

Introduction to WorkFlows

Welcome to the WorkFlows introduction. WorkFlows is the staff client that connects to the Unicorn software on the server for circulation, cataloging, acquisitions, and other staff duties.

- WorkFlows uses Microsoft Windows, Macintosh, and client/server technology.
- WorkFlows is installed on staff PCs only.

The goals of this course are to familiarize the staff with the following WorkFlows concepts.

- Toolbars – a group of icons representing a set of related wizards that can be changed or customized to simplify your task.
- Wizards – buttons in the toolbar that allow you to perform complex library tasks quickly and efficiently.
- Properties – specific WorkFlows settings that can be changed and saved.
- Helpers – provide options for doing work related to a wizard task. They can be changed or removed from wizards.
- Tools – allow you to modify, add, or delete information related to a wizard task. They are available depending on the type of task being performed.
- Next Steps – allow you to select the next step to continue your task.
- WorkFlows client navigation – moving through the client using both a mouse and the keyboard.

WorkFlows Configuration

The first screen to appear after launching WorkFlows from the desktop shortcut is the WorkFlows Configuration screen. You can also access this screen within WorkFlows through the Preference option on the menu bar. The WorkFlows Configuration screen stores connection information so that this client knows how to connect to the server. It also stores information specific to this particular workstation.

Logging In

Once you click **OK** on the Configuration screen, the WorkFlows client will launch and present a login dialog box. The operator must type a valid user ID that has been created in Unicorn. PINs are passcodes that add extra security for your users. You do not have to configure WorkFlows to use PINs. If there are no PINs used, there is no security for the system. Any operator can modify the WorkFlows system by logging in as the admin user. After you click **OK** to log in, configuration files are downloaded from the server to the workstation. The server also pushes files to each workstation to ensure the configuration changes made on the server get delivered to each workstation.

Peripherals

Other configuration settings are available through the Preference > Peripherals menu.

How to Change the Receipt Printer

Will due date slips and other receipts be printed from this workstation? If so, the receipt printer needs to be modified. Go to **Preference > Peripherals > Receipt Printer**. Check the **Receipt printer available** box and supply information about the way the printer is connected. When finished, click **OK** to save the changes.

How to Change the Barcode Reader

Will a barcode scanner be used at this workstation? If so, the barcode reader needs to be modified. Go to **Preference > Peripherals > Barcode Reader**. Check the **Barcode reader available** box and supply information about how the scanner will be connected to the workstation.

Fonts and Special Characters

Select Font Settings

The font display in client windows can easily be changed. Go to **Preference > Desktop > Font Settings** and select different fonts for menu and window text, or use the default established in the local Windows install.

Symbol Table for Inserting Special Characters and Diacritics

Using the Symbol Table, it's easy to insert special characters and diacritics. Go to **Tools > Symbol Table** to access the table. Select a code set from the drop-down list and a character table for that code set appears. Position the cursor where the diacritic should be inserted, then click the diacritic in the table. The table can be left open so that diacritics can continue to be inserted as text is typed.

How to Save Configuration Changes

Select **OK** to save your changes. If you make changes to the Configuration screen from the Preference > Configuration screen while working in WorkFlows, changes take effect when you log out and log back in.

The WorkFlows Desktop

This is the WorkFlows desktop. You'll find that, as its features are discussed, WorkFlows incorporates many of the conventions of Microsoft Windows – which will make new users much more comfortable if they've used Microsoft Windows in the past.

The overall look of the desktop is configurable. This is defined through the Preference > Desktop > Desktop Setup > Themes setting. This presentation uses the Classic theme because it will be the most familiar to users of the WorkFlows C client, but you may wish to try some of the different themes. You will have to restart the WorkFlows client to see the new theme.

Menu Bar

The menu bar can be used to access basic Windows commands, set preferences, and access online help.

The Toolbar

WorkFlows contains a number of toolbars which can be changed and customized on the desktop. The reason there are a number of toolbars is because we have grouped common tasks and put them together on a toolbar. For example, the Cataloging toolbar contains all cataloging and authority functionality available in WorkFlows. On every toolbar, the module-specific tasks will be located on the left end. An operator using any of the toolbars might have the need to print, check an item's status, access help, and so on. So, we have designated certain wizards to be on all toolbars and placed them on the right end of every toolbar. Users are granted access to the toolbars based on the way they log in. This feature is controlled by the system administrator when creating staff level logins.

The Wizard

A wizard is a button that represents a staff member's task. Wizards try to take into account all possible paths a user may need to complete a task. Ideally, if a patron is checking out a book, the patron would first hand the staff member their library card to scan. The library card would be current with no fines, and the staff member would then begin scanning the material the patron wanted to check out. The patron would then be on their way with the desired material. But many other scenarios could take place. For example,

- The patron may need to obtain a library card.
- The patron may have a library card, but may not have the library card with them.
- The patron may have a library card, but the record is blocked due to fines.

