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Workflows Supervisor Set-up Guide

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Introduction

At each library, the library director and/or a designated person will be the Workflows **Supervisor.** The supervisor will have the ability to set defaults and set up or change how various functions behave in the software. This is the admin level login for your library and only 1 or 2 people should ever use this login and ONLY to change the settings. The supervisor login should NEVER be used in day-to-day operations.

Supervisor Password

To login as the supervisor, you will need to use your normal login procedure, but wherever you would normally type CIRC, you will instead use SUPER.

DO NOT OPERATE YOUR LIBRARY LOGGED IN AS SUPERVISOR! ONLY USE THIS TO AMEND YOUR WORKFLOWS SETTINGS.

You only need to set up ONE computer using this guide. Once that computer is set up correctly, you can simply copy the settings between computers. We also recommend you keep at least one ‘known good’ copy of the settings saved on a thumb drive. This allows you to fix many Workflows issues without a lot of effort on your part.

If you have questions on how to back up your Workflows, please see the following guides:
How to Back Up the Workflows Configuration Folder on Windows 10
How to Back Up the Workflows Configuration Folder on Windows 11

Setting Defaults Behaviors

For each wizard in Workflows, you can use your supervisor login to change the default settings and many of the ways that wizard behaves. You can also make the same kind of changes for the helpers that appear within the wizards.

There are hundreds of decisions that you can make to fine-tune the way Workflows behaves. This set-up guide will take you step-by-step for a few of the most necessary changes – the changes needed to make Workflows operate immediately. Over time, you are likely to find yourself making additional changes to make the software work most effectively for your library.

RSA has set up custom login scripts for our largest libraries (specific list to follow). These libraries do not need to do any additional settings other than changing things on individual machines. For those libraries, all changes can be made by RSA and that change will update all those library's staff clients the next time they log in.

NOTE: RSA does not support printer configuration and so printers must be configured by each member library. The custom scripts mentioned above do not affect printer configurations.

You must be online to make these changes. In offline mode you can only set the offline wizard properties.

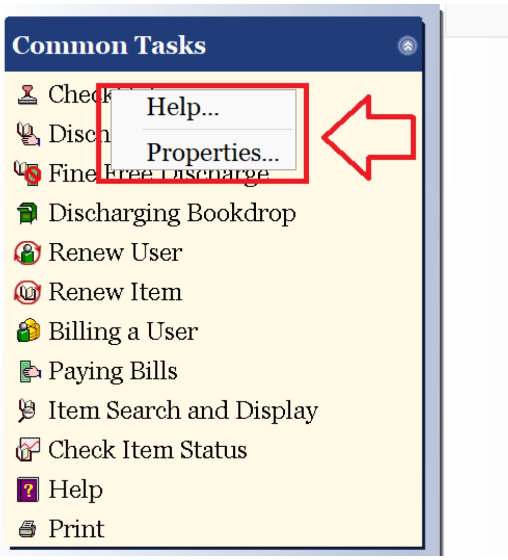
Terms

Wizard: An icon that guides the user through the steps to perform a specific task, such as checking out an item or paying a bill. Wizards are located on the left side of the Workflows screen and are grouped in toolbars (Common tasks, e.g.)

Helpers: Small icons found at the top of wizards that allow you to perform a specific task without leaving the wizard.

Default: The normal setting. Usually, a field that is already filled in for you, but that can be changed if necessary. For instance, the default payment type in the Pay Bills wizard is 'Cash.'

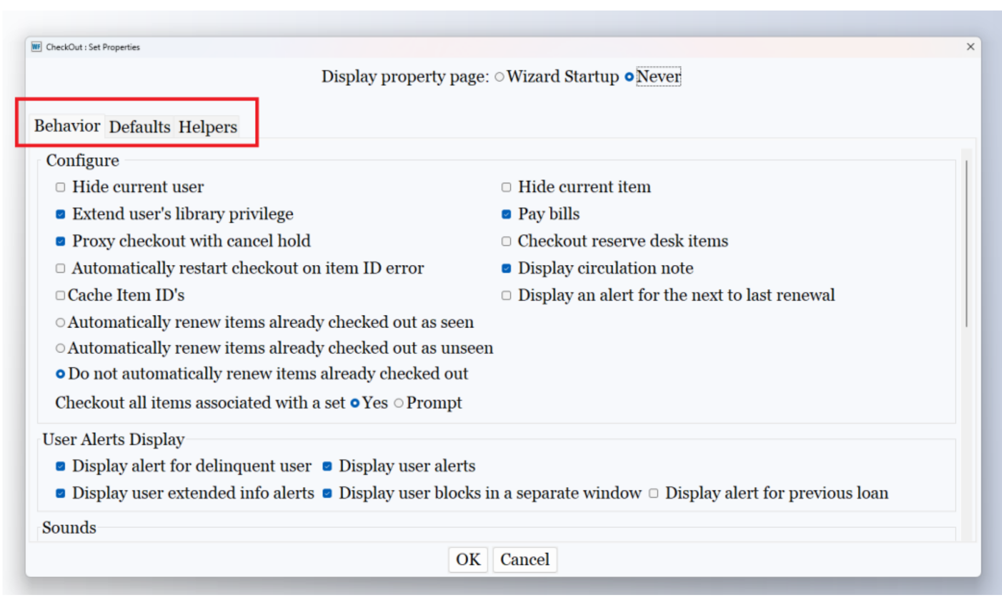
Accessing Menus to Set-up Defaults and Behaviors
To open the menus that will allow you to change defaults and behaviors, you will need to right-click on the name of the wizard itself. When you do so, you will see the following box:



Click on Properties.

Each box will have from one to three tabs: Behavior, Defaults, and Helpers. To choose any one of the tabs, click on the tab itself, and that will open the appropriate menu.

The next few pages will take you through the necessary changes you should make using these menus.

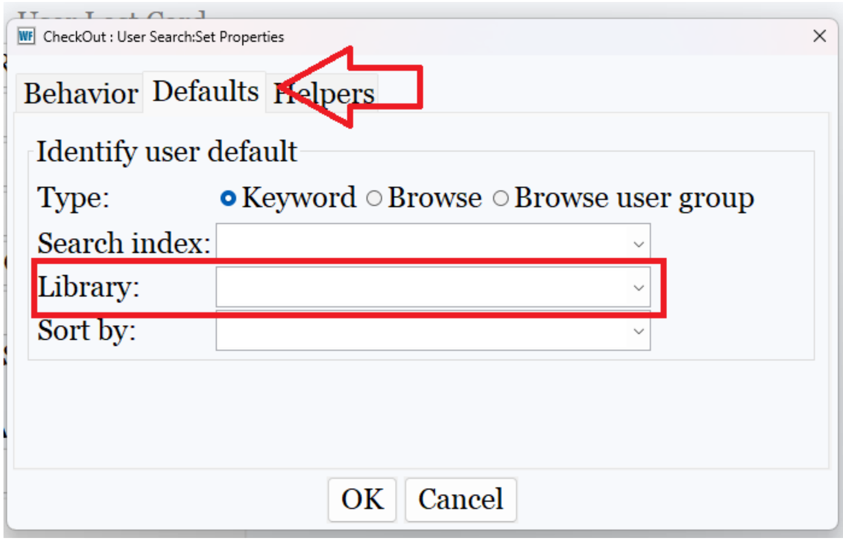


Settings for All Libraries

Home Library: The primary thing you need to do is to make sure that Workflows knows what library it is in. This will need to be done in several places. These instructions will walk you step-by-step through doing a few of them, then give you the locations of the rest that need to be updated.

