



Acquisitions Properties Symphony

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Introduction

Be sure to check your property settings in circulation immediately after upgrading your Workflows client to GL 3.1. You must be logged in as ACQ to make and save property changes. To view and change property settings, you must right click on the wizard.

General

Session Settings

Behavior

Enter date ready	Check
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Defaults

Maintenance library	Select your library
Display library	Select your library
Fiscal cycle	Select year

Fund Preferences

Automatically add audit trail to	Do not check
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Display Preferences

Order in Foreign Currencies	Optional
Enter Requisition number in order	Optional
Enter Requester Id	Optional
Display only selected segments in viewer pane of Segments interface	Optional
Number of Segments to trigger display of single selected segment in view pane	100
Specify discount in order	Optional
Enter Ship info in Distribution	Optional
Enter extended price	Optional

Orderline Tree

Display extended info alerts in tree when orderline is expanded	Check
Display distributions in tree when orderline is expanded	Check
Display claim/cancel segments in tree when orderline is expanded	Check
Sort order tree by title	Optional

Invoice Behavior

Automatically number invoice lines	Optional
Automatically invoice orderlines that are received-in-full	Default
Allow selection of orderlines for invoicing	Optional
Populate invoice line amount from order line	Default is unchecked
After invoice lines have been created, display a confirmation message	Default is checked
Add linking errors to the invoice line entry	NOTE

Selection Behavior Preferences

Enter listline vendor	Check
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Orderline defaults

Sum distribution quantities	Uncheck
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New Segments Defaults

Default library for holding code setup	Set to your library
Funding	Select single or multiple funding
Split funding	Select if using multiple funding
Distribution	Holding Distribution

Claim and Cancellation Defaults

Cancel Reason	Select reason from list
Claim Reason	Select reason from list
Claim On	Default is Today to change click on gadget to set date

Item Search and Display

Behavior

Search by library	Check
Search library list	All

Defaults

Type	Enter your most commonly used type
Index	Enter your most commonly used index
Library	All Libraries
MARC view	Check
Descriptive view	
Display fixed fields	Uncheck
Display descriptive labels (for entries)	Check
Show shelving key	
Item tree display	Default is Collapsed
Display staff note on item list	Optional
Display public note on item list	Optional
Show bookings	
Show holdings	
Show serial control	Check
Show bills	Enter your most commonly used
Bills tab: Library	All libraries
Bills tab: Bills type	Unpaid
Show checkouts	Check
Checkouts tab: Change ownership	
Checkouts tab: Library	
Checkouts tab: Checkouts type	All
Show Sectionlists folder	
Sectionlists: Library	
Sectionlists: Status	
Show orders	Check

Show orders: Library	All
Show orders: Orders type	
Show holds	
Show holds: Library type	
Show holds: Library	
Show holds: Holds type	

Helpers

Display Bibliographic Description	Check – Click on configure button to set more defaults
Print labels	Check
Preview Print labels	Check
Configure options for Item Search	Check - Click on configure button to set more defaults
Advanced search	Check – Click on configure button to set more defaults

Display Bibliographic Description Helper Defaults

Library	Full access to all Libraries
Entries	All
Shadow	Both
Display Description labels (for entries)	Check
Display Numeric tags (for entries)	Check
All Call Numbers	Check
All Items	Check
Marc Holdings	
Bound-with	
Fixed fields	Uncheck
Order Summary	Check

Configure Options for Item Search Defaults

Publication Year	
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

Call Number Browse	Dewey for all except for BCC and MMA
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Display/Order of libraries

Name	
Description	
None	Default

Record view

Review view	ALL
Entries	
Marc Holdings	Uncheck

Call Number/Item Order

Ascending	Checked
Descending	

Advanced Search Defaults

Presentation type	Single field or Advanced search (binocular search)
Advanced search preferences	Change choose up to eight indexes to display when advanced search option.