Helpers and next steps allow a staff member to use one wizard, the Checkout wizard, to handle these situations and more. Using one wizard is easier than trying to remember the commands needed to register a new user or to clear a patron's bills. When your cursor hovers over a wizard, balloon help and flyby help display to explain the wizard's task.

Helpers

Helpers, represented by icons at the top of wizard windows, provide options for doing work related to a wizard task. Touching a helper icon with your cursor opens balloon help to tell you what the helper does. Let's use the checkout wizard in our example of a helper. When checking out a book using the checkout wizard, if the patron tells you they didn't bring their card with them for you to scan, you can use the User Search helper to find the user's library card number without deviating from your original task – checking out the material.

Toolbox and Tools

A toolbox contains tools that provide different functions to modify, add, or delete information. Tools are positioned on the various tabs used throughout WorkFlows. Some tools are unavailable depending on the information contained within the tab. For example, the Create a Distribution tool is unavailable while the Modify a Distribution and Delete A Distribution tools are active. You can change the default distribution or delete it.

Next Steps

Next steps are located either at the bottom of the wizard window or in a new dialog box. They allow you to proceed to the next step of your task. For example, when placing a hold, after you place the hold there are four next steps presented: Place Hold for Another User, Place Another Hold for This User, Remove This Hold, and Close. For some next steps, certain letters are underlined on the next steps. This is a key combination short cut. Press **ALT** and the underlined letter on the next step button to choose that step. The key combination is an alternative to clicking with your mouse.

Properties

Three types of properties are available in WorkFlows. The most common is the default property. Default values can be set to fill fields with commonly used values so that work proceeds more quickly. For example, creating original cataloging requires a great deal of keystrokes in order to enter all of the information in the bibliographic entries as well as fields like Item Type, Format, and Location. If the cataloger is getting ready to catalog a stack of videos, keystrokes can be saved by filling in the default properties for the Add Title wizard so that Item Type and Location default to the correct value. Properties can be changed any time by right-clicking on the wizard and selecting properties.

There is also a group of properties called Behavior properties that can only be modified by the Unicorn administrator. Behavior properties are properties that usually deal with system-wide library policies. These properties apply throughout the library, whereas default properties need to be set workstation by workstation. Behavior properties also control what next steps are available to the staff. For example, when using the Discharge wizard, there is a behavior property for paying a user's bills. If this box is checked, WorkFlows will display a next step that allows a user to pay overdue fees at the time an item is returned. Most libraries want this feature checked so that overdue fines can be paid from this screen. Properties such as this need to be consistent from workstation to workstation.

The last type of property is the Helper property. Helpers are represented by icons at the top of wizard windows and provide options for doing work related to a wizard task. The Helper property allows the administrator to determine which helpers will display on a particular wizard. Many helpers have Behavior, Default, and/or Helper properties themselves.

Who can make changes to properties? The Unicorn administrator, using the admin login, can change Behavior and Helper properties. Staff using Circ and Tech logins cannot change Behavior or Helper properties. Any user can change Default properties on the workstation where they are working. Properties pages have context-sensitive help which can be selected if you need an explanation of the properties options in the active window.

The Admin user can save property changes to the server so they are distributed to all clients at login. Properties can be saved immediately after the changes are made or just before exiting the client. To save properties on the server, select **Save Properties** on the Utility toolbar. Select a property file from the drop-down list and click **Load**. Choose a wizard from the tree and click **Modify**. The Set Properties window displays. Make necessary changes to the wizard's properties and click **Save** when finished.

SirsiDynix recommends that Unicorn administrators and supervisory staff systematically review properties for each Unicorn module. Change properties as needed to tailor WorkFlows to meet the needs of your library operations.

Features

There are three icons in the right corner of the WorkFlows desktop. These icons are Minimize, Maximize/Restore, and Close. These icons appear on every wizard window in the WorkFlows desktop as well. There are two ways to close a wizard window: the Close next step on the wizard window and the Close icon in the top corner of the wizard window. The Close icon on the WorkFlows desktop performs the same task as clicking on File > Exit from the Menu Bar.

Although only one window is active at a time, multiple windows can be opened on the WorkFlows desktop. This allows a quick move from one wizard to another. Some circulation desks like to have both the Checkout and Discharge wizards open so that it is easy to toggle back and forth between tasks. The active window is indicated by the highlighted bar at the top of the active window.

Displaying and Modifying Toolbars

WorkFlows comes with a variety of different toolbars. To change from one toolbar to another, right-click anywhere on the toolbar and click **Select Current Toolbar**. A dialog box opens. Select the toolbar and click **OK**.

