


Wizard	Tab	Property Option	Setting	Explanation
 Discharge/Checkin Wizard	Behavior	Hide Current Item	check/uncheck	If the check box is selected, the Current button will not appear under Identify Item to allow you to select the most recently viewed or modified item for the check in. If the check box is cleared, the Current button will appear.
		Display User Information		not used by our system
		Pay Bills	check	If this property is selected, when a bill is created on discharge, the Pay Bills screen opens so you can take care of the patron's outstanding bills.
		Display Instructions	check	Displays a message with instructions for items that are to be routed for special reshelving, for example— Holds shelf, Reserve Desk, and so on. Displays a status alert window if the user's status has a delinquency type of DELINQUENT, BLOCKED, or BARRED.
		Warning If User Delinquent	check	Displays a message with instructions for items that are to be routed to the Holds shelf for an available hold or for items that are to be put in transit to fill a hold at another library.
		Display Hold Instructions	check	If the check box is unchecked, the item is added to the list of discharges, and the "Item Not Checked Out" message displays in the Message column for the item.
		Display "Item Not Checked Out" Error in a Separate Window	uncheck	Displays a message with instructions for items that are to be put into transit for shelving at another library. By default, this check box is cleared.
		Display In Transit Instructions	check	
		Display Circulation Note	check	
		Enable 3M Enhanced Pad	uncheck	if using RFID, contact SAILS
		Check for Claims Returned Items	check	You can continue discharging and have the option of opening the user record to edit it if your library's policy says to decrement the claims returned #.
		Claims Returned Alert: Allow Modify User Prompt	check	When selected, the program opens the Discharging: Modify User wizard after completely discharging the item.
		Display Bill Warning for Every Item	uncheck	If this property is selected, when discharging multiple overdue items for the same user, Symphony will display a warning message prompting the payment of a fine for each item.
		Accumulate Fines -		Yes – Wizard always accumulates or groups together fines for each patron. The Select All button will display above the list of discharged items and be selected by default when this option is selected.
		No – Fines will not be grouped together and totaled for each patron at check in.		
Display User ID in List	check/uncheck	Prompt – Asks if you want to accumulate fines, Yes/No.	Only affective if the Accumulate Fines property is set to no.	
Configure Properties		See information on website about setting up receipt printers		
Defaults				
		Automatic Payment Defaults	we don't use these (has to do with patron credit accounts)	

Helpers	<ul style="list-style-type: none"> • Item Search Helper • Cash Management Wizard - check with SAILS • Pay Bills Helper • Check Item Status Helper • Change Item ID Helper • Print User Helper 	Select which you want to have displayed in the Discharge Wizard
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 **Checkout Wizard**

Behavior	Hide Current User Hide Current Item	check check	
	Extend User's Library Privilege Pay Bills	check check	Renew a patron's expired privileges during check out. If the check box is not selected, the staff cannot extend the patron's expired privileges, and the patron will be unable to check out items. If Symphony is configured to charge a fee when the user's privilege is extended, a bill is created. For example, the NOMASS profile will create a bill.
	Proxy Checkout with Cancel Hold	check/uncheck	Allows an item placed on hold by a patron to be checked out by this patron's family member or friend. Checking out the item cancels the hold. We've had so much trouble with holds being cancelled, this shouldn't be allowed unless circ staff have been thoroughly trained. It's also a privacy issue, so please make sure your library allows this.
	Automatically Restart Checkout on Item ID Error Display Circulation Note	check check	If staff forgets to select Checkout to New User, and scans a user ID in the Item ID field, the check out process automatically restarts by clearing the previous user from the screen, and accessing the user record for the user whose ID was scanned in the Item ID field.
	Display an Alert for the Next to Last Renewal Automatically Renew Items Already Checked Out as Seen Automatically Renew Items Already Checked Out as Unseen Do Not Automatically Renew Items Already Checked Out Display Alert for Delinquent User	uncheck uncheck check uncheck check	Suppresses the "Item already charged to this user" message Displays the "Item already charged to this user" message so the user can decide whether to renew the item
	Display User Alerts	check	Displays a message during check out with important information from the user record if the user has alerts, such as an available hold, claims returned items, privilege expiration, and so on
	Display Alert for Previous Loan	uncheck See information on website about setting up receipt printers	Displays a message during check out if the user had previously checked out a copy of the title. Can be a nuisance with magazines.
	Charge Printing Email Checkout Receipt:		
	Display Email All Checkouts receipt button Display Email Current Checkouts receipt button Template	check/uncheck check/uncheck library policy name	will be the name of your library policy (ask SAILS for help)