- Right-click on the Checkout wizard, then click on the word Properties.
- In the new window that pops up, left click on the tab that says Helpers.
- You should see a list of buttons for the Helpers that appear in the Checkout wizard. Click on the top one that says User Search.

- A smaller box should appear. Make sure that the tab at the top of it says Defaults.
- In the field labeled Library, choose your own library name from the drop-down box, then click OK.

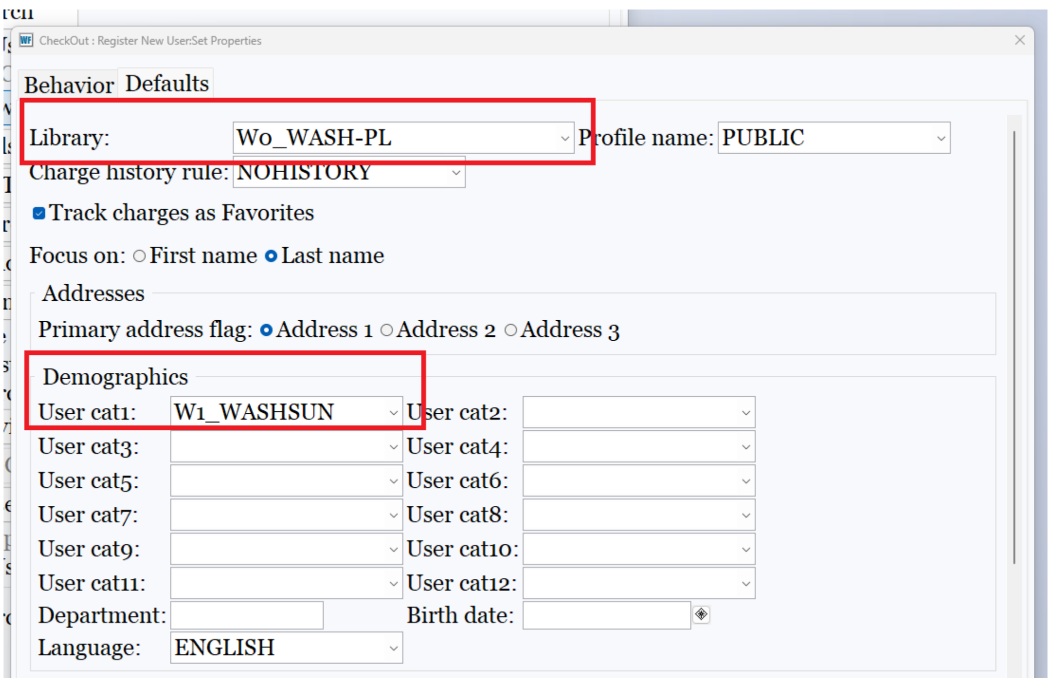


- **NOTE:** You also can change the default search results method on this screen as well:
  - Keyword – Locates and displays user records that contain the terms you entered. Boolean operators, field qualifiers, and other search strategies can be used to narrow or expand your search.
  - Browse – Produces a list in the alphabetic vicinity of the term you entered.
- Next click on the Register New User button.

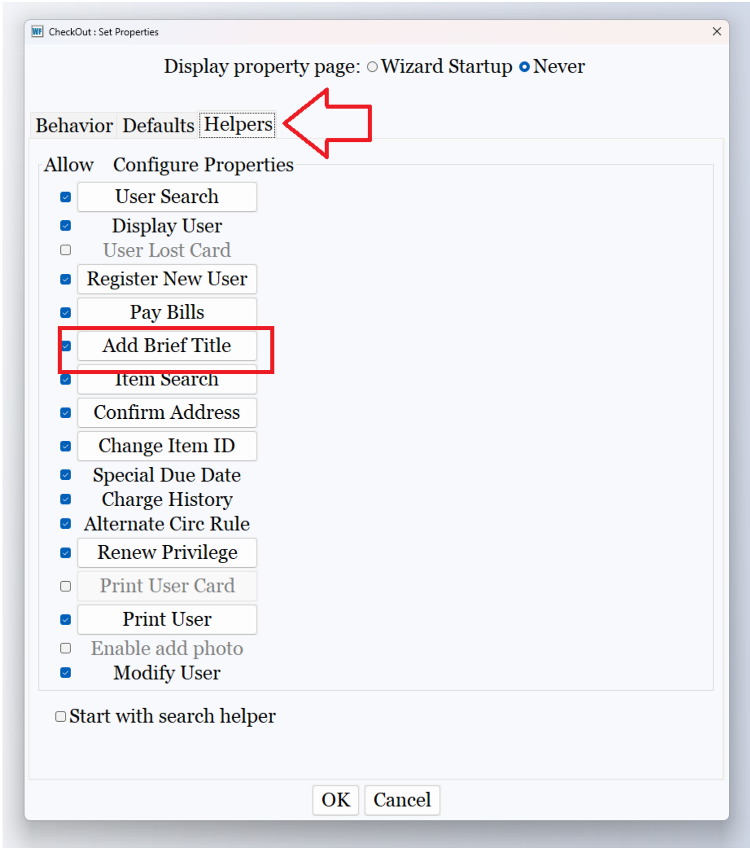
- Click on the tab at the top of the page that says Defaults.

- At the top of this box, where it says Library, choose your own library name from the drop-down box.

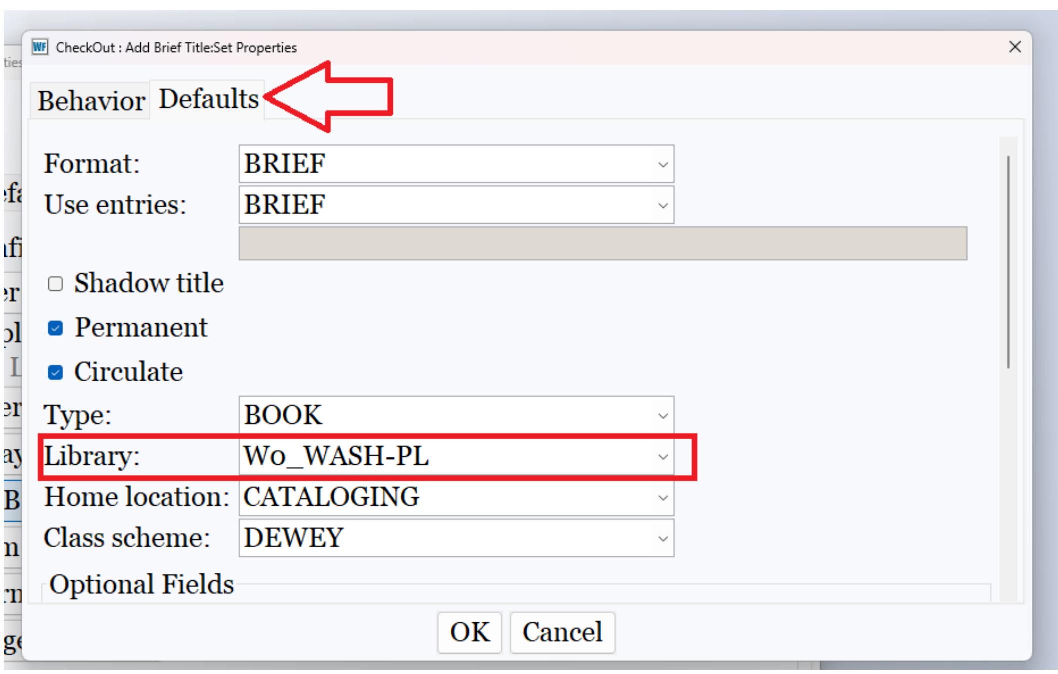
- **NOTE:** if you are a branch library, you need to choose your main library's name here. Main libraries own all patrons for that library and all its branches.
- Enter your library name in the User Cat 1 box.
- **NOTE:** if you are a branch library, you need to choose your branch name in the User Cat 1 box.



