

# Workflows

## Cataloging Toolbar

*Cataloging*

*Wizards*

*Property Settings*



## Help Options

- Review Linking and Cataloging Skills Checklist:
- <http://will.state.wy.us/wyld/network/committees/training/cataloging.html>
- Sign up for e-mail distribution lists:
- <http://will.state.wy.us/wyld/email/lists.cfm>
- Review Online Help – Click on the word **Help** in the Menu bar while in Workflows -- context (opens directly to window that is displayed) or contents – both options allow you to search specific topics
- Review WYLD TechNotes, SirsiDynix Manuals and access to other documentation: <http://will.state.wy.us/wyld/docs/index.html>
- Call or e-mail WYLD Support Team -- [wyldstaff@will.state.wy.us](mailto:wyldstaff@will.state.wy.us)

## Cataloging – Common Tasks

**Call Number and Item Maintenance wizard**

## Property Settings -Defaults tab

Descriptive view shows fixed fields at top of record as you are used to seeing them

Display descriptive labels shows descriptions for each tag instead of tag numbers only

Item tree display collapsed shows just call numbers (Good option to use when viewing items linked to serials records)

Item tree display expanded shows all call number with their barcodes

Behavior **Defaults** Helpers

Search preferences

Type:

Index:

Library:

Editor display options

MARC View  Display fixed fields

**Descriptive view**  **Display descriptive labels (for entries)**

Call number default values

Library:   Shadow call number

Class scheme:   Show shelving key

Item tree defaults

Item tree display collapsed  **Item tree display expanded**

Extended Info Display Options

Display staff note on item list

Display public note on item list

Item required default values

Type:   Permanent

Home location:   Circulate

Shadow item

Item optional default values

Price:  Item category 1:

Media desk:  Item category 2:

Call Number and Item Maintenance (F4) : Set Properties

Display property page:  Wizard Startup  Never

**Behavior** Defaults Helpers

Select Behavior

- Add call number
  - Prompt for library when adding a new call number
  - Auto-generate temporary XX call numbers
  - Add item when adding a new call number
- Add item
  - Auto-generate item ID when adding item
- Modify existing call number
- Modify existing item
- Delete call number
- Delete item
  - Prompt before deleting items with bills
- Maintain MARC Holdings
- Delete items with a charge history record
- Set current location of new items to AVAILABLE\_SOON
- Print labels for new items
  - Automatically
    - Prompt for label template
  - Print preview
  - Use label template profiles

## Cataloging – Common Tasks

### ***Call Number and Item Maintenance wizard***

Property Settings

Behavior tab

***Note: You can add and edit call numbers and item records using this one wizard***

Setting properties to auto-generate xx call number and item ID (barcode) help prevent the appearance of the message “Call number already exists” and “Call number is not unique”