Defaults we don't use credit accounts

Helpers			Library cards are the best way to identify a user, but if you need to search, use this and be sure to verify the street address and/or phone number to make sure you have the correct patron.
	User Search Helper		
	Display User Helper	check	
	User Lost Card Helper	uncheck	best to just replace the barcode.
	Register New User Helper	check	Used to register a new user.

Cash Management Helper	uncheck	contact SAILS if you're interested in using Workflows as a point of sale cash register
Pay Bills Helper	check	Used to accept bill payment. For more information, see Pay Bills Helper.
Add Brief Title Helper	check	Used when you need a circulate a book that came in through traditional ILL. Click for more information.
Item Search Helper	check	Used to display item information. Click for more information.
Confirm Address Helper	check/uncheck	Used to confirm or update a user's address.
Change Item ID Helper	check/uncheck	Used to replace a missing, damaged, or temporary barcode. Must be logged in as tech.
Special Due Date Helper	check	Used to set a special due date and time for checkouts/renewals.
Charge History Helper	uncheck	For patron privacy, charge history should not be available to staff.
Alternate Circ Rule Helper	uncheck	
Renew Privilege Helper	check	Used when the user's privilege is set to expire within 30 days. For more information, see Renew Privilege Helper.
Print User Helper	check if printer available	Can print current checkouts and/or holds.
Enable add photo	uncheck	we don't use photos
Start with Search Helper	uncheck	we should be using barcodes before searching for a patron



Fine Free Discharge/Checkin

use same settings as normal Discharge/Checkin



Renew User

Behavior

Warning If User Delinquent		Displays a status alert window if the user's status has a delinquency type of DELINQUENT, BLOCKED, or BARRED Allows circulation staff to renew a patron's expired privileges during check out. If the check box is not selected, the staff cannot extend the patron's expired privileges, and the patron will be unable to check out items. If Symphony is configured to charge a fee when the user's privilege is extended, a bill is created. For example, the NOMASS profile will create a bill.
Extend User's Library Privilege	check	If you select this property, an individual window for each item displays during renewal. In this window, you can click Renew This Item to renew each selected item, or click Do Not Renew to cancel the process.
Review Items Before Renewing	check	
Renew Reserve Desk Items	uncheck	
Override All Failed Items	uncheck	let the system determine if an item may be renewed
Display User Alerts	check	Displays a message during check out with important information from the user record if the user has alerts, such as an available hold, claims returned items, privilege expiration, and so on
Display Circulation Note	check	
Display an Alert for the Next to Last Renewal	uncheck	See information on website about setting up receipt printers
Charge Printing		

Defaults

Renew All/Selected Checkouts Default	check/uncheck	The Select All check box in the Renew User wizard can be used to select all eligible charged items for renewal. A "seen" renewal means the item is physically present at the time of renewal.
Renew All/Selected Seen Items Default	uncheck	
Automatic payment defaults	unused	
List items for renewal default: List Items		
Currently Due On or Before	leave blank	

Helpers

- User Search Helper
- Display User Helper
- User Lost Card Helper
- Pay Bills Helper
- Special Due Date Helper
- Limit List by Due Date Helper
- Renew Privilege Helper



Renew Item

Behavior	Renew Reserve Desk Items	uncheck
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	Review Items Before Renewing Display Circulation Note	check check	If you select this property, an individual window for each item displays during renewal. In this window, you can click Renew This Item to renew each selected item, or click Do Not Renew to cancel the process.
	Display an Alert for the Next to Last Renewal	uncheck	
	Extend User's Library Privilege	check	Renew a patron's expired privileges during check out. If Symphony is configured to charge a fee when the user's privilege is extended, a bill is created. For example, the NOMASS profile will create a bill.
	Accumulate Fines - The property controls if the created fines are grouped together by patron and totaled at the end of the session for easy payment.	Yes No Prompt See information on website about setting up receipt printers	Wizard always accumulates or groups together fines for each patron. The Select All button will display above the list of discharged items and be selected by default when this option is selected. Fines will not be grouped together and totaled for each patron at check in. Asks if you want to accumulate fines, Yes/No.
	Charge Printing		
Defaults	Item Seen	uncheck	A "seen" renewal means the item is physically present at the time of renewal.
Helpers	Automatic payment defaults • Item Search Helper • Change Item ID Helper • Special Due Date Helper • Pay Bills Helper	unused	




