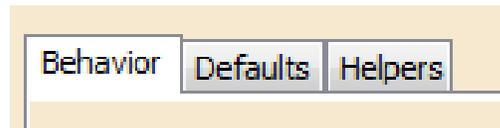


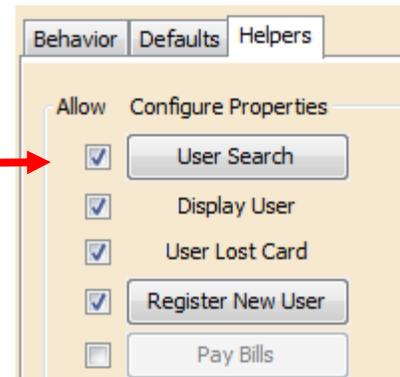
Wizard Property Basics

- This is all computer specific
- Make sure the wizard you are working in is closed or the changes will not be reflected properly.
- Right Click to pull up your properties
- Change from Wizard Startup to Never.
 - If you change it on startup it only applies for that session and the pop up will never go away, and the session settings reset each time.

• Be aware of the tabs



• And the buttons within them



Wizard Property Basics

A note on the Helpers Buttons:

Allow	Configure Properties
<input checked="" type="checkbox"/>	User Search
<input checked="" type="checkbox"/>	Display User
<input checked="" type="checkbox"/>	User Lost Card
<input checked="" type="checkbox"/>	Register New User
<input type="checkbox"/>	Pay Bills
<input type="checkbox"/>	Add Brief Title
<input checked="" type="checkbox"/>	Item Search
<input checked="" type="checkbox"/>	Confirm Address
<input checked="" type="checkbox"/>	Change Item ID
<input checked="" type="checkbox"/>	Special Due Date
<input checked="" type="checkbox"/>	Alternate Circ Rule
<input checked="" type="checkbox"/>	Renew Privilege
<input type="checkbox"/>	Print User Card
<input checked="" type="checkbox"/>	Print User
<input type="checkbox"/>	Enable add photo

Start with search helper

You can click anywhere within the helpers tab where you see a button in order to further customize the helper.

If you do not use a specific helper, simply uncheck it to turn it off!