Fund Wizards

Review all funds

Behavior

Show Copies Folder	Check
Show Financials Folder	Check
Show Performance Folder	Check
Show Fund Levels Folder	Check
Miscellaneous behavior – when searching funds go directly from fund lookup to review all	Optional

Defaults

Search preferences	Select search
Preferred search index	Choose from list
Selection defaults	Check

Review available funds

Behavior

When searching funds, go directly to from fund to review available	Check
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Defaults

Preferred search type	Select search, browse, or exact
Preferred search index	Select from list
Selection defaults	Check

Display all fund cycles

Defaults

Preferred search type

Select search browse or exact

Preferred search index

Select from list

Financial	Check
Performance	Check
Extended Info	Check
Levels	Check
Copies	Check

Display Specific Fund cycle

Defaults

Preferred search type

Select Search, Browse, Exact, or Fund level

Preferred search index

Select from list

Financial	Check
Performance	Check
Extended info	Check
Levels	Check
Copies	Check
Invoices	Check
Orders	Check

Add Fund

Defaults

Generate new fund ID automatically	Uncheck
Account number	
Level 1	Select from list
Level 2	Select from list
Level 3	Select from list
Level 4	Select from list
Budget amount	
Encumbrance allowed %	
Expenditure allowed %	
Block over encumbrance	
Block over expenditure	
Ordering allowed	Check
Paying allowed	Check

Duplicate Fund

Defaults

Preferred search type	Search, Browse, Exact, Fund level
Preferred search index	Select from list
Generate new fund ID automatically	Uncheck

Modify Fund

Behavior

Allow modification of budget amount	Check
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Defaults

Preferred search type	Search, Browse, Exact, and Fund Level
Preferred search index	Select from list

Add Fund Cycle

Defaults

Preferred search index	Enter your most commonly used
New Fiscal cycle	
Budget amount	
Encumbrance allowed %	
Expenditure allowed %	
Block over encumbrance	
Block over expenditure	
Ordering allowed	Check
Paying allowed	Check

Modify Fund Budget

Defaults

Preferred search type	Enter your most commonly used
Preferred search index	Enter your most commonly used
Select all	
When adjusting budgets, set option to:	Replace (=), Increase (+), Decrease (-)
When adjusting budgets:	Review Individually, Do not review Individually

Transfer Budget Amount

Defaults

Preferred search type	Enter your most commonly used
Preferred search index	Enter your most commonly used
Display options	Check select all
Transfer options – fiscal year of destination funds	Select a fiscal year

Helpers

Adjust options	Check – Click on button to set Adjust Options
Adjust options defaults	Default is replace

Rollover Fund

Defaults

Preferred search index	Enter your most commonly used
Selection defaults – Select All	Check
Options adjust after rollover	Check

Helpers

Adjust options	Check – Click on button to set Adjust Options
Adjust options defaults	Default is replace

Delete Fund

Do not use this Wizard unless you consult with SAILS first

Defaults

Preferred search index	Select your most commonly used
Remove Defaults	Remove selected Cycles

Vendors

Review all vendors

Defaults

Preferred search type	Enter your most commonly used
Preferred search index	Enter your most commonly used
Show Amounts Tab	Check
Show Quantities Tab	Check
Show Averages Tab	Check
When searching vendors, go directly from vendor lookup to review all	Check

Display Vendor (All cycles)

Defaults

Preferred search type	Enter your most commonly used
Preferred search index	Enter your most commonly used
Show Extended Tab Info	Check
Show Deposit Account Tab	
Show Amounts Tab	Check
Show Counts Tab	Check
Show Vendor Cycle Info Tab	Check
Show Invoices Tab	
Show Averages Tab	Check

Display Vendor (Specific Cycle)

Defaults

Preferred search type	Enter your most commonly used
Preferred search index	Enter your most commonly used
Show Extended Tab Info	Check
Show EDI Address Tab	
Show Deposit Amount Tab	
Show Orders Tab	Check
Show Addresses Tab	Check
Show Vendor Cycle Info Tab	Check
Show Discount Table Tab	
Show Serial Control Tab	Check

