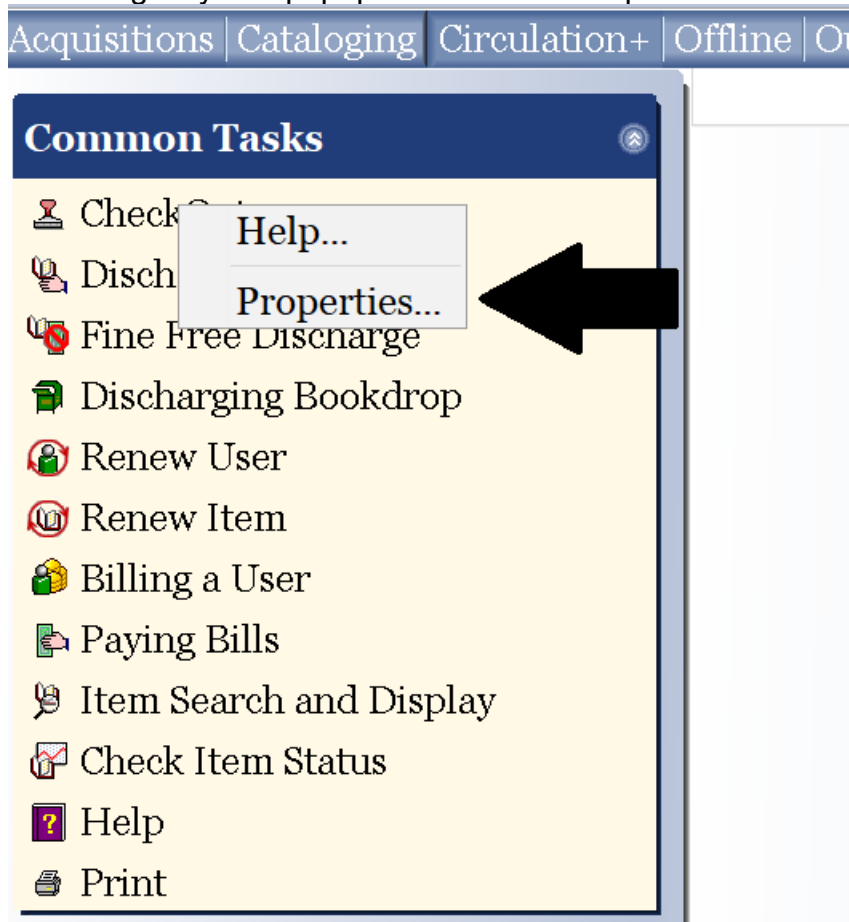


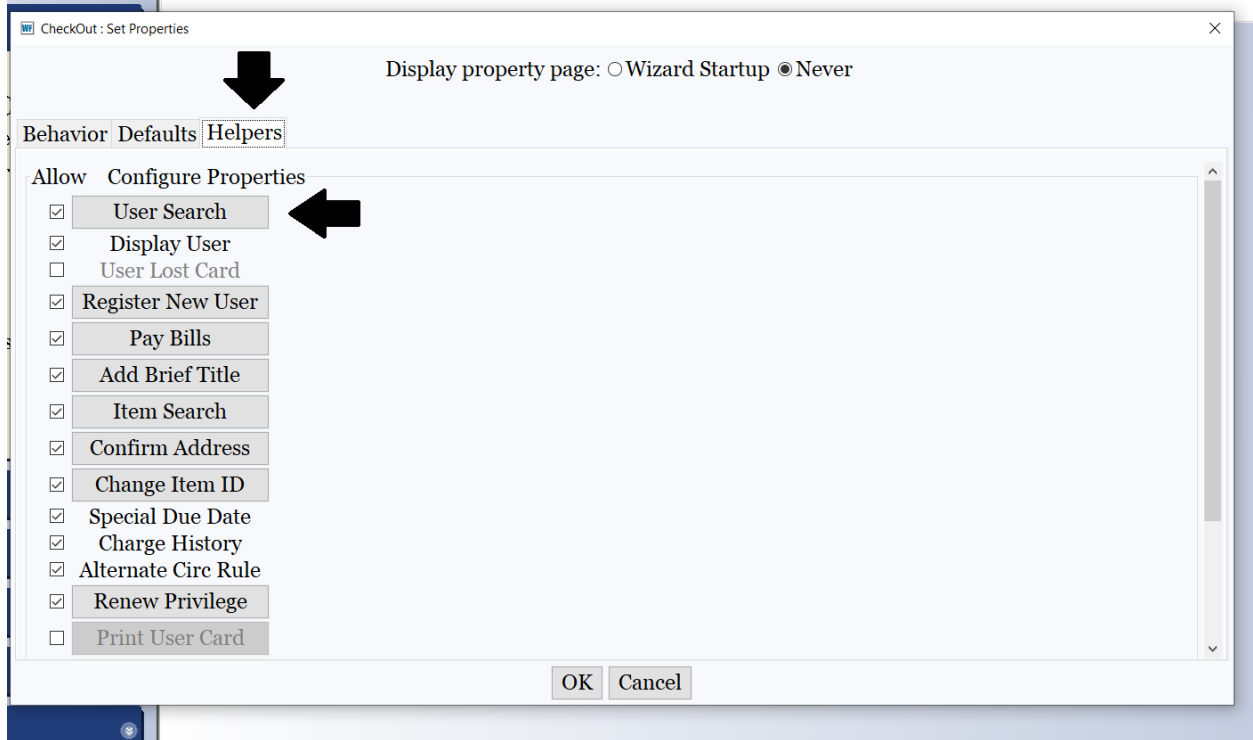
2 June 2023

Subject: Commonly Set Preferences in Workflows for Circulation

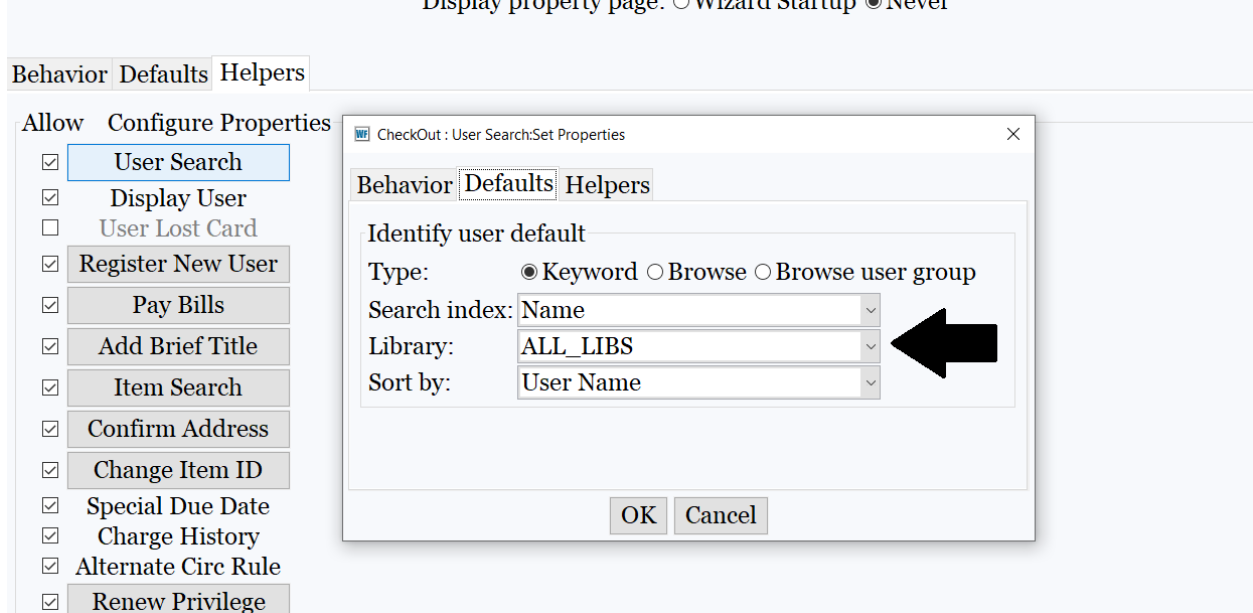
1. Sign into your WorkFlows using the Supervisor log in. If you do not know this, please contact the HelpDesk.
2. In Circulation+, go to the Common Tasks Group and right click on CheckOut. This will give you a popup box. Click on Properties...