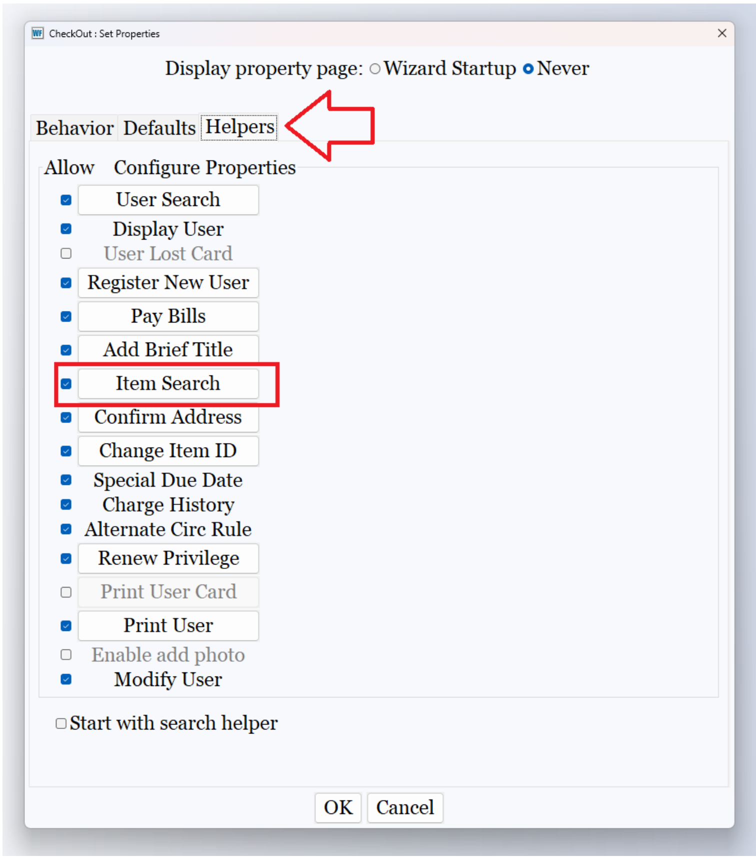
- Next select the Add Brief Title button. Click on the tab at the top of the page that says Defaults.



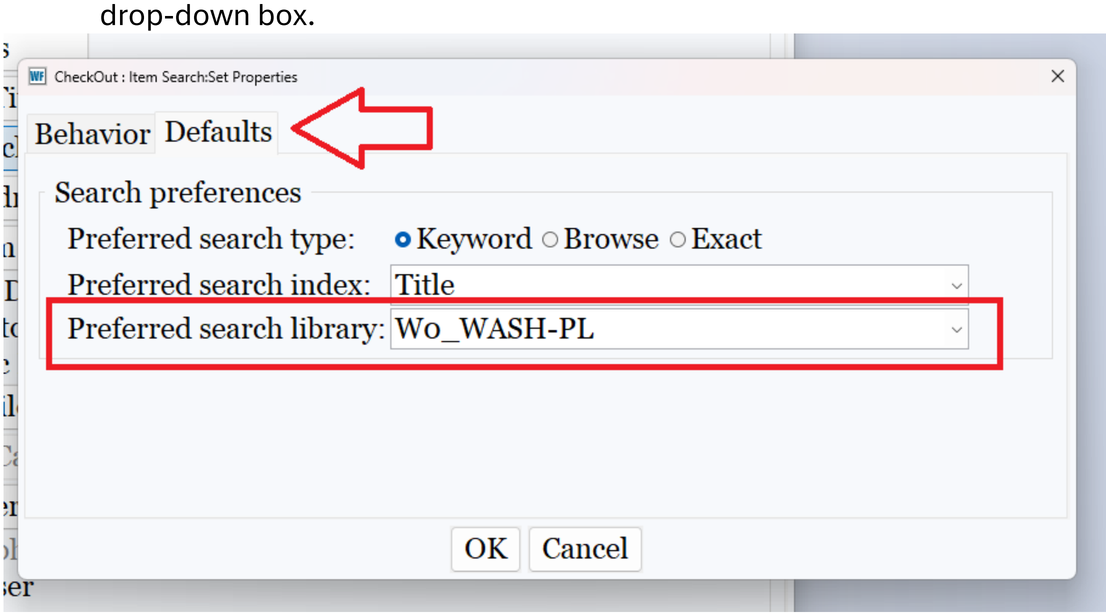
- In the field labeled Library, choose your own library name from the drop-down box.



- Next select the Item Search button. Click on the tab at the top of the page that says Defaults.



- In the field labeled Preferred Search Library, choose your own library name from the drop-down box.



- Now click OK at the bottom of the box with all the buttons.

This is the basic process for changing home locations. You will need to use the same process to set your library default in the following wizards:

In the Circulation Module

- User Registration
    - In the Default tab, enter your library.
        - NOTE: if you are a branch library, you need to choose your main library's name here as well in the box and set the User Cat 1 to your library.
    - **NOTE**: we recommend you turn on User Duplicate Searching in the Behavior tab.
        - Click the on button, then click Daytime phone, Home Phone, License #, Phone, and Street. This will add another button to the user registration screen called Check Duplicate User that will allow you to check for existing users with the same data.
- Add Item
        - In the Default tab under Search preferences select Item tree display collapsed to make navigating and finding items easier in the item tree.
- Add Brief Title
    - In the Default tab ensure the Format and Use Entries lines are set to BRIEF
    - Set your library name in the library line.
- Display Title Holds
    - Click the Detailed Hold Count button, then on the default tab, choose your library in the box that opens. Check the Item Search button, default tab, library to make sure it is set to your library.

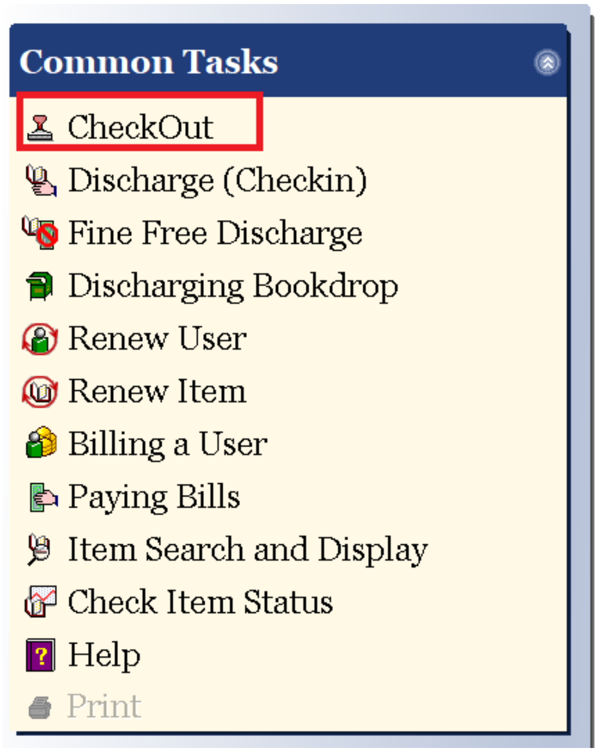
Wizards in the Cataloging Module

- Call Number & Item Maintenance – On the defaults tab, under Search preferences and the Call number default values section (both on the same page)
- Edit Item – On the Default tab under Search preference

