

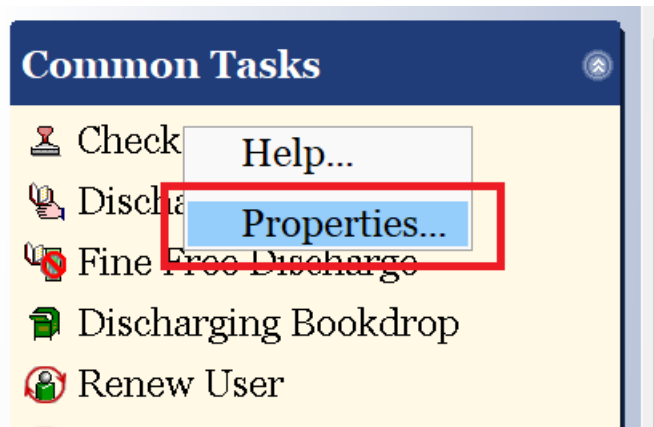
Setting Up the Adding Brief Title Helper Procedure

Last updated: July 29, 2024

If an item produces the “Item not found in the catalog” message during check out, a brief record may be entered “on the fly”.

Properties:

1. Before using the “Add Brief Title” helper, set default properties.
 - Close any open Workflows sessions.
 - Log into a Workflows session using the SUPER login.
 - Open the Circulation Module.
 - Place the cursor on the CheckOut wizard in the Common Tasks toolbar and right click.
 - Select Properties from the drop-down menu.



The “CheckOut: Set Properties” box will pop up.

2. Select the Helpers tab on the “CheckOut: Set Properties” popup box.
 - Check the box in front of the “Add Brief Title” button.
 - Double click the “Add Brief Title” button.

Display properties

Behavior Defaults **Helpers**

Allow Configure Properties

- User Search
- Display User
- User Lost Card
- Register New User
- Pay Bills
- Add Brief Title
- Item Search
- Confirm Address
- Change Item ID
- Special Due Date
- Charge History
- Alternate Circ Rule
- Renew Privilege
- Print User Card
- Print User
- Enable add photo
- Modify User

3. The “CheckOut: Add brief Title: Set Properties” box will pop up.
4. On the Behavior tab:
 - Uncheck:
 - Auto-generate item ID when adding item
 - ISXN warnings must be acknowledged
 - Check:
 - Library
 - Item type
 - Home location

Item ID
Item category 1
Item category 2
Item category 3
Item category 4
Item category 5

WF CheckOut : Add Brief Title:Set Properties

Behavior Defaults

Auto-generate item ID when adding item

ISXN warnings must be acknowledged

Modify

Library

Item type

Home location

Item ID

Item category 1

Item category 2

Item category 3

Item category 4

Item category 5

On Defaults tab:

- Format: Select BRIEF from the drop-down menu
- Use entries: Select BRIEF from the drop-down menu
- Shadow title: Unchecked
- Permanent: Checked
- Circulate: Checked
- Type: Select BOOK from the drop-down menu
- Library: Select your library code from the drop-down menu
- Home location: Select ILL from the drop-down menu
- Class Scheme: Select DEWEY from the drop-down menu
- Optional fields: (select the following choices from the drop-down menus)
 - Item cat1: FICTION (Item cat1 cannot be blank or UNKNOWN)
 - Item cat2: ADULT (Item cat2 cannot be blank or UNKNOWN)

- Item cat3: BOOK (Item cat3 cannot be blank or UNKNOWN)
- Item cat4: UNDEFINED (Item cat4 cannot be blank or UNKNOWN)
- Item cat5: UNDEFINED (Item cat5 cannot be blank or UNKNOWN)
- Click the OK button on the bottom of the “CheckOut: Add Brief Title: Set Properties” popup box.

CheckOut : Add Brief Title:Set Properties

Behavior Defaults

Format: BRIEF

Use entries: BRIEF

Shadow title

Permanent

Circulate

Type: BOOK

Library: AG_ALS-PDC

Home location: ILL

Class scheme: DEWEY

Optional Fields

Item cat1: FICTION

Item cat2: ADULT

Item cat3: BOOK

Item cat4: UNDEFINED

Item cat5: UNDEFINED

Item cat6: UNDEFINED

Item cat7: UNDEFINED

Item cat8: UNDEFINED

Item cat9: UNDEFINED

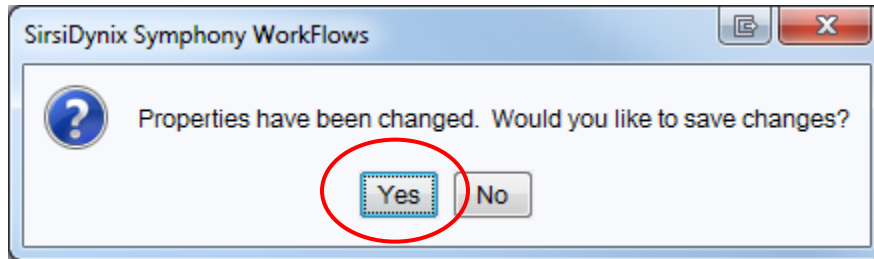
Item cat10: UNDEFINED

OK Cancel

- Click the OK button on the bottom of the “CheckOut: Set Properties” popup box.

5. Close WorkFlows:

- Click Yes on the popup box when closing WorkFlows.



These selections are defaults only. Different Type, Item cat1 and Item cat2 selections can be made during creation of “on the fly” brief records. The Home location must remain ILL.

These properties must be changed on each computer that is used for circulation.

Remember to back up your Sirsi folder that now contains the updated Add Brief Title helper default properties.

Instructions for backing up or restoring your Sirsi folder are available on the RSA Support web page:

https://support.librariesofrsa.org/project/setup-config-backup/#Backup_and_Restore.

The backed up Sirsi folder is used to:

- Transfer settings from one computer to another
- Load configured settings onto a new computer
- Replace settings on a computer that has crashed