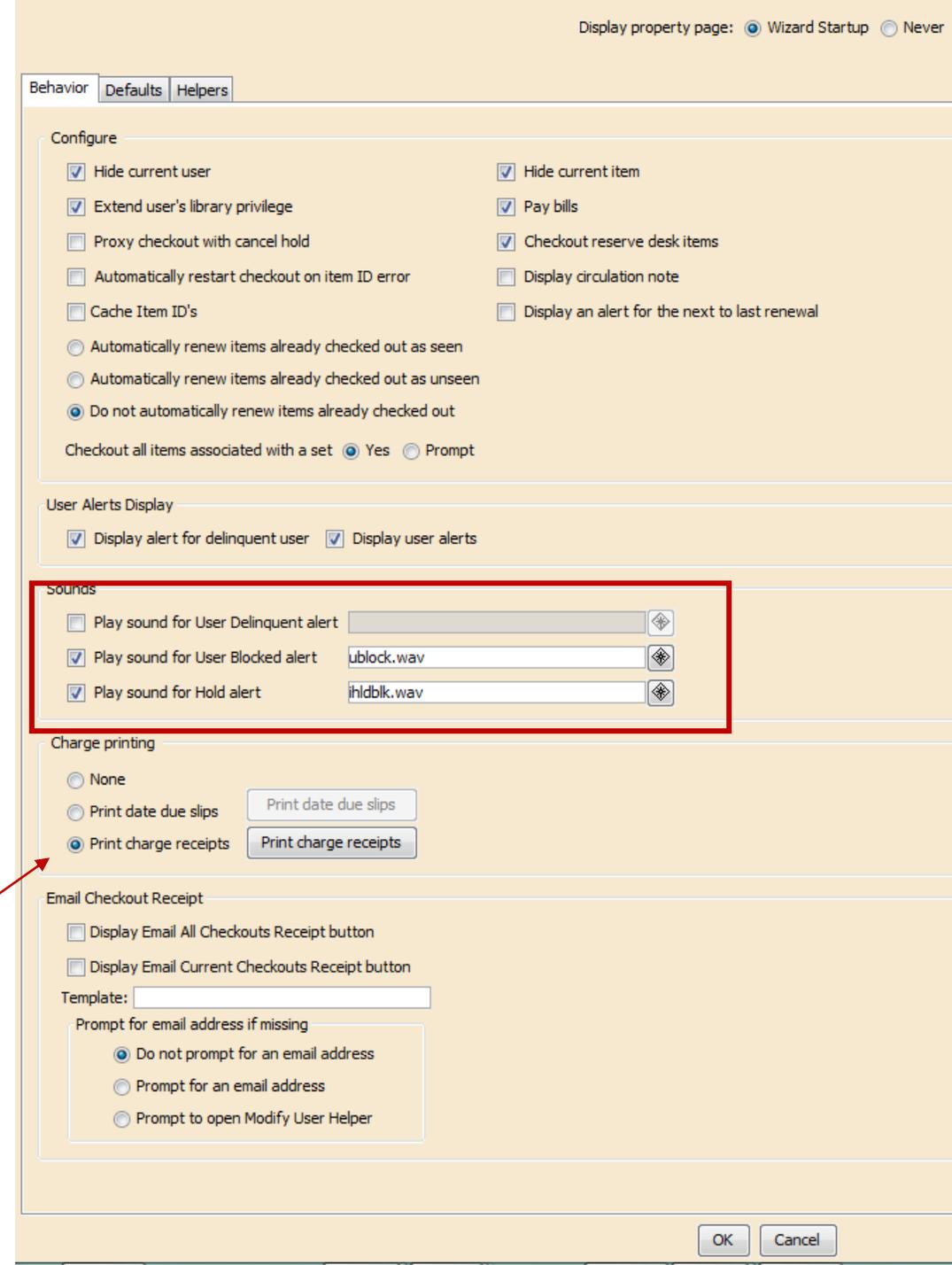
Common Tasks: Checkout Properties



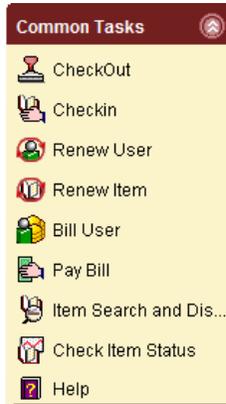
Some people don't like sounds - others do.

If you have your speakers muted you should turn sounds off, otherwise your computer might search for a way to play the sound and create a delay.

This can change based on your printer and printing preferences.



Common Tasks Checkin Properties



This error means that the item was already checked in, or not checked out at all.

With this checked, a window will popup to tell you the item hasn't been checked out.

If you want to avoid the extra popup you can uncheck this and the error will still appear on the right hand side of the screen.

A screenshot of the "Checkin Properties" configuration window. The window has tabs for "Behavior", "Defaults", and "Helpers". The "Configure" section contains several checkboxes: "Hide current item" (checked), "Pay bills" (checked), "Warning if user delinquent" (unchecked), "Display 'item not checked out' error in a separate window" (checked and highlighted with a red box), "Display circulation note" (unchecked), "Display bill warning for every item" (checked), "Accumulate fines:" (radio buttons for Yes, No, Prompt; No is selected and highlighted with a red box), "Display user information" (unchecked), "Display instructions" (checked), "Display hold instructions" (checked), "Display in transit instructions" (checked), "Check for claims returned items" (unchecked), "Claims returned alert: allow modify user prompt" (unchecked), and "Display user ID in list" (unchecked). The "Sounds" section contains a list of alerts with checkboxes and sound file paths: "Play sound for Hold Available alert" (checked, disrout.wav), "Play sound for Transit alert" (checked, disrout.wav), "Play sound for Claims Returned alert" (unchecked, disrout.wav), "Play sound for User Delinquent alert" (checked, disrout.wav), "Play sound for Item not Charged alert" (checked, disrout.wav), and "Play sound for Item not in Catalog alert" (checked, disrout.wav). The "Allow" section contains checkboxes for printing slips: "Print available hold slips" (checked), "Print transit slips" (unchecked and highlighted with a red box), "Print transit slips if transit to is outside selected group" (unchecked), "Print reshelving slips" (unchecked), and "Print hold wrapper slip" (unchecked). A red arrow points from the "Print transit slips" checkbox to a text box at the bottom right.

