

Procedure for Deleting Items from WorkFlows

Revised September 12, 2019

These instructions are posted at <https://goo.gl/zKwIJJ>

Follow the instructions in this document to delete an item from WorkFlows. You may delete your library's item even if it is the last item attached to the bibliographic record.

This deletion method works well if:

- Your library wants to quickly delete items from WorkFlows without corresponding with the RSA Help Desk to ask that a discard account be cleared.
- Your library does not need to track deletion statistics for its board or administration.

Please review these important considerations for WorkFlows deletions:

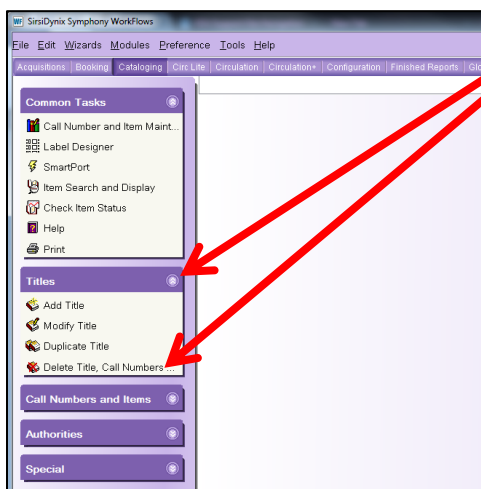
- WorkFlows only allows your library to delete its own items. Libraries with branches may delete items from any of its associated branches.
- You cannot delete items owned by other RSA libraries.
- RSA does not follow a last copy retention policy. If you are deleting the last item attached to the bibliographic record, you may do so. No need to retain your item because it is the last copy in WorkFlows.
- You cannot delete an item with title-level holds until the hold is filled by another item attached to the same bibliographic record.
 - Use the Mark Item Missing wizard in the circulation module to mark the item you are unable to delete as missing.
 - While you still be unable to delete the item, marking it as missing will prevent it from showing up on your library's picklist.
 - You should periodically check the item to see if it no longer has title-level holds and then delete it. There is unfortunately no way to be notified once the holds on that record have been filled.
- Since 2016 Delete Titles has struggled with a known "bug," in which this wizard may suddenly freeze and stop working if a library is using it to do several consecutive deletions. Delete Titles will only resume working again the next day, after overnight WorkFlows indexing. Using the Procedure for the WorkFlows Discard User, linked in the next point, avoids this Delete Titles "bug."

- If you need to track how many items you deleted from WorkFlows, and you use the Delete Titles wizard, WorkFlows is unable to track how many items you deleted.
 - If tracking deletions is helpful for your library's operations, RSA strongly recommends following the Procedure for the WorkFlows Discard User, posted at <https://goo.gl/ger1SH>
 - If you need to track deletion statistics, and you decide to use the Delete Titles wizard, you will need to manually keep track of how many items you delete using a tick mark on a piece of paper or on a spreadsheet.

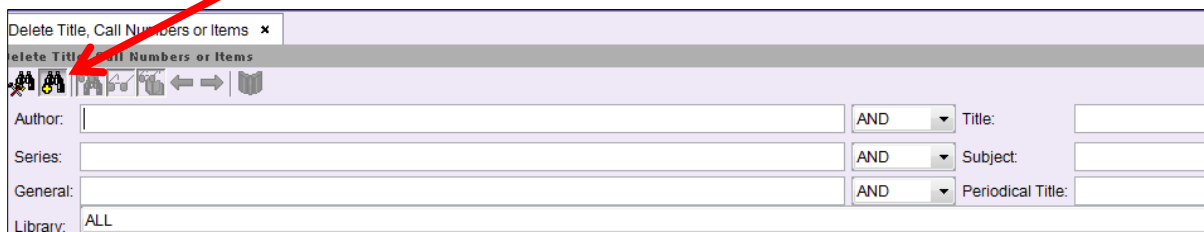
Please share any questions about deleting items with the RSA Help Desk at rsahelp@railslibraries.info or 1-866-940-4083.

Procedure for deleting items from WorkFlows:

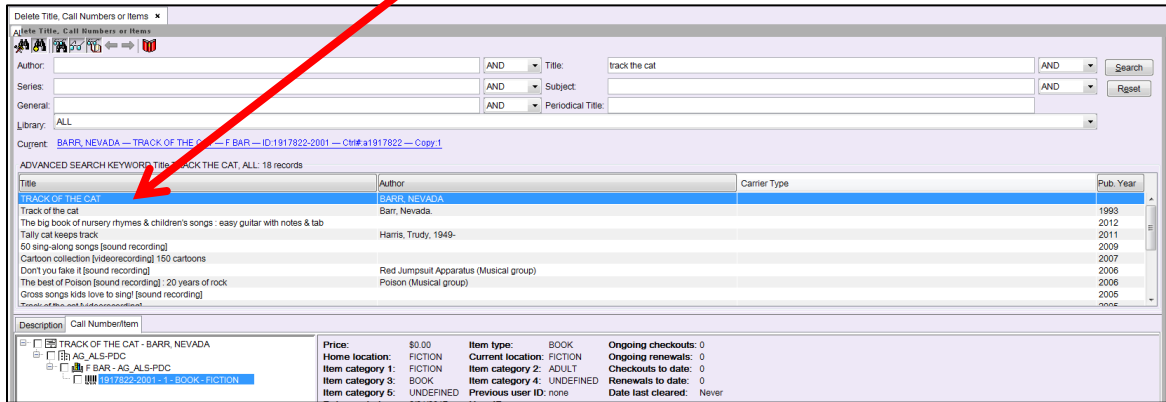
1. Log into WorkFlows using your individual cataloging login or your library's TECH login if you have not yet been assigned an individual login. You may also log into WorkFlows as CIRC if you know the override password, provided to your supervisor during your library's cataloging transition meeting with Erica from the RSA.
2. Open the Cataloging module.
3. Use the arrow to open the Titles group on the left side of the screen.
4. Click on the Delete Title, Call Numbers, or Items wizard.



