



WorkFlows Cataloging Set-up Guide

Revised July 3, 2024

This guide is also online at

<https://support.librariesofrsa.org/project/workflows-cataloging-set-up-guide/>

If you have questions, please contact

RSA Help Desk

help@rsanfp.org

1-866-940-4083

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Before You Begin

- You must perform these steps on each computer that has WorkFlows installed on it. Any settings changed in one WorkFlows do not automatically transfer to another WorkFlows.
- An alternative is to save a copy of the Sirsi folder that contains the WorkFlows settings you have adjusted on one computer.
 - If the copy of the Sirsi folder is saved on a portable storage device, such as your library's RSA NFP flash drive, you can easily transfer the Sirsi folder to another computer that has WorkFlows installed on it.
 - Copying the Sirsi folder onto another computer will eliminate the need to repeat these set-up instructions on that computer.
 - For instructions how to copy and replace the Sirsi folder, please contact the RSA Help Desk at help@rsanfp.org or 1-866-940-4083.
- *You do not need to repeat these instructions each time you use WorkFlows on the same computer.*
- Please keep this guide in case you need to adjust cataloging settings in the future.

Configuration of Your WorkFlows Cataloging Account

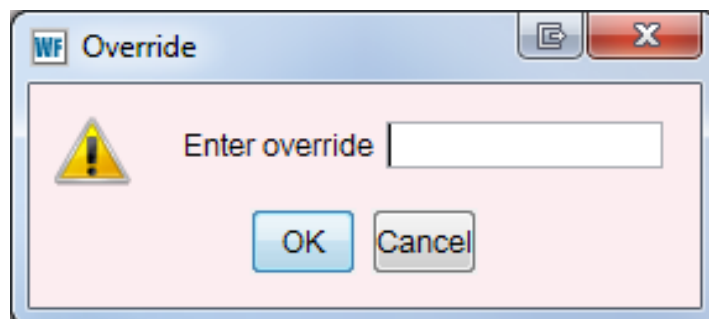
- RSA will create WorkFlows cataloging accounts when staff participate in Basic WorkFlows Cataloging or RSA Bibload Workshops.
- All WorkFlows cataloging accounts begin with the first two letters of the library's WorkFlows code (or the first three letters of the library's code in the case of some libraries with branches), directly followed by an underscore, then the staff member's complete first name, followed by the first letter of his/her last name.

For example:

PK_JOANNEH
PX2_DEANNEG

- For libraries with branches, a WorkFlows cataloging account may catalog items that belong to any of that library's branches, even though the account will be registered under a particular branch.
- WorkFlows cataloging accounts can be configured to include any combination of the following authorization levels:
 - Circulation tasks:
 - All cataloging accounts include access to circulation wizards to allow staff to easily switch between cataloging and circulation tasks.
 - Cataloging accounts will eventually be used to access the MobileCirc application for RSA libraries. CIRC accounts should currently be used to access MobileCirc.
 - Basic cataloging:
 - All cataloging accounts include access to the basic authorization level.
 - This authorization level includes add, edit, and delete functionality using these wizards: Call Number and Item Maintenance, Add Title, Delete Title, Call Numbers, or Items, and Global Item Modification, although access to additional cataloging wizards is included in this basic level.
 - Refer to the "Core Competencies for Cataloging Staff at RSA Member Libraries," posted [here](#), for more information about the basic cataloging level, including a complete list of included wizards.
 - Batch editing:

- This authorization level includes access to the item group editor wizard to search by cataloging code for items in the library's collection and *routinely* perform batch edits on multiple items at once.
- Refer to the “Core Competencies for Cataloging Staff at RSA Member Libraries,” posted [here](#), for more information about the batch editing level.
- Staff who do not meet the core competencies for the batch editing level, and/or staff who only *occasionally* need batch edits performed on the library's collection, should submit a ticket to the RSA Help Desk that describes the collection batch edits needed. RSA staff will perform the batch edits on behalf of the library.
- OCLC cataloging:
 - This authorization level involves *routinely* using OCLC Connexion, either the Browser interface or the desktop Client program, to search OCLC WorldCat for bibliographic records for items that need to be cataloged yet lack existing matching records in WorkFlows. The OCLC cataloging level involves attaching local holdings information to the bibliographic record in OCLC Connexion, exporting the record, and loading it into WorkFlows using the MARC Import wizard and Load Bibliographic Records report.
 - Refer to the “Core Competencies for Cataloging Staff at RSA Member Libraries,” posted [here](#), for more information about the OCLC cataloging level.
- WorkFlows cataloging accounts should never be used by multiple staff members when they perform cataloging tasks. Staff may, however, share the same cataloging account in order to efficiently perform circulation tasks (i.e., checkouts and holds) for patrons at a public services desk.
- The authorization levels configured into your WorkFlows cataloging account will reflect your cataloging responsibilities, your completion of RSA or in-house cataloging training, and your cataloging experience.
- If your WorkFlows cataloging account is not configured to allow access to a particular wizard, you will see the override box, shown below, when you try to access the blocked wizard:

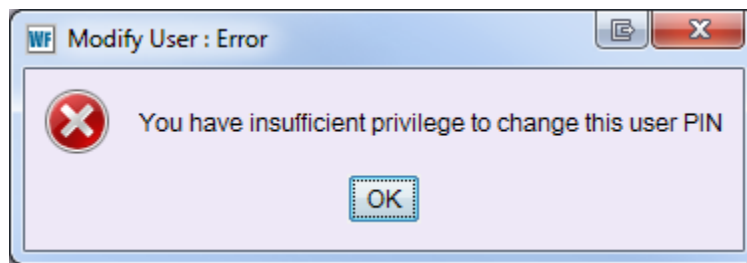


If you have questions about the configuration of your WorkFlows cataloging account, please the RSA Help Desk at help@rsanfp.org or 1-866-940-4083.

- Library directors and/or managers may request a complete list of the library's WorkFlows cataloger accounts, including user IDs, associated users, and authorization levels. Please email the RSA Help Desk at help@rsanfp.org to request a complete list. If cataloger account PINs are also requested, RSA will share those in a separate email for security purposes.
- The library's complete list of WorkFlows accounts will also include override passwords to allow library staff without cataloging accounts the option to assist with collection maintenance activities using the Delete Title, Call Numbers, or Items and Global Item Modification wizards. Directors and/or managers will share, at their discretion, the override passwords with the appropriate staff.
- To provide ease of access by multiple library staff (especially in the case of staff absence), no overdue, bill, or courtesy notices will be assigned to individual cataloging accounts.

Using the RSAcat to Change Your Cataloging Account PIN

- Each staff member issued a cataloging account has the option, though not required, to change the PIN to ensure its use only by that staff member.
- Due to the WorkFlows administrative back-end configuration of individual cataloging accounts, the PIN can only be changed from the RSAcat.
- Your cataloging account PIN cannot be changed from the WorkFlows Modify User wizard. If you try to change the PIN from the Modify User wizard, you will see the following error:



- Follow these steps to change the PIN using the RSAcat:
 1. WorkFlows can be open, logged in as CIRC, TECH, SUPER, or an individual cataloger, before you change your cataloging account PIN.

WorkFlows can also be closed on your computer before you change your cataloging account PIN.

Whether WorkFlows is opened or closed does not affect your ability to change your cataloging account PIN in the RSAcat.
 2. Open an internet browser on your computer. Google, Chrome, Firefox, and Safari can all access the RSAcat.
 3. Open your library's RSAcat library catalog. If you are unsure of the link, look it up here: <https://support.librariesofrsa.org/project/rsacat-link/>
 4. At the top of your library's RSAcat, click the "My Account" link.
 5. On the pop-up box, enter the user ID of your WorkFlows cataloging account.

Your user ID begins with the first two letters of the library's WorkFlows code (or the first three letters of the library's code in the case of some libraries with

branches), directly followed by an underscore, then your complete first name, followed by the first letter of your last name.

Your user ID can be typed in upper or lowercase letters. The RSAcat automatically converts lowercase letters you type into uppercase letters.

6. For the PIN, type your cataloging account's existing PIN.

Like your user ID, your PIN can be typed in upper or lowercase letters. The RSAcat automatically converts lowercase letters you type into uppercase letters.

7. Click "Log in." The pop-up box may display the status "Logging in..." for a few seconds.
8. Once you are logged into the RSAcat, click on the "Personal Information" tab, and your name will appear at the top of the page.
9. Click the arrow next to the "Change PIN" menu.
10. The change PIN menu will expand. For the current PIN, delete the auto-populated PIN. Type in all caps your existing PIN.
11. In the "New PIN" field, enter your preferred PIN for your cataloger account.

RSA requires your PIN to meet all four of these criteria:

- Entered in all caps
- At least four characters long
- Contain at least one letter
- Contain at least one number

12. RSA *strongly* recommends that you write down the new PIN for your cataloger account. This is especially important because you cannot view your cataloging account's PIN in the Modify User wizard. Asterisks appear in place of the actual PIN.

If you forget your cataloging account's PIN after you change it, please contact the RSA Help Desk at help@rsanfp.org or 1-866-940-4083.

