



WorkFlows Detectives

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Mystery #1

Scenario: Your patron is getting notices for an item but you're not seeing it in the Checkouts Tab.





Solution Steps

- Open the Display User Wizard
- Enter User ID
- Click on Checkout Tab
- Type of Checkout drop-down
 - Select INACTIVE

Mystery #2

Scenario: A patron has a fine on their account, but you are a fine free library. How did this happen?



Solution Steps

- Open Display User Wizard
- Enter patron ID
- Open Bills Tab
- Click on the Owes column glossary
 - Notice the checkout library and Circulation Rule



Mystery #3

Scenario: Patron at desk is blocked but doesn't have any overdue items. Why?



Solution steps:

- Path: Display User Wizard
- Search by patron ID
- Click Checkouts tab
 - Notice no active checkouts
- Click the Bills tab
 - Notice the unpaid LOST bill

Mystery #3

- The overdue item has been billed- but it *is* still overdue
- List of FF libraries and how they block:
<https://support.swanlibraries.net/documentation/67324>





Mystery # 4

Scenario: You are searching for an item that you know your library owns in WorkFlows, but you can't find it using a Browse search?

Mystery #4

Solution

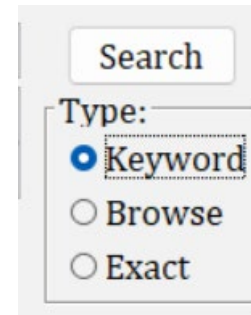
The item is checked out to MISSING.

MISSING is a shadowed location.

Shadowed items do not display in a Browse search.

What do I do now?

If this happens again, try switching to a Keyword search instead and see if you can find your title!



A screenshot of a search interface. At the top is a button labeled 'Search'. Below it is a section labeled 'Type:' containing three radio button options: 'Keyword' (which is selected and highlighted with a blue circle), 'Browse', and 'Exact'.

Mystery #5

- Scenario: You notice that the number of holds changes when you click on your item in the item tree in Item Search and Display vs. when you click on the call number. Why?

Call Number	Holds
Number of records:107	
User ID	User name

Item Info	
Checkouts	Holds
Number of records:90	

Mystery #5

Solution

Clicking on a call number shows all holds on a title.

Clicking on an item shows only holds that item can fill.

You may often notice large discrepancies in these holds counts when items are new and holdable to your users only!

Mystery #6

Scenario:

An item turns up in the book drop but isn't in the catalog



Mystery #6

BCA SWANLIBS > Shared Reports > SWAN Reports > Bills > Search User Bill Notes for Barcode

S ▾

DATA ▾

GRID

FORMAT ▾



Corporate ▾



? x

REPORT DETAILS

Report Filter:
(({User Barcode Type} = Barcode) And ({Bill Note (Symphony)}) (ID) Contains ')

User Barcode	User First Name	User Middle Name	User Last Name	Drop objects here to add columns
20:		-		Drop Metrics here to add data

Mystery # 6

Solution:

- BCA SWANLIBS>Shared Reports>SWAN Reports>Bills>Search User Bill Notes for Barcode
- <https://noam-bca-2.bc.sirsidynix.net/bcanalytics/asp/Main.aspx?evt=4001&src=Main.aspx.4001&visMode=0&reportViewMode=1&reportID=CD4812AD11E93A1096B20080EF656356&Server=BCA-MICROSTRAT2-1.BC.SIRSIDYNIX.NET&Project=BCA%20SWANLIBS&Port=0&share=1>



The background of the slide is a still from the movie 'The Shining'. It shows two identical young girls, the 'Twin Girls', standing in a hallway. They are wearing matching light blue, short-sleeved dresses with white lace at the cuffs and waist. They have dark hair and are looking directly at the camera with a neutral, somewhat eerie expression. The hallway has patterned wallpaper and a wooden door in the background.

Mystery # 7

Scenario: Patron has 2 referral fees. Why?

Mystery #7

How did this happen?

The user status was changed manually

How do I fix it?

Remove the duplicate bill

How do I prevent it?

Do not modify status



Mystery # 8

- Scenario:
- Patron is getting overdue notices for an item that they previously paid for.