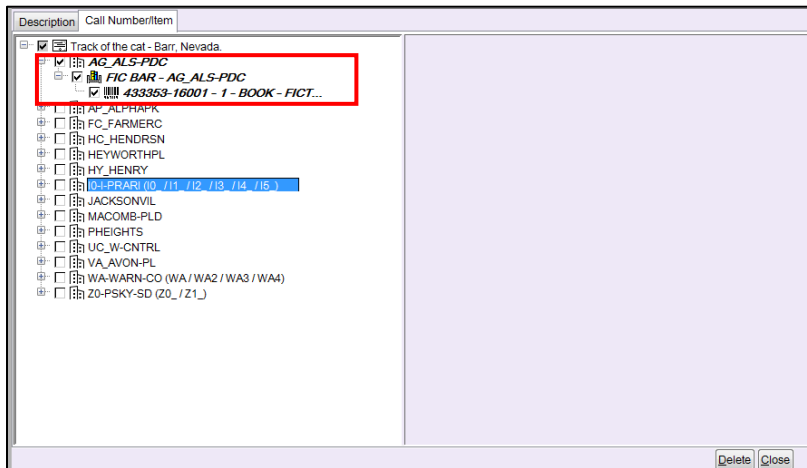
5. Search for the title you want to delete, or use the advanced search screen to search by its item ID. To access the advanced search screen, click the helper button with the binoculars and yellow plus sign:



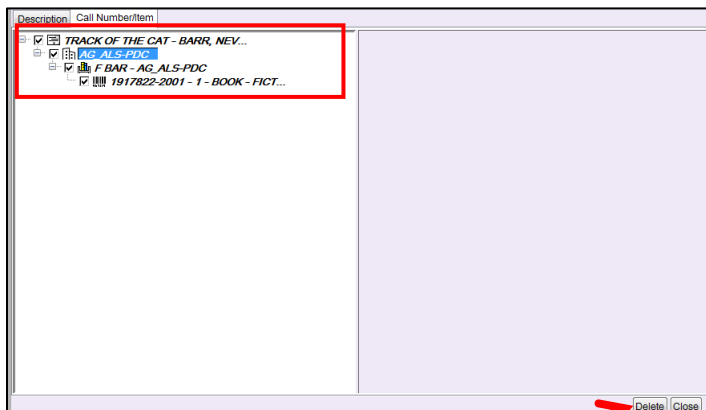
- If the title to delete does not automatically open in the Delete Titles wizard, highlight the title from the result list so it appears in blue.



- On the Call Number/Item tab on the bottom half of the screen, check the box in front of your library's call number.
 - If other RSA libraries still own items attached to the same bibliographic record, the lines with your library code, call number, and item ID will appear in bold, italicized text.

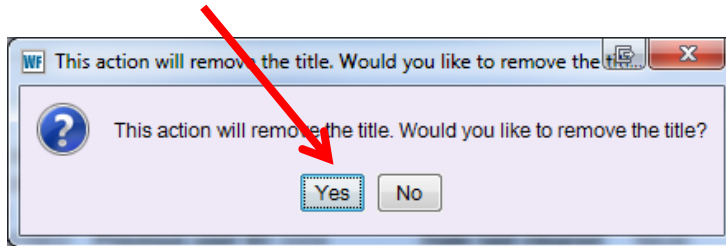


- If your library is the last one attached to the bibliographic record, the lines with the title, your library code, call number, and item ID will appear in bold, italicized text.



- Click the Delete button on the bottom of the screen.

9. Click “Yes” on the pop-up box if it warns you the title will be removed. You will only see this box if your library is the last item attached to the bibliographic record.



Once you click “Yes,” or if this box does not appear after you click the Delete button, your item immediately deletes from WorkFlows.

10. The item you tried to delete may display one of these warnings:
- “This action will remove the item. There are bills associated with the item. No bills will be removed. Would you like to remove the item?”
 - Click “Yes” to delete the item from WorkFlows. You can continue to collect payments for bills that were associated with the deleted item. Deleted items that had associated bills will continue to display in user records, but they no longer have item IDs.
 - Click “No” to stop the deletion and leave the item in WorkFlows.
 - “This action will remove the item and the item’s charge history record. Would you like to remove the item(s) and the charge history records?”
 - Click “Yes” to delete the item from WorkFlows and remove it from any patrons’ records who have opted to track their charge history. Patrons who track charge history should understand it may be inaccurate as libraries delete items they once checked out.
 - Click “No” to stop the deletion and leave the item in WorkFlows.
 - “Title on order – cannot remove”
 - Click “OK” to close the warning.
 - A library that uses the WorkFlows acquisitions module has attached their order to the bibliographic record from which you are trying to delete your item. The order is considered “open” because it has not yet been received or loaded into WorkFlows.
 - WorkFlows will not allow any item, regardless of its owning library, to be deleted if it is attached to a bibliographic record with an open order.
 - Please send your item ID and title that will not delete to rsahelp@railslibraries.info. Use “Title on order – cannot remove” as your message’s subject line.
 - RSA will work with the acquisitions library to edit its open order and follow up when your item is able to be deleted.