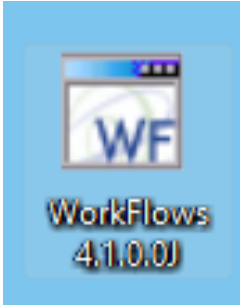
13. Re-type your new PIN in uppercase letters into the "Confirm New PIN" field in the RSAcat.

Please re-type it and do not simply copy/paste it from the new PIN field.

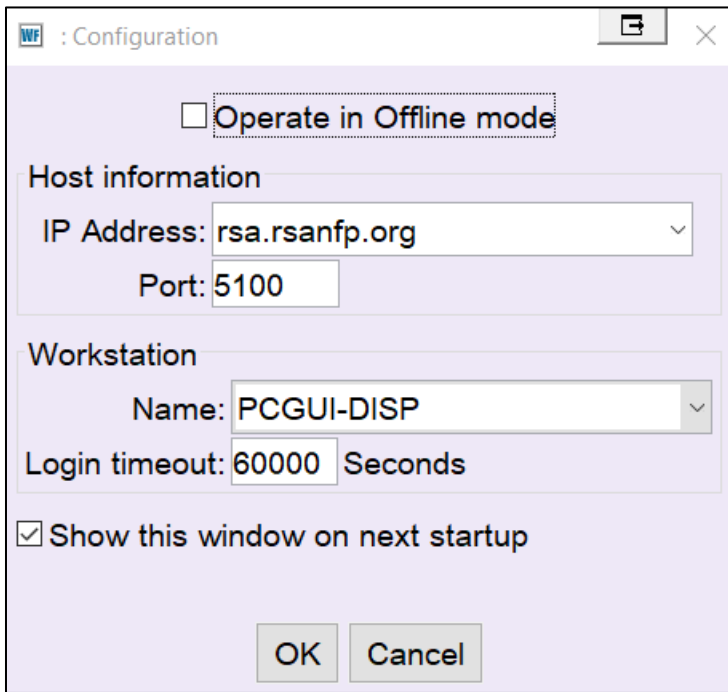
14. Click the “Update” button at the bottom of the change PIN menu. The PIN will immediately change on your WorkFlows cataloging account.
15. The RSAcat will confirm your PIN has been successfully changed with a green message.
16. Log out of the RSAcat using the “Log Out” link at the top of the page.
17. Once you are no longer logged into your RSAcat account, the “Log In” link will reappear at the top of the page, and your name will no longer display at the top of the page.

How to Log into WorkFlows to Adjust Settings

1. Double click the WorkFlows icon on your computer's desktop.

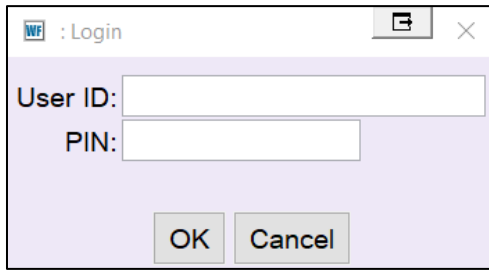


2. Ensure the WorkFlows configuration box uses the correct settings. Make any necessary adjustments to the settings so they match those shown here:



3. Click OK.

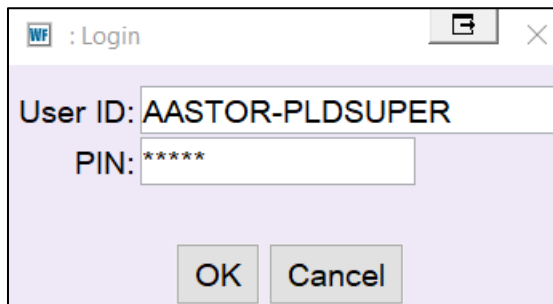
4. The login box will open:



If you are adjusting any circulation module settings in this guide, they will be adjusted while you are logged into WorkFlows in SUPER (“supervisor”) mode.

- The user ID for your SUPER account is your WorkFlows library code immediately followed by SUPER.
- The PIN for the SUPER account in most cases is SUPER.
- If your library has edited the PIN for the SUPER account and you are unable to log in, please contact the RSA Help Desk at help@rsanfp.org.

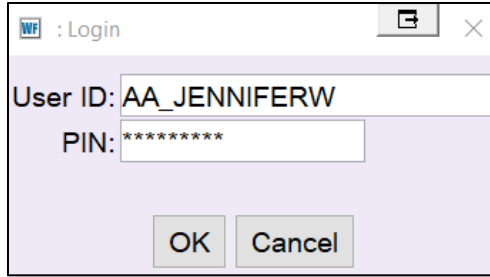
Here is an example of a SUPER account. AASTOR-PLD is shown here, but your library code will differ.



If you are only adjusting cataloging module settings in this guide, they will be adjusted while you are logged into WorkFlows using your individual cataloging account or the TECH account if you have not yet been assigned an individual cataloging account.

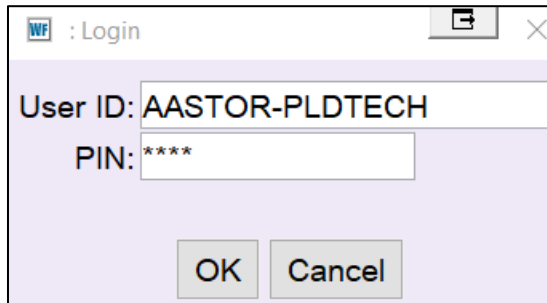
- The user ID for an individual cataloging account is the first two or three letters of your WorkFlows library code, followed by an underscore, your first name, and last initial.
- If you are unsure of the PIN for your individual cataloging login, please contact the RSA Help Desk at help@rsanfp.org.

Here is an example of an individual cataloger account for Astoria PLD. Your individual cataloging account will differ.

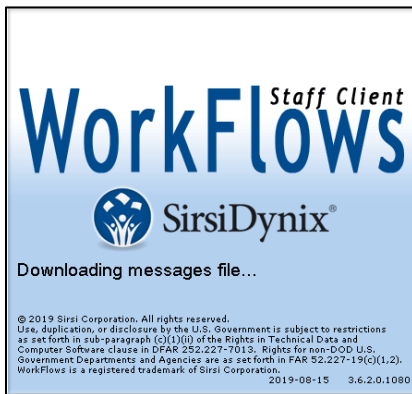


- The user ID for your TECH account is your WorkFlows library code immediately followed by TECH.
- The PIN for the TECH account in most cases is TECH.
- The TECH accounts at some libraries have been disabled because all cataloging staff have been assigned individual logins. There is no longer a need for the TECH account at those libraries. If you are unsure of the status of your library's TECH account, please contact the RSA Help Desk at help@rsanfp.org.

Here is an example of a TECH account. AASTOR-PLD is shown here, but your library code will differ.

