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WorkFlows Discard User Procedure

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These instructions are posted at https://support.librariesofrsa.org/project/workflows-discard-user/.

There is a video to accompany this procedure which can be found here: https://www.youtube.com/watch?v=tNNEdxfwn5M.

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Background

Follow the instructions in this document to delete items from WorkFlows using a discard user account. The discard procedure works well if:

- Your library has many items to delete from WorkFlows, such as from a weeding project.
- The discard procedure can also be used instead of deleting items manually from WorkFlows using the Delete Titles, Call Numbers, or Items wizard.
- The discard procedure is especially helpful if you need to track deletion statistics for your board or administration. If you need to track how many items you deleted from WorkFlows, and you use the Delete Titles wizard for the deletions, WorkFlows is unable to track how many items you deleted. If tracking deletions is helpful for your library's operations, RSA strongly recommends using the discard method described in this document.

RSA does not follow a last copy retention policy. If you are discarding 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.

Important considerations before you begin discarding

- Be careful not to assign the DISCARD home location in the WorkFlows Cataloging module. The discard process relies on a user ID – not a home location – to ensure items are properly tracked via reports and deleted from the database.

- If you are discarding items using MobileCirc's weeding function, you must configure a default discard user account into MobileCirc's settings to ensure the discard process, including reports, works correctly. MobileCirc weeding procedures will be discussed in a future revision of this document.

- Checkout statistics for the discard user profile are currently included in your library's monthly circulation statistics generated by WorkFlows. Please consider this detail if your circulation statistics seem inflated.

Please share any questions about the discard procedure with the RSA Help Desk at help@rsanfp.org or 1-866-940-4083.

Procedure for creating a discard user in WorkFlows

All RSA member libraries now have a Discard User set up. If you don't know your Discard User's ID barcode, contact the RSA Help Desk at help@rsanfp.org or 1-866-940-4083 and we can let you know what it is.

RSA recommends creating one discard user per library. Libraries with branches may create one discard user per branch. Creating multiple discard users for the same library makes the removal of discarded items more difficult and requires a special report in WorkFlows. Any library interested in using multiple discard accounts should contact the RSA Help Desk at help@rsanfp.org or 1-866-940-4083. Multiple discard accounts may be helpful, for example, if staff from various departments weed the collection.

When a new discard user is created, it will be considered in the next month's discard processing. The report to find new discard users runs after the discards are cleared at the beginning of the month.

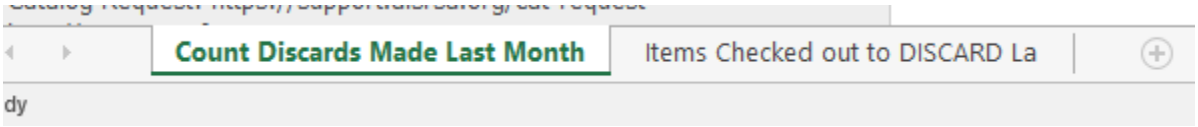
Procedure for discarding items in WorkFlows

You will follow these instructions each time you discard items.

1. Log into WorkFlows using your library's CIRC login, your individual cataloging login, or your TECH login if you have not yet been assigned an individual cataloging login.
2. Open the Circulation module.

3. Go to the Checkout wizard.
4. Search for your discard user and either scan or type its ID into the user ID box.
5. In the item ID box, scan the item IDs of the items you want to discard.
   - Be careful to only scan your library's items into your discard account.
   - Items owned by other RSA libraries should not be checked out to your discard account and will fail to be deleted during the discard process.
   - RSA staff will contact you if you check out other libraries' items to your discard account. The end of this document explains your next steps if this happens.
   - Do not check out lost items to the discard user until you manually create a bill and add a bill note on the associated patron's record using these instructions: https://support.librariesofrsa.org/project/billing/#Adding_a_Bill_and_Bill_Note_Before_Removing_a_Lost_Item_from_the_RSA_Database .

