

Workflows Supervisor Set-up Guide

Last updated June 17, 2024

Contents

Supervisor Password.2Setting Defaults Behaviors.2Terms.3Accessing Menus to Set-up Defaults and Behaviors3Settings for All Libraries.5For Libraries using Receipt Printers Only.10Setting up Hold Slips in Discharging14Setting up Transit Slips in Discharging16Setting up Hold Wrapper Slips (Check-in wizard)16Setting up Receipts for Bills (Fines) Paid18Creating a BRIEF Record for an ILL Item19	Introduction	1
Terms3Accessing Menus to Set-up Defaults and Behaviors3Settings for All Libraries5For Libraries using Receipt Printers Only10Setting up Hold Slips in Discharging14Setting up Transit Slips in Discharging16Setting up Hold Wrapper Slips (Check-in wizard)16Setting up Receipts for Bills (Fines) Paid18	Supervisor Password	2
Accessing Menus to Set-up Defaults and Behaviors3Settings for All Libraries5For Libraries using Receipt Printers Only10Setting up Hold Slips in Discharging14Setting up Transit Slips in Discharging16Setting up Hold Wrapper Slips (Check-in wizard)16Setting up Receipts for Bills (Fines) Paid18	Setting Defaults Behaviors	2
Settings for All Libraries5For Libraries using Receipt Printers Only10Setting up Hold Slips in Discharging14Setting up Transit Slips in Discharging16Setting up Hold Wrapper Slips (Check-in wizard)16Setting up Receipts for Bills (Fines) Paid18	Terms	3
For Libraries using Receipt Printers Only.10Setting up Hold Slips in Discharging	Accessing Menus to Set-up Defaults and Behaviors	3
Setting up Hold Slips in Discharging	Settings for All Libraries	5
Setting up Transit Slips in Discharging	For Libraries using Receipt Printers Only	10
Setting up Hold Wrapper Slips (Check-in wizard)	Setting up Hold Slips in Discharging	14
Setting up Receipts for Bills (Fines) Paid	Setting up Transit Slips in Discharging	16
	Setting up Hold Wrapper Slips (Check-in wizard)	16
Creating a BRIEF Record for an ILL Item	Setting up Receipts for Bills (Fines) Paid	18
-	Creating a BRIEF Record for an ILL Item	19

Introduction

At each library, the library director and/or a designated person will be the Workflows **supervisor**. The supervisor will have the ability to set defaults and set up or change how various functions behave in the software. This is the admin level login for your library and only 1 or 2 people should ever use this login and ONLY to change the settings. The supervisor login should NEVER be used in day-to-day operations.

Supervisor Password

To login as the supervisor, you will need to user your normal login procedure, but wherever you would normally type CIRC, you will instead use SUPER.



DO NOT OPERATE YOUR LIBRARY LOGGED IN AS SUPERVISOR! ONLY USE THIS TO AMEND YOUR WORKFLOWS SETTINGS.

You only need to set up ONE computer using this guide. Once that computer is setup correctly, you can simply copy the settings between computers. We also recommend you keep at least one 'known good' copy of the settings saved on a thumb drive. This allows you to fix many Workflows issues without a lot of effort on your part.

If you have questions on how to backup your Workflows, please see the following guides: <u>How to Back Up the Workflows Configuration Folder on Windows 10</u> <u>How to Back Up the Workflows Configuration Folder on Windows 7</u>

Setting Defaults Behaviors

For each wizard in Workflows, you can use your supervisor login to change the default settings and many of the ways that wizard behaves. You can also make the same kind of changes for the helpers that appear within the wizards.

There are hundreds of decisions that you can make to fine-tune the way Workflows behaves. This set-up guide will take you step-by-step for a few of the most necessary changes – the changes needed to make Workflows operate immediately. Over time, you are likely to find yourself making additional changes to make the software work most effectively for your library.

RSA has set up custom login scripts for our largest libraries (specific list to follow). These libraries do not need to do any additional settings other than changing things on individual machines. For those libraries, all changes can be made by RSA and that change will update all those library's staff clients the next time they log in.