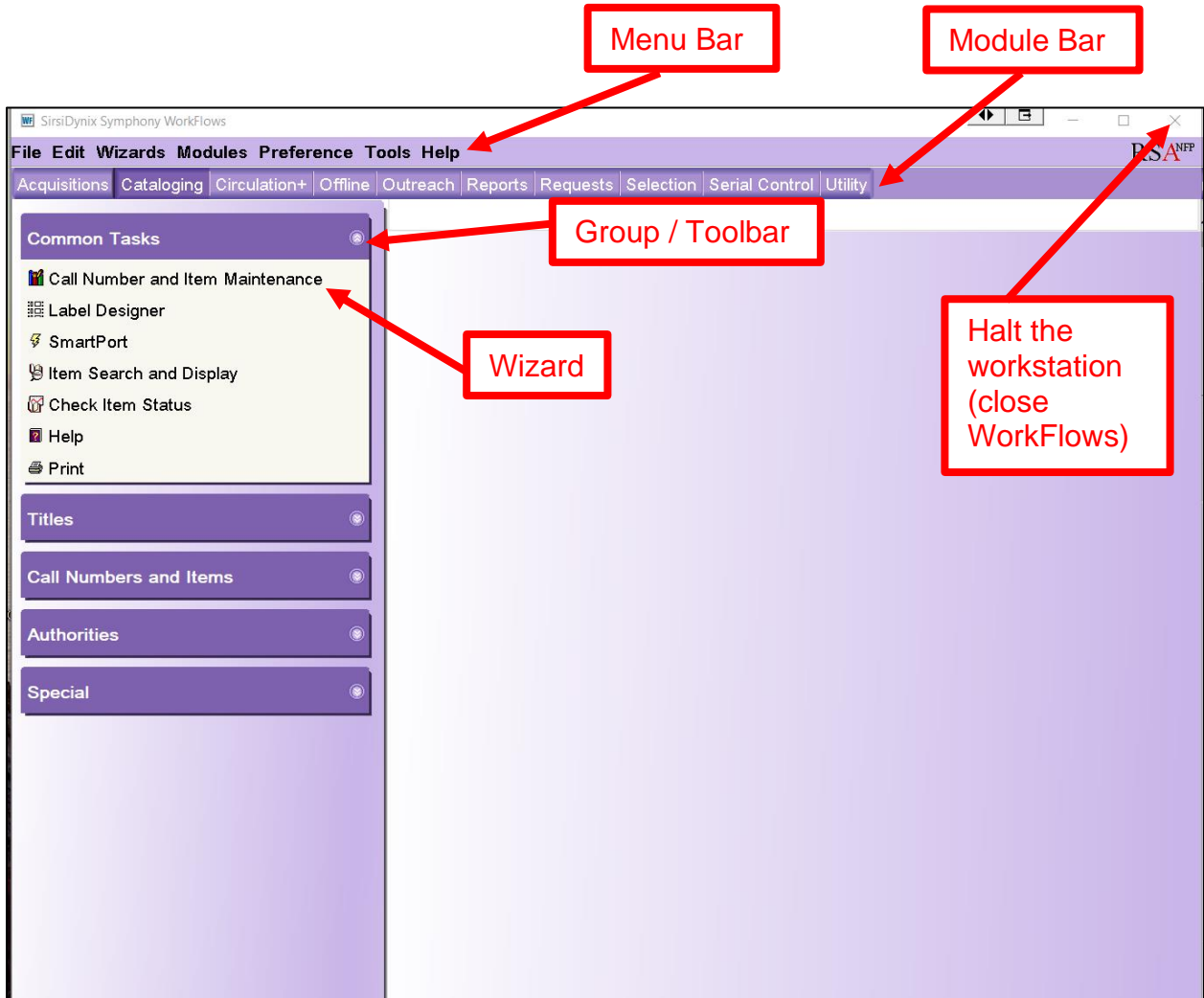


5. Click OK after entering your user ID. WorkFlows will take several seconds to open and display this screen:



WorkFlows Interface Terminology

Once you are logged into WorkFlows, the interface should look similar to that shown here.



Viewing Your Cataloging Account in WorkFlows

- Your cataloging account will be visible if you search by your first and last name in any circulation wizard, including the User Search helper in the CheckOut or Modify User wizards.

Below is a screen shot of a search from the User Search helper in the Modify User wizard. The individual cataloging account appears boxed in red.

Modify User : User Search

Search for:
Name:
LAUGHLIN,
ERICA

Search for: Search

Index: Name

Library: ALL_LIBS

Type:
 Keyword
 Browse
 Browse user group

List of users

Name	UserID	Alt ID	Phone
Laughlin, Erica	ERICA		
LAUGHLIN, ERICA	D150098745		866-940-4083
LAUGHLIN, ERICA	MQ_ERICAL		
LAUGHLIN, ERICA JAYNE	D667076018		(309) 472-9265

Modify User Display this User Group Return to User Group List Cancel

- WorkFlows cataloging accounts should *never* be used by a staff member to check out or put holds on materials for personal or internal use, such as for repair or other technical service functions.

All cataloging accounts are barred to prevent personal or internal checkouts.

The following note is also entered on each cataloger account's profile as a reminder: "DO NOT USE FOR PERSONAL OR TECH SERVICES CHECKOUTS." The entry of the note in all caps adheres to RSA patron registration standards.

- To check the authorization levels configured into your cataloging account, search by name or user ID in Modify User wizard. Once your cataloging account is displayed, hover your cursor over the CAT text that appears next to “Profile name” at the top of the screen.

A small yellow box should appear with a caption that indicates which authorization level(s) are configured in your cataloging account. “BC” should always be present in the caption. “BC” indicates your account includes the “Basic Cataloging” authorization level.

The screenshot shows the 'Modify User' wizard interface. At the top, there are 'Alerts' and 'Notes' tabs. Below them, a user profile is displayed with the following information:

- Name: LAUGHLIN, ERICA
- Id: MQ_ERICAL
- Group ID:
- Profile name: CAT1-BASIC

A tooltip box is visible, containing the text: BC (Basic cataloging) -Basic Online. Red arrows point from the tooltip to the 'Profile name' field and from the 'Profile name' field to the tooltip.

The 'Identify User' section shows the User ID: MQ_ERICAL.

The 'Basic Info' section includes the following fields:

- Title:
- First name: ERICA
- Preferred name: Use preferred name
- Middle name:
- Last name: LAUGHLIN
- Suffix:
- User ID: MQ_ERICAL
- Alt ID: Allow routing
- Group ID:
- Library: MQUETTE-HT
- Profile name: *****
- Charge history rule: NOHISTORY

Red arrows point from the 'Profile name' field to the tooltip and from the 'Profile name' field to the asterisks in the dropdown menu.

Asterisks should appear in the profile name menu in the middle of the Display or Modify User wizard.

- If a cataloging profile is visible in the profile name menu, rather than asterisks, please do not change the cataloging profile to a different profile. Doing so will prevent cataloging access in your account.

Please contact the RSA Help Desk to customize your user profile menu to include only those profiles used by your library. Once your library's user profile menu is customized, your specific cataloging profile will appear in asterisks in the profile name menu, as shown in the screenshot on the previous page.

Preference Menu: WorkFlows Configuration Settings

1. If you have not already done so, log into WorkFlows using your individual cataloging login or the TECH login if you have not yet been assigned an individual cataloging login.
2. Go to the Preference menu at the top.
3. Select Configuration.
4. Ensure the following is unchecked: "Operate in Offline mode."
5. The IP address should be rsa.rsanfp.org
6. The port should be 5100
7. The workstation name may be left as-is.
8. The login timeout should be 60000 seconds.
9. Ensure the following is checked "Show this window on next startup."
10. Click OK to close the configuration box.
11. Click OK on the box that has the warning "These changes will not go into effect until you restart the workstation."
12. Do not exit WorkFlows. Continue to adjust the settings in this guide.

-- or --
13. If you only needed to adjust the WorkFlows configuration settings at this time, do the following:
 - a. Click the X in the upper right corner of WorkFlows.
 - b. Click "Yes" when warned "This will halt the workstation."
 - c. Click "Yes" when asked "Properties have been changed. Would you like to save changes?"
 - d. WorkFlows will close. The next time you log into WorkFlows, the previously changed configuration settings will be retained.
 - e. Remember to repeat the steps in this section on any other library computers that have WorkFlows installed on them and also need their configuration settings adjusted. Any settings changed in one WorkFlows do not automatically transfer to another WorkFlows.

Preference Menu: Setting the WorkFlows Font

1. If you have not already done so, log into WorkFlows using your individual cataloging login or the TECH login if you have not yet been assigned an individual cataloging login.
2. Go to the Preference menu at the top.
3. Select Desktop, then click on Font Settings.
4. On the pop-up box, make sure both “Use system defaults” boxes are unchecked.
5. Under “Menu text,” use the gadget to select one of these fonts:
 - Dialog – Select first if it appears in the list.
 - Lucida Console – Select second if no Dialog.
 - Verdana – Use this font if neither Dialog nor Lucida Console is in the list.
6. In “Menu text,” select a font style of “bold” and a size of at least 12. Select a larger size for a larger computer screen.
7. Click OK to close the menu text settings.
8. Under “Window text,” use the gadget to select one of these fonts:
 - Dialog – Select first if it is in the list.
 - Lucida Console – Select second if no Dialog.
 - Verdana – Use this font if neither Dialog nor Lucida Console is in the list.
9. In “Window text,” select a font style of “regular” and a size of at least 12. Select a larger size for a larger computer screen.
10. Click OK to close the window text settings.
11. Click OK to close the font settings box.
12. Do not exit WorkFlows. Continue to adjust the settings in this guide.

-- or --
13. If you only needed to adjust the WorkFlows font settings at this time, do the following:
 - a. Click the X in the upper right corner of WorkFlows.
 - b. Click "Yes" when warned "This will halt the workstation."
 - c. Click "Yes" when asked "Properties have been changed. Would you like to save changes?"
 - d. WorkFlows will close. The next time you log into WorkFlows, the previously changed font settings will be retained.
 - e. Remember to repeat the steps in this section on any other library computers that have WorkFlows installed on them and also need their font adjusted. Any settings changed in one WorkFlows do not automatically transfer to another WorkFlows.

Preference Menu: Setting the WorkFlows Desktop Preferences

1. If you have not already done so, log into WorkFlows using your individual cataloging login or the TECH login if you have not yet been assigned an individual cataloging login.
2. Go to the Preference menu at the top.
3. Select Desktop, then click on Desktop Setup.
4. On the pop-up box, use the gadget button next to “Max response size” to enter 5000000 if it is not already set.
5. Scroll down in the pop-up box. Under “Themes,” choose an interface color.
 - You may select any theme *except* Classic.
 - WorkFlows may be opened more than once on the same computer. Opening multiple instances of WorkFlows may be helpful for logging into the individual cataloger account and also into the CIRC account to retrieve overdues, courtesy notices, or bills.
 - If multiple instances of WorkFlows are open on the same computer, RSA recommends that you change the theme of the WorkFlows interface to a different color for each open WorkFlows. The change in color will be a visual cue, helpful for easily identifying that WorkFlows is open multiple times under different accounts.
 - Changing the theme only affects a single WorkFlows on a single computer – not all WorkFlows installed on all computers at the library. The theme is saved in WorkFlows on a per-computer basis.
 - Before you shut WorkFlows, RSA recommends changing the theme back to the theme that WorkFlows was originally configured to use before you changed it in order to distinguish multiple WorkFlows open on that computer.
 - If you do not restore the original theme before you shut WorkFlows, the changed theme will still be visible when WorkFlows is re-opened on that computer, whether under the CIRC, individual cataloger, or SUPER account. By restoring the original theme, the next time you log into WorkFlows using the CIRC, individual cataloger, or SUPER account, WorkFlows will display its usual interface color, rather than the changed color.
6. At the bottom of the Desktop Setup pop-up, check the box next to “Multiple windows mode.”
7. Check the box next to “Tabbed windows.”
8. *Optional*—If you prefer the tabs that display open wizards to appear on the bottom of the WorkFlows screen, check the box next to “Tabbed windows on bottom.”
9. Click OK to close the box.