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

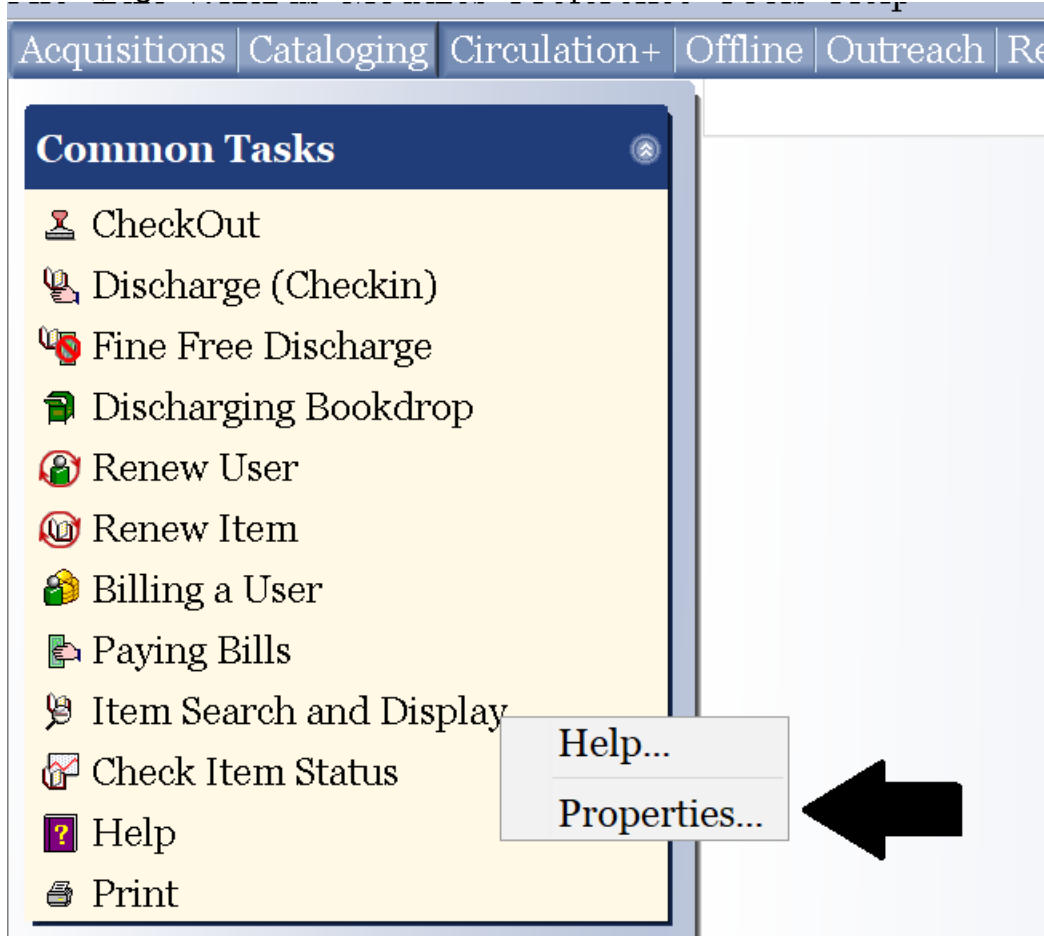


- 4. This will give you another popup box. Click on the defaults tab and change the library menu from ALL_LIBS to the name of your library.