This may also vary based on your printer and printing preferences

Common Tasks

Renew User

Renew user renews by specific user.

Defaults:

Renew	Seen	Title



Be sure to right click and set the properties!

Allow	Configure Properties
<input checked="" type="checkbox"/>	User Search
<input checked="" type="checkbox"/>	Display User
<input checked="" type="checkbox"/>	User Lost Card
<input checked="" type="checkbox"/>	Pay Bills
<input checked="" type="checkbox"/>	Special Due Date
<input checked="" type="checkbox"/>	Limit List by Due Date
<input checked="" type="checkbox"/>	Renew Privilege

To renew all eligible items as "unseen" renewals, select the **Select All** check box.

To renew all eligible items and record the renewals as "seen" renewals, select the **Select All** check box and the **Select All Seen** check box.

To renew only selected items as an "unseen" renewal, select the **Renew** check box next to the item or items you want to renew.

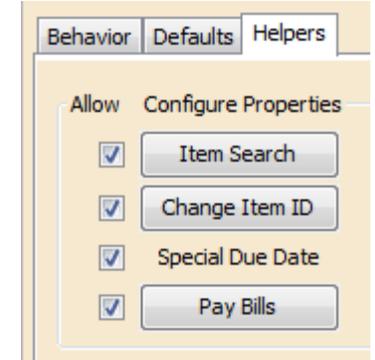
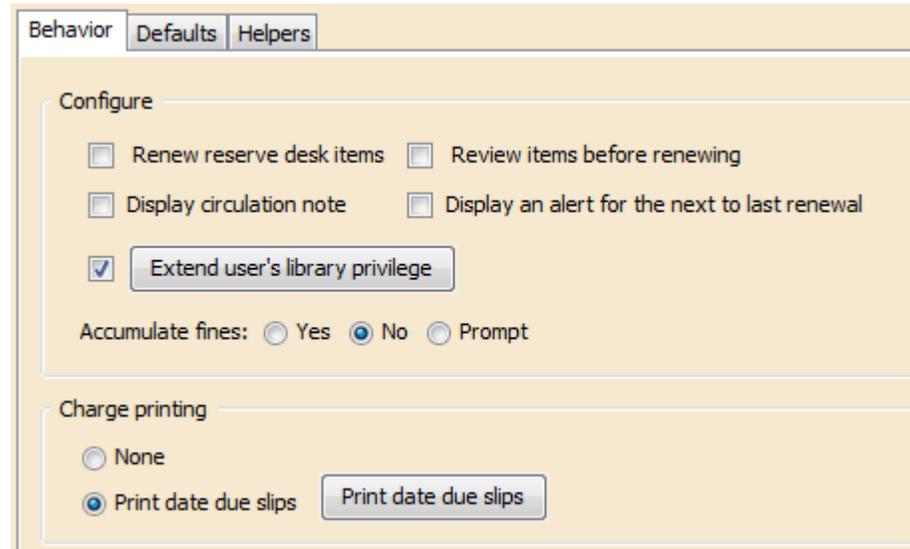
To renew only selected items and record the renewal as a "seen" renewal, select the **Renew** check box and the **Seen** check box next to the items or items you want to renew.