WorkFlows allows users to create custom toolbars. What if you primarily use the Cataloging toolbar but also need to access the Create a Serial Control wizard? You could toggle back and forth between the Cataloging and Serial Control toolbars or you could make a custom toolbar combining the wizards. This new toolbar can be the default toolbar when you log onto your workstation. If you want to add a wizard or wizards to a toolbar to create a custom toolbar, follow these steps.

1. Access **Local Toolbar Management** from the **Preference > Desktop > Current Toolbar** menu, or right-click the current toolbar and select **Local Toolbar Management** from the shortcut menu. A window displays with three panes: Delivery Toolbar Files, Local Toolbar Files, and Customized Toolbar Files. Each pane displays the toolbars delivered, saved on the PC, and saved to the server.
2. Click a toolbar to display a tree structure of the group wizards and individual wizards that appear on these toolbars.
3. In the Delivery Toolbar Files pane, copy a toolbar file to the Local Toolbar Files pane. You also can copy a wizard (or wizard group) to a clipboard and paste the wizard either in a toolbar file or group wizard node in the Local Toolbar Files pane.
4. In the Local Toolbar Files pane, you can add, modify, or remove a toolbar file, a single wizard, a wizard group, or a separator.
5. You also can save a toolbar file with a different name or description. Pasting and moving wizards (groups or separators) is easy using the drag and drop method.

Adding new wizards to a toolbar is easy. In the local pane, right-click a toolbar or wizard group, click **Add Wizard** in the shortcut menu, select a wizard from the drop-down list, and the wizard fields, such as Toolbar Image, Fly-by Help, and Balloon Help, automatically fill in.

The Unicorn administrator can save the custom toolbars to the server so that this change will be distributed to all users when they log in. The staff user using the circ or tech login can save the changes in the local toolbar files only on the workstation.

Keyboard Shortcuts

While many users find it comfortable moving from keyboard to mouse to complete their work, all navigation around the screen can be done completely from the keyboard without ever using the mouse.

- To navigate the menu bar, press the **Alt** key with the appropriate underlined character. For example, type **Alt-P** to access the Preference pop-up menu. Type **Alt-T** to display the Tools menu.
- Wizards are mapped to function keys. To change or display the function key map, right-click the wizard, select **Toolbar Management**, then right-click the wizard in the local toolbars pane and select **Modify**. A new key sequence can be assigned.
- Use the **Tab** key to move between writable fields and next step buttons in a wizard window.
- Use **Shift-Tab** to move backwards between active, input fields, and next step buttons in a wizard window.
- Use the **Arrow** keys to move forward, backward, up, and down among folder tabs.
- To select a next step button, press **ALT** and the appropriate underlined character.
- Pressing the **Enter** key in a WorkFlows window selects the default button, which is the highlighted button on the left of the screen. Pressing the **Enter** key in a verify list selects the highlighted value.
- Use the **Spacebar** to select or clear check boxes and radio buttons.

Online Help

All documentation for the WorkFlows client is built into the client in the form of online help. Help can be accessed a number of ways. The first way is to click on **Help** in the menu bar and select **Content**. This will take you to the beginning of WorkFlows Help. If you or a staff member are new to WorkFlows, SirsiDynix recommends starting your tour of the help from this point.

Another link under Help on the menu bar is Key Enhancements. Key Enhancements presents a list of hyperlinks that highlight new features of WorkFlows that are included in your version. If you have recently upgraded to a new version of Unicorn, we recommend reading the Key Enhancements.

One of the most useful help options is Context under the Help menu bar. If you are working with a wizard on your WorkFlows desktop and select Context, the help that displays is pertinent to this active wizard.

A quick way to access all the help files is use the purple book with a question mark. If no wizards are active on the WorkFlows desktop when you click the book, the help that displays is the content help. If there is a wizard active when you click the book, the context sensitive help displays.

If you have a specific question or if you know what subject you need to read about, type this word or phrase into the Find field of the Search tab in the help. Topics pertinent to your search will display.

References to the help files are particularly useful when working with policies. If you are not sure what a particular field in a policy means, use the helps. Help is also useful when working with

reports. WorkFlows help contains samples of various reports so that the output can be viewed without actually having to run the report.

Printing

Select **File > Print** or the Print wizard to print the current client window to your default workstation printer. Select **File > Print Preview** to display a preview of the print output.

Conclusion

This concludes the Introduction to WorkFlows online training. View this tutorial again for a better familiarity with WorkFlows. More information is available in the online help. For a more in-depth understanding of WorkFlows, contact our training department. Thanks for choosing SirsiDynix.