     If you check out a lost item to the discard user without first manually creating the bill, the bill information will be cleared because WorkFlows assumes the item has been returned.
6. The current location of the items checked out to your discard account will change to DISCARD.
7. If reviewing the items checked out to your discard account before the 1st of the month would be helpful, do one of the following:
   - Search for your discard user in the Display User wizard and look at the Checkouts tab.
   - Run a report in BLUEcloud Analytics of any items assigned the DISCARD current location.
   - Submit an RSA report request (https://form.jotform.com/RSAnfp/RetReq-One-Time to ask RSA to run the discard report for you.
8. On the 1st of each month, your library's RSA Gmail receives two Excel reports.
   - RSA recommends saving these reports if your library tracks discarded items for its statistics. Saving them electronically is recommended because they are not formatted to print.
   - Please contact the RSA Help Desk at help@rsanfp.org or 1-866-940-4083 if you prefer to receive these reports at an email address other than your RSA Gmail.
   - The first discard report will have two tabs of information at the bottom.



   - The first tab of this report displays counts of items checked out to the discard user during the previous month, broken down by item type and item category 2.

   Here is an example of this report for Peoria Public Library:

Count Discards Made Last Month by Item Type & Item Cat 2

Metrics	Count (Item Id)			
Item Type	ADULT	JUVENILE	YOUNGADULT	Total
BOOK	44	62		106
BOOK-PBK	1	11	1	13
DVD	3	6		9
PERIODICAL	52			52
REFERENCE	24			24
Total	**124**	**79**	**1**	**204**

- The second tab of the report displays a detailed list of items checked out to the discard user during the previous month. The output includes the title control numbers of the OCLC records on which the discarded items were cataloged in WorkFlows.

  Here is an example for Peoria Public Library:

Items Checked Out to DISCARD Last Month with Key/OCLC Control Number

Item Barcode (Item ID)	Item Call Number	Catalog Title	Catalog Author	Checkout Date	Key/OCLC Title Control Number
A13207837001	641.864 JEL	Jell-O brand, fun and fabulous recipes /		2017-12-02	ocm18953428
A13209521680	J 305.235 JUK	It's a girl thing : how to stay healthy, safe, and in charge /	Jukes, Mavis.	2017-12-01	ocm29428643
A13210508962	JP BAN	A prairie alphabet, ABC /	Bannatyne-Cugnet, Jo.	2017-12-01	ocm25548558
A13211067804	JP BAR	Round is a pancake /	Baranski, Joan Sullivan.	2017-12-01	ocm45202085
A13211113265	641.013 MAY	French lessons : adventures with knife, fork, and corkscrew /	Mayle, Peter.	2017-12-01	ocm46863289
A13211960256	J WIS	Romeo & Juliet /	Aronson, Billy.	2017-12-02	ocm34594815

- If your library manually updated holdings in OCLC for any of the records on this report, rather than relying on RSA's batch load to automatically update the holdings in OCLC, you will need to use the OCLC title control numbers from this report to search for the records in OCLC Connexion and delete your library's holdings. Any holdings manually updated in OCLC will be invisible to RSA's batch processing and will not be removed.

  For instructions how to delete holdings manually using OCLC Connexion, please refer to the following documents:
  https://alsi.sdp.sirsi.net/client/RSAwebsite/search/asset/5204

- If your library does not manually update holdings in OCLC, you do not need to manually delete your holdings in OCLC using the instructions linked above. The next

run of RSA's batch processing will remove your holdings from OCLC now that the items have been discarded from WorkFlows.

- The second report, which will arrive in the RSA Gmail on the 1st of each month with the subject Monthly Discard Document Pt 2, displays a detailed list of items checked out to the discard user during the previous month. This report outputs only those discarded items that were cataloged on records that lacked OCLC title control numbers (i.e., brief records for materials such as telecourse materials, on-orders, non-RSA interlibrary loans, equipment, etc.).

  Here is an example for Peoria Public Library:

Items Checked Out to Discard Last Month without Key/OCLC Control Numbers

Item Barcode	Item Call Number	Catalog Title	Catalog Author	Checkout Date
A13209651320	YPL TOM	FORESTWIFE	TOMLINSON, THERESA	2017-12-02
A13211237522	JP BEC	ELLIOT'S BATH	BECK, ANDREA.	2017-12-02
A13211383064	JP BEC	ELLIOT DIGS FOR TREASURE	BECK, ANDREA.	2017-12-02
A13211744317	JP BEC	ELLIOT GETS STUCK	BECK, ANDREA.	2017-12-02

9. Between the 2nd and 5th of each month, RSA runs two WorkFlows reports to process your discards.
   - The first report clears any items checked out to the discard user up to the last day of the previous month, rather than only those discards checked out during the previous month.
   - The second report deletes the items from WorkFlows.
   - An item that has a bill attached to it will be automatically deleted during the discard process. The bill will continue to be attached to the user's account but without the item ID.
   - The discard process will delete your item even if it is the last item attached to the record, as long as there are no holds.
   - If you want your discards cleared outside of the 2nd through the 5th, please contact the RSA Help Desk at help@rsanfp.org or 1-866-940-4083 to request an on-demand run of your discards. On-demand runs will be considered on a case-by-case basis. Discards will continue to run on the 2nd through the 5th each month despite on-demand runs.