Add Vendor

Defaults

Auto-generated ID	Uncheck
Group 1	LOCAL
Group 2	
Group 3	
Ordering Allowed	Check
Paying Allowed	Check
Order claim period	Default is blank enter the number of days
Order cancel period	Default is blank enter the number of days
% encumbrance allowed	Default is 100%

Duplicate Vendor

Defaults

Preferred search type	Enter your most commonly used
Preferred search index	Enter your most commonly used
Generate new vendor ID automatically	Uncheck

Modify Vendor

Defaults

Preferred search	Search, Browse, or Exact
Preferred search index	Select from list
Show Extended Tab Info	Check
Show EDI Address Tab	
Show Deposit Amount Tab	
Show Addresses Tab	Check
Show Vendor Cycle Info Tab	Check
Show Discount Table Tab	

Add Vendor Cycle

Defaults

Preferred search index	Enter your most commonly used
New fiscal cycle	Enter your most commonly used
Order claim period	
Order cancel period	
% encumbrance allowed	Default is 100%

Delete Vendor

Defaults

Preferred search type	Enter your most commonly used
Preferred search index	Enter your most commonly used
Remove vendors and all cycles or Remove Selected cycles	Select Remove selected cycles

Orders

Display Order

Defaults

Preferred search type	Enter your most commonly used
Preferred search index	Enter your most commonly used
Item Library	ALL
Entries to display	ALL
Entries to display	ALL

Helpers

Display Bibliographic Description	Check - Click on configure button to set more defaults
Save Orderline to file	Check - Click on configure button to set more defaults
Display all orderlines	Check

Display Bibliographic Description Helper Defaults

Library	Full access to all Libraries
Entries	All
Shadow	Both
Display Description labels (for entries)	Check
Display Numeric tags (for entries)	Check
All Call Numbers	Check
All Items	Check
Marc Holdings	
Bound-with	
Fixed fields	Uncheck
Order Summary	Check

Save Orderline to File Helper Defaults

Orderline Extended information

Entries to display	ALL
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Order Extended information

Entries to display	ALL
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Add Basic Order

Behavior

Auto-generated order ID	Uncheck
Show order extended information	Check
Use quantity matching for order maps	Check
ISXN warning must be acknowledged	Uncheck
Add Temporary Title	Click on Button to set more defaults
Require adding temporary title for each orderline	
Require searching and selecting an existing title for each orderline	
Allow searching and selecting an existing title and Add temporary title	Select this option
Add Temporary title	Check
SmartPort	Uncheck
Skip Item lookup/add	Check

Add Temporary Title Defaults

Format	ACQ or ACQPBK
Entries template	TEMPLATE
Entries	
Shadow title	Uncheck
Add item when creating title	Check
MARC View	Check
Descriptive view	
Display fixed fields	
Display descriptive labels (for entries)	Check
Library	Select your library
Class Scheme	Dewey
Shadow call number	Uncheck
Show shelving key	Uncheck
Type	ONORDER or ONORDERN
Home location	ON-ORDER
Permanent	Check
Circulate	Check
Shadow item	Uncheck
Price	
Media desk	Leave blank
Item Category 1	
Item Category 2	

Defaults

Preferred search type	Keyword, Browse, or Exact
Preferred search index	Select from list
Item Library	ALL
Vendor ID	Click on gadget to select
Order type	Select from list
Date ready	Click on gadget or leave as NEVER
Date mailed	Click on gadget or leave as NEVER
Quantity	Default is 1
Unit Price	
Request ID	
Parts in set	
Bib Entries	ACQ
Discount	TABLE
Requisition number	
Date mailed	
Fund ID	Click gadget to select fund
Automatically display payment fields in funding segments	Check
Automatically display receiving fields in distribution segments	Check
Automatically display loaded field in distribution segments	Check
Holding Code	Your ACQ code

Helpers

Display Bibliographic Description	Check – Click on Button to set Defaults (see page 17)
Find A Holding Code	Check – Click on Button to set Defaults
Produce Order Reports	Check – Click on Button to set Defaults
View Order Reports	Check

Find A Holding Code Defaults

Library	Select your library from drop down list
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Produce Order Reports Defaults

