

Resource Sharing Alliance NFP 715 Sabrina Dr East Peoria, IL 61611 866-940-4083

2 June 2023

Subject: Commonly Set Preferences in Workflows for Circulation

- 1. Sign into your WorkFlows using the Supervisor log in. If you do not know this, please contact the HelpDesk.
- 2. In Circulation+, go to the Common Tasks Group and right click on CheckOut. This will give you a popup box. Click on Properties...

Acquisitions	Cataloging	Circulation+	Offline O
Common	<b>Fasks</b>	۲	
<ul> <li>Check</li> <li>Disch</li> <li>Fine Free</li> <li>Discharge</li> <li>Renew U</li> <li>Renew I</li> &lt;</ul>	Help Properties e Discharge ging Bookdro Jser tem User Sills arch and Dis em Status	play	

3. This will give you a large popup box. Go to the Helpers tab and click on the User Search box.

_			
W Check	Out : Set Properties		×
		Display property page: ○Wizard Startup ●Never	
Beha	vior Defaults Helpers		
Allo	w Configure Properties		^
$\checkmark$	User Search		
	Display User	-	
	User Lost Card		
	Register New User		
	Pay Bills		
	Add Brief Title		
	Item Search		
	Confirm Address		
$\checkmark$	Change Item ID		
$\checkmark$	Special Due Date		
	Charge History		
	Alternate Circ Rule		
	Renew Privilege		
	Print User Card		~
		OK Cancel	

4. This will give you another popup box. Click on the defaults tab and change the library menu from ALL\_LIBS to the name of your library.

Beha	vior Defaults Helpers			
Allo	w Configure Properties	E CheckOut : User Sear	ch:Set Properties	×
$\checkmark$	User Search			
$\checkmark$	Display User	Behavior Defa	ults Helpers	
	User Lost Card	Identify user of	default	
$\checkmark$	Register New User	Type:	● Keyword ○ Browse ○ Browse user group	
$\checkmark$	Pay Bills	Search index:	Name	
$\checkmark$	Add Brief Title	Library:	ALL_LIBS	
$\checkmark$	Item Search	Sort by:	User Name	
$\checkmark$	Confirm Address			
$\checkmark$	Change Item ID			
$\checkmark$	Special Due Date		OK Cancel	
$\checkmark$	Charge History	L		
$\checkmark$	Alternate Circ Rule			
$\checkmark$	Renew Privilege			

5. Click ok and you're done!

6. If you want to search your library first when using the Item Search and Display wizard, right click on that and select Properties...

			-	
Acquisitions Cataloging Cir	rculation+	Offline	Outreach	Re
Common Tasks	۲			
🛓 CheckOut				
🖳 Discharge (Checkin)				
崎 Fine Free Discharge				
🗿 Discharging Bookdrop				
🝘 Renew User				
🞯 Renew Item				
🎒 Billing a User				
🔄 Paying Bills				
🎾 Item Search and Display	y IIalu			
🚰 Check Item Status	негр			
김 Help	Proper	ties		
🖨 Print				

7. This will give you a popup box. Go to the Defaults tab and change the Library menu from ALL to your library.

Item Search a	Display : Set Properties	×
	Display property page: $\bigcirc$ Wizard Startup $\circledast$ Never	
Behavior	efaults Helpers	
Search	eferences	^
Туре	KEYWORD ~	
Index	Title	
Libra	ALL	
⊡Dis	ay View Pane	
Editor	splay options	
○ MA	C View □ Display fixed fields	
• Des	iptive view ⊡ Display descriptive labels (for entries)	
Call nu	ber default values	
□Sho	shelving key	~
	OK Cancel	

8. Click ok and you're done!

9. If you want to search your library first when using the Display User wizard, right click on that and click Properties...



10. This will give you a popup box. Go to the Helpers tab and click on User Search.

llow	Configure Properties	
	User Search	
	Modify User	
	Pay Bills	
Dis Dis	splay Credit Account Transaction History	
$\checkmark$	Display User Group Bills	
$\checkmark$	Display User Group Charges	
	Display User Group Holds	
	Print User	
	Print User Card	

11. This will give you another popup box. Go to the Defaults tab and change the Library menu from ALL\_LIBS to your library name.

## Behavior Defaults Helpers

Allow Confi	🐨 Display User : User Se	arch:Set Properties	×
	Behavior Defa	ults	
	Identify user o	lefault	
	Type:	$\odot$ Keyword $\bigcirc$ Browse $\bigcirc$ Browse user group	
Display C	Search index:	Name	
D D	Library:	ALL_LIBS	
	Sort by:	User Name 🗸	
□ Start with		OK Cancel	

- 12. Hit ok and you're done!
- 13. If you want to set your library as the default library when making a library card, go to the User Registration Wizard and right click, then select Properties...

Acquisitions Cataloging Circulat	ion+ Offline
🖳 Discharge (Checkin)	
崎 Fine Free Discharge	
🗿 Discharging Bookdrop	
🙆 Renew User	
🞯 Renew Item	
🎒 Billing a User	
🔄 Paying Bills	
🎾 Item Search and Display	
🚰 Check Item Status	
🛿 Help	
🖨 Print	
Users	۲
Users 🖧 Display User	
Users Ser Display User User Registration	
Users Second Second Se	
Users Solution User Registration Modify U Copy Use Properties	
Users	
Users ♣ Display User ♣ User Registration ♣ Modify U ♣ Copy Use ♣ Copy Use ♣ Confirm Address ♣ Renew Privilege	
Users	
Users         Display User         User Registration         Modify U         Help         Modify U         Properties         Copy Use         Confirm Address         Renew Privilege         Suspend User         Remove User	

14. This will give you a popup box. Click on the Defaults tab and change the library from AG\_ALS-PDC to your library.

	Display property page: ○Wizard Startup ●Never	
	s	navior Defaults Helpe
^	ALS-PDC V Profile name: ADULT V ISTORY V tes	arge history rule: NOI
	Last name	cus on: ⊖First name @
		ddresses
	Address 1 $\bigcirc$ Address 2 $\bigcirc$ Address 3	rimary address flag: 🖲
		emographics
	~ User cat2:	ser cat1:
	✓ User cat4: ✓	ser cat3:
	∨ User cat6:	ser cat5:
	✓ User cat8:	ser cat7:
	✓ User cat10: ✓	ser cat9:
	✓ User cat12: ✓	ser cat11:
~	Birth date:	epartment:
	Birth date: OK Cancel	epartment:

- 15. Hit ok and you're done!
- 16. In order to save these preferences, you need to close out of WorkFlows and reopen it. You will get a popup box asking if you want to save your changes.

siDynix Symphony WorkFlows	×
Properties have been changed. Would y	ou like to save changes?
Yes No	\$

- 17. Click Yes, then log back in with your regular WorkFlows log in.
- 18. These changes only will work on the computer you set them on, they do not change for the entire library, so if you need to update several computers, you will have to do them all individually. If you have any questions or run into any issues, Member Services can help!