Discard problem #1: Items with holds

If any of the discarded items have holds, those items will be cleared from the discard user (i.e., no longer listed on the Checkouts tab in the Display User wizard). The items, however, will still be in WorkFlows assigned the DISCARD current location and will be shadowed.

If the item that did not delete due to the hold is attached to a record that has other holdable items attached to it, the next available item on that record will fill the hold.

- No need to check your item out again to the discard user.
- When the discard process runs the next month, your item will be deleted from WorkFlows because it is no longer on hold.

If the item that failed to be deleted due to the hold is the only item attached to the record, the hold will remain on the item.

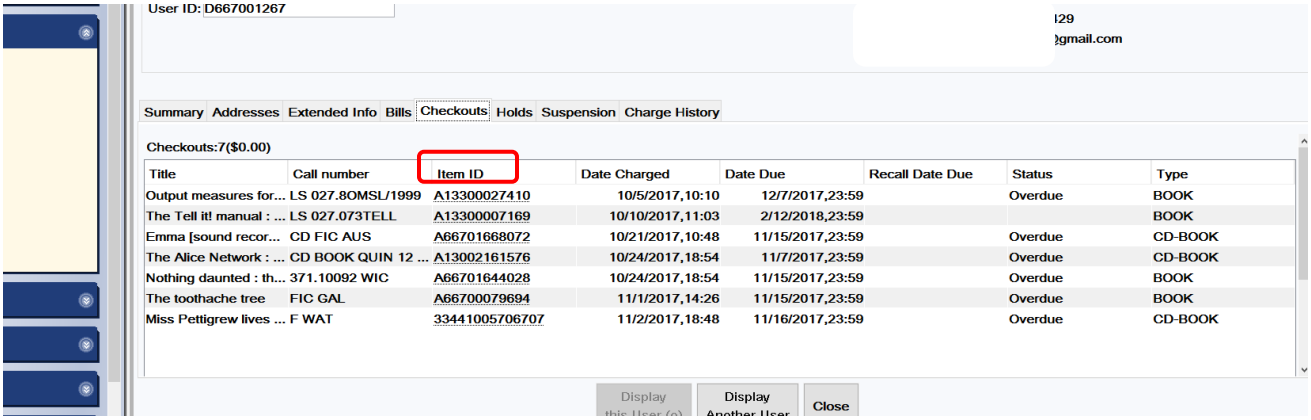
- The hold will expire after 300 days from the date the hold was originally placed, not the date from when the item was checked out to discard.
- Once the hold expires, your item will be deleted from WorkFlows during the next run of the discard process.
- No need to check your item out again to the discard user.
- RSA has created a report that tracks discarded items with holds that are the only items attached to the records. RSA staff informs the patron library so that they can remove these holds and notify the patrons. The item will then be deleted during the next month's run of the discard process.