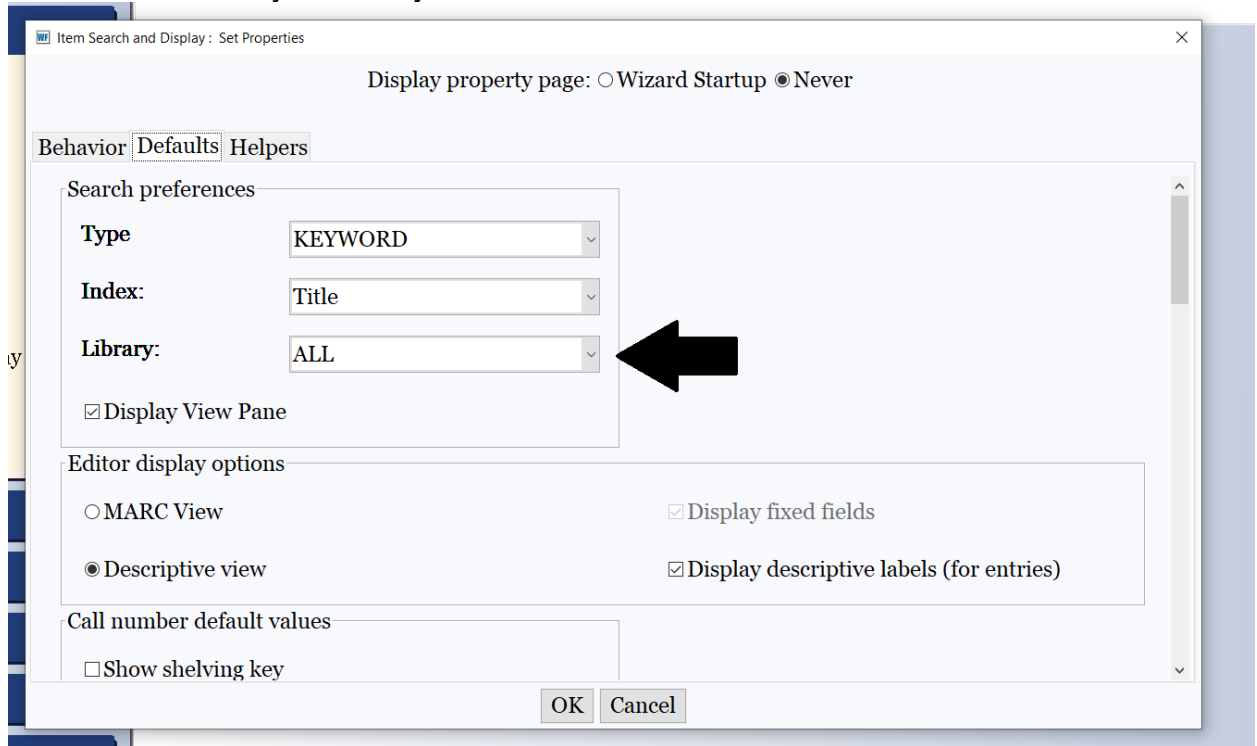


- 5. Click ok and you're done!