Bill a User

Behavior	Hide Current User	check/uncheck	If the check box is selected, the Current button will not appear under Identify User to allow staff to select the most recently viewed or modified user record for the check out. If the check box is cleared, the Current button will appear.
	Hide Current Item	check/uncheck	If the check box is selected, the Current button will not appear under Identify Item to allow you to select the most recently viewed or modified item for the check in. If the check box is cleared, the Current button will appear.
	Bill User	check	This option allows the patron to pay the bill later.
	Pay Now	check	This option allows the patron to pay the bill in full now.
	Allow Bills to Be Forgiven/Cancelled	check	Select this check box to include payment types of FORGIVEN or CANCEL on the payment type list.
	Print Slip Showing Payments	check/uncheck	check box to print a receipt at the time of payment
	Payment types that open cash drawer	uncheck	
Defaults	Show bill note	check	Select this check box to allow the Note column to display under Individual Bills and Payments. Will only appear for newer bills.
	Show bill tax	uncheck	
	Show bill total	check	
	Payment Type	Select the payment type used most often at your library	The Payment Type field is a required field.
	Automatic payment defaults	unused	



Paying Bills

Behavior	Allow Bills to Be Forgiven/Cancelled	check	Select this check box to include payment types of FORGIVEN or CANCEL on the payment type list.
	Print Slip Showing Payments	check/uncheck	check box to print a receipt at the time of payment
	Payment types that open cash drawer	uncheck	
Defaults	Show bill note	check	Select this check box to allow the Note column to display under Individual Bills and Payments. Will only appear for newer bills.
	Show bill tax	uncheck	
	Show bill total	check	

	Payment Type	Select the payment type used most often at your library	The Payment Type field is a required field.
	Automatic payment defaults	unused	
 Item Search and Display	Behavior	Search Library List Type	Select: Search by library
These settings are with the cataloger in mind. If just searching, configure at will			From the drop-down list, select ALL
	Defaults	Search Preferences:	All – Includes all libraries on the system
		Type: Keyword	locates and displays records that contain the terms you entered. Boolean operators, field qualifiers, and other search strategies can be used to narrow or expand your search. Keyword will bring back the most results.
		Browse	produces a list in the alphabetic vicinity of the term you typed.
			displays a single record of the search index you used. This option is best for specific number or code searches. If the exact ID is not in the database, a message displays that the information was not found.
		Exact	
		Index: Author	Browses last name only. This field contains the item's author. This field is cataloged using the 1XX field and can be a personal, corporate, or government name. Added or secondary authors display in 7XX fields.
		Select which you use most often. Can be changed for a limited time, based on need. Just don't save your properties when exiting workflows.	Browses only one library at a time, displaying each number of copies. The call number is a number (and/or letters) assigned to an item according to a particular class scheme. It determines the item's placement in the library collection.
		Call Number	Browses only subject indexes. A keyword search of the whole bibliographic record.
		General	Also called barcode. Defaults to the exact search.
		Item ID	
		Periodical Title	Browses only the periodical index. Periodicals are a special group of materials with issues or parts that arrive periodically. Magazines, journals, and serials can all be considered as types of periodicals.
		Series	This search option retrieves headings from the bibliographic record that contain series titles, such as 440, 490, or 830.
		Subject	This field contains controlled language subject headings. This field is cataloged using the 6xx heading field (subject).
		Title	This field contains an item's main title. This field is cataloged using the 245 tag.
		Title Control Number	It identifies the specific title record in the catalog. This number is system generated if the title is created in SirsiDynix Symphony, with an "a" prefix, such as a9484. If the record is imported from a bibliographic utility, it will be preceded by a different prefix. For example, OCLC records have an "o" prefix, such as o3453456, which is based on the OCLC record number. This number may also be referred to as the title key, title control key, or flexible key.
		Library: ALL	Best to search all libraries unless you're trying to find a title on shelf.
		Display View Pane Check	Gives a preview of the title highlighted in the search results list
	Editor Display Options:	MARC View (Select)	displays selected view when cataloging/editing titles
		Descriptive View (Do not select if cataloging)	
		Display Fixed Fields (uncheck)	
		Display descriptive labels (for entries)(check)	
	Call Number/Item Default Values	Show Shelving key (uncheck)	