NOTE: RSA does not support printer configuration and so printers must be configured by each member library. The custom scripts mentioned above do not affect printer configurations.

You must be online to make these changes. In offline mode you can only set the offline wizard properties.

Terms

Wizard: A icon that guides the user through the steps to perform a specific task, such as checking out an item or paying a bill. Wizards are located on the left side of the Workflows screen and are grouped in toolbars (Common tasks, e.g.)

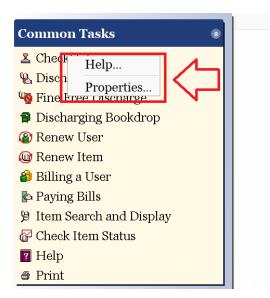
Helpers: Small icons found at the top of wizards that allow you to perform a specific task without leaving the wizard.

CheckOut ×	
. 4 8 0 4 1 4 4 9	IIII 🗔 👼 🔿

Default: The normal setting. Usually, a field that is already filled in for you, but that can be changed if necessary. For instance, the default payment type in the Pay Bills wizard is 'Cash.'

Accessing Menus to Set-up Defaults and Behaviors

To open the menus that will allow you change defaults and behaviors, you will need to rightclick on the name of the wizard itself. When you do so, you will see the following box:



Click on Properties.

Each box will have from one to three tabs: Behavior, Defaults, and Helpers. To choose any one of the tabs, click on the tab itself, and that will open the appropriate menu.

The next few pages will take you through the necessary changes you should make using these menus.

CheckOut : Set Properties	
Display property p	age: ○Wizard Startup •Never
Behavior Defaults Helpers	
Configure	
□ Hide current user	□ Hide current item
Extend user's library privilege	Pay bills
Proxy checkout with cancel hold	\Box Checkout reserve desk items
□ Automatically restart checkout on item ID error	Display circulation note
□Cache Item ID's	Display an alert for the next to last renewal
• Automatically renew items already checked out as see	en
• Automatically renew items already checked out as un	seen
• Do not automatically renew items already checked ou	ıt
Checkout all items associated with a set ${\scriptstyle \circ}$ Yes ${\scriptstyle \circ}$ Prompt	t
User Alerts Display	
 Display alert for delinquent user Display user aler 	ts
 Display user extended info alerts Display user bloc 	cks in a separate window □ Display alert for previous loan
Sounds	
(OK Cancel

Settings for All Libraries

Home Library: The primary thing you need to do is to make sure that Workflows knows what library it is in. This will need to be done in several places. These instructions will walk you step-by-step through doing a few of them, then give you the locations of the rest that need to be updated.

- Right-click on the Checkout wizard, then click on the word Properties.
- In the new window that pops up, left click on the tab that says Helpers.
- You should see a list of buttons for the Helpers that appear in the Checkout wizard. Click on the top one that says User Search.

	wior Defaults Helper			
	User Search			
	Display User User Lost Card			
	Register New User			
	Pay Bills			
2	Add Brief Title			
~	Item Search			
	Confirm Address			
	Change Item ID			
	Special Due Date Charge History Alternate Circ Rule			
2	Renew Privilege			
	Print User Card			
~	Print User			
•	Enable add photo Modify User			
	tart with search help			

- A smaller box should appear. Make sure that the tab at the top of it says Defaults.
- In field labeled Library, choose your own library name from the drop-down box, then click OK.

Resource Sharing Alliance NFP

CheckOut : User Search:Se	t Properties	×
Behavior Defa	ults Helpers	
Identify user	default	
Type:	$\bullet Keyword \circ Browse \circ Browse user group$	
Search index:	~	
Library:	~	
Sort by:	~	
	OK Cancel	

- **NOTE:** You also can change the default search results method on this screen as well:
 - <u>Keyword</u> Locates and displays user records that contain the terms you entered. Boolean operators, field qualifiers, and other search strategies can be used to narrow or expand your search.
 - Browse Produces a list in the alphabetic vicinity of the term you entered.
- Next click on the Register New User button.

eha	vior Defaults Helper	<	1		
Allo	w Configure Proper				
	User Search				
	Display User User Lost Card				
	Register New User				
	Pay Bills				
	Add Brief Title				
e	Item Search				
	Confirm Address				
	Change Item ID				
2	Special Due Date Charge History Alternate Circ Rule				
	Renew Privilege				
	Print User Card				
Ø	Print User				
	Enable add photo Modify User				
S	start with search helpe				

 \circ $\,$ Click on the tab at the top of the page that says Defaults.