Mystery # 8

Summary	Addresses	Extended Info	SMS Notice Contact Info	Bills	Checkouts	Holds	Routings	Bookings	Sus
Paid bills: 1(\$0.00)									
Title	Item ID	Reason	Owes	Billed	Date	Payment library			
		DAMAGEX	\$0.00	\$10.00	8/6/2025	SWS			

Bills:

Bill was paid 😊

Summary	Addresses	Extended Info	SMS Notice Contact Info	Bills	Checkouts	Holds	Routings	Bookings	Suspension	Char
Checkouts: 1(\$0.00)										
Title	Call number	Item ID	Date Charged	Date Due	Recall...	Status				
Encyclopedia of Victorian ...	748.2913 V. 2	31140001423919	8/6/2025,14:27	8/7/2025,23:59		Overdue				

Checkout is still active 😞

Mystery # 8

- Solution
 - Check the item out to DISCARD
 - For RB Items, LOSS_RB_ILL





Mystery # 9

Scenario: Was this in Quarterly Billing?

Mystery #9

Item Search and Display

The covenant of water : a novel / Vergheese, Abraham, 1955-

Control Bibliographic MARC Holdings Call Number/Item Bound-with Orders Serials Ctrl Selections

Item Info Circ Info Bills Checkouts Holds Charge History Bookings

Call number information

Call number: PLAYAWAY FICTION VERGHESE, A. Class scheme: DEWEY

Call library: DGS

Shadow call number N

Item information

Item ID: 31191011855327 Copy number: 1

Type: AUDIOBK Item library: DGS

Home location: RB_ILL Current location: LOST-ASSUM

Item cat1: AUDIO Item cat2: ADULT

Item cat3: FICTION Item cat4:

Item cat5: AU_PLAWAY Item cat6:

Item cat7: Item cat8:

Item cat9: Item cat10:

Media desk: Number of pieces: 1

Total charges: 30 Price: \$84.99

Permanent Y Circulate Y

Shadow item N

Extended information

Tag	Contents
CAT_BY	JUL23
CALLNUMBER	
CIRCNOTE	Paid via SWAN quarterly billing -- SWAN 2025_04

Return to Search Display Holdings Close

- Item Search and Display Wizard
- Search by item ID
- Click Item Info tab
- Scroll down to Extended information

Mystery #9

Item Search and Display x

Item Search and Display

A stroke of midnight : a novel / Hamilton, Laurell K.

Control Bibliographic MARC Holdings Call Number/Item Bound-with Orders Serials Ctrl Selections

A stroke of midnight : a novel - Hamilton, Laurell K.

PB Fic Hamilton - SWS

31135008260298 - 1 - PAPERBACK - LOST-CLAIM

SF/F HAMILTON, L.K. - DGS

31191012259271 - 1 - BOOK - 2NDFLOOR_A

Item Info

Circ Info

Bills

Checkouts

Holds

Charge History

Bookings

Call number information

Call number: PB Fic Hamilton

Class scheme: DEWEY

Call library: SWS

Shadow call number N

Item information

Item ID: 31135008260298

Copy number: 1

Type: PAPERBACK

Item library: SWS

Home location: TRAINING

Current location: LOST-CLAIM

Item cat1: BOOK

Item cat2:

Item cat3: FICTION

Item cat4:

Item cat5:

Item cat6:

Item cat7:

Item cat8:

Item cat9:

Item cat10:

Media desk:

Number of pieces: 1

Total charges: 19

Price: \$7.00

Permanent Y

Circulate Y

Shadow item Y

Extended information

Tag Contents

CIRCNOTE

PUBLIC

Date created: 1/30/2007

Date last charged: 8/12/2025

Date due: none

Last checked in: 8/12/2025,11:03

Date inventoried: Never

Times inventoried: 0

Previous user ID:

Last activity: 8/12/2025

In-house uses: 0

What do I do now?