Item Tree Defaults	Item Tree Display Expanded Item Tree Display Collapsed (select)	Displays item tree with all call numbers expanded Displays item tree with the user's library call numbers expanded and all others collapsed.
Extended Info Display Options	Display Staff Note on Item List Display Public Note on Item List	
Tabs to display: Bills Tab	show bills - check Library - All libraries	but know you can investigate by looking at the paid bills after performing a search.
Orders Tab	Bill type: Unpaid Show Orders - check Library - Full access to all libraries Orders Type - All	
Checkouts Tab	Show Checkouts - check Charge Ownership Library Checkouts Type - depends on what	Checkout library or Owning library; controls the display of an items checkouts Full access to all libraries Active - Displays only active charges for the item
	information you're looking for. Default should be Active.	All - Displays all charges for the item. Claims - Displays only charges for the item that a user claims to have returned. Inactive - Displays only inactive charges for the item. Overdue - Displays only overdue charges for the item.
Hold Tab	Show Holds - check Library Type Library Holds Type	Renewals - Displays only charges for the item that have been renewed. Owning library - Displays an item's holds by the library that owns the item. Pickup library - Displays an item's holds by the library specified for pickup. Placed at library - Displays an item's holds by the library where the hold was placed. Full access to all libraries All

Helpers

- Display Bibliographic Description Helper
 - Print Labels Helper
 - Print Preview Labels Helper
 - Configure Options for Item Search Helper
 - Advanced Search Helper
- [Find how to search and set the properties for these helpers.](#)







Check Item Status

Behavior	Display Instructions Display hold instructions Display intransit instructions	check check check	Displays messages for items that require some type of action. Routes items to holds shelf. Places the item intransit.
Configure Properties		See information on website about setting up receipt printers	











Display User

Behavior	Addresses Tab Extended Info Tab Show SMS Notice Contact Info Tab Default Tab Bills Tab Checkouts Tab Holds Tab	check check check Summary All Libraries Unpaid All Libraries Active Display suspension dates All Libraries Active	The following are recommended settings.
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	Defaults			If this property is set to allow the Note column to display for the Bills tab, the Note column may also display in the bill information displayed in the CheckOut, Renew User, and User Lost Card wizards and the Display User Helper.	
		Show bill note	check		
	Helpers	<ul style="list-style-type: none"> • User Search Helper • Modify User Helper • Pay Bills Helper • Print User Helper 			
		Start with Search Helper	uncheck	best to start by scanning in the patron barcode	
	User Registration	Behavior	Auto-generated User ID	uncheck	See information on website about registering patrons.
			Default User ID Prefix	uncheck	
			Show Addresses Tab	check	
			Show Extended Info Tab	check	
			Show SMS Notice Contact Info Tab	check	
			Show Privileges Tab	check	
			Demographics Tab	check	
			Allow routing	check	
			Duplicate Checking	off	
		At End of Wizard:		show checked buttons (select all)	
	Defaults	Library		enter your library	
			Profile name	ADULT or most common profile used at workstation	
			Charge history rule	NOHISTORY	
			Track charges as favorites	uncheck	
			Focus On	Click either First Name or Last Name	The cursor will be entered on this field when you open this wizard.
			Addresses	Address 1	
			Demographics	UserCat1	set your library's most common demographics. Refer to the patron registration manual for details
				UserCat3	Patron's preferred contact method for notices
				UserCat4	Mostly used for identifying residents from noncertified towns
			Birthdate	leave blank	
			Language	set to English	
	Modify User	Behavior	Show Demographics Tab	check	
			Show Addresses Tab	check	
			Show SMS Notice Contact Info Tab	check	
			Show Extended Info Tab	check	
			Show Privileges Tab	check	
			Allow Privilege Renewal By Profile	check	Displays a check box that, when selected, renews a user's library privileges based on the user profile. Automatically extends a user's library privileges when the user's profile changes. Privileges will be changed according to the selected user profile.
			Profile Modified/Auto Extend Privilege	check	
		At End of Wizard:		show checked buttons (select all)	
	Defaults	Focus On		Click either First Name or Last Name	The cursor will be entered on this field when you open this wizard.
	Copy User				handy wizard to use if you're registering a family
	Remove User	Behavior	Pay Bills	check	
			Remove User Hold	check	This option allows you to remove holds placed by a specific user. Select the check box to display a prompt before attempting to remove a user who has a charge history.
			Prompt Before Removing Charge History	check	
				show checked buttons (select all)	
		At End of Wizard:		all)	











