WorkFlows
Learning to Use the Staff Client

Version 3.3

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 .

iBistro

iBistro is the name of the online public access catalog used by SAILS libraries.
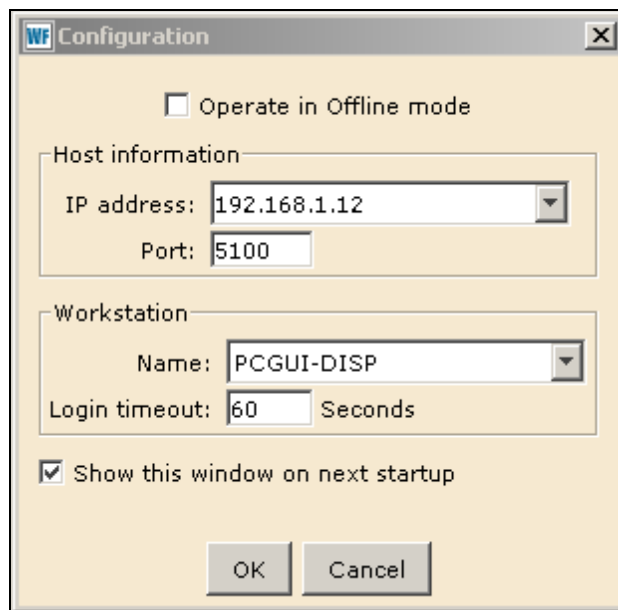
Getting Started

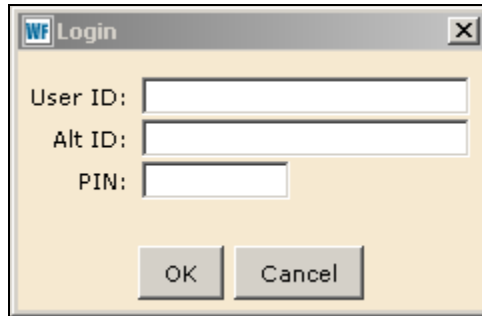## Logging into WorkFlows

To log into WorkFlows:

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.
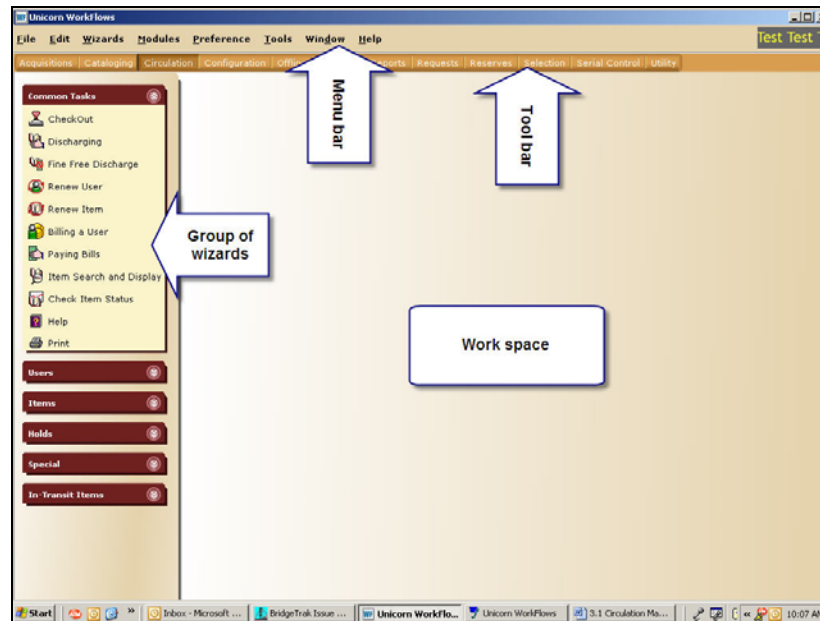
File Menu

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.
  - o A4 – Which is 210 x 297 mm in size.
  - o Custom – If you select Custom, type the Width and Height of the paper being used, and be certain to select the appropriate Units from the list.
  - o Legal – Which is 8.5 x 14 inches in size.
  - o Letter – Which is 8.5 x 11 inches in size.
  - o Receipt– 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 paper size. (You should verify this information is correct.)
  - o Units – Select either Inches or Centimeters from the list.
- 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. This option downloads the update file, typically `/Unicorn/Clients/upd_jwf.exe`. 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. If

you click Install Now, you exit the current session. Click the shortcut on your workstation and run the executable to continue the update.

> Typically, you are given the option of automatically updating the staff client each time you log in.
>
> Update Staff Client is not available when running WorkFlows in the offline mode.