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

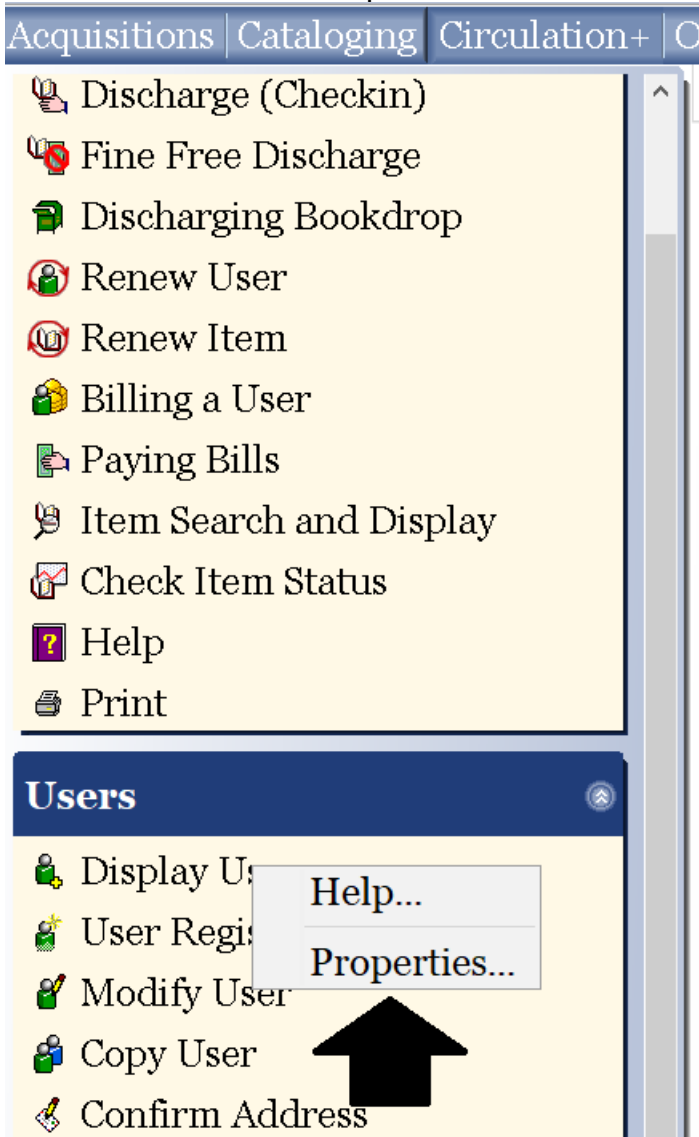


- 7. This will give you a popup box. Go to the Defaults tab and change the Library menu from ALL to your library.

