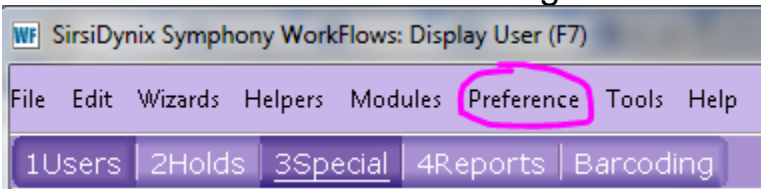


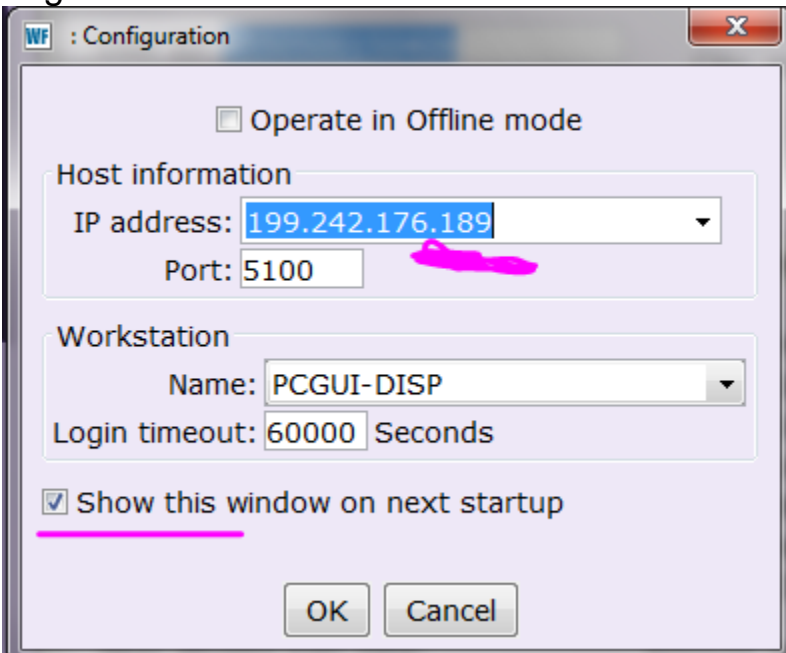
WF Refresher Course

Setup:

Click on Preference – then Configuration



Log into the TEST server:



- Change the IP address to 199.242.176.189
- Click the Show this window on next startup

Login as your library.

Don't forget to change the IP address BACK to 199.242.176.192 and uncheck the "Show this window on next startup" when you are finished.

Things you can do w/o leaving Checkout:

Looking up a Patron:

- 1) Suggested default search: Browse search for **LASTNAME**, **FIR**st 3 letters of firstname.
- 2) Advanced searching: Keyword can search by Street address, Phone, Notes, Email, Birth Date, and Alt or Previous ID. The last ones aren't very common.

Exercise: Look up your own record by phone number. If you don't have anything checkedout, on hold, or any fines, use my record. Phone # (920) 303-1122. Pull up my real record.

Helpers:

User Search—look up another patron,

User Display—not much use because almost everything on this screen.

Pay Bills—clear off their fines before checking out,

Special Due Date—change the due date. This is important to know for things like ILL, Equipment, and odd stuff.

Charge History—show their charge history, when they returned something.

Print

Patron Info

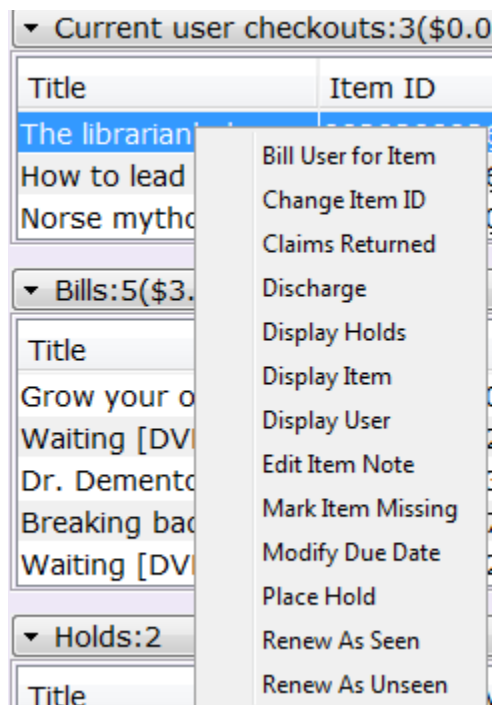
Dotted line under the name is called a “glossary.” ANY time you see something with a dotted line under it, you can click it for more information.

Checkouts

The “List of Checkouts” is where items will appear as you check the patron out. The “Current User Checkouts is what the patron already has checked out at the time s/he walks up to your desk.