 At the top of this box, where it says Library, choose your own library name from the drop-down
 box.

CD	×
Behavior Defaults	_
Library: Wo_WASH-PL Vrofile name: PUBLIC	
Charge history rule: NOHISTORY	
Track charges as Favorites	
Focus on: ○First name • Last name	
Addresses	
Primary address flag: • Address 1 0 Address 2 0 Address 3	

- **NOTE:** if you are a branch library, you need to choose your main library's name here. Main libraries own all patrons for that library and all its branches.
- Enter your library name in the User Cat 1 box.
- **NOTE:** if you are a branch library, you need to choose your branch name in the User Cat 1 box.

ren				
CheckOut : Register New	v User:Set Properties			×
Behavior Det	aults			
Library:	Wo_WASH-P	L	 Profile name: PU. 	BLIC ~
Charge histor	ry rule: NOHISTORY	~		
∎ ∎Track char	ges as Favorites			
-	°irst name ∘Last name)		
<pre>G Focus on: ○ First name ● Last name Addresses Primary address flag: ● Address 1 ○ Address 2 ○ Address 3</pre>				
Addresses Primary address flag: • Address 1 • Address 2 • Address 3 Demographics				
5 Demographics				
User cat1:	W1_WASHSUN	✓ User cat2:	~	
User cat3:		∨ User cat4:	~	
User cat ₅ :		- User cat6:	~	
• User cat7:		- User cat8:	~	
User cat9:		- User cat10:	~	
User cat11:		- User cat12:	~	
• Department	:	Birth date:	*	
Language:	ENGLISH	~		

• Next select the Add Brief Title button. Click on the tab at the top of the page that says Defaults.

Resource Sharing Alliance NFP

ha	vior Defaults Helpe	pperty page: • Wizard Startup • Never
Allo		
	User Search	
	Display User User Lost Card	
	Register New User	
	Pay Bills	
	Add Brief Title	1
 Image: Construction 	Item Search	1
~	Confirm Address	
	Change Item ID	
2	Special Due Date Charge History Alternate Circ Rule	
~	Renew Privilege	
	Print User Card	
	Print User	
	Enable add photo Modify User	
□ S	Start with search help	P

• In field labeled Library, choose your own library name from the drop-down box.

ties	W CheckOut : Add Brief Title:Set I	Properties	×
	Behavior Defaul		
	Format:	BRIEF	
f	Use entries:	BRIEF	- 11
ıfi			
\mathbf{r}	\Box Shadow title		- 11
pl	Permanent		- 11
Ι	Circulate		
er	Type:	BOOK	- 11
ay	Library:	Wo_WASH-PL ~	
В	Home location:	CATALOGING	
\mathbf{n}	Class scheme:	DEWEY	- 11
\mathbf{n}	Optional Fields		
ge		OK Cancel	

• Next select the Item Search button. Click on the tab at the top of the page that says Defaults.

eha	avior Defaults Helpe	\checkmark	
Allo	ow Configure Prope	ies	
	User Search		
	Display User User Lost Card		
	Register New User		
	Pay Bills		
	Add Brief Title		
	Item Search		
	Confirm Address	•	
	Change Item ID		
2	Special Due Date Charge History Alternate Circ Rule		
	Renew Privilege		
	Print User Card		
	Print User		
	Enable add photo Modify User		
	Start with search help	r	

• In field labeled Preferred Search Library, choose your own library name from the drop-down box.

CheckOut : Item Search:Set Properties		×
Behavior Defaults		
Search preferences		
Preferred search type:	• Keyword \circ Browse \circ Exact	
Preferred search index:	Title	
Preferred search library	: Wo_WASH-PL ~	
-		
	OK Cancel	
:		

 \circ $\,$ Now click OK at the bottom of the box with all the buttons.