Mystery #9

Item Info Circ Info **Bills** Checkouts Holds Charge History Bookings

Number of records:2

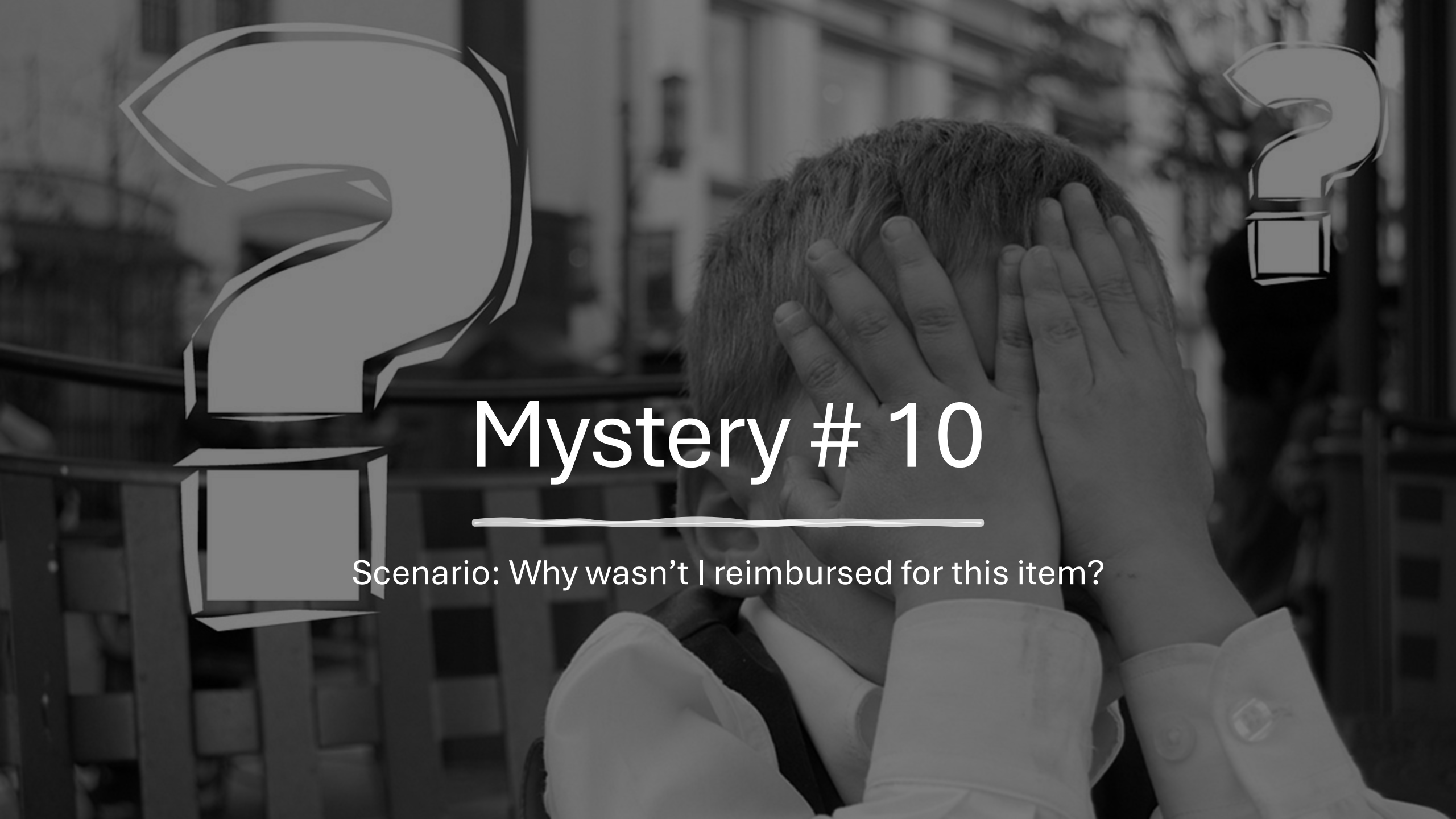
User ID	User name	Owes	Reason
SWANXTEST10	SWANX Test User, ...	\$0.00	LOST

Bill library: SWS
Billed: \$7.00
Date billed: 8/12/2025
Date paid: 8/12/2025
Number of payments: 1
Date charged: 8/12/2025,10:59
Date due: 9/2/2025,23:59
Date item returned:
Circ rule: 3W0F0G2R
Transaction date: 8/12/2025
Payment library: SWS

Display
Library: All libraries
Bills type: Paid
All
Paid
Unpaid

Search Display Holdings Close

- Switch to Bills tab
- Toggle Bills Type to “Paid”
- Locate the LOST bill
- Use date to calculate bill quarter



Mystery # 10

Scenario: Why wasn't I reimbursed for this item?