 Add Brief Title	Defaults	Format Use Entries	MARC-OO SELECTED ENTERIES 245 should be entered in the blank field	Click for instructions on creating a brief title
		Shadow title Circulate	check check	
		Type Home location Item Cat1	what your library uses for ILL. ILL ILL	
 Mark Item Missing	Behavior	User ID	your library's in-house missing patron	call SAILS if you don't have this
 Mark Item Lost	Behavior	Automatically Bill for Lost Item	check	Displays the Billing for Lost Item/Processing Fee window for you to enter a bill amount for the lost item and a processing fee. Displays the Pay Now button for you to accept payment for the lost item at the time the item is marked as Lost. Displays each item found with the User Search or Item Search helpers for review before marking it lost.
		Pay Now	check	
		Display Item From Search Before Marking It Lost	check	
 Place Hold	Behavior	Pay Bills	check	Pay Bills allows a patron to pay bills while placing holds.
		Clear Previous Item ID	check	If you want to place multiple holds on a title for different users, you can clear this property check box and the item ID will remain in the wizard.
		Display Suspension Dates	check	
		Display Hold Level	check	
		Display Hold Range	check	
		Display "First in Queue"	check	Should only be used if patron's hold was removed by accident and they were at the top of the queue
		Pickup Library Default	Workstation Library	this can always be changed later
	Defaults	Level	Title	this allows any available copy on this title in the network to fill the hold Places a hold across all copies in the system that are eligible to fill the hold.
		Range	System	
 Place Blanket Hold	Behavior	Pay Bills	check	
		Clear Previous Item ID	check	
		Display Suspension Dates	check	
		Display Hold Level	check	
		Display Hold Range	check	
	Defaults	Level	Copy	If you want more than one copy of a title to fill the blanket hold, place a Copy level hold on each copy you want.
		Range	System	
 Modify Holds for User	Behavior	Display Suspension Dates	check	Select this check box to automatically make a now suspended hold unavailable. Status remains on hold shelf unless you do a check item status or run the clean holds shelf report.
		Remove From Holds Shelf	check	
		Make Next Hold Available	check	Select this check box so that when an available hold is suspended, the next hold in the queue, if any, becomes available.
		Reroute Available Hold	check	when an available hold is modified and the pickup location is changed, a transit message displays. You can then put it in transit.
		Allow Editing of Pickup By Date	check	
 Remove User Holds	Behavior	Remove From Holds Shelf	check	Select this check box to automatically make a now suspended hold unavailable. Status remains on hold shelf unless you do a check item status or run the clean holds shelf report.
		Make Next Hold Available	check	Select this check box so that when an available hold is suspended, the next hold in the queue, if any, becomes available.
		Display Summary Screen	check	The dialog box lists the user ID, item ID, and title for each hold that was removed.
 Display Title Holds	Helpers	Detailed Hold Count	check	provides specific hold counts for the title based on the selected library, the hold level, and the type of hold count.

Click the helper button for these options: Library - your choice

Level - your choice

For -

If you use the Select Call Number/Item helper to select a copy or volume, the Level option will automatically change to Copy or Volume. Choose either to view just your patrons holds (patron library or pickup library is you) - My Library, or the whole network - All.