For Libraries using Receipt Printers Only

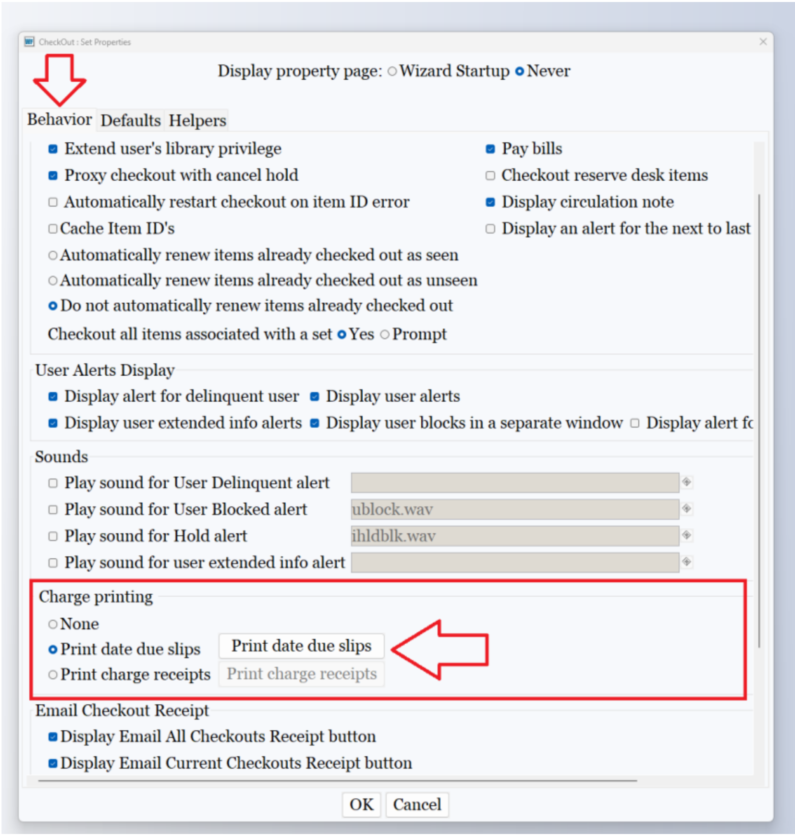
If you have questions on how to install your receipt printer, please see the section on the RSA Website dedicated to printers:
https://support.librariesofrsa.org/project/setup-config-backup/#Receipt_Printer_Installation_%E2%80%94_Thermal_Printer.

Setting Preferences

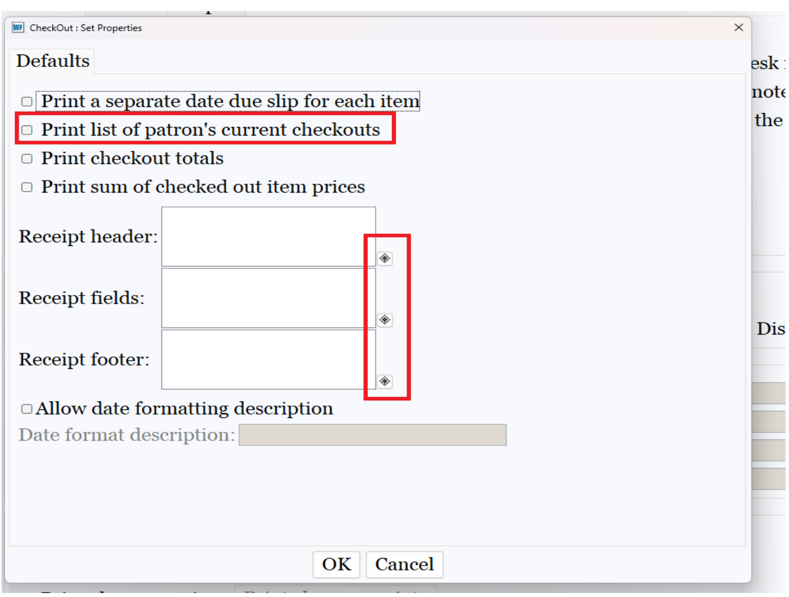


- Anywhere that you would like the option to print out a receipt (Checkout, Discharge, Renew, Paying Bills, etc.), right click on Wizard, select properties, and go to Behaviors tab.
- Make sure that in the Charge Printing section, Print date dues slips is selected.

- Select the Print Due Date Slips box.

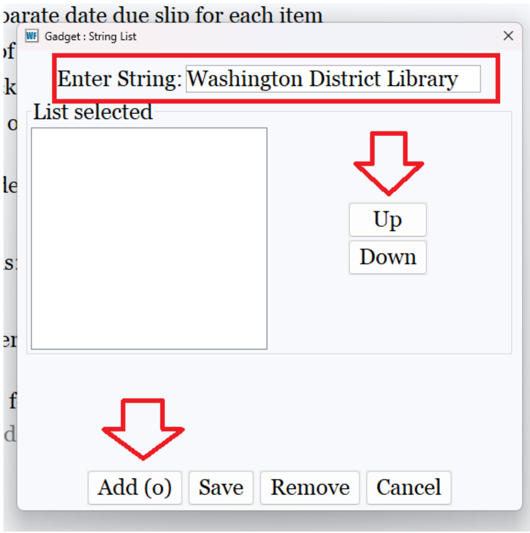


- The receipt is divided into three sections:
  - **Header:** unchanging info that prints at the top of each receipt
  - **Receipt fields:** Items that will print for each item checked out
  - **Footer:** unchanging information that prints at the bottom of each receipt



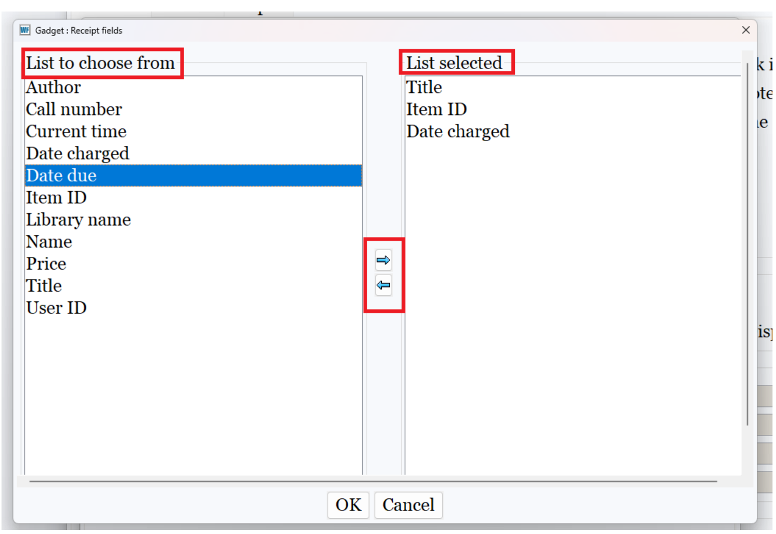
Creating a Header

- To create a header, click on the diamond-shaped gadget to the right of the box. Each line of text in the header is called a string. Enter the data you want on the top line and click on Add. Do the same for any additional lines you want, such as a phone number or slogan. When you are done, click on Save.