This is the basic process for changing home locations. You will need to use the same process to set your library default in the following wizards:

In the Circulation Module

- User Registration
 - In the Default tab, enter your library.
 - NOTE: if you are a branch library, you need to choose your main library's name here as well in the box and set the User Cat 1 to your library.
 - **NOTE**: we recommend you turn on User Duplicate Searching in the Behavior tab.
 - Click the on button, then click Daytime phone, Home Phone, License #, Phone, and Street. This will add another button to the user registration screen called Check Duplicate User that will allow you to check for existing users with the same data.
- o Add Item
- In the Default tab under Search preferences select Item tree display collapsed to make navigating and finding items easier in the item tree.
- Add Brief Title
 - In the Default tab ensure the <u>Format</u> and <u>Use Entries</u> lines are set to BRIEF
 - Set your library name in the library line.
- Display Title Holds
 - Click the Detailed Hold Count button, then on the default tab, choose your library in the box that opens. Check the Item Search button, default tab, library to make sure it is set to your library.

Wizards in the Cataloging Module

- Call Number & Item Maintenance On the defaults tab, under Search preferences and the Call number default values section (both on the same page)
- Edit Item On the Default tab under Search preference

For Libraries using Receipt Printers Only

If you have questions on how to install your receipt printer, please see the section on the RSA Website dedicated to printers:

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

Setting Preferences

Common Tasks 🛛 🛞
👗 CheckOut
🖳 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

- Anywhere that you would like the option to print out a receipt (Checkout, Discharge, Renew, Paying Bills, etc.), right click on Wizard, select properties, and go to Behaviors tab.
- Make sure that in the Charge Printing section, Print date dues slips is selected.

• Select the Print Due Date Slips box.

Display property	y page: OWizard S	startup • Never	
Behavior Defaults Helpers			
Extend user's library privilege		Pay bills	
Proxy checkout with cancel hold		Checkout reserve des	k items
Automatically restart checkout on iter	m ID error	Display circulation no	ote
□Cache Item ID's		Display an alert for the second se	ne next to last
○ Automatically renew items already ch			
• Automatically renew items already ch		en	
• Do not automatically renew items alre	-		
Checkout all items associated with a set	• Yes \circ Prompt		
 Display alert for delinquent user Display user extended info alerts 		s in a separate window □ D) Display alert fo
 Display alert for delinquent user Display user extended info alerts Display user extended info alerts Play sound for User Delinquent alert Play sound for User Blocked alert Play sound for Hold alert Play sound for user extended info ale 	Display user blocks ublock.wav ihldblk.wav	s in a separate window ⊃ D	Display alert fo
 Display user extended info alerts Display sounds Play sound for User Delinquent alert Play sound for User Blocked alert Play sound for Hold alert 	Display user block: ublock.wav ihldblk.wav ert	s in a separate window 🗆 D	\$ \$
 Display alert for delinquent user Display user extended info alerts Display user extended info alerts Play sound for User Delinquent alert Play sound for User Blocked alert Play sound for Hold alert Play sound for user extended info ale Charge printing None Print date due slips Print charge receipts 	Display user blocks ublock.wav ihldblk.wav ert e slips ecceipts	s in a separate window \square D	\$ \$ \$

- The receipt is divided into three sections:
 - Header: unchanging info that prints at the top of each receipt
 - o Receipt fields: Items that will print for each item checked out
 - Footer: unchanging information that prints at the bottom of each receipt

Defaults	es
□ Print a separate date due slip for each item	n
Print list of patron's current checkouts	tl
Print checkout totals	
$\hfill\square$ Print sum of checked out item prices	
Receipt header:	
Receipt fields:	г
Receipt footer:	
□Allow date formatting description	
Date format description:	
OK Cancel	

Creating a Header

• To create a header, click on the diamond-shaped gadget to the right of the box. Each line of text in the header is called a string. Enter the data you want on the top line and click on Add. Do the same for any additional lines you want, such as a phone number or slogan. When you are done, click on Save.

	rate date due slip for each item
k	Enter String: Washington District Library
o le	
.s:	Down
er	
f d	Add (o) Save Remove Cancel

Adding Receipt Fields

- Click on the diamond gadget next to the box labeled Receipt Fields. You will get a screen with two boxes on it. One has potential fields you can include, the other will list the fields you have chosen. Highlight the fields you want included, then click on the arrow to select it. You may choose what you wish; recommended fields are:
 - o Item ID
 - o Title
 - o Due Date
 - When you have chosen the fields you want, click on OK.