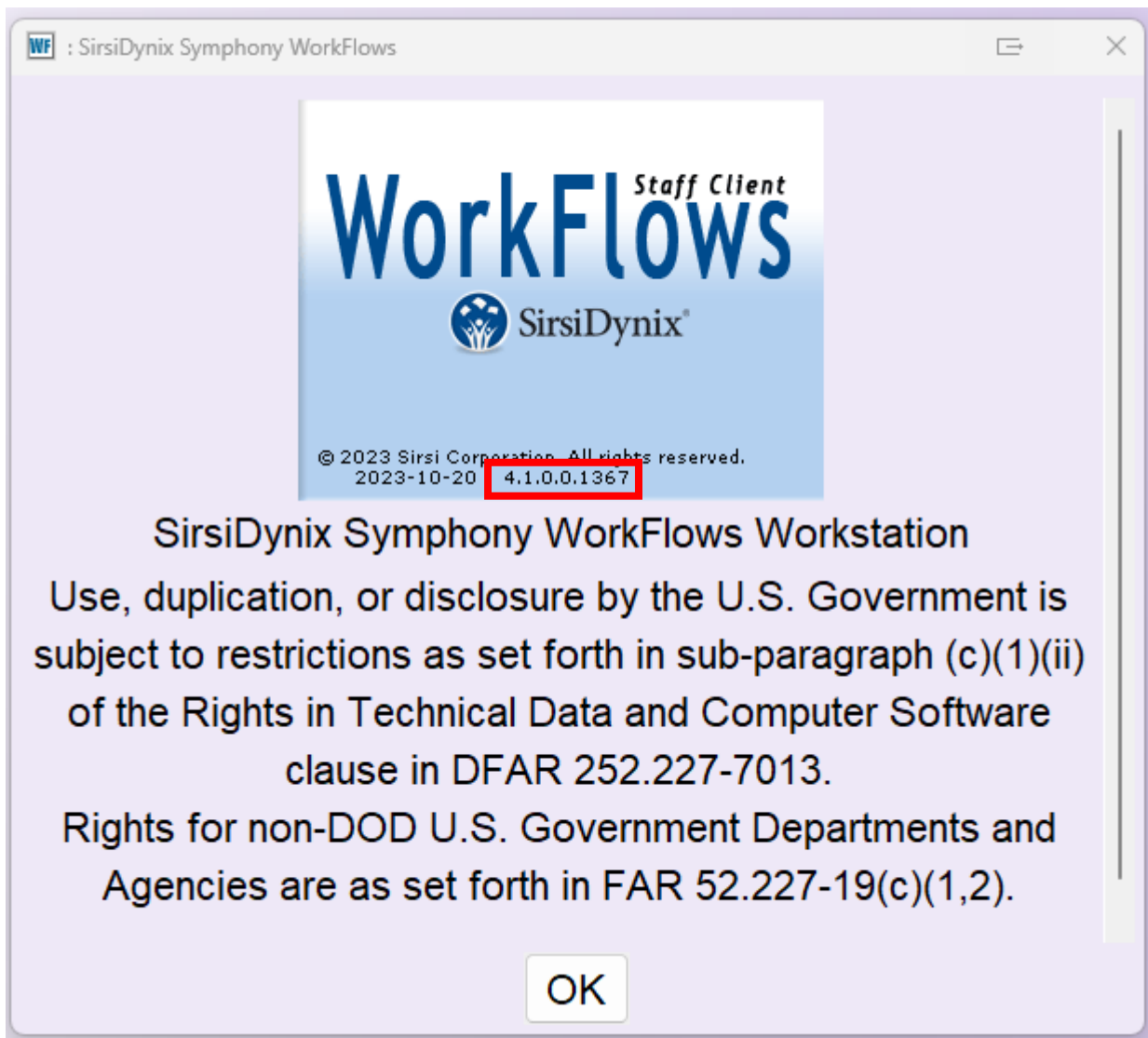
10. Click OK on the box that has the warning “These changes will not go into effect until you restart the workstation.”
11. Click “OK.”
12. Do not exit WorkFlows. Continue to adjust the settings in this guide.
-- or --
13. If you only needed to adjust the WorkFlows desktop preferences at this time, do the following:
 - a. Click the X in the upper right corner of WorkFlows.
 - b. Click "Yes" when warned "This will halt the workstation."
 - c. Click "Yes" when asked "Properties have been changed. Would you like to save changes?"
 - d. WorkFlows will close. The next time you log into WorkFlows, the previously changed desktop preferences will be retained.
 - e. Remember to repeat the steps in this section on any other library computers that have WorkFlows installed on them and also need their desktop preferences adjusted. Any settings changed in one WorkFlows do not automatically transfer to another WorkFlows.

Help Menu: Check the Current WorkFlows User

1. If you have not already done so, log into WorkFlows using your individual cataloging login or the TECH login if you have not yet been assigned an individual cataloging login.
2. Go to the Help menu at the top.
3. Select Session Info.
4. On the pop-up box, check the line labeled “user access.” CATALOGER or CIRC should appear as the value for the user access.
 - Never perform cataloging or circulation operations when WorkFlows is logged in as SUPER.
 - The SUPER account should *only* be used to adjust WorkFlows properties.
5. Click OK to close the Session Info box.
6. No need to exit WorkFlows and save properties after checking the current WorkFlows user.

Help Menu: Check the WorkFlows Version Number

1. If you have not already done so, log into WorkFlows using your individual cataloging login or the TECH login if you have not yet been assigned an individual cataloging login.
2. Go to the Help menu at the top.
3. Select About.
4. In the pop-up box, under the SirsiDynix WorkFlows logo, look for a series of numbers that includes periods.
 - If you see 4.1.0.0.1367, your WorkFlows client is up to date.
5. Click OK to close the box.
6. No need to exit WorkFlows and save properties after checking the WorkFlows version number.



Cataloging Module: Call Number and Item Maintenance Wizard

1. If you have not already done so, log into WorkFlows using your individual cataloging login or the TECH login if you have not yet been assigned an individual cataloging login.
2. Click on the Cataloging module at the top.
3. Expand the “Common Tasks” group on the left side of the screen if it is not already expanded.
4. Right click on “Call Number and Item Maintenance,” select “Properties.”
5. In the pop-up window, select the “Defaults” tab.
6. Expand the pop-up window if necessary to see all the information.
7. Under “Search preferences,” you can adjust the search type, index, and library for the advanced search screen.

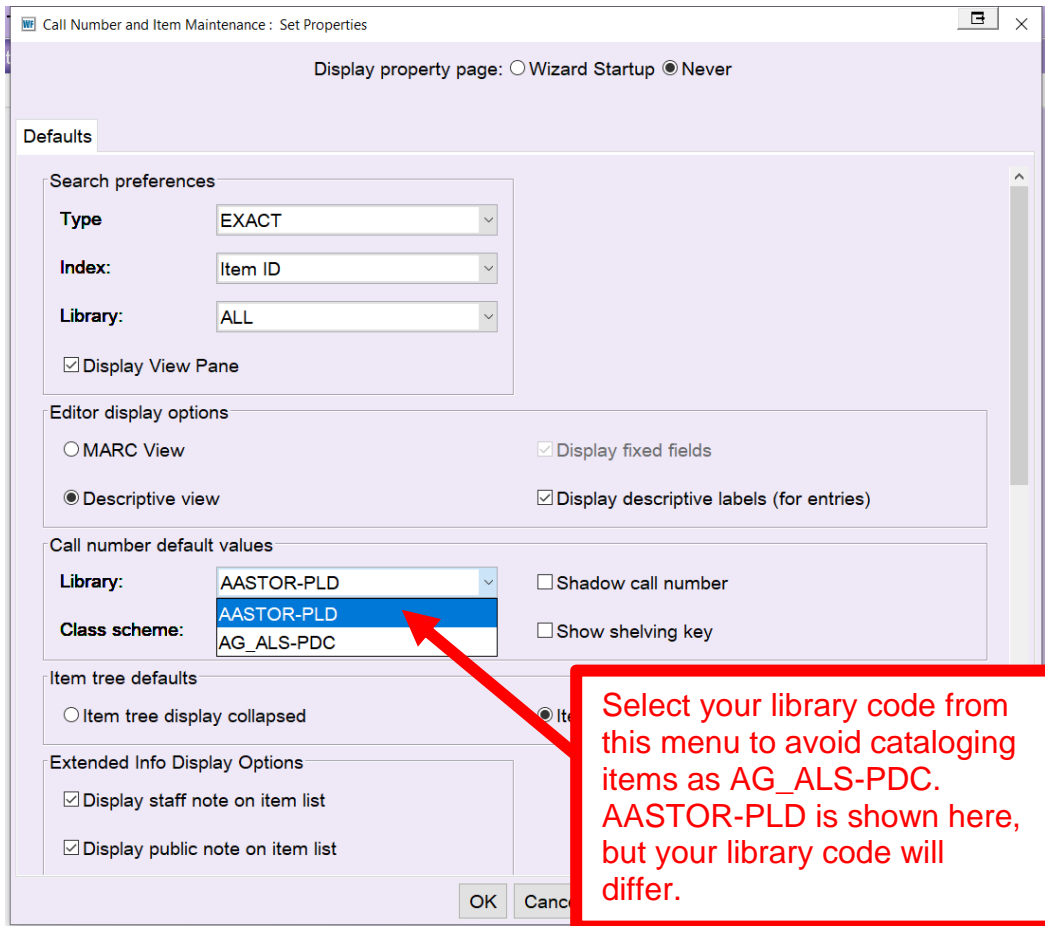
A search by item ID (barcode) can be selected here:

For the Type, select Exact.

For the Index, select Item ID.

For the Library, select ALL.

8. Under “Call number default values,” select your WorkFlows code from the library drop-down menu. Due to WorkFlows reconfiguration on April 8, 2020, AG_ALS-PDC will now appear as the default until you select your library.



9. For the class scheme, make sure “Dewey” appears in the menu. If your library uses Library of Congress classification for its call numbers, select “LC.” If your library uses National Library of Medicine classification, select “NLM.”
10. Under “Item tree defaults,” make sure the collapsed option is selected.
11. Under “Item required default values,” select the item type code your library most often uses when cataloging. BOOK is likely the default you will select from the item type menu.
12. For home location, select the code your library most often uses when cataloging (FICTION or NONFICTION, for example).
13. Make sure the boxes next to “Permanent” and “Circulate” are checked.
14. For item category 1, select FICTION or NONFICTION as the default, depending on which code you use more often when cataloging.
15. For item category 2, select ADULT, JUVENILE, or YOUNGADULT as the default, depending on which code you use most often when cataloging.
16. For item category 3, select the general format code you will use most often when cataloging. You will likely select BOOK as the default item cat 3. For a complete list of item cat 3 codes, see <https://alsi.sdp.sirsi.net/client/search/asset/3842>

17. For item category 4, select a default code for genre. Assigning item cat 4 is strongly recommended but not required. For a complete list of item cat 4 codes, see <https://alsi.sdp.sirsi.net/client/search/asset/3862/0>
18. For item category 5, select a default code for sub-genre. Assigning item cat 5 is optional. For a complete list of item cat 5 codes, see the list posted at <https://alsi.sdp.sirsi.net/client/search/asset/3863>
19. For item categories 6-10, ensure UNDEFINED is selected.
20. Under “Holds Tab,” make sure the “Show holds” check box is selected. The following should also be selected under “Holds Tab”:
 - Library type: Placed at library
 - Library: All libraries
 - Holds type: Active
21. Under “Tab Display Preference,” select Bibliographic.
22. Click “OK” at the bottom of the window to save your changes and close the window.
23. Do not exit WorkFlows. Continue to adjust the settings in this guide.

-- or --
24. If you only needed to adjust the Call Number and Item Maintenance settings at this time, do the following:
 - a. Click the X in the upper right corner of WorkFlows.
 - b. Click "Yes" when warned "This will halt the workstation."
 - c. Click "Yes" when asked "Properties have been changed. Would you like to save changes?"
 - d. WorkFlows will close. The next time you log into WorkFlows, the Call Number and Item Maintenance settings you previously changed will be retained.
 - e. Remember to repeat the steps in this section on any other library computers that have WorkFlows installed on them and also need their Call Number and Item Maintenance settings adjusted. Any settings changed in one WorkFlows do not automatically transfer to another WorkFlows.

Cataloging Module: Item Search and Display Wizard

1. If you have not already done so, log into WorkFlows using your individual cataloging login or the TECH login if you have not yet been assigned an individual cataloging login.
2. Click on the Cataloging module at the top.
3. In the Common Tasks toolbar on the left, put your cursor over the Item Search and Display wizard and right click.
4. Select Properties. A pop-up window appears.
5. Expand the pop-up window if necessary to see all the information.
6. Under “Search preferences,” you can adjust the search type, index, and library for the advanced search screen.

A search by item ID (barcode) can be selected here:

For the Type, select Exact.

For the Index, select Item ID.

For the Library, select ALL.

7. Under “Item tree defaults,” make sure the collapsed option is selected.
8. Under “Tab Display Preference,” select Call Number/Item.
9. Click “OK” at the bottom of the window to save your changes and close the window.
10. Do not exit WorkFlows. Continue to adjust the settings in this guide.

-- or --

11. If you only needed to adjust the Item Search and Display settings at this time, do the following:
 - a. Click the X in the upper right corner of WorkFlows.
 - b. Click "Yes" when warned "This will halt the workstation."
 - c. Click "Yes" when asked "Properties have been changed. Would you like to save changes?"
 - d. WorkFlows will close. The next time you log into WorkFlows, the previously changed Item Search and Display settings will be retained.
 - e. Remember to repeat the steps in this section on any other library computers that have WorkFlows installed on them and also need their Item Search and Display settings adjusted. Any settings changed in one WorkFlows do not automatically transfer to another WorkFlows.

Cataloging Module: Item Search and Display Wizard *Optional Setting*

If the default search screen in the “Call Number and Item Maintenance” and “Item Search and Display” wizards should open to the advanced search screen, with a single search field and options to select “keyword,” “browse,” or “exact” as the search type, please follow the steps below to configure this setting.

Configuring your “Call Number and Item Maintenance” and “Item Search and Display” wizards to open to the advanced search screen by default is optional. If you do not configure this setting, the “Call Number and Item Maintenance” and “Item Search and Display” wizards will open to the keyword search screen with multiple search fields for the author, title, series, subject, general, and periodical title.

Please follow these steps if you want to configure the “Call Number and Item Maintenance” and “Item Search and Display” wizards to open to the advanced search screen by default.

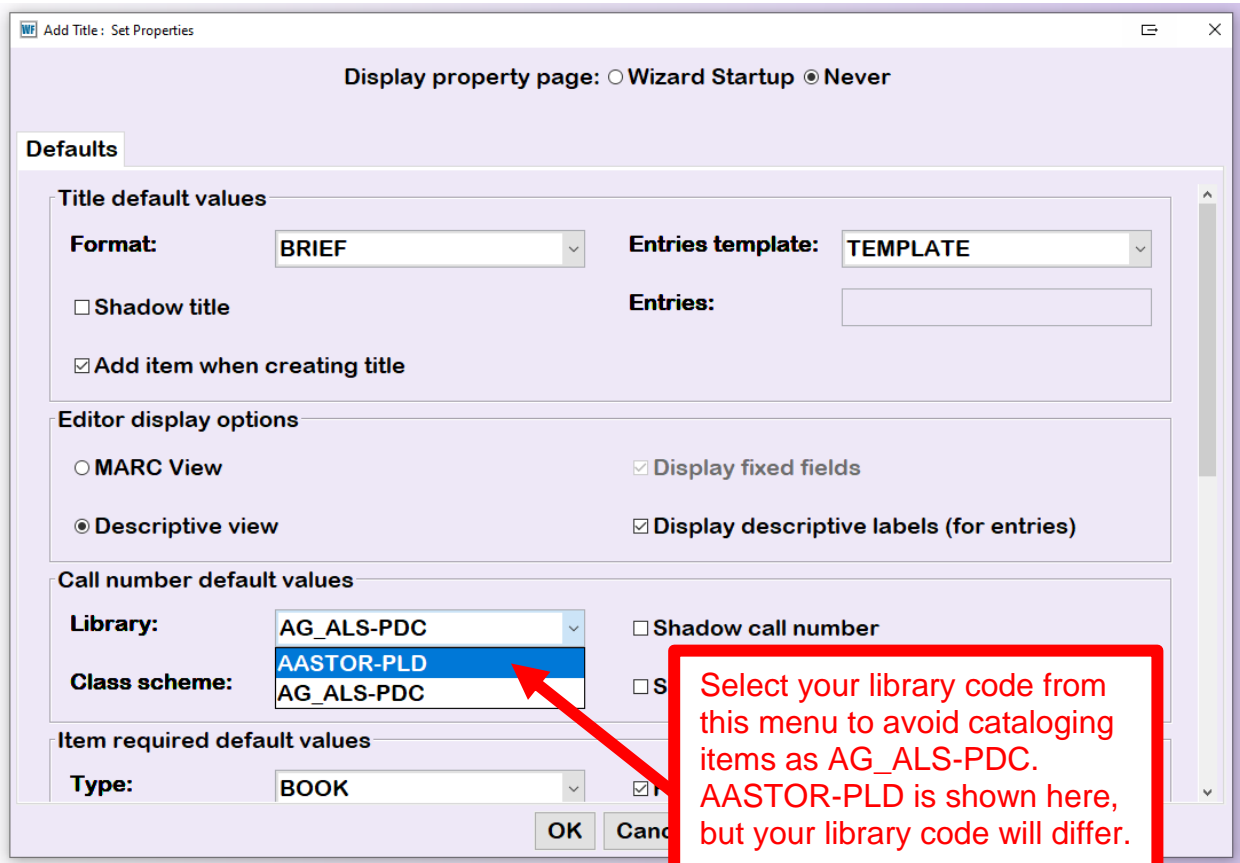
1. Log into WorkFlows using your library’s SUPER login. Check with your library supervisor or contact the RSA Help Desk at 1-866-940-4083 if you are unsure of your SUPER login.
2. Click on the Cataloging module at the top.
3. In the Common Tasks toolbar on the left, put your cursor over the Item Search and Display wizard and right click.
4. Select “Properties.”
5. In the pop-up window, select the “Helpers” tab.
6. Expand the pop-up window if necessary to see all the information.
7. Click the “Configure” button next to the “Advanced search” option.
8. In the pop-up window, select the button next to “Single field search.”
9. Click “OK” at the bottom of the pop-up window to save your change and close the window.
10. Do not exit WorkFlows. Continue to adjust the settings in this guide.