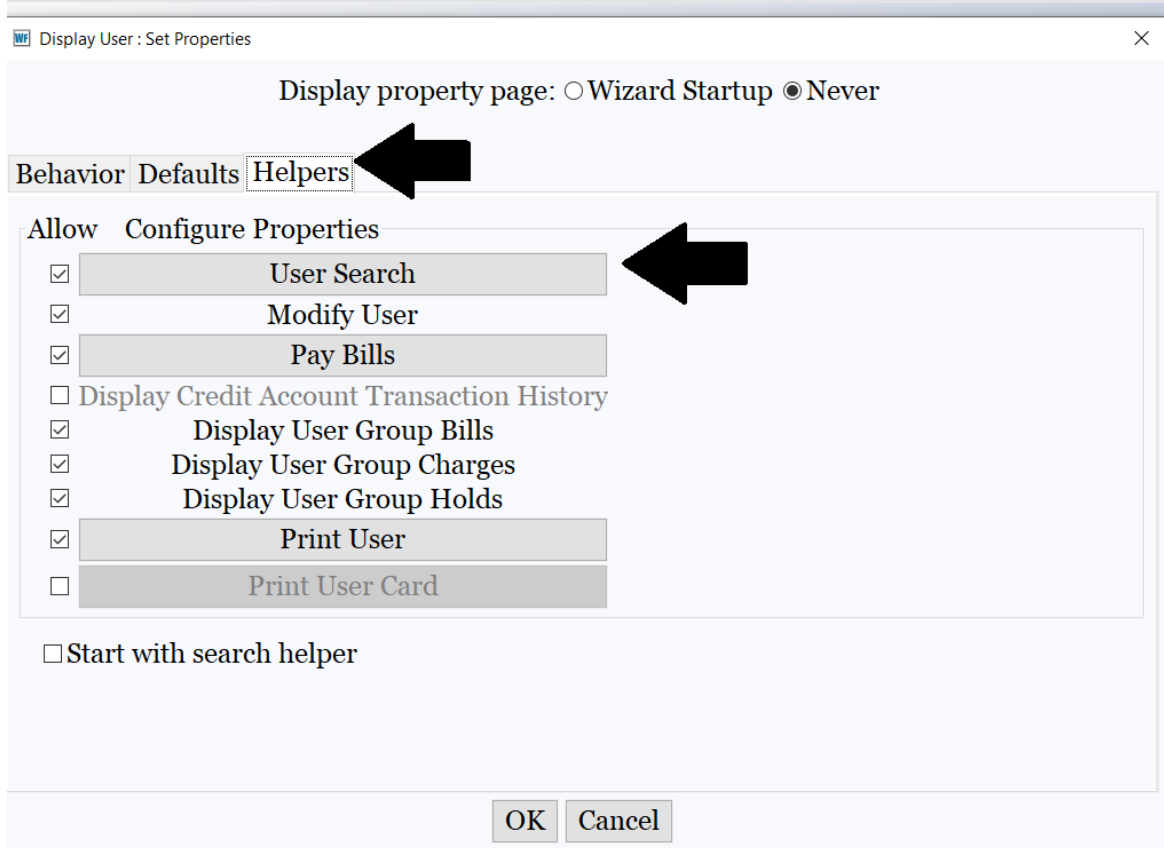


- 8. Click ok and you're done!

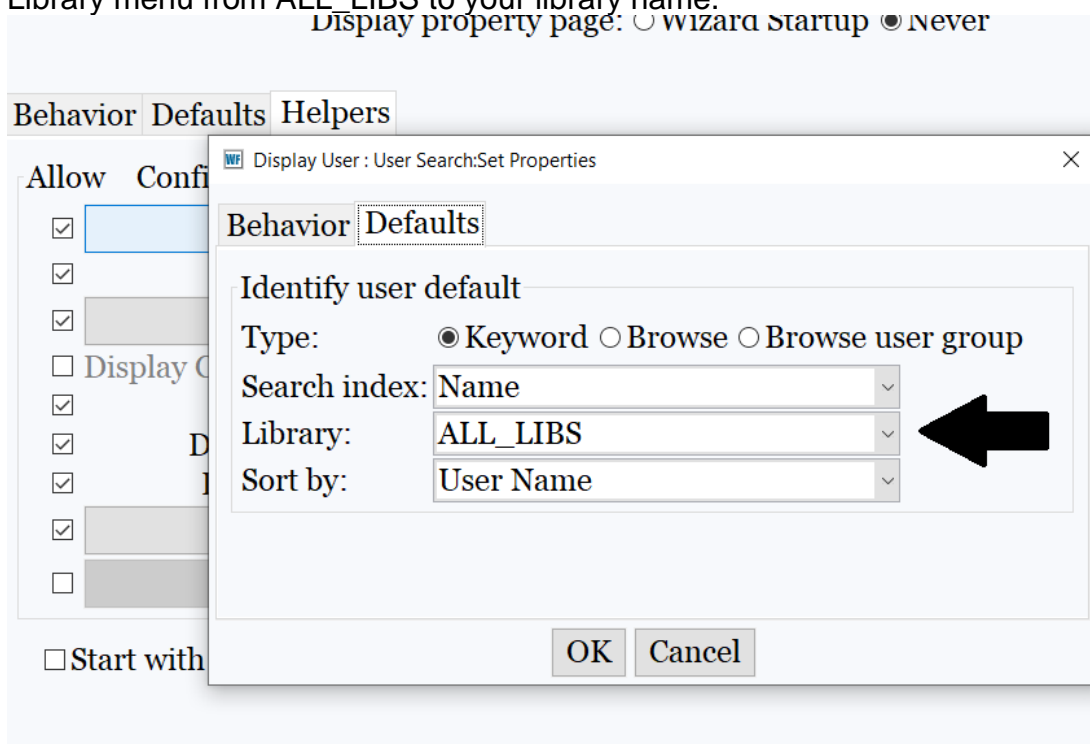
9. If you want to search your library first when using the Display User wizard, right click on that and click Properties...