Glossary: you can click on the item ID for more information about the Items that are already checkedout.

Right-click: you can right-click on any item in the list and do any of the following functions:



Some of these options should be used with care—like modifying due dates. Others are amazingly convenient.

“Did you know that “How to lead...” is due in a few days? Would you like to renew it now?”

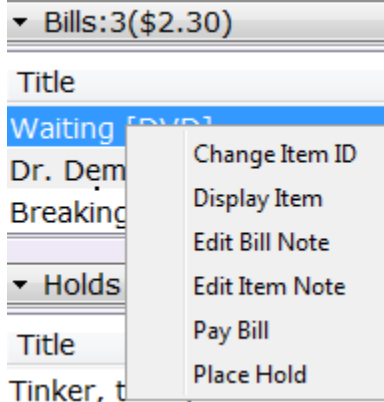
“I’m sorry, but your card is blocked. It looks like Title X is way overdue. Oh, you returned that? I can mark it Claims Returned—that gives you a bit more time to look for it. And we can still checkout today.”

WALS doesn't care if items are renewed as “Seen” or “Unseen” at this point. Some systems differentiate the number of times someone can call in and renew, and/or whether they need to bring the item in so that staff “see” it and can verify it exists and isn't damaged.

Bills

Glossary – Click on the amount due. It will show when billed, billing library, how many payments have been made and when...lots of useful stuff.

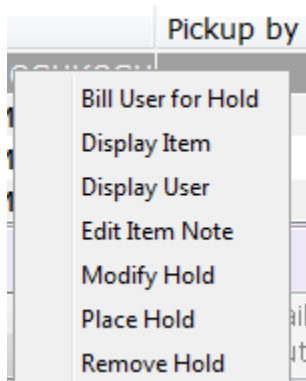
Right-Click – Right-clicking on a bill item gives you these options:



Holds

Glossary – click on the Status. It shows at which library the hold was placed, the pickup library, if/when the patron was notified, etc.

Right-Click – Right-clicking on a hold item gives you these options:



It doesn't matter where one right-clicks. This one I did way over by Pickup By column.

We don't use Bill User for Hold. I think I can get rid of that....

If you highlight more than one item in the list, you can apply some of the options to multiple items at once. Very helpful—like Remove Hold, or Modify Hold.

Entering/Modifying Patron Records

There is a wealth of information about entering/modifying patron records on the Extranet here: <https://extranet.winnefox.org/wals/sirsidynix/workflows/patronrecords>

However, let's talk about some of the things that a) are often overlooked/forgotten; b) not covered on the Extranet.

Before you click on User Registration: Check if the person already has a card. This can be a fun exercise in sleuthing.

For example: Registration card says "Bill Smith" ---Need to check SMITH, WILL and SMITH, BILL.

Need to click on Check for Duplicates before saving new user. The system checks Phone#, Street, Name, Email. I set it for today to check against Birthdate also—we could do that if folks agree that it would be helpful.

Basic, but often ignored rules: ALL CAPS. No punctuation between CITY STATE. No brackets in phone number. No "preferred" names or nicknames—even if it is the name everyone knows them by. No punctuation or spaces in patron names like VAN DE CAMP becomes VANDECAMP, and O'MALLEY becomes OMALLEY.



Holds

What are the most common questions about holds that you get?

- 1) Why is my hold taking so long/Where am I on the list?
 - a. These are questions you can't answer—at least not honestly or accurately. Best you can do is look it up in Display Title Holds and say vaguely, and "well, we own 2 copies, and 5 of your neighbors also want it."
- 2) I didn't get my hold notice.
 - a. Look up the patron, go to their list of holds, find the title—if not there, switch to ALL. Click on the glossary for the title.
 - b. Look up the title, click on the holds tab, find your patron in the list, and look on the right-hand panel.
 - c. Check your email for a bounced notice from OPL-Tech
- 3) I want to place 10 holds on G is for Gumshoe for my bookclub.
 - a. Best thing is to look up title in Item Display, open another tab with Place Hold.
 - b. Look up patron and place one copy-level hold for them.
 - c. Then click "Place another hold for this patron."
 - d. Click over to your Item Display tab, click on another copy.
 - e. Click back to Place Hold tab. The "current item" grey button now has the info from the copy you just selected in Item Display.
 - f. Click Place Hold button
 - g. Wash, rinse, repeat from step "c"

Paying Bills

Can only pay for items that have been returned or renewed late.

Can use Paying Bills Wizard  or Cash Management Wizard  Cash Management (F11). Not all libraries have Cash Management setup. Cash Management allows the library to record money intake for more than just fines—for example, book sales, t-shirts, garlic, etc.

Paying Bills is most common.