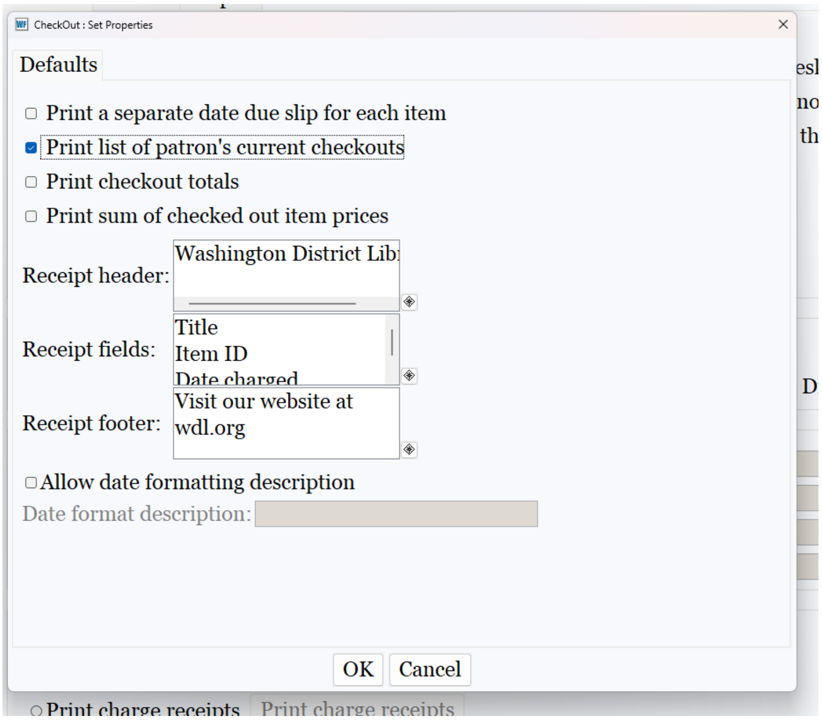


Adding Receipt Fields

- Click on the diamond gadget next to the box labeled Receipt Fields. You will get a screen with two boxes on it. One has potential fields you can include, the other will list the fields you have chosen. Highlight the fields you want included, then click on the arrow to select it. You may choose what you wish; recommended fields are:
    - Item ID
    - Title
    - Due Date
    - When you have chosen the fields you want, click on OK.



- It is important to keep any Personal Identifying Information off receipts. This includes Patron Name or User ID. For questions about this, please see the [Printed Documents with PII guide](#).
- Creating a footer is the same as creating a header.



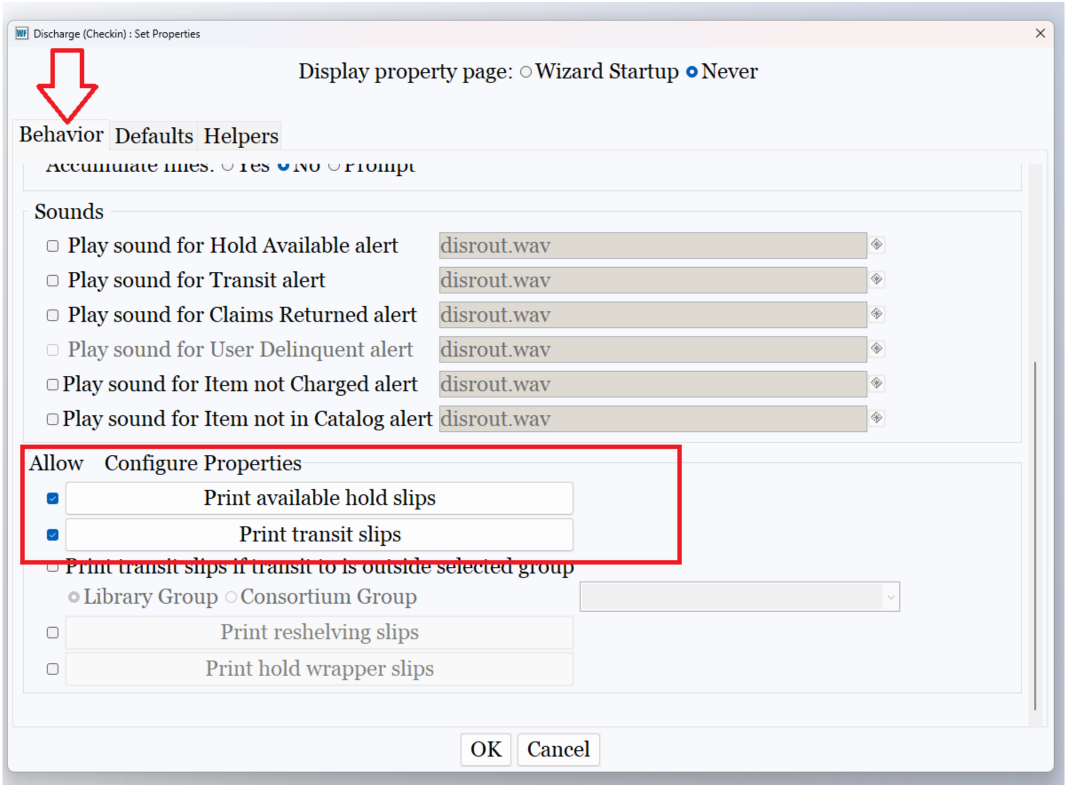
- When your receipt is set up to your liking, click OK to return to the Checkout Properties box, then OK to close the Checkout Properties screen.
- Your date due slips should now automatically print during checkout.

Other Places to set up date due slips:

- There are several places in Workflows where you may need to print Date Due slips. You will have to set them up individually in each place.
- The other locations where Date Due slips should be set up are:
  - Renew User Wizard
  - Renew Item Wizard

Setting up Hold Slips in Discharging

- When you discharge a book that has a hold on it, you will want a receipt that contains the information of the person who placed the hold.
- Access the Properties menu for the Discharge.
- Click on the Behaviors tab at the top of the page, then put a check mark next to Print Available Hold Slips at the bottom left of the page. When you do so, the Print Available Hold Slips button will light up. Click on that button.



- Using the same process you used for checkout receipts, enter a header, receipt fields and footer. Since these are seen only by library staff, they need not be fancy. You may choose what receipt fields you wish. The recommended fields are:
  - Title
  - Item ID
  - Name
  - Phone number
  - Comments
  - User ID
  - Email
- When your receipt is set up the way you want it, click on OK to return to the Discharging Properties box. You will stay here if you wish to set up transit slips.
- Hold available slips may include PII (name, phone, email) so that staff may contact the patron. Dispose of this information appropriately.

Other places to set up Hold Available slips

- There are several places, either wizards or helpers, in Workflows where you may need to print Hold Available slips. You will have to set them up individually in each place.
- The other locations where Hold Available slips can be set up are:
  - Fine Free Discharge Wizard
  - Discharging Bookdrop Wizard
  - Remove User Hold Wizard
  - Remove Item Hold Wizard