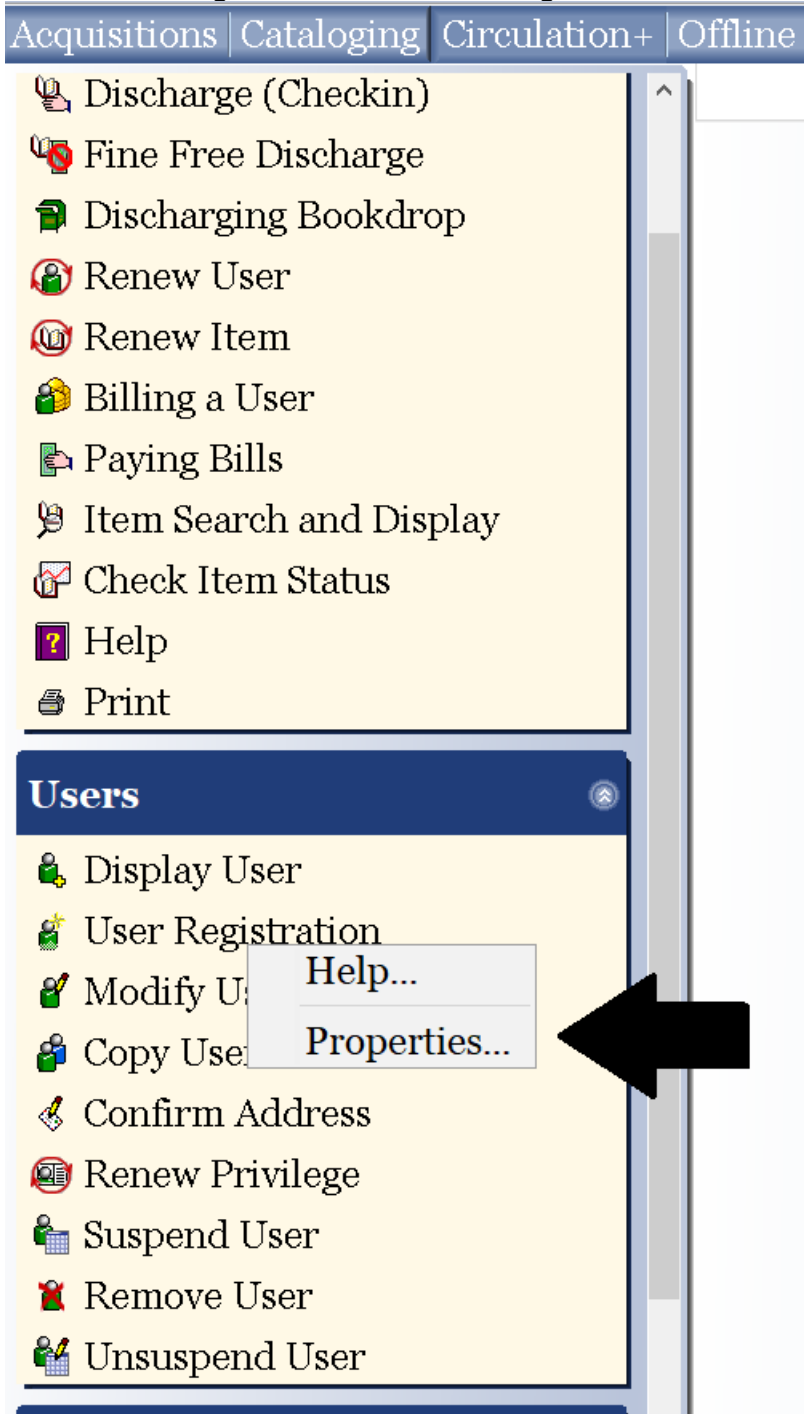
10. This will give you a popup box. Go to the Helpers tab and click on User Search.