User Information	
Name: SMITH, KARLA U	Status: BLOCKED
Profile name: STAFF...	Amount owed: \$5.10
User categories: Y	Overdues: 2
Group ID:	Privilege expires: 11/17/2018
Identify User	
User ID: 1000200356904	
Total bills and payments	
Total bills: 3	Payment: <input type="text"/>
Total owed: \$2.30	Payment type: CASH
Still owes: \$2.30	Change: <input type="text"/>

I owe \$5.10, but can only pay \$2.30.

I have 3 “bills” and 2 “overdues”

Many payment types in dropdown:

Payment type:	CASH
Change:	CANCEL
	CARDSWIPE
	CASH
	CHECK
ID	FOOD4FINES
608472035	FORGIVEN
405423969	IN-KIND
302607418	NONE

Cancel = library error, or system cleared.

Cardswipe = for libraries that take credit cards at their desks with the SirsiDynix supplied readers.

Cash = Cash currency.

Check = Check.

Food4Fines = Some libraries accept food donations in lieu of cash, or have special food drives.

Forgiven = When library forgives the patron’s fine. Fine is still patron’s fault, but library is being nice.

In-Kind = Some libraries allow the patron to supply a replacement copy for something they lost or damaged.

None = Shouldn’t be used.

Can pay specific amount, OR pay for specific items.

Payment:	<input type="text"/>
Payment type:	CASH
Change:	<input type="text"/>

Specific amount:

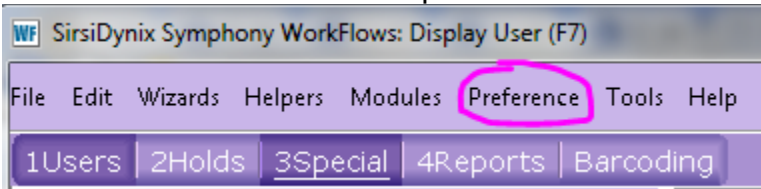
Specific Item:

Individual Bills and Payments					
Title	Item ID	Reason	Owes	Payment Type	Payment
Waiting [DVD]	0060608472035	OVERDUE	\$0.20	CASH	
Dr. Demento 20th an...	0040405423969	OVERDUE	\$1.60	CASH	
Breaking bad habits i...	0030302607418	OVERDUE	\$0.50	CASH	

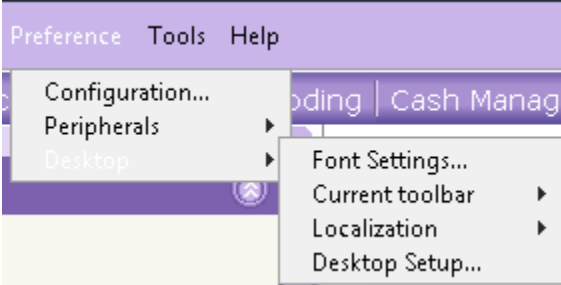
Setting up and Customizing your WorkFlows

There is a lot you can do to customize how WorkFlows looks. It is all found under Preference.

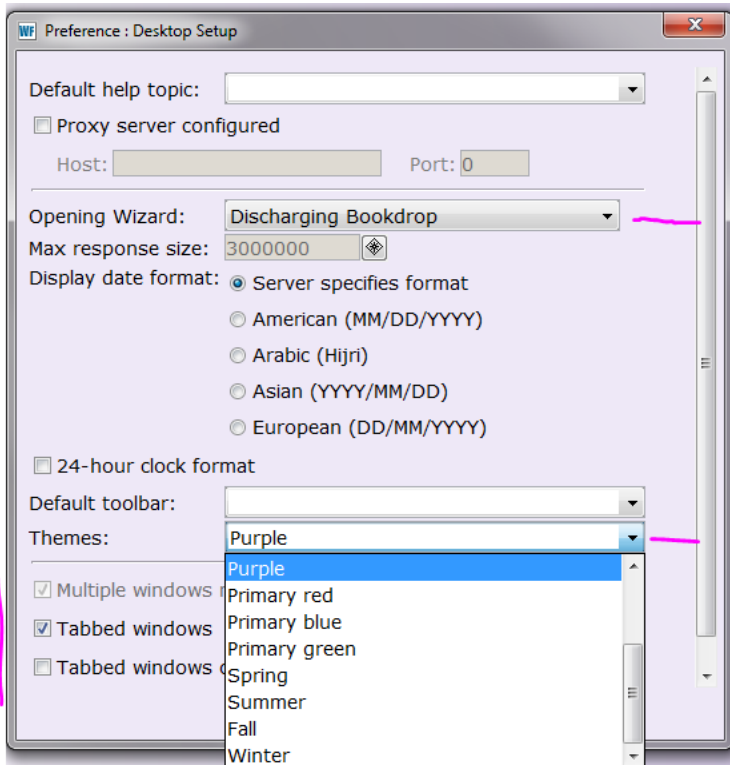
Click on Preference....Desktop.