-- or --
11. If you only needed to adjust this Item Search and Display setting at this time, do the following:
 - a. Click the X in the upper right corner of WorkFlows.
 - b. Click "Yes" when warned "This will halt the workstation."
 - c. Click "Yes" when asked "Properties have been changed. Would you like to save changes?"
 - d. WorkFlows will close. The next time you log into WorkFlows, the previously changed Item Search and Display setting will be retained.
 - e. Remember to repeat the steps in this section on any other library computers that have WorkFlows installed on them and also need their Item Search and

Display settings adjusted. Any settings changed in one WorkFlows do not automatically transfer to another WorkFlows.

Cataloging Module: Add Title (i.e., Brief Record) Wizard

1. If you have not already done so, log into WorkFlows using your individual cataloging login or the TECH login if you have not yet been assigned an individual cataloging login.
2. Click on the Cataloging module at the top.
3. In the Titles toolbar on the left, put your cursor over the Add Title wizard and right click.
4. Select “Properties.” A pop-up window appears.
5. Expand the pop-up window if necessary to see all the information.
6. Under “Title default values,” make sure the “Format” is set to brief.
7. The “Entries template” should be set to TEMPLATE.
8. Under “Call number default values,” select your WorkFlows code from the library drop-down menu. Due to WorkFlows reconfiguration on April 8, 2020, AG_ALS-PDC will now appear as the default until you select your library.



9. For the class scheme, make sure “Dewey” appears in the menu. If your library uses Library of Congress classification for its call numbers, select “LC.” If your library uses National Library of Medicine classification, select “NLM.”

10. Under “Item required default values,” select the item type code your library most often uses when cataloging. BOOK is likely the default you will select from the item type menu.
11. For home location, select the code your library most often uses when cataloging (FICTION or NONFICTION, for example).
12. Make sure the boxes next to “Permanent” and “Circulate” are checked.
13. For item category 1, select FICTION or NONFICTION as the default, depending on which code you use more often when cataloging.
14. For item category 2, select ADULT, JUVENILE, or YOUNGADULT as the default, depending on which code you use most often when cataloging.
15. For item category 3, select the general format code you will use most often when cataloging. You will likely select BOOK as the default item cat 3. For a complete list of item cat 3 codes, see <https://alsi.sdp.sirsi.net/client/search/asset/3842>
16. For item category 4, select a default code for genre. Assigning item cat 4 is strongly recommended but not required. For a complete list of item cat 4 codes, see <https://alsi.sdp.sirsi.net/client/search/asset/3862/0>
17. For item category 5, select a default code for sub-genre. Assigning item cat 5 is optional. For a complete list of item cat 5 codes, see the list posted at <https://alsi.sdp.sirsi.net/client/search/asset/3863>
18. For item categories 6-10, ensure UNDEFINED is selected.
19. Under “Tab Display Preference,” make sure Bibliographic is selected.
20. Click “OK” at the bottom of the window to save your changes and close the window.
21. Do not exit WorkFlows. Continue to adjust the settings in this guide.

-- or --

22. If you only needed to adjust Add Title (i.e., brief record) settings at this time, do the following:
 - a. Click the X in the upper right corner of WorkFlows.
 - b. Click "Yes" when warned "This will halt the workstation."
 - c. Click "Yes" when asked "Properties have been changed. Would you like to save changes?"
 - d. WorkFlows will close. The next time you log into WorkFlows, the previously changed Add Title settings will be retained.
 - e. Remember to repeat the steps in this section on any other library computers that have WorkFlows installed on them and also need their Add Title settings adjusted. Any settings changed in one WorkFlows do not automatically transfer to another WorkFlows.

Cataloging Module: Delete Title, Call Numbers, or Items Wizard

1. If you have not already done so, log into WorkFlows using your individual cataloging login or the TECH login if you have not yet been assigned an individual cataloging login.
2. Click on the Cataloging module at the top.
3. In the Titles toolbar on the left, put your cursor over the Delete Titles, Call Numbers, or Items wizard and right click.
4. Select "Properties." A pop-up window appears.
5. Expand the pop-up window if necessary to see all the information.
6. Under "Search preferences," you can adjust the search type, index, and library for the advanced search screen.

A search by item ID (barcode) can be selected here:

For the Type, select Exact.

For the Index, select Item ID.

For the Library, select ALL.

7. Under "Item tree defaults," make sure the collapsed option is selected.
8. Click "OK" at the bottom of the window to save your changes and close the window.
9. Do not exit WorkFlows. Continue to adjust the settings in this guide.

-- or --

10. If you only needed to adjust Delete Title settings at this time, do the following:
 - a. Click the X in the upper right corner of WorkFlows.
 - b. Click "Yes" when warned "This will halt the workstation."
 - c. Click "Yes" when asked "Properties have been changed. Would you like to save changes?"
 - d. WorkFlows will close. The next time you log into WorkFlows, the previously changed Delete Title settings will be retained.
 - e. Remember to repeat the steps in this section on any other library computers that have WorkFlows installed on them and also need their Delete Title settings adjusted. Any settings changed in one WorkFlows do not automatically transfer to another WorkFlows.

Cataloging Module: Add Item Wizard

1. If you have not already done so, log into WorkFlows using your individual cataloging login or the TECH login if you have not yet been assigned an individual cataloging login.
2. Click on the Cataloging module at the top.
3. In the Call Numbers and Items toolbar on the left, put your cursor over the Add Item wizard and right click.
4. Select “Properties.” A pop-up window appears.
5. Expand the pop-up window if necessary to see all the information.
6. Under “Search preferences,” you can adjust the search type, index, and library for the advanced search screen.

A search by item ID (barcode) can be selected here:

For the Type, select Exact.

For the Index, select Item ID.

For the Library, select ALL.

7. Under “Item tree defaults,” make sure the collapsed option is selected.
8. Under “Item required default values,” select the item type code your library most often uses when cataloging. BOOK is likely the default you will select from the item type menu.
9. For home location, select the code your library most often uses when cataloging (FICTION or NONFICTION, for example).
10. Make sure the boxes next to “Permanent” and “Circulate” are checked.
11. For item category 1, select FICTION or NONFICTION as the default, depending on which code you use more often when cataloging.
12. For item category 2, select ADULT, JUVENILE, or YOUNGADULT as the default, depending on which code you use most often when cataloging.
13. For item category 3, select the general format code you will use most often when cataloging. You will likely select BOOK as the default item cat 3. For a complete list of item cat 3 codes, see <https://alsi.sdp.sirsi.net/client/search/asset/3842>
14. For item category 4, select a default code for genre. Assigning item cat 4 is strongly recommended but not required. For a complete list of item cat 4 codes, see <https://alsi.sdp.sirsi.net/client/search/asset/3862/0>
15. For item category 5, select a default code for sub-genre. Assigning item cat 5 is optional. For a complete list of item cat 5 codes, see the list posted at <https://alsi.sdp.sirsi.net/client/search/asset/3863>
16. For item categories 6-10, ensure UNDEFINED is selected.
17. Under “Holds Tab,” make sure the “Show holds” check box is selected. The following should also be selected under “Holds Tab”:
 - a. Library type: Placed at library
 - b. Library: All libraries
 - c. Holds type: Active
18. Under “Tab Display Preference,” select Call Number/Item.

19. Click "OK" at the bottom of the window to save your changes and close the window.
20. Do not exit WorkFlows. Continue to adjust the settings in this guide.