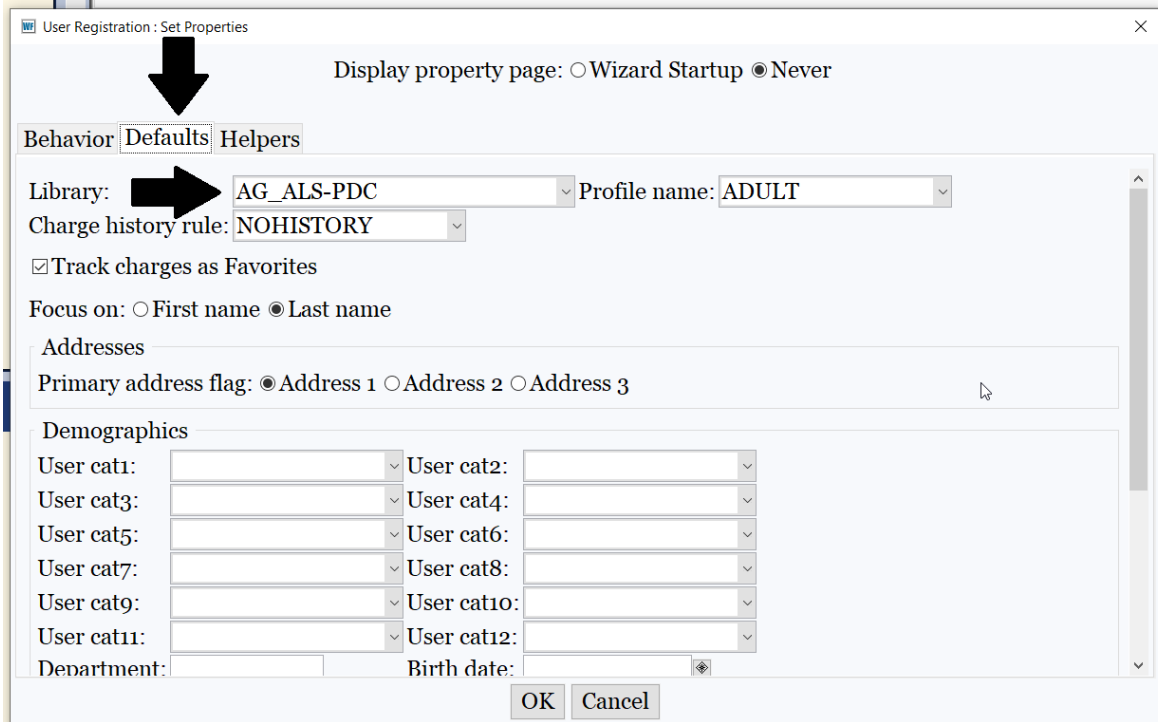
11. This will give you another popup box. Go to the Defaults tab and change the Library menu from ALL_LIBS to your library name.



- 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...



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



User Registration : Set Properties

Display property page: Wizard Startup Never

Behavior Defaults Helpers

Library: AG_ALS-PDC Profile name: ADULT

Charge history rule: NOHISTORY

Track charges as Favorites

Focus on: First name Last name

Addresses

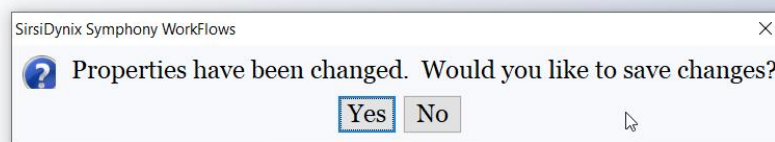
Primary address flag: Address 1 Address 2 Address 3

Demographics

User cat1: User cat2: User cat3: User cat4: User cat5: User cat6: User cat7: User cat8: User cat9: User cat10: User cat11: User cat12: Department: Birth date:

OK Cancel

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.



SirsiDynix Symphony WorkFlows

? Properties have been changed. Would you 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!