Discard problem #2: Items not owned by your library

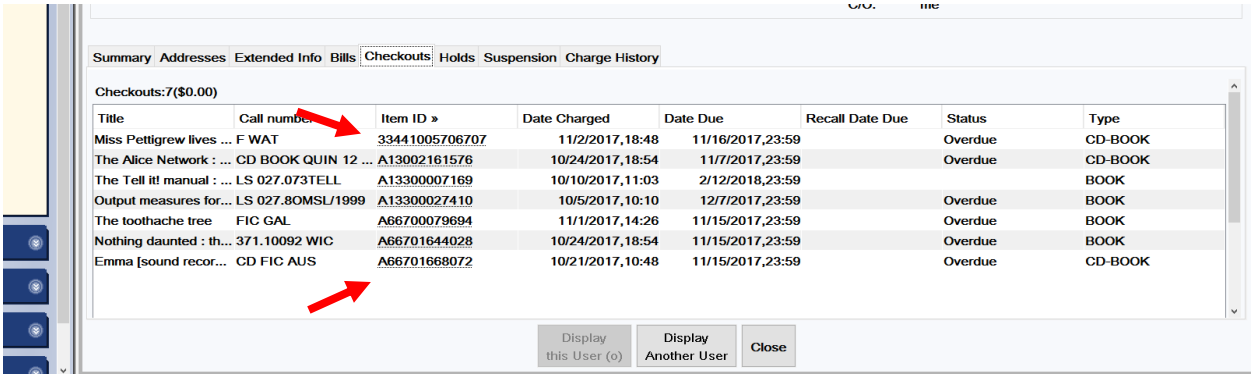
RSA staff receives a report each month of items that failed to be deleted during the discard process because they were not owned by the discard user's library. These problem items will still be checked out to the discard user.

RSA will contact each library that has problem items to do the following:

1. Search for the discard user account in the Display User wizard.
2. Go to the Checkouts tab.
3. Sort the Item ID column on the discard user's account.

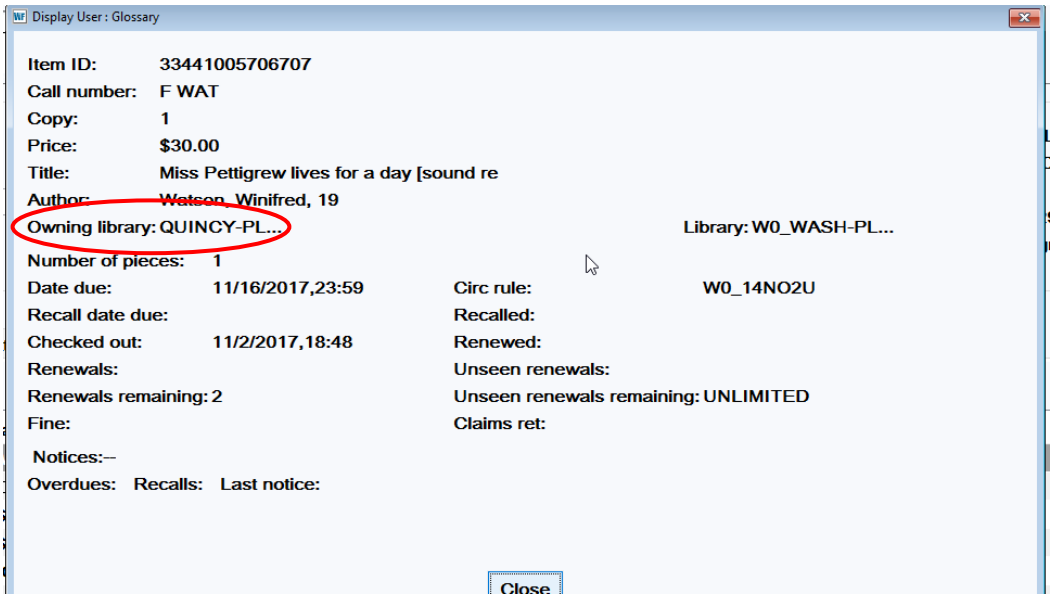


4. Look at the top and bottom of the ID column for barcode numbers that do not belong to your library.



RSA recommends checking for these barcodes at the end of the month before the discard process runs at the beginning of the new month.

5. Use the glossary (by clicking the underlined item ID) to find the owning library.



6. Check your library's discarded items to see if the item is still physically in the library.
   a. If the item is with the discards:
      i. Discharge the item
      ii. Send the item back to the owning library with any notes to clarify what happened.
   b. If the item is not with the discards:
      i. Is there an item with the same title owned by your library with the discards? If yes, the wrong item may have been selected to discard.
         - Call the item-owning library and ask them to check their shelves.
         - If the item is at the owning library, ask the owning library to discharge the item so it is no longer checked out to your discard user.
         - Check your item out to your discard user. The item will be removed during the next month's run of the discard process.
      ii. If there is not an item with the same title with your discards:
         - Contact the owning library to arrange for your library to replace the item.
   c. RSA can run a history log if you want an in-depth look at what happened to the discarded item in WorkFlows. When you contact the RSA Help Desk for the history log, please share the item's barcode.