Common Tasks

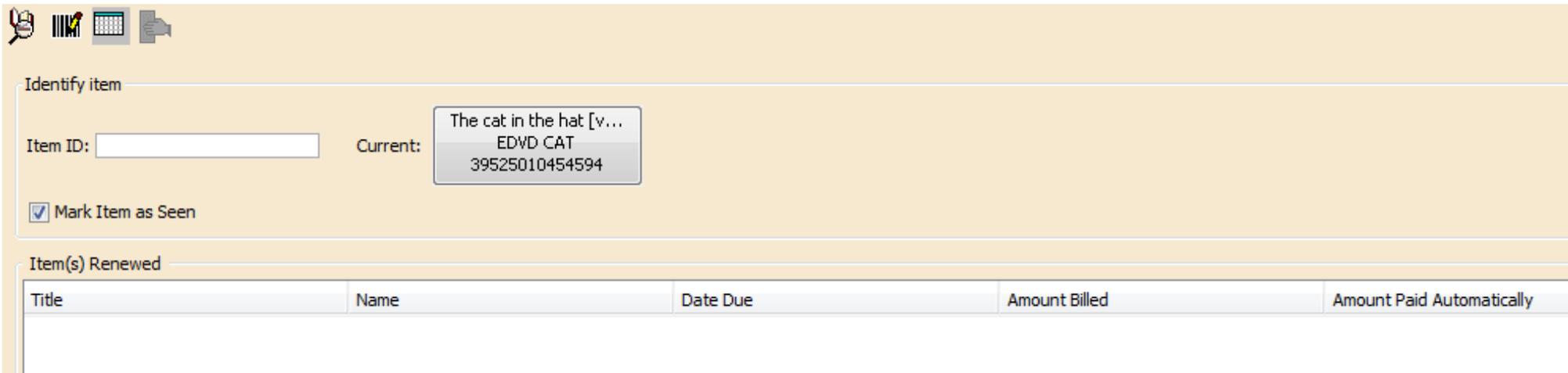
Renew Item



Be sure to right click and set the properties!



You can mark items seen or unseen, scan a barcode or use item search to find the correct item to renew.



Common Tasks and User Group

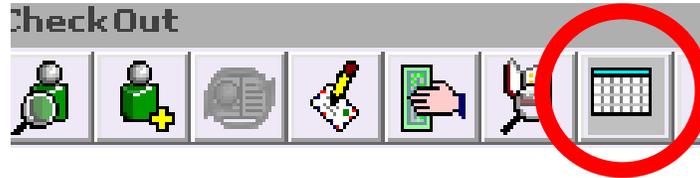
Bill Notes

- Turn it on in properties – bill user, pay bill, display user
- This will only display in the above wizards and the bill glossary
- You cannot use it for reports
- It is tied to the bill. When the bill goes away, so does the note!

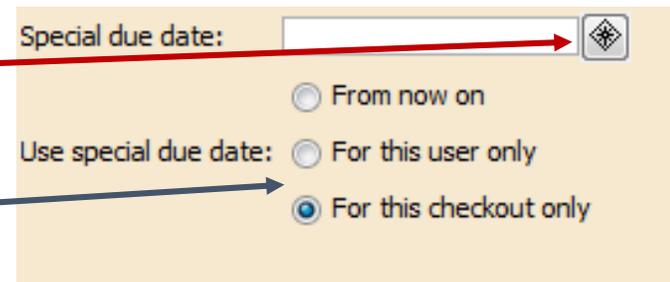


Common Tasks: Adjust due dates with ease!

There is a Due Date Helper in the **Check Out** wizard



- Use the gadget
- Pay attention to the 3 options for duration of special date!



Go to the Modify Due Date wizard in the Special group for already charged items to change multiple or individual items



User Group

Modify User

Behavior **Helpers**

Edit Options

Show Demographics Tab Show Accountability Tab

Show Addresses Tab Show Extended Info Tab

Privilege Tab

Show Privilege Tab

Allow privilege renewal by profile

Profile modified/auto extend privilege

Show web auth ID Show BLUEcloud Staff ID

Outreach Tabs

Show Outreach Tab

Interests: Histories:

Inactive IDs

Move previous User ID to inactive IDs

At end of wizard

Show checked buttons Perform selected action

Show

Modify Another User

Make More Changes

Close

Perform

Modify Another User

Close



User information

Identify User

Card #:

Basic Info **Privilege** **Demographics** **Addresses** **Extended Info**

User Group

Copy User

- Use to “clone” a patron for making multiple cards in the same household
- Copies last name, address, phone
- Does not copy PIN
- Set properties to determine whether to copy extended info



Users Group: Duplicate User check

- Turn on in the New User properties



- Decide what it will check against

- It returns results for all MSC libraries

Display property page: Wizard Startup Never

Behavior Defaults Helpers

Configure

Auto-generated User ID
Default user ID prefix:

Show Addresses Tab Show Privilege Tab
 Show Extended Info Tab Show Demographics Tab
 Allow routing

User Duplicate Searching

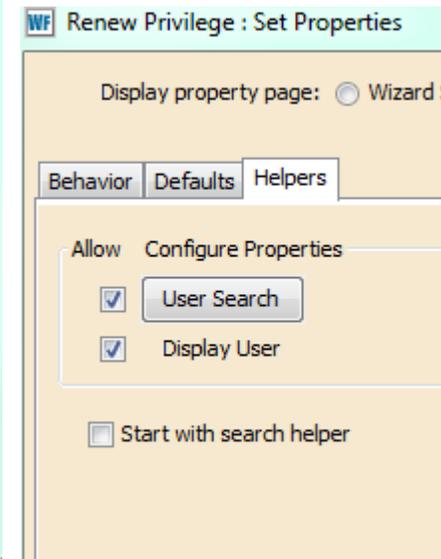
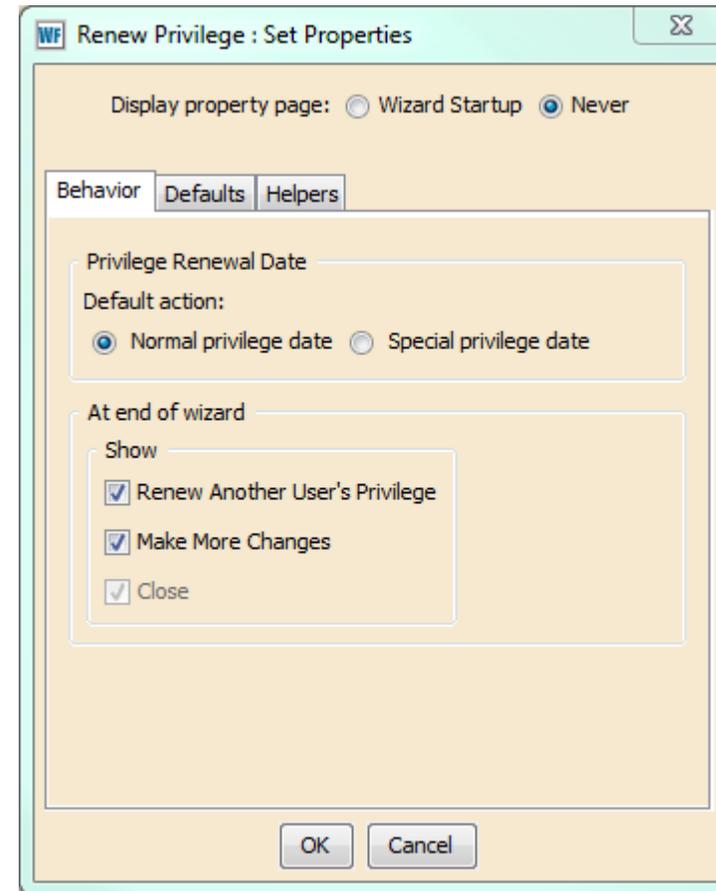
Duplication checking: on off

<input checked="" type="checkbox"/> Birth Date	<input type="checkbox"/> COMMENT
<input type="checkbox"/> COMPANY	<input type="checkbox"/> DAYPHONE
<input checked="" type="checkbox"/> EMAIL	<input type="checkbox"/> Group ID
<input type="checkbox"/> HOMEPHONE	<input type="checkbox"/> LICENSE
<input type="checkbox"/> LOSTITEM	<input checked="" type="checkbox"/> Name
<input type="checkbox"/> PH-NOTICE	<input type="checkbox"/> PHONE
<input type="checkbox"/> SSN	<input type="checkbox"/> STREET
<input type="checkbox"/> STUDENT_ID	<input type="checkbox"/> Web Authentication
<input type="checkbox"/> WORKPHONE	

Users Group: Renew Privilege



Be sure to right click and set the properties!



This is where you renew patron library cards.

You can select a normal renewal, or agree on something special.

This is useful for schools when faculty needs something a little longer than usual.