Update files for clients run on Solaris and Linux platforms and Mac workstations are named as follows.

- On Solaris systems, the update file is `upd_jwf.solaris`.
- On Linux systems, the update file is `upd_jwf.linux`.
- On Mac workstations, the update file is `WorkFlowsInstall.dmg`.

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 on the menu, the keyboard shortcut for this command is CTRL+C.

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.

Key Enhancements

Click Key Enhancements to display summaries of new, cool features available in this release.

Session Information

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

In the process of troubleshooting, and in correspondence with SirsiDynix Client Care, it is often necessary to provide detailed information about the client session. This information may be accessed by clicking Session Information on the Help menu. Detailed login information such as the user's login, user access, environment, profile, and station library are provided. Detailed server information including server IP address, server platform, and server version number are also available.

Note Additional server version information is available from the About selection of the Help menu.

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:
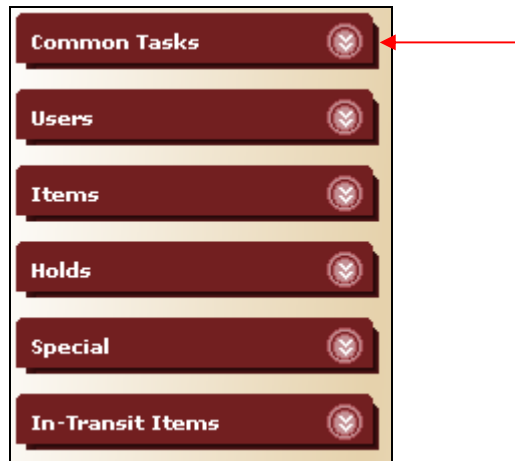

The Common Tasks group of wizards, for example, looks like this:

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.
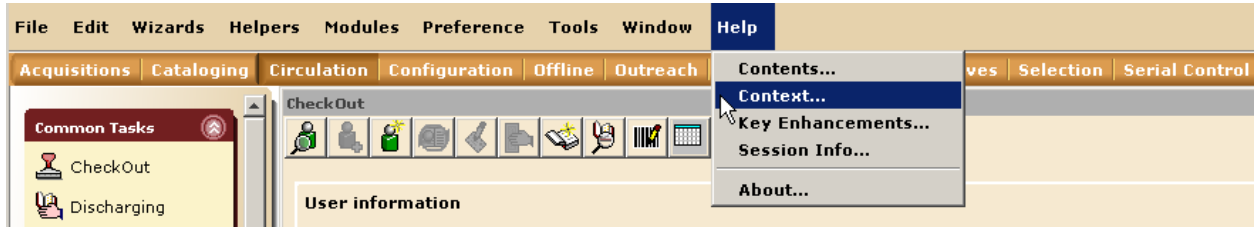
For example if you click on Checkout and click on Help – Context this screen will appear.
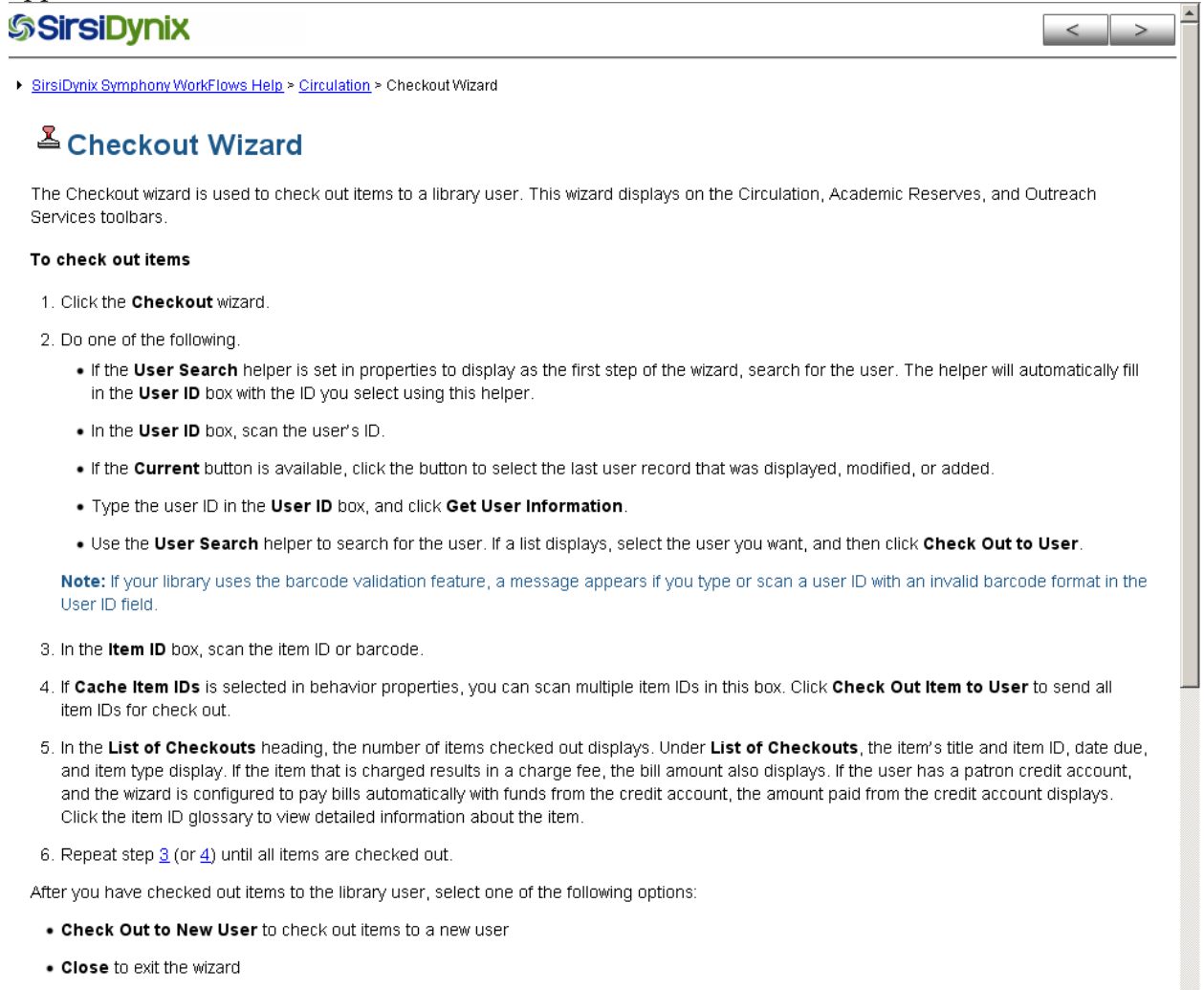
Properties