  - Trap Holds Wizard

Setting up Transit Slips in Discharging

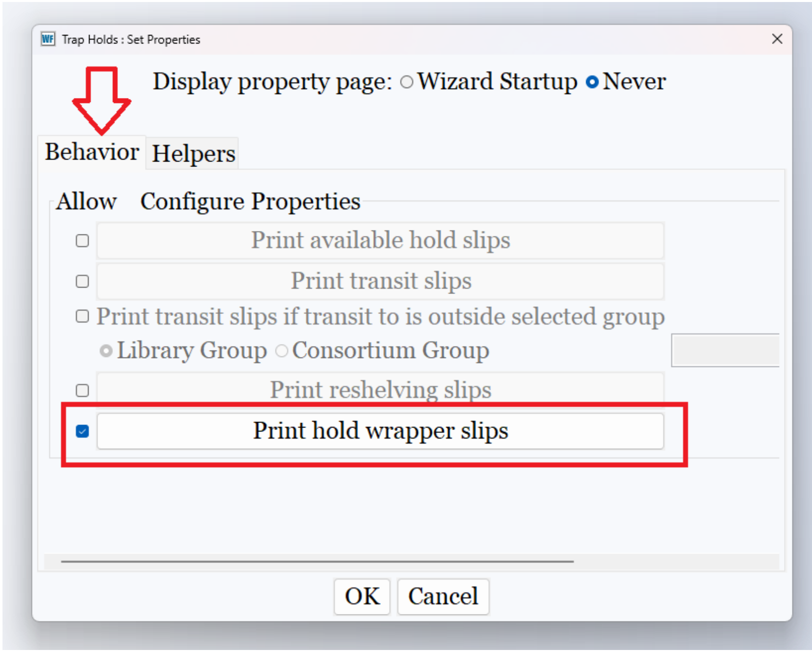
- Transit slips are used when books are returned that need to be sent to another library. They are a convenience for library staff only. You will still need to use the official RAILS routing label for materials that are to be placed in delivery.
- If you choose to print transit slips, you will find that choice just below the box hold slips. To set it up, put a check mark next to Print Transit Slips at the bottom left of the page.
- Using the same process, set up what information you would like on your transit slips.
- You may choose what receipt fields you wish; recommended fields are:
  - Transit to
  - Transit Date
  - Title
  - Item ID
  - Transit Library
- When your receipt is set up the way you want it, click on OK to return to the Discharging Properties box. Then click on OK to exit this screen.

Other places to set up Transit slips

- There are several places, either wizards or helpers, in Workflows where you may need to print Transit slips. You will have to set them up individually in each place.
- The other locations where Transit slips can be set up are:
  - Fine Free Discharge Wizard
  - Check Item Status Wizard
  - Remove User Hold Wizard
  - Remove Item Hold Wizard
  - Trap Holds Wizard
  - Discharging Bookdrop Wizard
  - Pending Transits Wizard
  - Receive Transit Wizard

Setting up Hold Wrapper Slips (Check-in wizard)

- A feature in Symphony is the Hold Wrapper Slip. A hold wrapper is typically a slip of paper printed with user, hold, and/or item information that is wrapped or folded around the spine of an item to be placed on a holds shelf. Hold wrappers are most useful in libraries that have a self-service hold shelf. You will also have the option to limit the patron ID number and patron name printing length to provide privacy.



- If you choose to print hold wrappers, you will find that choice in any wizard that potentially traps a hold. The process is essentially the same as setting up the other receipt printer settings.
- You may choose what receipt fields you wish; recommended fields are:
    - Expires
    - Name (limited in length if you wish)
    - User ID (limited in length if you wish)
- When your receipt is set up the way you want it, click on OK to return to the Properties window. Then click on OK to exit this screen.

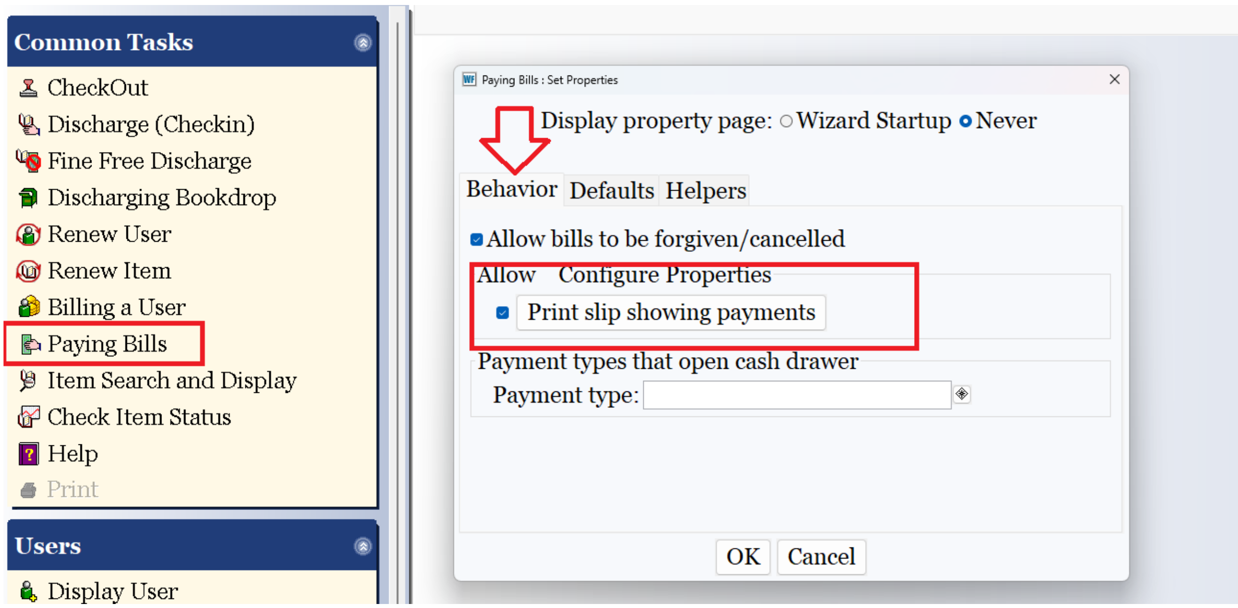
Other places to set up Hold Wrapper slips

- There are several places, either wizards or helpers, in Workflows where you may need to print hold wrapper slips. You will have to set them up individually in each place.
- The other locations where the wrappers can be set up are:
    - Fine Free Discharge Wizard
    - Remove User Hold Wizard
    - Remove Item Hold Wizard
    - Trap Holds Wizard
    - Discharging Bookdrop Wizard

Setting up Receipts for Bills (Fines) Paid

- Some libraries like to provide a receipt whenever patrons pay fines, whether for overdue items, lost materials, etc.

- Access the Properties menu for the Paying Bills wizard by right-clicking on the wizard's name, then choosing properties. The **Paying Bills: Set Properties** box will open.

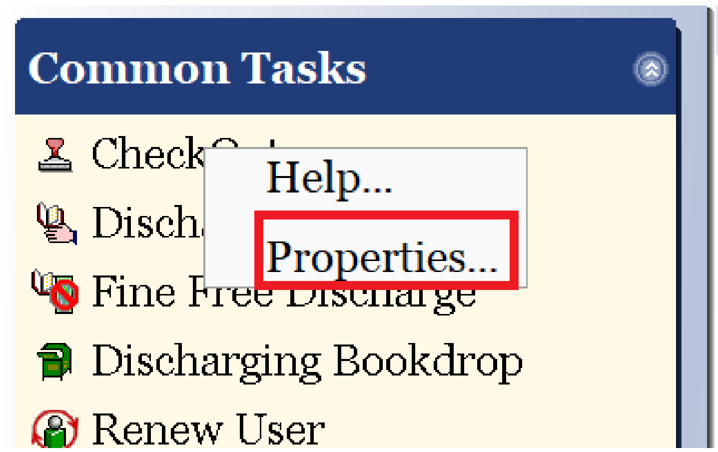


- The process is essentially the same. You will choose text for the receipt fields and create a footer.
- You may choose what receipt fields you wish; recommended fields are:
    - Current time (includes date)
    - Amount billed
    - Amount paid
    - Reason for bill
    - Title
    - Author
    - Payment Type
    - Payment Info
- When your receipt is set up the way you want it, click on OK to return to the Paying Bills Properties box. Then click on OK to exit this screen.
- There are several places (either wizards or helpers) in Workflows where you may need to print receipts for bills. You will have to set them up individually in each place.
- The other locations where receipts for bills paid can be set up are:
    - Billing a User Wizard
    - Paying Bills Helper