A screenshot of a user management interface. It shows fields for 'Name:', 'Id:', 'Group ID:', and 'Profile name: BPL-PUB...'. Below is an 'Identify User' section with a 'Card #' field. At the bottom is a 'Privilege info' section with the text 'Extend user's library privilege:' and two radio buttons: 'Normal' (selected) and 'Special'. A red arrow points from the 'Normal' radio button to the text in the adjacent block. Below the radio buttons are fields for 'New privilege expiration date:' and 'override:'.

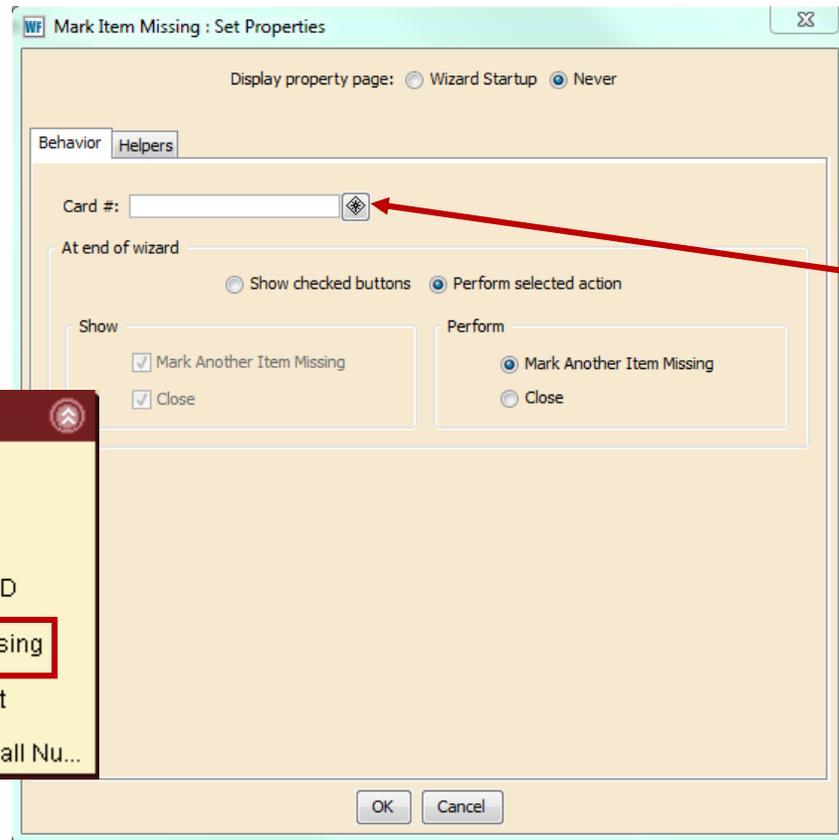
Items Group

Mark Item Missing

- If it should be on the shelf and isn't – Mark It Missing!
- This is helpful to staff and patrons – so nobody spends time looking for an item you can't find
- Each library should have their own Missing User account



Items Group: Mark Item Missing – cont.



The naming convention is your library policy name-MISSING
LIVINGSTON-MISSING for example.

If this is not in here, tell us so we can set it up!

Use this when something is supposed to be on the shelf but
isn't. Do not use it when someone has it checked out.

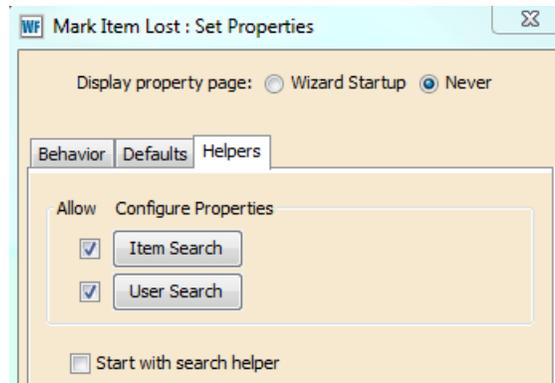
To use it, search for the item, and click Mark Item Missing on the
bottom of the screen.

If it turns up, just check it in to restore its former status. It is a
good idea to send someone out to look for these items from
time to time. If they do not turn up you can ask us to run a
report to remove them from your catalog.