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.

If a tab does not contain any information, the tab will not display. For example, the Checkout wizard does not contain any Defaults properties, and so the Defaults tab does not display.

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.
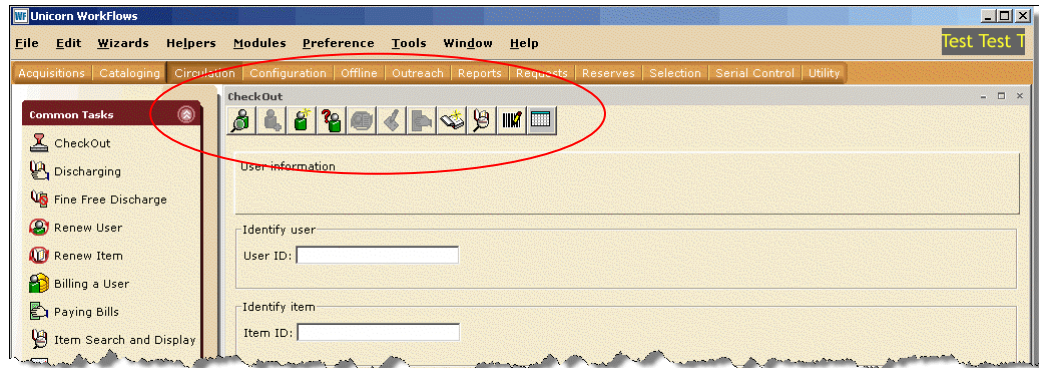
The Helper bar is positioned horizontally across the top of the WorkFlows client interface, just below the active window's title bar. Helpers listed on the left side of the bar primarily make it easier to access necessary information needed by the current wizard. For example, Checkout wizard uses the 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
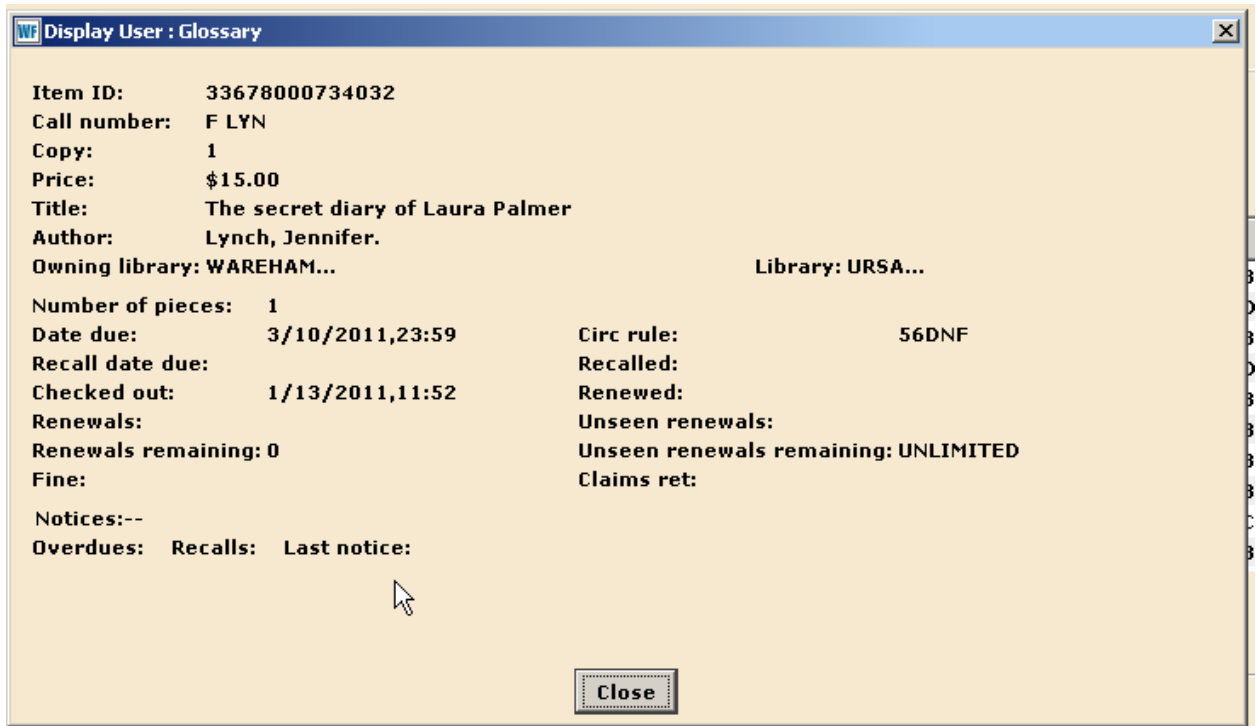
Gadgets

