General Skills Checklist

Minimum Requirements

1. Know how to subscribe to the appropriate **WYLD email distribution lists** (https://wyldlibraries.freshdesk.com/support/solutions/articles/61000284898-wyld-email-lists).
2. Know basic computer skills, such as file management.
3. Know how to access Workflows for staff functions.
4. Be able to move between toolbars in WorkFlows and understand when to use different groups of tools/wizards.
5. Know how to access context-sensitive help in WorkFlows and WYLDcat.
6. Search and display patron data in WorkFlows.
7. Search and display basic item data in Workflows and WYLDCat.
8. Navigate through various tabs, screens, or to next set of records in WYLDCat and WorkFlows.
9. Use the **Workflows Searching Tips Technote** (https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285354-workflows-searching-tips).
10. Be able to place holds in WYLDCat and WorkFlows.
11. Know when to contact the WYLD Office.
12. Recognize and access glossaries in WorkFlows.
13. Be able to translate Roman numerals into Arabic numbers.
14. Recognize temporary (on-the-fly) records, and understand their uses, such as on-order records for acquisitions and temporary records created to circulate items that are not linked in the catalog.

Intermediate Requirements

1. Be proficient in advanced item searching strategies using all available wizards, helpers, qualifiers, sorts, etc. in WorkFlows and WYLDCat.
2. Be able to modify wizard properties in WorkFlows.
3. Access the **WYLD Network Members website** (https://library.wyo.gov/wyld/network/) to answer questions and find procedures.
4. Know and follow the **WYLD Cataloging Standards** (https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285219-wyld-cataloging-standards).
5. Know how to use and access the **Support Portal** (https://wyldlibraries.freshdesk.com/support/home) for help.
6. Be familiar with the articles and documents in the **Support Portal Portal** (https://wyldlibraries.freshdesk.com/support/home) pertinent to your area of responsibility. Be aware that you must log in to the portal to see all documentation.
7. Refer to the **Wyoming State Library Training Calendar** (https://library.wyo.gov/services/training/calendar).

8. Be able to **create temporary (on-the-fly) records** (https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285048-add-a-brief-title-in-circulation) to circulate items that are not linked in the catalog.

Expert Requirements

1. Be able to download and install WorkFlows software from the State Library.
2. Be able to modify WorkFlows client configuration settings using WorkFlows Preference menu (IP address, barcode scanner, receipt printer).
3. Understand how circulation policies in WorkFlows govern system operations. See **Technote – Circulation Map**: https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285182-circulation-map
4. Know how to request library policy and circulation map changes for your library.
5. Be able to create **custom toolbars** (https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285301-creating-a-customized-toolbar) in WorkFlows.
6. Understand and manage reports using **Reports Skills Checklist** (https://wyldlibraries.freshdesk.com/support/solutions/articles/61000288837-reports-skills-checklist).
7. Understand and manage reports using **Analytics Skills Checklist** (https://wyldlibraries.freshdesk.com/support/solutions/articles/61000280837-analytics-skills-checklist).

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