Items Group

Mark Item Lost

- If a patron loses a book – this is how you clear it from their card and charge them for it
- You might want to turn on the search helper in the properties because this wizard only has Item Id Scan and when an item is lost you don't usually have the barcode



- Look up the patron first – then Mark the Item Lost

Items Group: Mark Item Lost

- If it is a certain amount of time overdue we can set it up to automatically mark the item lost and bill the patron
- The pop up window shows the bill from the item record – it will have a price in the field but it can be edited
 - If you edit it the price must be more than zero
- If you click Cancel Lost Bill - it cancels the bill entirely.

The screenshot shows a library management software interface. At the top, there is a search window titled "Item Search" with the search term "wind" and the library "BITTERROOT". Below the search results, a table lists several items. The selected item is "Gone with the wind [electronic resource]" by Mitchell, Margaret, 1900-1949.

Title	Author	Series	Additional Info
The hour of land : a personal topograp...	Williams, Terry Tempest.		online resource
Gone with the wind [electronic resource]	Mitchell, Margaret, 1900-1949.		online resource
The big book of gross stuff [electronic ...	King, Bart, 1962-		online resource
The hour of land : a personal topograp...	Williams, Terry Tempest.		volume
The Apache wars : the hunt for Geroni...	Hutton, Paul Andrew, 1949- author.		volume
The adventures of Philip Marlowe	Mohr, Gerald, 1914-1968,		online resource
Unstoppable : harnessing science to ch...	Nye, Bill, author.		online resource

Below the search results, there is a detailed view of the selected item. The left pane shows a tree view of the item's locations, with "EBOOK - BITTERROOT" selected. The right pane shows the item's details:

Price:	\$0.00	Item type:	DIG-BOOK	Ongoing checkou
Home location:	MTLIB2GO	Current location:	MTLIB2GO	Ongoing renewal
Item category 1:	EBOOK	Item category 2:	none	Checkouts to date
Item category 3:	none	Item category 4:	none	Renewals to date
Item category 5:	OVERDRIVE	Previous user ID:	none	Date last cleared
Date created:	7/28/2016	Card #:		
Date last charged:	Never	Last activity:	Never	
Last discharged:	Never	Total checkouts:	0	
Date inventoried:	Never	In-house uses:	0	
Times inventoried:	0			

At the bottom of the window, there are two buttons: "Mark Item Lost" (highlighted with a red box) and "Cancel".

Hold Group

Onshelf items

- List of holds that need to be pulled off the shelf
- Dynamic, constantly updated throughout the day
- Customizable in properties
- Can be printed or exported to Excel
- When in properties – do not enable **Unfill Holds** or the **Trap Holds** features. They do not play well with consortia!



Holds Group: Onshelf Items

Onshelf Items

On shelf: 8

Onshelf Hold Items: BITTERROOT

Call Number »	Title	Item ID	Item type	Current location	Date/Time Discharged	Pickup Library
DVD BACKTRACK	Backtrack [videorecordin...	39525010436039	DVD	DVD	8/27/2016,15:32	BITTERROOT
DVD SEINFELD	Seinfeld. Seasons 1 & 2 ...	39525010391937	DVD	DVD	7/23/2016,11:13	FCL-CF
DVD781.66 LED	Led Zeppelin [videorecor...	39525010395086	DVD	DVD	8/12/2016,11:57	FCL-MAIN
FLYNN	Kill shot: an American as...	39525010356682	BOOK	FICTION	1/19/2016,15:03	BITTERROOT
J 523.8 SASAKI	Constellations : a glow-i...	39525010325919	BOOK	JUV-NF	3/23/2016,11:12	FRENCHHS
J ROYAL KIRWAN	Victoria. May blossom of ...	39525010340652	BOOK	JUV-FICT	7/7/2016,11:12	NVPL
LT CARR	Harvest moon [text (large...	39525010333756	BOOK	LARGE-TYPE	3/16/2016,17:16	BITTERROOT
MELVILL	Moby Dick, or, The whale	39525000564097	BOOK	FICTION	4/4/2016,10:47	FCL-CF

Notice the pick-up library. If you are in a partner Sharing group, or if there are multiple locations for patrons to pick up materials this will be important to you. Otherwise you might turn it off in properties.