 Modify Holds for Item	Behavior	Display Suspension Dates	check	The item's current location will remain as the Holds shelf until you make the hold unavailable using the Check Item Status wizard, or by running the Clean Holds Shelf report. when an available hold is suspended, the next hold in the queue, if any, becomes available. when an available hold is modified and the pickup location is changed, you'll be prompted to put the item in transit. let's you extend the due date for extenuating circumstances
		Remove From Holds Shelf	check	
		Make Next Hold Available	check	
		Reroute Available Hold Allow Editing of Pickup By Date	check check	
 Remove Item Hold	Behavior	Remove From Holds Shelf	check	The item's current location will remain as the Holds shelf until you make the hold unavailable using the Check Item Status wizard, or by running the Clean Holds Shelf report. when an available hold is suspended, the next hold in the queue, if any, becomes available. confirmation window will appear when hold is removed
		Make Next Hold Available	check	
		Display Summary Screen	optional	
 Trap Hold	Behavior	Skip Transit	check	if you need to check the title out locally, after you've trapped it to go to a different library, you'll be able to override the transit and check it out to your patron. Printing options are up to your library
 Onshelf Items Click for instructions on using the Onshelf Items Wizard Any options not listed are considered optional	Behavior	Allow Trap Hold	check	If this check box is selected, the Trap Hold for Selected Copy button displays and trap holds is an option in the right-click menu works the same as the missing wizard. Be sure to have your missing patron configured in the missing wizard check if you are able to print from this workstation to a non-receipt printer For all the reasons a hold can't be filled, there are other procedures, such as checking the item out to a missing or discard patron workstation. The helper outputs the list in a comma-delimited format and saves the data to a file with a .csv extension. Outside the WorkFlows client, navigate to the folder where you saved the file. Double-click the file, and it will open in your default spreadsheet application.
		Allow Mark Item Missing	check	
		Allow Print List	optional	
		Allow Unfill Hold Display Item ID	unchecked check	
		Prompt for Confirmation Before Marking an Item Missing and Unfilling a Hold	check	
Helpers				
	Export Onshelf Hold Items List	optional		
 User Lost Card		contact SAILS before use		
 Discharging Bookdrop		see regular discharge wizard properties		
 Ephemeral	Behavior Defaults	see regular checkout wizard properties		Type or scan a default barcode to use when checking out impermanent items. Ex. SWA-ROMANCE. Easy to remember and you don't need to keep a card at the desk. Good for statistics - create a short record in the system so you can get credit for these checkouts too.
		Default barcode	optional	
 Pending Transits	Behavior	Display Instructions	check	Displays messages for items that require some type of action (route to holds shelf, put in transit, and so on). Select the Display Hold Instructions check box to display a window with instructions for items that have holds
		Display Hold Instructions	check	

Display in Transit Instructions	unchecked	display a window with instructions for items that are to be put into transit or taken out of transit.
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Helpers


Select Another Library Helper	checked	if you want to see another library's transits. Good for managing branches.
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Receive Transits

see trap holds wizard properties

Cataloging Properties

Wizard	Tab	Property Option	Setting	Explanation
Call Number and Item Maintenance 	Behavior	Search Library list type	Search by Library or search group - ALL	
		Add Call Number	Check	
		Prompt for library when adding call number	Uncheck unless you are adding for a branch	
		Auto-generate temporary XX call numbers	Uncheck	
		Add item when adding a new call number	Check	
		Add item	Check	
		Auto-generate item ID when adding item	Uncheck	
		Modify existing call number	Check	
		Modify existing item	Check	
		Delete call number	Check	
		Delete item	Check	
		Maintain Marc Holdings	Uncheck	
		Delete items with a charge history	Check	
		Set current location to Available Soon	Uncheck	
		Print labels for new items	Uncheck	
Defaults	Index	Library	Select your preferred search index	
		Library	ALL	
		Display View Pane	Check	
		MARC View	Check	
		Descriptive View	Uncheck	
		Display fixed fields	Uncheck	
		Display descriptive labels (for entries)	Check	
		Library	Select your library	
			Dewey or DeweyPer – except for BCC and Mass	
		Class Scheme	Maritime Academy	
		Shadow Call Number	Uncheck	
		Show Shelving key	Uncheck	
		Item tree display collapsed	Select this option	
		Item tree display expanded		
		Display Staff note on item list	Optional	
		Display Public note on item list	Optional	
		Type	Enter your most commonly used	
		Home Location	Enter your most commonly used	
		Permanent	Check	
		Circulate	Check	
		Shadow	Uncheck	
		Price	\$	
		Item Category 1	Enter your most commonly used	
		Item Category 2	Enter your most commonly used	
		Media Desk	Leave blank	
		Tab Display Preference	Select Bibliographic	
		Helpers	Print labels	Print labels
Print preview labels	Check			