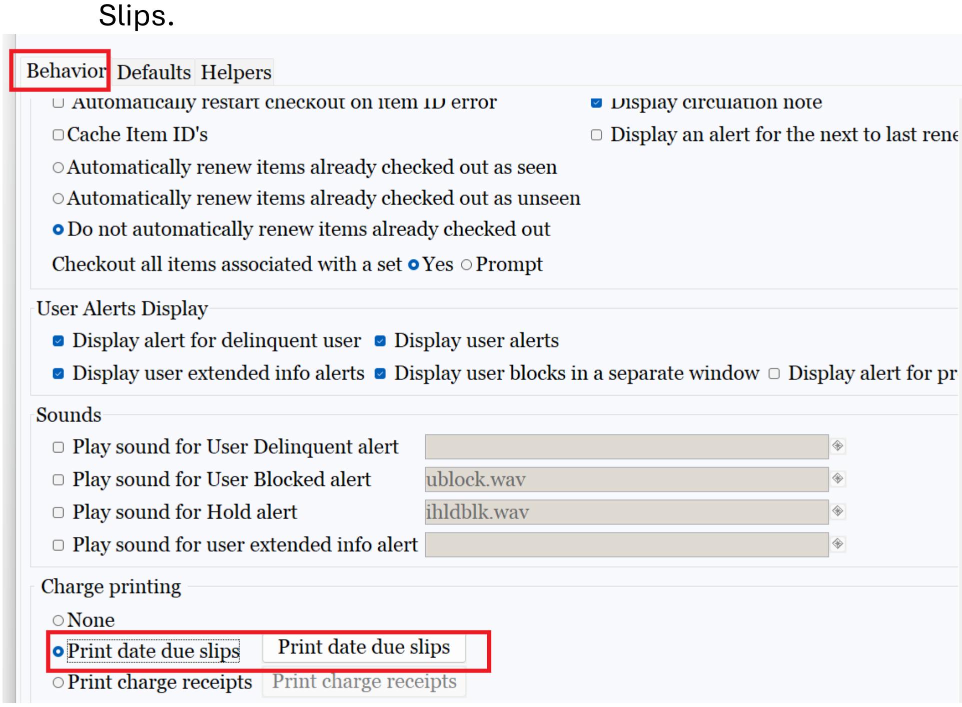
- Access it by clicking on Properties for the Checkout wizard, then choosing the Helpers tab. Click on the button that says Paying Bills and you will see the place to set up Print Slip Showing Payments.

Setting up the "You Saved" Info Slips

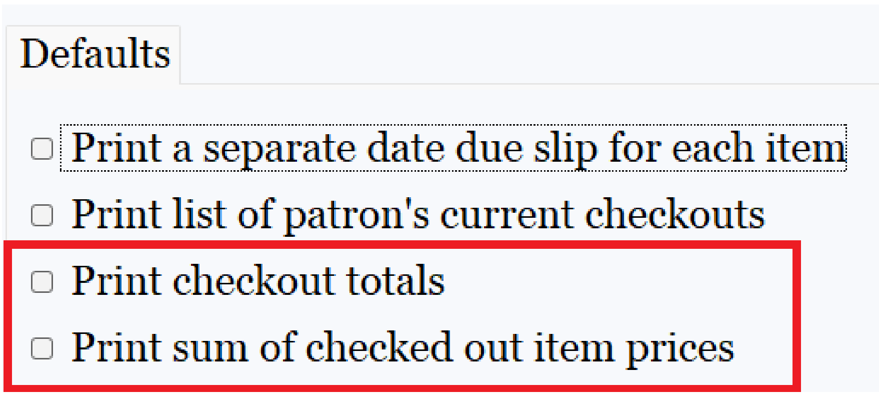
- Workflows allows you to add a "you saved" total at the bottom of your checkout receipt. It will use the price of the item in the catalog record.
- This option is only available on receipts printed from the Check Out Wizard.
- In the Circulation+ module, open the Common Tasks Group and right click on CheckOut. Select Properties.



- In the Properties, go into the Behaviors tab, scroll down and select Print Due Date Slips.

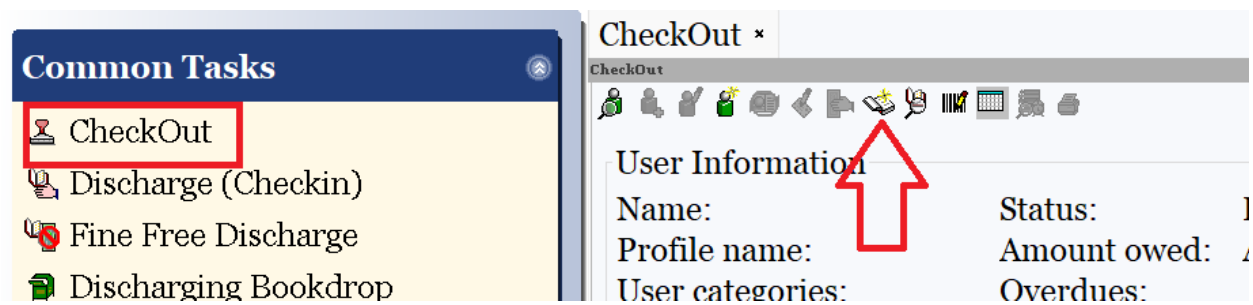


- In the popup box, make sure that Print checkout totals and Print sum of checked out item prices are selected.

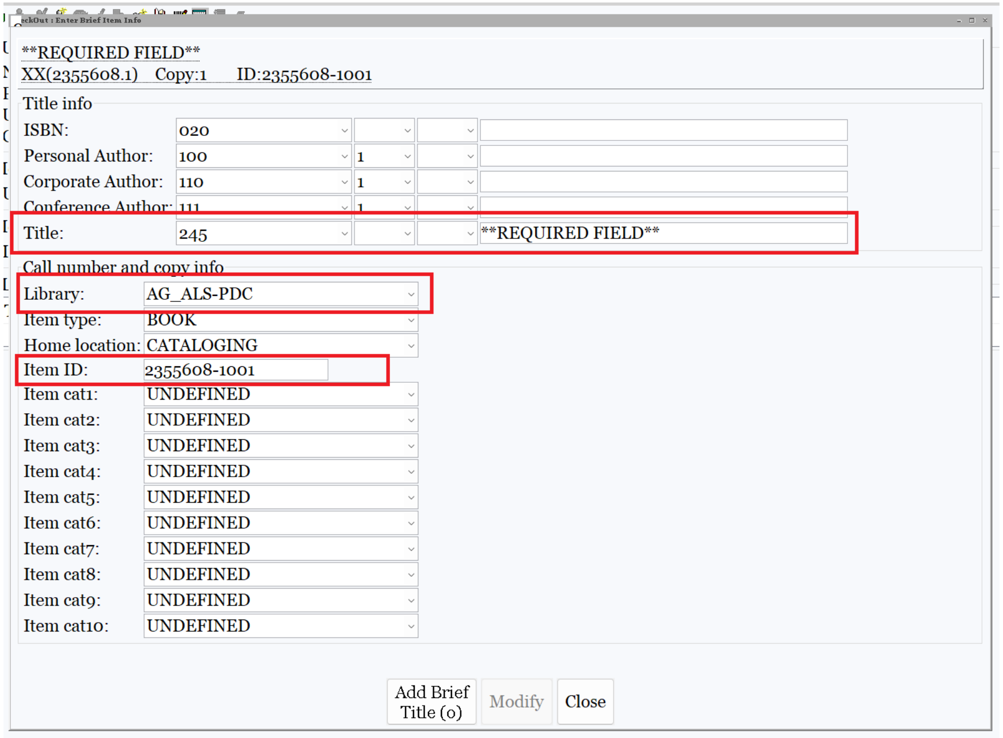


- This setting will print the sum of the items checked out based on the item price in the record. The bottom of the receipt will read: “Using the library saved you: $x.xx”

Creating a BRIEF Record for an ILL Item
If you have an item that comes up as “Item not found in catalog” or get an item from a patron via OCLC or an outside the system library, you can create a Brief Record from the Checkout Wizard.