Onshelf Items : Set Properties

Display property page: Wizard Startup Never

Behavior **Helpers**

<input type="checkbox"/> Allow Trap Hold	<input type="checkbox"/> Allow Mark Item missing
<input type="checkbox"/> Allow Print List	<input type="checkbox"/> Allow Unfill Hold
<input type="checkbox"/> Display author	<input checked="" type="checkbox"/> Display discharge date
<input checked="" type="checkbox"/> Display hold pickup	<input checked="" type="checkbox"/> Display item ID
<input checked="" type="checkbox"/> Display item type	<input checked="" type="checkbox"/> Display location
<input checked="" type="checkbox"/> Display title	<input type="checkbox"/> Display user ID
<input type="checkbox"/> Display user name	<input type="checkbox"/> Display user notify via
<input checked="" type="checkbox"/> Prompt for confirmation before marking an item missing and unfilling a hold	

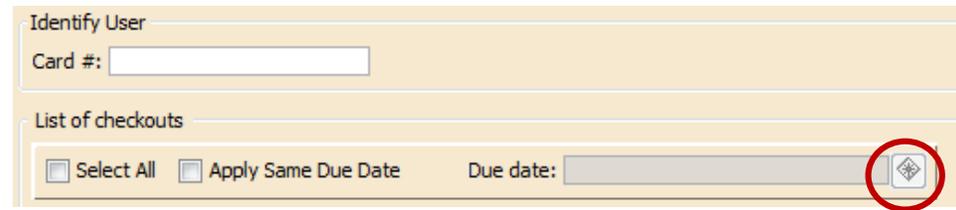
Allow Configure Properties

Special Wizards

User Claims Returned



- Use the gadget to set a date

A screenshot of a software interface showing a form titled 'Identify User'. The form has a 'Card #' field with a text input box. Below this is a section titled 'List of checkouts'. In this section, there are two checkboxes: 'Select All' and 'Apply Same Due Date'. To the right of these checkboxes is a 'Due date:' label followed by a date input field. A red circle highlights the date picker icon on the right side of the date input field.

- Mark Items at bottom to save changes!



- Be sure to set the date claimed before the shown due date to avoid phantom fines
- Item stays on patron record – so you'll need to deal with them eventually
- The counter on the patrons record doesn't go down automatically

Special Wizards



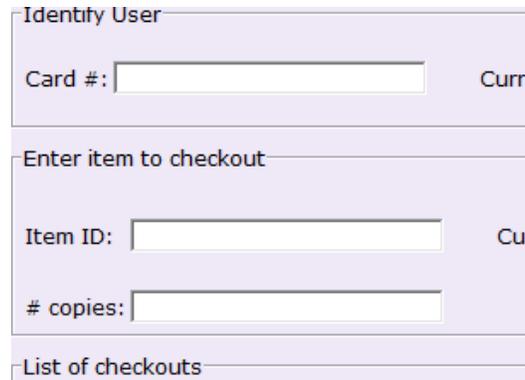
Mark Item Used

- Good way to get stats on things that are used but not checked out!
- Stats recorded in a different spot than regular circs so you can track separately
- Will give you alert pop-ups for any holds, checkouts, missing status, etc. so it's a nice double check for those piles of books that get left out
- If you are using MobileCirc it is handy to bring the tablet and scanner out to the table to scan them before reshelving.

Special Wizards

Ephemeral Checkout

- This is a real checkout that gets checked back in immediately
- You will need to create a user barcode and an item barcode to use it



The screenshot shows a web interface for the 'Ephemeral Checkout' wizard. It is divided into three main sections:

- Identify User:** Contains a text input field labeled 'Card #' and a partially visible 'Current' label to its right.
- Enter item to checkout:** Contains two text input fields. The first is labeled 'Item ID:' and has a 'Cur' label to its right. The second is labeled '# copies:'.
- List of checkouts:** This section is currently empty.

- It counts as a full circulation and is great for tracking statistics for items you don't want to barcode individually – Magazines, paperbacks, materials in the give and take area

Special Wizards

Check In Bookdrop



- If you don't fine – you don't need this
- Time travel for library books! Just set the check in date.
- Make sure you set properties for receipts, hold alerts, etc