Gadget : Receipt fields		×
List to choose from	List selected	ı k
Author	Title	ote
Call number	Item ID	
Current time	Date charged	le
Date charged		
Date due		
Item ID		
Library name		
Name		
Price		
Title		
User ID		
		is
		· · · · · · · · · · · · · · · · · · ·
"	II	
	OK Cancel	

 It is important to keep any Personal Identifying Information off receipts. This includes Patron Name or User ID. For questions about this, please see the <u>Printed Documents</u> <u>with PII guide</u>.

CheckOut : Set Properties	X	
Defaults		es
 Print list of p Print checkor 	ate date due sup for each item atron's current checkouts	no tł
Receipt header	Washington District Lib	
Receipt fields:	Title Item ID Date charged	D
Receipt footer:	Visit our website at	D
□ Allow date for	rmatting description	
Date format des	scription:	
	OK Cancel	
• Print charge	receipts Print charge receipts	

• Creating a footer is the same as creating a header.

- When your receipt is set up to your liking, click OK to return to the Checkout Properties box, then OK to close the Checkout Properties screen.
- Your date due slips should now automatically print during checkout.

Other Places to set up date due slips:

- There are several places in Workflows where you may need to print Date Due slips. You will have to set them up individually in each place.
- \circ The other locations where Date Due slips should be set up are:
 - Renew User Wizard
 - o Renew Item Wizard

Setting up Hold Slips in Discharging

- When you discharge a book that has a hold on it, you will want a receipt that contains the information of the person who placed the hold.
- Access the Properties menu for the Discharge.
- Click on the Behaviors tab at the top of the page, then put a check mark next to Print Available Hold Slips at the bottom left of the page. When you do so, the Print Available Hold Slips button will light up. Click on that button.

W Discharge (Checkin) : Set Properties		×
Display pr	coperty page: OWizard Startup • Never	
Behavior Defaults Helpers		
Accumulate miles. U 1es VINO UP1011	ipi	
Sounds	-	
 Play sound for Hold Available aler 	t disrout.way	*
 Play sound for Transit alert 	disrout.way	*
Play sound for Claims Returned al	ert disrout.wav	*
□ Play sound for User Delinquent ale	ert disrout.wav	٠
□ Play sound for Item not Charged al	ert disrout.wav	•
\Box Play sound for Item not in Catalog	alert disrout.wav	*
Allow Configure Properties		
Print available hold	slips	
Print transit slip	s	
 Print transit slips if transit to is out 		
• Library Group \circ Consortium Gro	1	×
Print reshelving sl		
Print hold wrapper	slips	
		I
	OK Cancel	

- Using the same process you used for checkout receipts, enter a header, receipt fields and footer. Since these are seen only by library staff, they need not be fancy. You may choose what receipt fields you wish. The recommended fields are:
 - o Title
 - o Item ID
 - o Name
 - Phone number
 - Comments
 - o User ID
 - o Email
- When your receipt is set up the way you want it, click on OK to return to the Discharging Properties box. You will stay here if you wish to set up transit slips.
- Hold available slips may include PII (name, phone, email) so that staff may contact the patron. Dispose of this information appropriately.