Click on the arrow by Desktop...Desktop Setup:



The following pop-up window appears. You probably will need to resize it a bit to see everything, or else scroll:



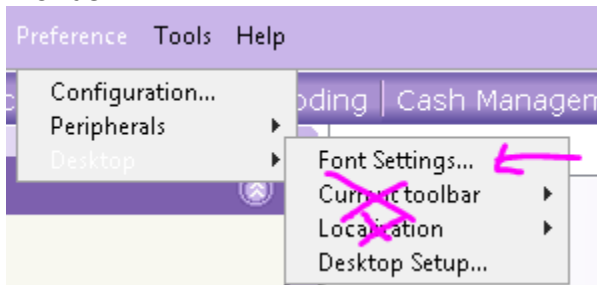
Lots of cool stuff. Each station can look different.

You can have WF automatically open with a specific wizard—like Discharging Bookdrop.

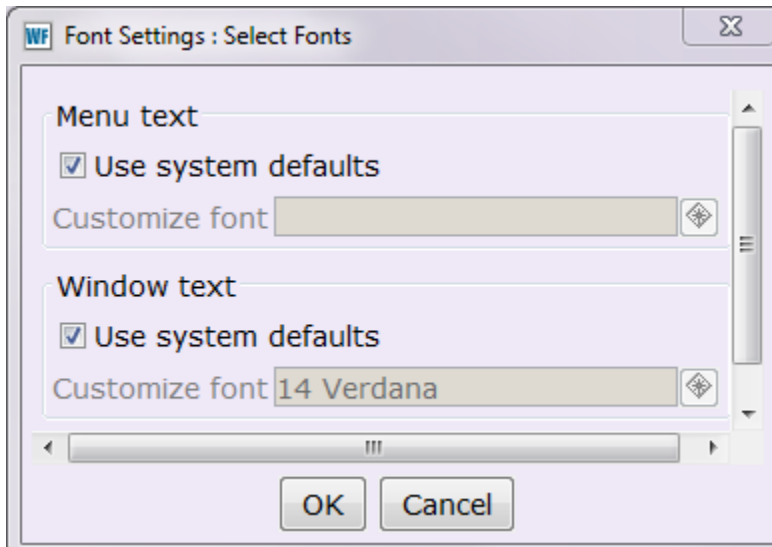
You can change the color scheme.

I highly recommend Multiple Windows Mode and Tabbed Windows.

Preference...Desktop is also where you can change the font size—both for the main window and the menus.



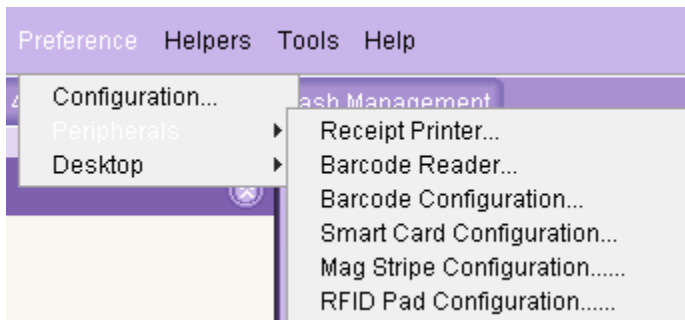
Don't mess with Current toolbar or Localization. It'll just screw you up. But Font settings....



When first installed, WF will be set to Use system defaults.

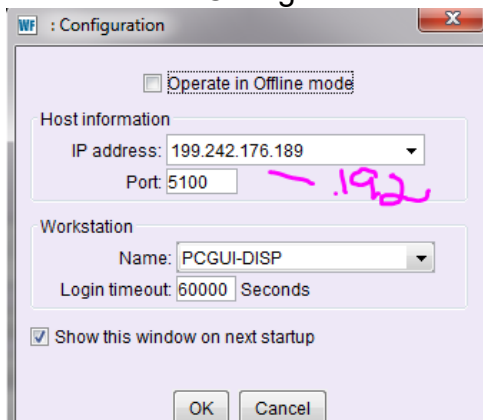
You can customize fonts, but be aware that things might not fit on the screen properly and/or you might need to resize screens all the time.

Preference.....Peripherals



is where you setup barcode scanners, receipt printers, credit card swiper, etc.

Preference....Configuration is where you switch from the test server back to the real server!!!



Also where you can set it to Operate in Offline Mode—or take it off of Offline Mode.

Don't forget to change the IP back to real life before doing any real work!

If you don't want to see this screen everytime you start WF, remember to uncheck the "Show this window on next startup" box.