Mystery #10



Shocking twist!!

Century user

User ID: 21321002135791

Summary

Addresses

Extended Info

SMS Not

aid bills:15(\$0.00)

Title

Item ID

What happened to the McCrays... 3148600424

What happened to the McCrays... 3148600424

What happened to the McCrays... 3148600424

What happened to the McCrays... 3148600424

ime of the child 3132100871

ood material : a novel

each blues 3208100240

ne

he yrics : 1956 to the present

he boys : a memoir of Hollywo...

he boys : a memoir of Hollywo...

ase : my life through food

aldu rising : a novel

he ut day : a novel 3180400297

WPF

Display User : Glossary

Item information

Title: What happened to the McCrays? : a novel ID: 31486004243162

Author: Lange, Tracey,

Call#: L.T. FIC LANGE

Copy: 1

Bill information

Billed: \$33.00 Tax: Reason: DAMAGE

payments: 1 Date: 3/3/2025 Last notice:

Still owes: \$0.00 Number of notices: 0 Library: TPS

Transaction date: 3/3/2025 Date paid: 3/3/2025

Payments:

Payment date: 3/3/2025 Amount: \$33.00 Payment type: ADJUSTMENT

Payment library: MTS

Note:

What happened to the Mccrays

[illegible]

Mystery #10

What happened to the McCrays? : a novel / Lange, Tracey,

Control Bibliographic MARC Holdings Call Number/Item Bound-with Orders Serials Ctrl Selections

LP FIC LAN - MPS
32904001604763 - 1 - LARGETYPE - STACKS
L.T. FIC LANGE - MTS
31486004243162 - 1 - LARGETYPE - LOST-CLAIM
LP LANGE - OBD
31534003098291 - 1 - BOOK - LPF
LT FIC LAN - PFS
31139005986426 - 1 - LARGETYPE - STACKS
LARGE PRINT FIC LANGE - SCD
30053014617685 - 2 - LARGETYPE - LP_A
LP LANGE - SHS
31350004142586 - 1 - LARGETYPE - STACKS
LARGE PRINT LANGE - SPS
31313002961878 - 1 - BOOK - STACKS
LARGE TYPE FICTION LANGE, TRACEY - TPS
31321008780200 - 1 - LARGETYPEN - CHECKEDOUT -
LT LAN - WOS

Date created: 2/7/2025
Date last charged: 2/17/2025
Date due: none
Last checked in: 3/8/2025,9:55
Date inventoried: Never
Times inventoried: 0
Previous user ID:
Last activity: 3/8/2025
In-house uses: 0

Item Info Circ Info Bills Checkouts Holds Charge History Bookings

Call number information

Call number: L.T. FIC LANGE Class scheme: DEWEY
Call library: MTS
Shadow call number N

Item information

Item ID: 31486004243162 Copy number: 1
Type: LARGETYPE Item library: MTS
Home location: NEW_ADULT Current location: LOST-CLAIM
Item cat1: LARGETYPE Item cat2: ADULT
Item cat3: FICTION Item cat4:
Item cat5: Item cat6:
Item cat7: Item cat8:
Item cat9: Item cat10:
Media desk: Number of pieces: 1
Total charges: 1 Price: \$28.00
Permanent Y Circulate Y
Shadow item N

Extended information

Tag	Contents
CAT_BY	RB
CALL NUMBER	
CIRCNOTE	

What happened to the McCrays? : a novel / Lange, Tracey,

Control Bibliographic MARC Holdings Call Number/Item Bound-with Orders Serials Ctrl Selections

LP FIC LAN - MPS
32904001604763 - 1 - LARGETYPE - STACKS
L.T. FIC LANGE - MTS
31486004243162 - 1 - LARGETYPE - LOST-CLAIM
LP LANGE - OBD
31534003098291 - 1 - BOOK - LPF
LT FIC LAN - PFS
31139005986426 - 1 - LARGETYPE - STACKS
LARGE PRINT FIC LANGE - SCD
30053014617685 - 2 - LARGETYPE - LP_A
LP LANGE - SHS
31350004142586 - 1 - LARGETYPE - STACKS
LARGE PRINT LANGE - SPS
31313002961878 - 1 - BOOK - STACKS
LARGE TYPE FICTION LANGE, TRACEY - TPS
31321008780200 - 1 - LARGETYPEN - CHECKEDOUT -
LT LAN - WOS