-- or --

21. If you only needed to adjust Add Item settings at this time, do the following:
 - a. Click the X in the upper right corner of WorkFlows.
 - b. Click "Yes" when warned "This will halt the workstation."
 - c. Click "Yes" when asked "Properties have been changed. Would you like to save changes?"
 - d. WorkFlows will close. The next time you log into WorkFlows, the previously changed Add Item settings will be retained.
 - e. Remember to repeat the steps in this section on any other library computers that have WorkFlows installed on them and also need their Add Item settings adjusted. Any settings changed in one WorkFlows do not automatically transfer to another WorkFlows.

Cataloging Module: Edit Item Wizard

1. If you have not already done so, log into WorkFlows using your individual cataloging login or the TECH login if you have not yet been assigned an individual cataloging login.
2. Click on the Cataloging module at the top.
3. In the Call Numbers and Items toolbar on the left, put your cursor over the Edit Item wizard and right click.
4. Select "Properties." A pop-up window appears.
5. Under "Search preferences," you can adjust the search type, index, and library for the advanced search screen.
 - A search by item ID (barcode) can be selected here:
 - For the Type, select Exact.
 - For the Index, select Item ID.
 - For the Library, select ALL.
6. Under "Item tree defaults," make sure the collapsed option is selected.
7. Under "Holds Tab," make sure the "Show holds" check box is selected. The following should also be selected under "Holds Tab":
 - a. Library type: Placed at library
 - b. Library: All libraries
 - c. Holds type: Active
8. Under "Tab Display Preference," select Call Number/Item.
9. Click "OK" at the bottom of the window to save your changes and close the window.
10. Do not exit WorkFlows. Continue to adjust the settings in this guide.

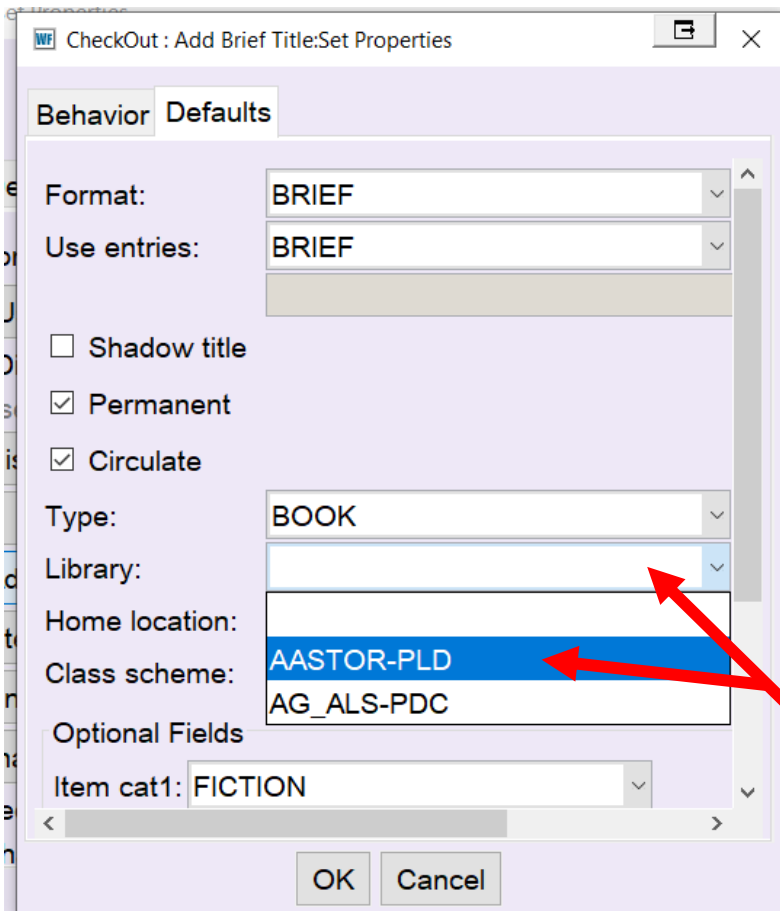
-- or --
11. If you only needed to adjust Edit Item settings at this time, do the following:
 - a. Click the X in the upper right corner of WorkFlows.
 - b. Click "Yes" when warned "This will halt the workstation."
 - c. Click "Yes" when asked "Properties have been changed. Would you like to save changes?"
 - d. WorkFlows will close. The next time you log into WorkFlows, the previously changed Edit Item settings will be retained.
 - e. Remember to repeat the steps in this section on any other library computers that have WorkFlows installed on them and also need their Edit Item settings adjusted. Any settings changed in one WorkFlows do not automatically transfer to another WorkFlows.

Cataloging Module: Transfers Wizard

1. If you have not already done so, log into WorkFlows using your individual cataloging login or the TECH login if you have not yet been assigned an individual cataloging login.
2. Click on the Cataloging module at the top.
3. In the Special toolbar on the left, put your cursor over the Transfers wizard and right click.
4. Select "Properties." A pop-up box appears.
5. *Optional*—Under "Search preferences," you can adjust the search type, index, and library for the advanced search screen.
 - A search by item ID (barcode) can be selected here:
 - For the Type, select Exact.
 - For the Index, select Item ID.
 - For the Library, select ALL.
6. Under "Item tree defaults," make sure the expanded option is selected.
7. Click OK to close the pop-up box.
8. Do not exit WorkFlows. Continue to adjust the settings in this guide.
 - or --
9. If you only needed to adjust Transfer settings at this time, do the following:
 - a. Click the X in the upper right corner of WorkFlows.
 - b. Click "Yes" when warned "This will halt the workstation."
 - c. Click "Yes" when asked "Properties have been changed. Would you like to save changes?"
 - d. WorkFlows will close. The next time you log into WorkFlows, the previously changed Transfer settings will be retained.
 - e. Remember to repeat the steps in this section on any other library computers that have WorkFlows installed on them and also need their Transfer settings adjusted. Any settings changed in one WorkFlows do not automatically transfer to another WorkFlows.

Circulation Module: Add Brief Title Helper

1. Log into WorkFlows using your library's SUPER login. Check with your library supervisor or contact the RSA Help Desk at 1-866-940-4083 if you are unsure of your SUPER login.
2. Click on the Circulation module at the top.
3. Expand the "Common Tasks" group on the left side of the screen if it is not already expanded.
4. Right click on "Check Out", select "Properties."
5. In the pop-up window, select the "Helpers" tab.
6. Click on "Add Brief Title."
7. Another pop-up window will appear where you can select default values.
8. Make sure the "Format" and the "Entries template" are both set to BRIEF.
9. Make sure the boxes next to "Permanent" and "Circulate" are checked.
10. For the "Type," select the item type code your library most often uses when cataloging. BOOK is likely the default you will select from the item type menu.
11. Under "Call number default values," select your WorkFlows code from the library drop-down menu. Due to WorkFlows reconfiguration on April 8, 2020, AG_ALS-PDC will now appear as the default until you select your library.



12. For home location, RSA recommends selecting CATALOGING as the default home location.
 - This default will help ensure upon discharge, the brief item is routed to library staff to be re-cataloged on a full bibliographic record in WorkFlows.
13. For the class scheme, make sure “Dewey” appears in the menu. If your library uses Library of Congress classification for its call numbers, select “LC.” If your library uses National Library of Medicine classification, select “NLM.”
14. Under “Optional Fields,” for item category 1, select FICTION or NONFICTION as the default, depending on which code you use more often when cataloging.
15. For item category 2, select ADULT, JUVENILE, or YOUNGADULT as the default, depending on which code you use most often when cataloging.
16. For item category 3, select the general format code you will use most often when cataloging. You will likely select BOOK as the default item cat 3. For a complete list of item cat 3 codes, see <https://alsi.sdp.sirsi.net/client/search/asset/3842>
17. For item category 4, select a default code for genre. Assigning item cat 4 is strongly recommended but not required. For a complete list of item cat 4 codes, see <https://alsi.sdp.sirsi.net/client/search/asset/3862/0>
18. For item category 5, select a default code for sub-genre. Assigning item cat 5 is optional. For a complete list of item cat 5 codes, see the list posted at <https://alsi.sdp.sirsi.net/client/search/asset/3863>
19. For item categories 6-10, ensure UNDEFINED is selected.
20. Click “OK” at the bottom of the window to save your changes and close the window.
21. Click “OK” again to close the “Properties” window.
22. Do not exit WorkFlows. Continue to adjust the settings in this guide.

-- or --
23. If you only needed to adjust Add Brief Title settings at this time, do the following:
 - a. Click the X in the upper right corner of WorkFlows.
 - b. Click "Yes" when warned "This will halt the workstation."
 - c. Click "Yes" when asked "Properties have been changed. Would you like to save changes?"
 - d. WorkFlows will close. The next time you log into WorkFlows, the previously changed Add Brief Title settings will be retained.
 - e. Remember to repeat the steps in this section on any other library computers that have WorkFlows installed on them and also need their Add Brief Title settings adjusted. Any settings changed in one WorkFlows do not automatically transfer to another WorkFlows.

