

## CaiaSoft Sample Workflow – Vertical Version – Item Circulation

**NOTE: Bold-faced queue number/names are examples and can change by site**

Special Collections Staff	Aeon System	CaiaSoft
	<b>8: Awaiting Request Processing</b>	
Add barcode and location indicator, if needed; Otherwise, routing rule will kick in.	<b>36. New ANNEX Request</b>	
Staff review item; print callslip; routing rule will kick in based on User Status	Option 1: <b>37: Awaiting Retrieval from ANNEX for Staff</b> Option 2: <b>43: Awaiting Retrieval from ANNEX for Patron</b>	CaiaSoft monitors these queues. Uses stop codes – PYR and SHP to differentiate between staff and patron use – this is an option and not required.
	Option 1: <b>38: In Transit from ANNEX</b> Option 2: <b>45: In Transit from ANNEX Special Handling</b>	CaiaSoft routes request based on whether USE CARE flag is present
Receive and route request to <b>14: Item On Hold</b>		
Check item out to patron: <b>12: Item Checked Out</b>		
Send item to staging area for return to ANNEX. Route request to <b>39: Awaiting Return to ANNEX</b>		
Staging area team complete tasks and route request to <b>40: In Transit to ANNEX</b>		When item arrives at ANNEX, CaiaSoft finds Aeon request in this queue
	<b>46: Awaiting Item Reshelving at ANNEX</b>	CaiaSoft will route items to this queue based on job.
	<b>32: Request Finished</b>	CaiaSoft will route items to this queue based on job

If there are any **errors** along the way, the Aeon request will route to **42: Error Processing ANNEX Request**

## CaiaSoft Sample Workflow – Vertical Version – Accession

**NOTE: Bold-faced queue number/names are examples and can change by site**

<b>Special Collections Staff</b>	<b>Aeon System</b>	<b>CaiaSoft</b>
Staff create request in Aeon.	<b>56. Awaiting Staff Request Processing</b>	
Send item to staging area for return to ANNEX. Manually route request to <b>ID 68: Awaiting Return to ANNEX for Accession</b>  Deliver item to ANNEX.	<b>70. Awaiting Delivery to ANNEX for Accessions</b>	
		When item arrives at ANNEX, CaiaSoft finds Aeon request in this queue.  Request are received/processed as new accession job of type "Direct to Address." Material type = archives and collection = sending Library
	<b>46: Awaiting Item Reshelving at ANNEX</b>	CaiaSoft will route items to this queue based on job
	<b>32: Request Finished</b>	CaiaSoft will route items to this queue based on job

If there are any **errors** along the way, the Aeon request will route to **71: Error Processing ANNEX Accession**

## CaiaSoft Sample Workflow – Vertical Version – De-accession

**NOTE: Bold-faced queue number/names are examples and can change by site**

Special Collections Staff	Aeon System	CaiaSoft
	<b>8: Awaiting Request Processing</b>	
Add barcode and location indicator, if needed; Otherwise, routing rule will kick in.	<b>36. New ANNEX Request</b>	
Staff review item; print callslip; route to Awaiting Retrieval from ANNEX for Staff DEA  (Aeon note: we'll need to double check on the set up of a routing rule; otherwise, staff will need to manually route.)	<b>68: Awaiting Retrieval from ANNEX for DEA</b>	These requests will be processed as DEA jobs, meaning the item will be permanently removed from the Annex.
	<b>69. Request Received by ANNEX for DEA</b>	CaiaSoft assigns this queue when request has been received.
	Option 1: <b>70.In Transit from ANNEX for DEA</b> Option 2: <b>17.Awaiting Item Reshelving</b>	CaiaSoft will route to Option 1 when item has been removed from shelf and is returning via shipment. CaiaSoft will route to Option 2 when item was currently circulating/not present at Annex and will not be expected to ever be refilled there. In this example the queue chosen was to alert the item be reshelved locally and not returned to the Annex.

If there are any **errors** along the way, the Aeon request will route to **72: Error Processing ANNEX DEA Request**