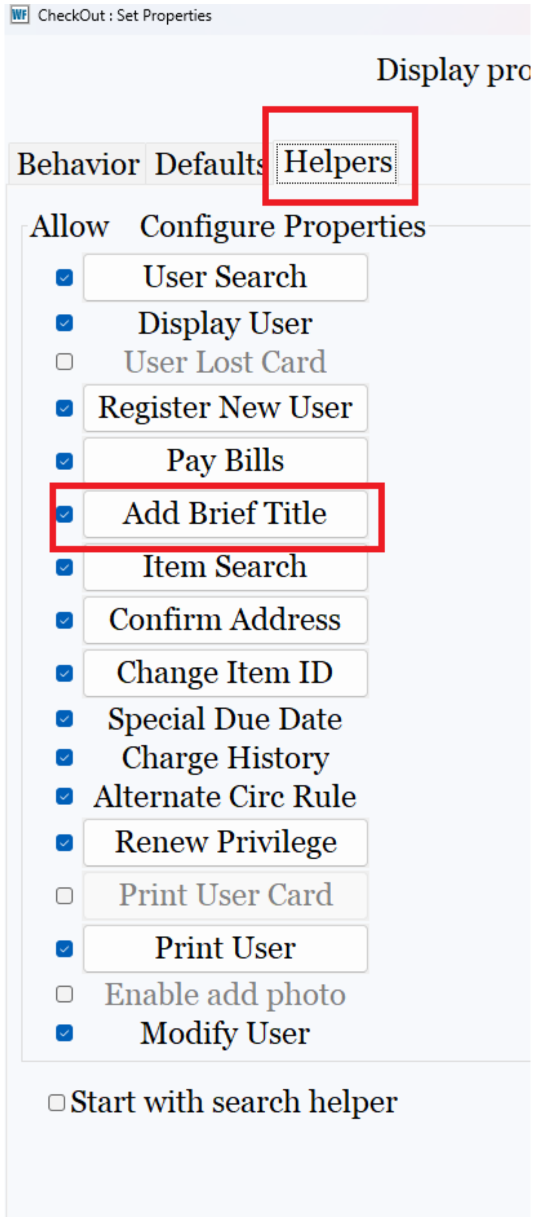


There are only three required fields for an ILL Brief Record:
- Title (Must be entered in all upper case)
- Library (your library)
- Item ID (whatever barcode you are scanning to check item out)



After you hit Add Brief Title, the item will **immediately** check out to the patron.

Under the SUPER User, you can set preferences for Library and Home Location.

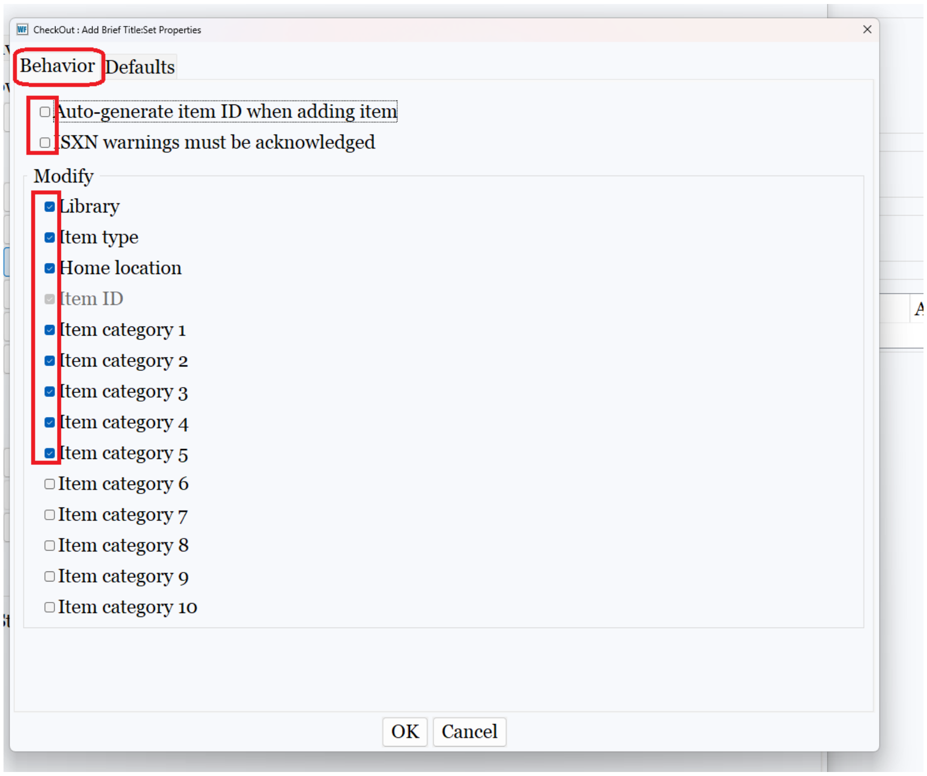


In the Behavior Tab, make sure the following items are unchecked:

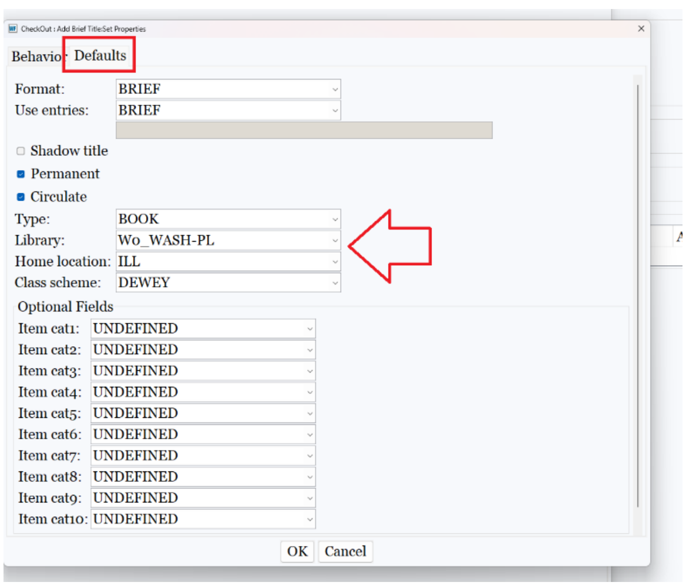
- Auto-generate item ID when adding item
- ISXN warnings must be acknowledged

And make sure the following items are checked:

- Library
- Item Type
- Home Location
- ItemCat1-5



In the Defaults tab, set up your most likely to be used item type, your library, and the home location you would like to use:



If this is a brief record of an item the library intends to keep, the brief record should be reported to the RSA Cataloging department.
If this is a brief record for an ILL item, it should not be kept in the database but checked out to your library's Discard User for deletion upon its return.