

Working with NOTES and other Extended Info in WorkFlows

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WorkFlows, despite its versatility, has a few shortcomings in its user design. This led to some practices that have deteriorated the health of the patron database.

This document has the recommended practices when interacting with the patron database through WorkFlows. While not mandatory, these tweaks to your user's Extended Information will improve the patron handling experience across the library system.

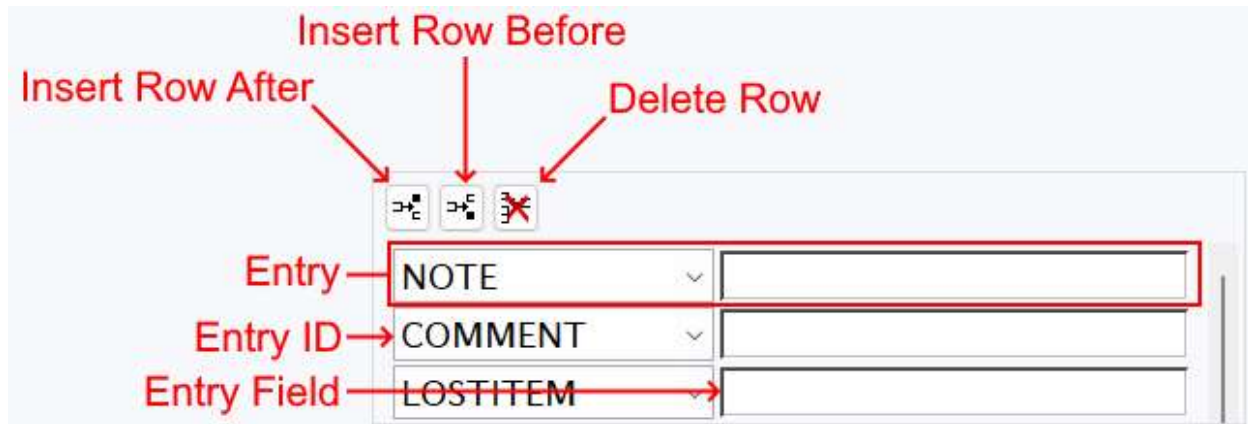
This document will be updated with more information in the future.

Updates related to the June 2024 LARS Meeting are found on Page 4.

A brief refresher on the Extended Information tab

The Extended Info tab is found within most User-related wizards. Our focus will be on the Modify User wizard, which is in the Circulation tab, under the Users sub-section. This area holds notes, previous IDs, notification preferences, and so-on.

When editing a user, the Extended Info tab contains the following:



- **Entry** – Each row is called an Entry. Some Entries only accept certain parameters, so care should be taken while editing a User’s Extended Info. There is no practical limit to the number of Entries that can be on a user’s record.
- **Entry ID** – Specifies the entry type. Each Entry ID has unique parameters, and some are used for user-related automations. Multiple entries of the same Entry ID are allowed, depending on the type.
- **Entry Field** – The data itself. This is the part that staff typically interact with. Entries can be “selected” by placing the text cursor in the Entry Field.
- **Insert Row After** – Inserts a new Entry below the currently selected Entry (the Field where the cursor is). If the cursor is not in any Entry Field, the new Entry will be placed after the top-most Entry (typically the NOTE entry).
- **Insert Row Before** – Same as Insert Row Before, but instead places the new Entry above the selected Entry Field.
- **Delete Row** – Deletes the currently selected Entry. If none have been selected, the top-most Entry is removed.

Adding a new NOTE or COMMENT

By default, the NOTE and COMMENT entries are the top two entries in the Extended Info tab. Both entries will accept anything that can be typed on a standard keyboard. The main difference between a NOTE and a COMMENT is that NOTES will trigger an alert pop-up, while COMMENTS will not.

You can add a new entry by selecting the Entry Field and typing as normal. There is no practical limit to the amount of text that is entered, but notes should be kept brief in the interest of readability.

When adding a NOTE or COMMENT entry, the LARS Circulation Guidelines specify that libraries should:

“Always include the date, your library, and your initials in caps as a part of the message. Make sure messages are clear so that individuals working in other libraries can understand.”

As an attempt to clear up any confusion, the following is an example which follows the LARS Circ Guidelines:

LIB INITIALS DATE W YEAR – NOTE

- **LIB** – Is the initials of the library of the person writing the note.
 - Recommended: Two, three, and four-letter codes – CH, BR, TR, MPL, KPL, NHPL, MCLS, etc.
 - Discouraged: Full words & shortened names – KIEL, MWTC, CHILTON, NEWHOL, BRILLION PUBLIC, LESTER PUBLIC, etc.
- **INITIALS** – The initials of the person writing the note.
 - People with similar initials can include a middle initial or other discriminator.
 - Hyphenated or other non-standard names can be handled as desired.
- **DATE W YEAR** – This one is self-explanatory. The important part is the inclusion of the year.
 - Date format is as desired. MM/DD/YY, YYYY-MM-DD, DD MMM YYYY, etc.
- **NOTE** – The contents of the note itself.

Further Examples:

NOTE	LPL ST 2024-06-21 – Patron applied for card online.	✓
NOTE	MPL-ST-6/21/24 – PATRON APPLIED FOR CARD ONLINE.	✓
NOTE	NHPL ST JUN 21 24 – Online card.	✓
NOTE	CARD APPLIED FOR ONLINE	X
NOTE	CPL ST – Online card.	X
NOTE	KPL ONLINE CARD	X

Removing Entries

When an Entry has served its purpose and needs to be removed, the Entry must be deleted by selecting the Entry and using the Delete Row helper button. This clears and completely removes the Entry from the User's record.

Deleted Entries cannot be retrieved. The default Entries are re-generated automatically after they are deleted. This does not affect the user's record.



IMPORTANT

Blanking or emptying the Entry Field using the Backspace or Delete key **does not** clear the Entry from the User's record. Doing this will generate a Blank Entry, which can lead to alert pop-ups with no text.