Circulation Module: Add Item Wizard

1. Log into WorkFlows using your library's SUPER login. Check with your library supervisor or contact the RSA Help Desk at 1-866-940-4083 if you are unsure of your SUPER login.
2. Click on the Circulation module at the top.
3. Expand the "Items" group on the left side of the screen if it is not already expanded.
4. Right click on "Add Item", select "Properties."
5. In the pop-up window, select the "Defaults" tab.
6. Expand the pop-up window if necessary to see all the information.
7. Under "Search preferences," you can adjust the search type, index, and library for the advanced search screen.

A search by item ID (barcode) can be selected here:

For the Type, select Exact.

For the Index, select Item ID.

For the Library, select ALL.

8. Under "Item tree defaults," make sure the collapsed option is selected.
9. Under "Item required default values," select the item type code your library most often uses when cataloging. BOOK is likely the default you will select from the item type menu.
10. For home location, select the code your library most often uses when cataloging (FICTION or NONFICTION, for example).
11. Make sure the boxes next to "Permanent" and "Circulate" are checked.
12. For item category 1, select FICTION or NONFICTION as the default, depending on which code you use more often when cataloging.
13. For item category 2, select ADULT, JUVENILE, or YOUNGADULT as the default, depending on which code you use most often when cataloging.
14. For item category 3, select the general format code you will use most often when cataloging. You will likely select BOOK as the default item cat 3. For a complete list of item cat 3 codes, see <https://alsi.sdp.sirsi.net/client/search/asset/3842>
15. For item category 4, select a default code for genre. Assigning item cat 4 is strongly recommended but not required. For a complete list of item cat 4 codes, see <https://alsi.sdp.sirsi.net/client/search/asset/3862/0>
16. For item category 5, select a default code for sub-genre. Assigning item cat 5 is optional. For a complete list of item cat 5 codes, see the list posted at <https://alsi.sdp.sirsi.net/client/search/asset/3863>
17. For item categories 6-10, ensure UNDEFINED is selected.
18. Under "Holds Tab," make sure the "Show holds" check box is selected. The following should also be selected under "Holds Tab":
 - a. Library type: Placed at library
 - b. Library: All libraries
 - c. Holds type: Active
19. Under "Tab Display Preference," select Call Number/Item.

20. Click "OK" at the bottom of the window to save your changes and close the window.
21. Do not exit WorkFlows. Continue to adjust the settings in this guide.

-- or --

22. If you only needed to adjust Add Item settings at this time, do the following:
 - a. Click the X in the upper right corner of WorkFlows.
 - b. Click "Yes" when warned "This will halt the workstation."
 - c. Click "Yes" when asked "Properties have been changed. Would you like to save changes?"
 - d. WorkFlows will close. The next time you log into WorkFlows, the previously changed Add Item settings will be retained.
 - e. Remember to repeat the steps in this section on any other library computers that have WorkFlows installed on them and also need their Add Item settings adjusted. Any settings changed in one WorkFlows do not automatically transfer to another WorkFlows.

Circulation Module: Add Brief Title Wizard

1. Log into WorkFlows using your library's SUPER login. Check with your library supervisor or contact the RSA Help Desk at 1-866-940-4083 if you are unsure of your SUPER login.
2. Click on the Circulation module at the top.
3. Expand the "Items" group on the left side of the screen if it is not already expanded.
4. Right click on "Add Brief Title", select "Properties."
5. Another pop-up window will appear where you can select default values.
6. Make sure the "Format" and the "Entries template" are both set to BRIEF.
7. Make sure the boxes next to "Permanent" and "Circulate" are checked.
8. For the "Type," RSA recommends selecting an ILL code as the default item type if your library uses the "Add Brief Title" wizard to catalog non-RSA interlibrary loan items.
9. Under "Call number default values," select your WorkFlows code from the library drop-down menu. Due to WorkFlows reconfiguration on April 8, 2020, AG_ALS-PDC will now appear as the default until you select your library.

WJ Add Brief Title : Set Properties

Display property page: Wizard Startup Never

Behavior Defaults

Format: BRIEF

Use entries: BRIEF

Shadow title

Permanent

Circulate

Type: BOOK

Library:

Home location:

Class scheme: AASTOR-PLD
AG_ALS-PDC

Optional Fields

Item cat1: FICTION

Item cat2: ADULT

Item cat3: BOOK

Item cat4: UNDEFINED

Item cat5: UNDEFINED

OK Cancel

Select your library code from this menu to avoid cataloging items as AG_ALS-PDC. AASTOR-PLD is shown here, but your library code will differ.

10. For home location, RSA recommends selecting an ILL code as the default home location if your library uses the “Add Brief Title” wizard to catalog non-RSA interlibrary loan items.
11. For the class scheme, make sure “Dewey” appears in the menu. If your library uses Library of Congress classification for its call numbers, select “LC.” If your library uses National Library of Medicine classification, select “NLM.”
12. Under “Optional Fields,” for item category 1, select FICTION or NONFICTION as the default, depending on which code you use more often when cataloging.
13. For item category 2, select ADULT, JUVENILE, or YOUNGADULT as the default, depending on which code you use most often when cataloging.
14. For item category 3, select the general format code you will use most often when cataloging. You will likely select BOOK as the default item cat 3. For a complete list of item cat 3 codes, see <https://alsi.sdp.sirsi.net/client/search/asset/3842>
15. For item category 4, select a default code for genre. Assigning item cat 4 is strongly recommended but not required. For a complete list of item cat 4 codes, see <https://alsi.sdp.sirsi.net/client/search/asset/3862/0>

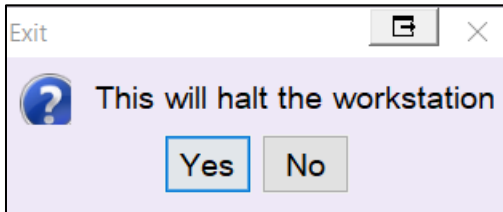
16. For item category 5, select a default code for sub-genre. Assigning item cat 5 is optional. For a complete list of item cat 5 codes, see the list posted at <https://alsi.sdp.sirsi.net/client/search/asset/3863>
17. For item categories 6-10, ensure UNDEFINED is selected.
18. Click "OK" at the bottom of the window to save your changes and close the window.
19. Do not exit WorkFlows. Continue to adjust the settings in this guide.

-- or --

20. If you only needed to adjust Add Brief Title settings at this time, do the following:
 - a. Click the X in the upper right corner of WorkFlows.
 - b. Click "Yes" when warned "This will halt the workstation."
 - c. Click "Yes" when asked "Properties have been changed. Would you like to save changes?"
 - d. WorkFlows will close. The next time you log into WorkFlows, the previously changed Add Brief Title settings will be retained.
 - e. Remember to repeat the steps in this section on any other library computers that have WorkFlows installed on them and also need their Add Brief Title settings adjusted. Any settings changed in one WorkFlows do not automatically transfer to another WorkFlows.

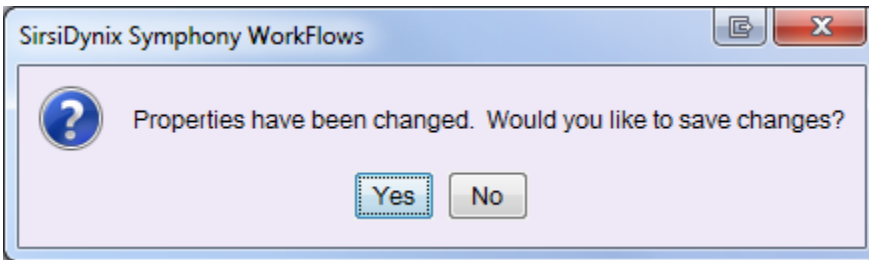
How to Complete WorkFlows Set-up

1. Click the X in the upper right corner of WorkFlows.
2. A pop-up will appear with this message:



Click Yes.

3. Another pop-up will appear with this message:



Click "Yes."

If "No" is selected, none of the settings you changed will be saved for your next WorkFlows session! You will need to reset them.

4. WorkFlows will close. You should see your computer's desktop.

Important Reminder about WorkFlows Set-up

Once you finish setting up WorkFlows, please remember to repeat the steps in this guide or copy your master Sirsi folder on all WorkFlows used for cataloging at your library. Doing so will ensure the settings are correctly configured in all of your library's WorkFlows.

Removal of Cataloging Accounts from WorkFlows

- Cataloging accounts are assigned protected profiles in WorkFlows. As a result, staff cannot use the Remove User wizard to delete their own cataloging account or that of a colleague.

If you try to remove a cataloging account, you will see the following error:



- Please contact the RSA Help Desk at help@rsanfp.org or 1-866-940-4083 if you need to delete your cataloging account or that of a colleague. RSA must be notified each time a staff member assigned a cataloging account no longer works at the library so his/her account can be removed from WorkFlows.
- Removal of cataloger accounts will be especially crucial to your library's security once RSA begins to use the web-based SirsiDynix BLUEcloud interface, which can be accessed from any internet connection to perform cataloging and circulation tasks, as well as run reports.