List catalog by call number

Check



Item Search and Display

Behavior	Search by library or search library group	Check
	Search library list	All
Defaults	Type	KEYWORD
	Index	Select your preferred search index
	Library	ALL
	Display View Pane	Check
	MARC View	Check
	Descriptive View	Uncheck
	Display Fixed Fields	Uncheck
	Display descriptive labels (for entries)	Check
	Show Shelving key	Uncheck
	Item tree display collapsed	Select this option
	Item tree display expanded	
	Display Staff note on item list	Optional
	Display Public note on item list	Optional
	Show Bookings	Uncheck
	Show Holdings	Uncheck
	Show Serial Control	Check
	Show bills	Check
	Library	All Libraries
	Bills type	Unpaid
	Show orders	Check
	Library	Full access to all libraries
	Orders type	All
	Show checkouts	Check
	Charge ownership	Owning Library
	Library	All Libraries
	Checkouts type	Active
	Show Holds	Check
	Library type	Placed at Library
	Library	All Libraries
	Holds Type	All
	Show Selection lists Folder	Check
	Library	Full access to all libraries
	Status	None
	Tab Display Preferences	Bibliographic
Helpers	Display Bibliographic Description	Check – Click on configure button to set these defaults: Library - Full access to all Libraries Entries - All Shadow - Both
		Display Descriptive labels (for entries) - Check

	Display Numeric tags (for entries) - Check	
	All Call Numbers - Check	
	All Items - Check	
	Marc Holdings - Uncheck	
	Bound-with - Uncheck	
	Fixed fields - Uncheck	
	Order Summary - Check	
Print labels	Check	
Preview Print labels	Check	
	Check – Keep these defaults and remember you can change them when you perform a search. The changes will stay until you close the wizard.	
Configure Options for Item Search	Publication Year - blank	
	Format - ALL	
	Item Type - ALL	
	Location - ALL	
	Item Category 1 - ALL	
	Item Category 2 - ALL	
	Language - ALL	
	Shadow - Both	
	Sort by - None	
	Call Number Browse: Class scheme	Dewey – except for BCC and Mass Maritime Academy
	Record View - ALL	
	Entries - Leave blank	
	Marc Holdings - Uncheck	
	Call Number/Item Order - Ascending	
		General, Author, Title, Subject, Series, Periodical Title (advanced search lets you combine indexes)
Advanced search	Check	



Add Title

	Display property page at wizard start up should be selected	
Defaults	Format	MARC-OO, SERIAL-00 or MUSEUMPASS
	Entries template	TEMPLATE
	Shadow title	Uncheck
	Add item when creating title	Check
	MARC view	Select
	Display fixed fields	Uncheck
	Display descriptive labels (for entries)	Check
	Library	Select your library
	Class scheme	Dewey or DeweyPer (SERIAL-00). LC (BCC and Mass Maritime Academy)
	Shadow Call number	Uncheck

	Show shelving key	Uncheck
	Type	Enter your most commonly used
	Home Location	Enter your most commonly used
	Permanent	Check
	Circulate	Check
	Shadow item	Uncheck
	Price	If the item is lost, the patron will be billed this amount.
	Item Category 1	Enter your most commonly used
	Item Category 2	Enter your most commonly used
	Media Desk	Leave blank
	Tab Display Preference	Bibliographic
<hr/>		
Behavior	Add Call Number	Check
	Prompt for library when adding a new call number	Uncheck – unless you add copies for branches
	Auto-generate temporary XX call numbers	Uncheck
	Add Item when adding a new call number	Check
	Add Item	Add Item
	Auto-Generate item ID when adding item	Uncheck
	Delete call number	Check
	Delete item	Check
	Maintain MARC holdings	Uncheck
	ISXN warnings must be acknowledged	Uncheck
	Disable diacritic keyboard shortcuts	Uncheck
	Set current location of new items to Available soon	Uncheck
	Print labels for new items	Uncheck
<hr/>		
Helpers	Validate headings	Uncheck
	Print labels	Check
	Print preview labels	Check
	List catalog by item number	Check
	Add Subfield Delimiter/code	Uncheck
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