Other places to set up Hold Available slips

- There are several places, either wizards or helpers, in Workflows where you may need to print Hold Available slips. You will have to set them up individually in each place.
- The other locations where Hold Available slips can be set up are:
 - Fine Free Discharge Wizard
 - Discharging Bookdrop Wizard
 - o Remove User Hold Wizard

- Remove Item Hold Wizard
- Trap Holds Wizard

Setting up Transit Slips in Discharging

- Transit slips are used when books are returned that need to be sent to another library. They are a convenience for library staff only. You will still need to use the official RAILS routing label for materials that are to be placed in delivery.
- If you choose to print transit slips, you will find that choice just below the box hold slips. To set it up, put a check mark next to Print Transit Slips at the bottom left of the page.
- Using the same process, set up what information you would like on your transit slips.
- You may choose what receipt fields you wish; recommended fields are:
 - o Transit to
 - o Transit Date
 - o Title
 - o Item ID
 - Transit Library
- When your receipt is set up the way you want it, click on OK to return to the Discharging Properties box. Then click on OK to exit this screen.

Other places to set up Transit slips

- There are several places, either wizards or helpers, in Workflows where you may need to print Transit slips. You will have to set them up individually in each place.
- \circ $\;$ The other locations where Transit slips can be set up are:
 - Fine Free Discharge Wizard
 - Check Item Status Wizard
 - Remove User Hold Wizard
 - Remove Item Hold Wizard
 - Trap Holds Wizard
 - Discharging Bookdrop Wizard
 - Pending Transits Wizard
 - Receive Transit Wizard

Setting up Hold Wrapper Slips (Check-in wizard)

 A feature in Symphony is the Hold Wrapper Slip. A hold wrapper is typically a slip of paper printed with user, hold, and/or item information that is wrapped or folded around the spine of an item to be placed on a holds shelf. Hold wrappers are most useful in libraries that have a self-service hold shelf. You will also have the option to limit the patron ID number and patron name printing length to provide privacy.

Allow	Configure Properties	
	Print available hold slips	
	Print transit slips	
🗆 Pri	nt transit slips if transit to is outside selected group	
٥L	ibrary Group \circ Consortium Group	
	Print reshelving slips	
	Print hold wrapper slips	

- If you choose to print hold wrappers, you will find that choice in any wizard that potentially traps a hold. The process is essentially the same as setting up the other receipt printer settings.
- You may choose what receipt fields you wish; recommended fields are:
 - o Expires
 - Name (limited in length if you wish)
 - User ID (limited in length if you wish)
- When your receipt is set up the way you want it, click on OK to return to the Properties window. Then click on OK to exit this screen.

Other places to set up Hold Wrapper slips

- There are several places, either wizards or helpers, in Workflows where you may need to print hold wrapper slips. You will have to set them up individually in each place.
- \circ $\,$ The other locations where the wrappers can be set up are:
 - Fine Free Discharge Wizard
 - Remove User Hold Wizard
 - Remove Item Hold Wizard
 - Trap Holds Wizard
 - Discharging Bookdrop Wizard

Setting up Receipts for Bills (Fines) Paid

- Some libraries like to provide a receipt whenever patrons pay fines, whether for overdue items, lost materials, etc.
- Access the Properties menu for the Paying Bills wizard by right-clicking on the wizard's name, then choosing properties. The **Paying Bills: Set Properties** box will open.

Common Tasks 🛛 🛞	
🛓 CheckOut	Paying Bills : Set Properties X
🖳 Discharge (Checkin)	Display property page: ○Wizard Startup • Never
崎 Fine Free Discharge	
🗃 Discharging Bookdrop	Behavior Defaults Helpers
🝘 Renew User	Allow bills to be forgiven/cancelled
🞯 Renew Item	Allow Configure Properties
🎒 Billing a User	Print slip showing payments
🔄 Paying Bills	Payment types that open cash drawer
🞾 Item Search and Display	Payment type:
🚰 Check Item Status	
7 Help	
e Print	
Users 🛞	OK Cancel
💪 Display User	

- The process is essentially the same. You will choose text for the receipt fields and create a footer.
- You may choose what receipt fields you wish; recommended fields are:
 - Current time (includes date)
 - o Amount billed
 - Amount paid
 - o Reason for bill
 - o Title
 - \circ Author
 - o Payment Type
 - o Payment Info
- When your receipt is set up the way you want it, click on OK to return to the Paying Bills Properties box. Then click on OK to exit this screen.
- There are several places (either wizards or helpers) in Workflows where you may need to print receipts for bills. You will have to set them up individually in each place.
- \circ $\;$ The other locations where receipts for bills paid can be set up are:
 - Billing a User Wizard

- Paying Bills Helper
 - Access it by clicking on Properties for the Checkout wizard, then choosing the Helpers tab. Click on the button that says Paying Bills and you will see the place to set up Print Slip Showing Payments.