Library Address on Notice	Check
Library Address	Primary
Notice Text	Purchaseorder
Count as notice mailed	
Vendor Address to print	
Type of notice	Order, Order line, or Cancellation

Duplicate Order

Behavior

Show order extended information	Check
ISXN warnings must be acknowledged	Uncheck
Remove orderline	Check

Defaults

Preferred search type	Enter your most commonly used
Preferred search index	Enter your most commonly used
Item Library	Set to your library
New Order ID default	Set to None - You will be prompted for an ID
Date Ready	Click on gadget to set date or leave default NEVER
Date Mailed	Click on gadget to set date or leave default NEVER

Helpers

Produce order report	Click on Button to set Defaults
View order reports	Check
Save Orderline to File	Click on Button to set Defaults
Display All Orderlines	Check

Produce Order Report Defaults

Library Address on Notice	Check
Library Address	Primary
Notice Text	Purchaseorder
Count as notice mailed	
Vendor Address to print	
Type of notice	Order, Order line, or Cancellation

Save Orderline to File Helper Defaults

Orderline Extended information

Entries to display	ALL
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Order Extended information

Entries to display	ALL
--------------------	-----

Add Orderlines

Behavior

Auto-generated order ID	Uncheck
Show order extended information	Check
Use quantity matching for order maps	Check
ISXN warning must be acknowledged	Uncheck

Defaults

Add Temporary Title	Click on Button to set more defaults
Require adding temporary title for each orderline	
Require searching and selecting an existing title for each orderline	
Allow searching and selecting an existing title and Add temporary title	Select this option
Add Temporary title	Check
SmartPort	Uncheck
Skip Item lookup/add	Check

Add Temporary Title Defaults

Format	ACQ or ACQPBK
Entries template	TEMPLATE
Entries	
Shadow title	Uncheck
Add item when creating title	Check
MARC View	Check
Descriptive view	
Display fixed fields	Uncheck
Display descriptive labels (for entries)	Check
Library	Set to your library
Class Scheme	Dewey
Shadow call number	Uncheck
Show shelving key	Uncheck

Type	ONORDER or ONORDERN
Home location	ON-ORDER
Permanent	Check
Circulate	Check
Shadow item	Uncheck
Price	
Media desk	Leave blank
Item Category 1	
Item Category 2	

Defaults

Preferred search type	Enter your most commonly used
Preferred search index	Enter your most commonly used
Item Library	ALL
Vendor ID	Click on gadget to select
Order type	Select from list
Date ready	Click on gadget or leave as NEVER
Date mailed	Click on gadget or leave as NEVER
Quantity	Default is 1
Unit Price	
Request ID	
Parts in set	
Bib Entries	ACQ
Discount	TABLE
Requisition number	
Date mailed	

Modify Order

Behavior

ISXN warnings must be acknowledged	Uncheck
Remove orderline	Check

Defaults

Preferred search	Enter your most commonly used
Preferred search index	Enter your most commonly used
Item Library	ALL
Date Ready	Click gadget to change date or leave as Never
Fund ID	Click gadget to select fund
Holding code	Set to your ACQ holding code

Helpers

Display Bibliographic Description Helper	Check – Click on Button to set defaults (see page 19)
Find A Holding Code	Check – Click Button to set defaults (see page 23)
Produce Order Reports	Check – Click Button to set defaults (see page 24)
View Order Reports	Check
Save Orderline To File	Check – Click on Button to set defaults (see page 25)
Break Title Link	Check
Change Title Link	Check
Replace Fundings & Distributions	Check
Display All Orderlines	Check

Delete Order

Defaults

Preferred search type	Enter your most commonly used
Preferred search index	Enter your most commonly used
Item Library	ALL

Orderline extended information

Entries to Display	ALL
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Order extended information

Entries to Display	ALL
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Helpers

Display Bibliographic Description	Check – Click Button to set defaults (see page 19)
Save Orderline to File	Check – Click Button to set defaults (see page 25)
Display All Orderlines	Check
Prorate Invoice	Check
Save Funds Summary	Check