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.
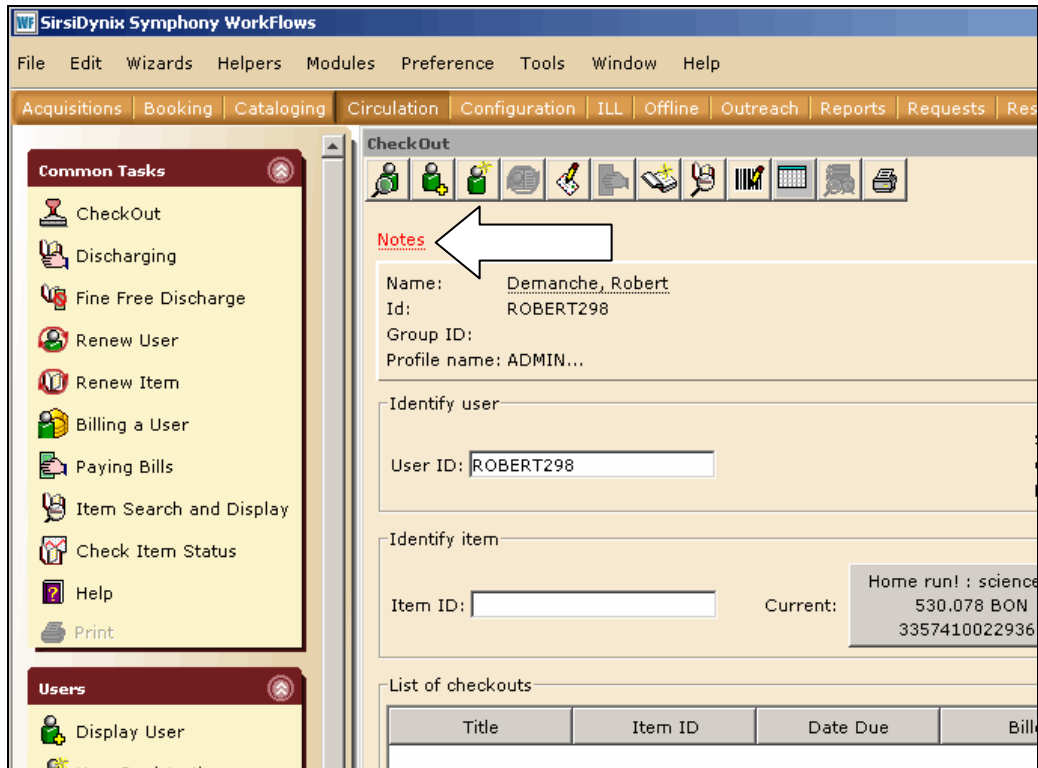
Click the Notes or Alerts to display this information.
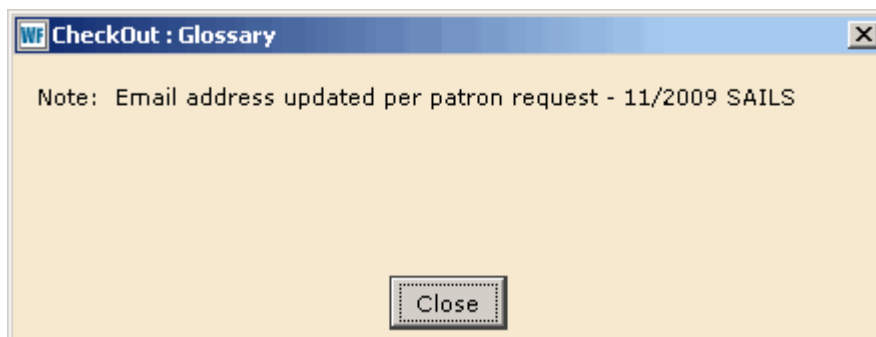
Sorting