Date created: 2/7/2025
Date last charged: 2/17/2025
Date due: none
Last checked in: 3/8/2025,9:55
Date inventoried: Never
Times inventoried: 0
Previous user ID:
Last activity: 3/8/2025
In-house uses: 0

Item Info Circ Info Bills Checkouts Holds Charge History Bookings

Number of records: 4

User ID	User name	Owes	Reason
		\$0.00	DAMAGE
		\$0.00	DAMAGE
		\$0.00	LOST
		\$0.00	PROCESSFEE

Display

Library: All libraries

Bills type: Paid
All
Paid
Unpaid

Search Display Holdings Close

Mystery #10

Senior user
User ID:

Summary Addresses Extended Info SMS Not

aid bills: 15(\$0.00)

Title	Item ID
What happened to the McCrays...	3148600424
What happened to the McCrays...	3148600424
What happened to the McCrays...	3148600424
What happened to the McCrays...	3148600424
Time of the child	3132100871
Food material : a novel	
Reach blues	3208100240
One step too far : a novel	3132100816
The lyrics : 1956 to the present	
The boys : a memoir of Hollywo...	
The boys : a memoir of Hollywo...	
Taste : my life through food	
Talibu rising : a novel	
Heat day : a novel	3180400297
The perfect couple : a novel	

Display User : Glossary

Item information
Title: What happened to the McCrays? : a novel ID: 31486004243162
Author: Lange, Tracey,
Call#: L.T. FIC LANGE
Copy: 1

Bill information
Billed: \$33.00 Tax: Reason: DAMAGE
payments: 1 Date: 3/3/2025 Last notice:
Still owes: \$0.00 Number of notices: 0 Library: TPS
Transaction date: 3/3/2025 Date paid: 3/3/2025

Payments:
Payment date: 3/3/2025 Amount: \$33.00 Payment type: ADJUSTMENT
Payment library: MTS

Note:
What happened to the McCrays

Close

Multiple bills created at the patron library, “paid” at item library

Damaged bills reconciled to bill owning library

LOST bills reconciled to Item Library

Display User : Glossary

Item information
Title: What happened to the McCrays? : a novel ID: 31486004243162
Author: Lange, Tracey,
Call#: L.T. FIC LANGE
Copy: 1

Charge information
Date charged: 2/17/2025, 18:35 Date due: 3/10/2025, 23:59
Checkout library: TPS
Circulation rule: 3W10C0G2R

Bill information
Billed: \$28.00 Tax: Reason: LOST
payments: 1 Date: 3/8/2025 Last notice:
Still owes: \$0.00 Number of notices: 0 Library: TPS
Transaction date: 3/8/2025 Date paid: 3/8/2025

Payments:
Payment date: 3/8/2025 Amount: \$28.00 Payment type: FORGIVEN
Payment library: MTS

Note:

Close

Mystery #10

- Item library wasn't reimbursed because item wasn't charged to LOSS_RB_ILL by patron library
- Item library was debited twice because they cleared DAMAGE bills they didn't own
- Item record wasn't updated when the QB ran because damaged items should be discarded
 - Reports 6/12 do not include item information. Records are not modified
- Communicate with each other!
- Refer to Bill Reason/Payment glossaries
 - [Bill Reason Glossary](#)
 - [Payment Type Glossary](#)
- Refer to Damaged item documentation
 - [Damaged and Unusable](#)
- Ask us :-)



Know your wizards!

- Display User Wizard
 - Checkouts (active/ inactive)
 - Holds (active/ inactive)
 - Bills (Unpaid/ paid)
- Item Search and Display Wizard
 - Item Info
 - Circ notes
 - Item status/ home location
 - Bills
- Bill a User Wizard
 - Does not modify item status
 - Bills owned by bill-creating library
- Mark Item Lost Wizard
 - Creates a bill owned by Item Library
 - Removes active checkout

-
- **Thank you!**
 - **Questions?**
 - **Send a ticket to**
Help@SWANlibraries.net

