyboard Shortcuts

You can use keyboard shortcuts or function keys for data entry, wizard access, and for entering special characters and diacritics. You can use standard Windows editing shortcuts, such as:

- CTRL + X for cut
- CTRL + C for copy, and
- CTRL + V for paste.

There are also keyboard shortcuts for each set of wizards. For example for circulation the following key combinations can be used as short cuts:

Circulation

Use the following keyboard shortcuts to access circulation wizards.

Wizard	Key Sequence
Checkout	F5
Discharge/Checkin	SHIFT+ALT+F6
Fine Free Discharge/Checkin	SHIFT+ALT+F1
Renew User	F7
Renew Item	SHIFT+F7
Bill a User	SHIFT+F8
Pay Bill	ALT+F8
Display User	ALT+F10
New User Registration	F11
Modify User	SHIFT+F11
Copy User	SHIFT+ALT+F10
Confirm Address	ALT+F11
Renew Privilege	ALT+F12
Remove User	SHIFT+F12
Add Items	ALT+F1
Add Brief Title	SHIFT+F1
Change Item ID	SHIFT+F6
Mark Item Missing	ALT+F4

Mark Item Lost	ALT+F5
Place Hold	F9
Display User Holds	SHIFT+F9
Modify User Holds	SHIFT+F10
Remove User Hold	ALT+F9
Display Title Holds	[No default mapping]
Display Item Holds	SHIFT+F2
Modify Item Holds	ALT+F2
Remove Item Hold	ALT+F3
Trap Holds	SHIFT+F3
User Claims Returned	ALT+F7
User Lost Card	SHIFT+ALT+F8
Modify Due Dates	SHIFT+ALT+F4
Credit User Account	[No default mapping]
Mark Item Used	SHIFT+ALT+F5
Inventory Item	SHIFT+F4
Ephemeral	SHIFT+ALT+F7
Checkin Bookdrop Items	ALT+F6
What's in Transit	SHIFT+ALT+F11
Receive Items in Transit	SHIFT+ALT+F12
Place Blanket Hold	None
Item Search and Display	F4
Check Item Status	F2
Help	F1
Print	F12

Quitting the Workstation

Use one of the following options to end your workstation session.

- Click the Close button in the upper right corner of the main client window.

- On the File menu, click Exit.
- Press the shortcut keys ALT+F and ALT+X, in that order.

The client displays the following message.

`This will halt the workstation`

Click OK to quit the workstation, or Cancel to resume your session.

If properties have been changed, you will be asked whether to save these changes.