Creating a BRIEF Record for an ILL Item

If you have an item that comes up as "Item not found in catalog" or get an item from a patron via OCLC or an outside the system library, you can create a Brief Record from the Checkout Wizard.



There are only three required fields for an ILL Brief Record:

- Title (Must be entered in all upper case)
- Library (your library)
- o Item ID (whatever barcode you are scanning to check item out)

Title info				
ISBN:	020	~	~	
Personal Autho		~ 1	~	
Corporate Autl		~ 1	~	
Conference Au	thor: 111	~ 1	~	
Title:	245	~	~	**REQUIRED FIELD**
Call number ar	nd copy info			
Library:	AG_ALS-PDC		~	
Item type:	воок		~	
	: CATALOGING		~	
Item ID:	2355608-1001			
Item cat1:	UNDEFINED		~	
Item cat2:	UNDEFINED		~	
Item cat3:	UNDEFINED		~	
Item cat4:	UNDEFINED		~	
Item cat5:	UNDEFINED		~	
Item cat6:	UNDEFINED		~	
Item cat7:	UNDEFINED		~	
Item cat8:	UNDEFINED		~	
Item cat9:	UNDEFINED		~	
Item cat10:	UNDEFINED		~	

After you hit Add Brief Title, the item will **immediately** check out to the patron.

Under the SUPER User, you can set preferences for Library and Home Location.

🐠 CheckOu	ut : Set Properties		
]	Display pro
		•	
Behav	vior Defaults	Helper	S
Allow	v Configure	Proper	ties
	User Sear	ch	
	Display Us		
	User Lost C	ard	
	Register New	v User	
	Pay Bills	S	_
	Add Brief T	Title	
	Item Sear	ch	
	Confirm Add	dress	
	Change Iten	n ID	
	Special Due	Date	
	Charge His	-	
	Alternate Circ	c Rule	
	Renew Privi	ilege	
	Print User (Card	
	Print Use	er	
	Enable add p	ohoto	
	Modify Us	ser	
□ <mark>S</mark> t	art with searc	ch helpe	er

In the Behavior Tab, make sure the following items are unchecked:

- Auto-generate item ID when adding item
- ISXN warnings must be acknowledged

And make sure the following items are checked:

- o Library
- o Item Type
- Home Location
- o ItemCat1-5

CheckOut : Add Brief Title:Set Properties	×
Behavior Defaults	
□Auto-generate item ID when adding item	
□ SXN warnings must be acknowledged	
Modify	
Library	
Item type	
Home location	
∎ <mark>I</mark> tem ID	
Litem category 1	
Litem category 2	
Litem category 3	
Litem category 4	
tem category 5	
□ Item category 6	
□ Item category 7	
□ Item category 8	
□ Item category 9	
□ Item category 10	
OK Cancel	
OK Cancer	

In the Defaults tab, set up your most likely to be used item type, your library, and the home location you would like to use:

		×
Behavio [•] De	faults	
Format:	BRIEF	T. I.
Use entries:	BRIEF	
Shadow ti	tle	
Permanen	t	
Circulate		
Type:	BOOK	
Library:	Wo_WASH-PL ~	
Home location: ILL		
Class scheme	e: DEWEY ~	N
Optional Fie	lds	
Item cat1:	UNDEFINED ~	
Item cat2:	UNDEFINED	
Item cat3:	UNDEFINED	
Item cat4:	UNDEFINED	
Item cat5:	UNDEFINED	
	UNDEFINED ~	
	UNDEFINED ~	
	UNDEFINED ~	
-	UNDEFINED ~	
Item cat10:	UNDEFINED ~	
	OK Car	ncel

If this is a brief record of an item the library intends to keep, the brief record should be reported to the RSA Cataloging department.

If this is a brief record for an ILL item, it should not be kept in the database, but checked out to your library's Discard User for deletion upon its return.