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:
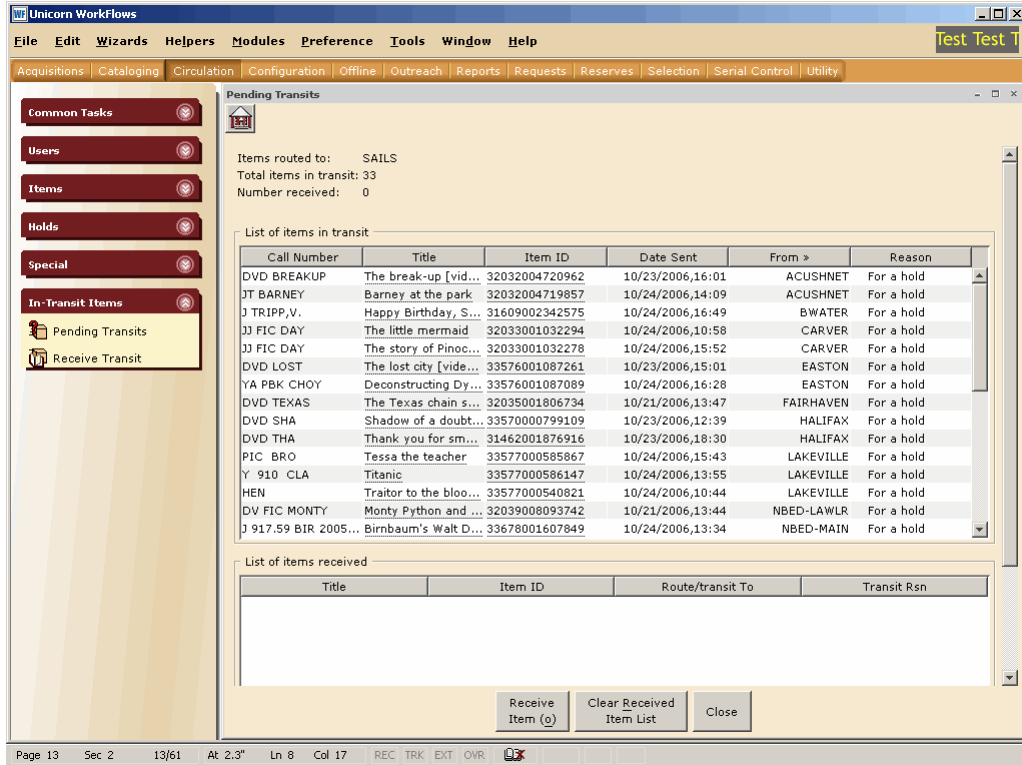
If there are too many items to sort (usually if there are several hundred), WorkFlows might not be able to perform the sort.

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
Suspend User	SHIFT+ALT+F9
Send User Message	SHIFT+ALT+F3
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
Delete Title, Call Numbers or Items	SHIFT+ALT+F2
Place Hold	F9
Display User Holds	SHIFT+F9
Modify User Holds	SHIFT+F10
Remove User Hold	ALT+F9
Display Title Holds	[No default mapping]

Reorder Hold Queue	[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
Barcode Validation Settings	F3
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.