***Note: You can delete call numbers and item records using this wizard***

Cataloging – Common Tasks

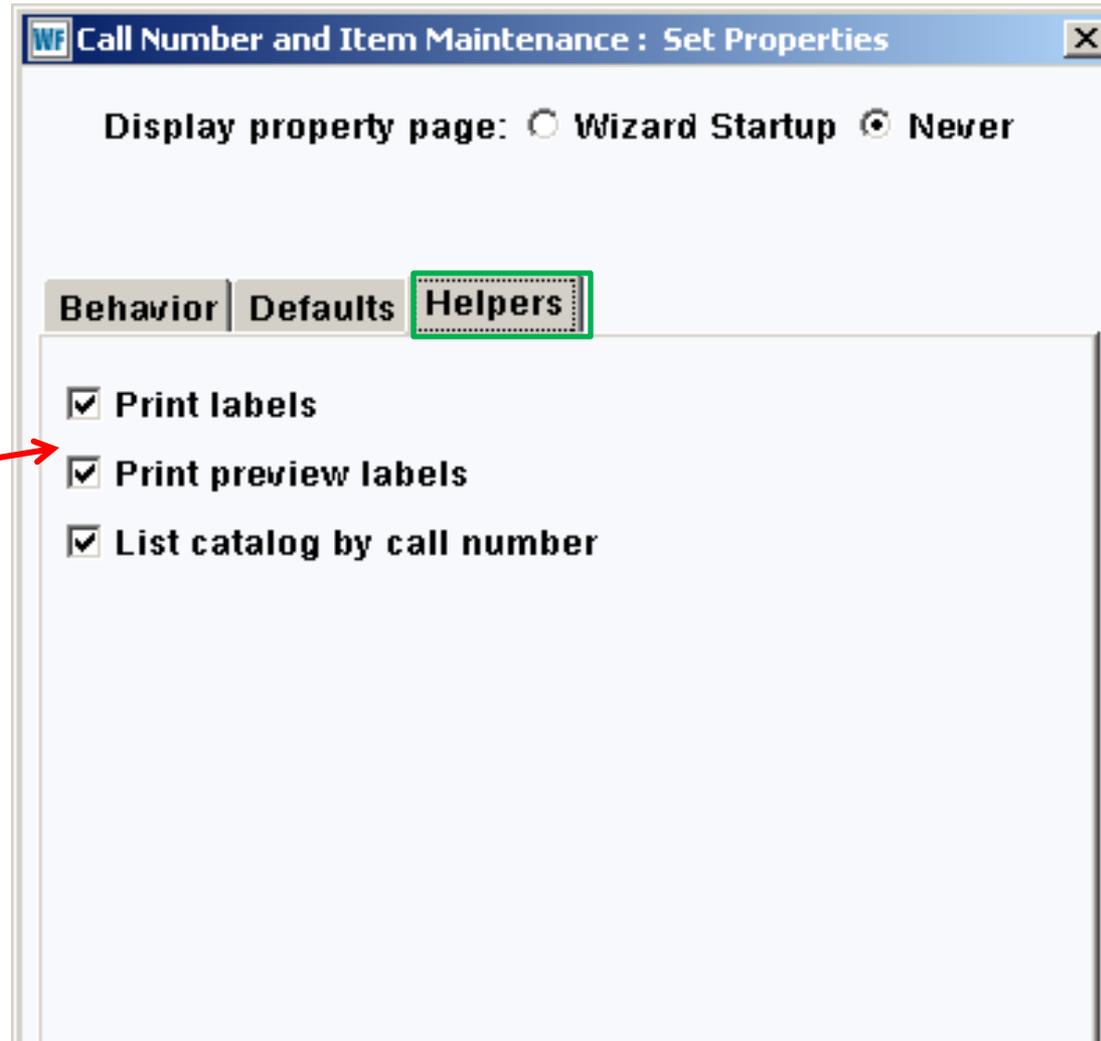
***Call Number and Item Maintenance wizard***

Property Settings

Helpers tab

If you use Label Designer,  
have both helpers for Print labels  
display

You may choose to not display the  
List catalog by call number helper  
This helper displays the selected  
call number for all WYLD libraries





## Cataloging – Common Tasks

### ***Label Designer wizard***

Property Settings

Behavior tab

The defaults shown enable you to perform all those actions in this wizard

## Cataloging – Common Tasks

### **SmartPort wizard**

#### Property Settings - Defaults tab

SmartPort : Properties

Display property page:  Wizard Startup  Never

**Defaults**

**Bibliographic Record Load Options**

Replace current record

Match and load

Match on title control number

Match on title control number or indexed MARC tag

Match on title control number and indexed MARC tag

Title control number source: islop/islop

Indexed MARC tag number:

Ignore catalog record format

Call sources: DEWEY,092,,N

Library: WSL

Format: MARC

Remove subject headings:

**Authority Record Load Options**

Replace current record

Match and load

Authority control number source: cn

Save directory:

Verify options:  Yes  No

Strip junktags:  Yes  No

Script for special processing:

**Hit limit for brief display**

Single server limit: 20

Multi-server limit: 3

Browse terms limit: 8

Gateway timeout: 20 Seconds

Formatted full display:  Yes  No

Accept the default Match and load option

Option to Match on title control number is preferred

Use the gadgets when provided

***Repeat title control number source after a slash to force the system to replace auto-generated title control numbers***

**Call number source shown is for libraries using Dewey classification**

**Libraries using LC classification, enter Call source LC,050,,N**

***Note: Select your own library***

***Strip junktags: YES***

Options for number of entries retrieved when searching a single database or multiple databases at once (OCLC and LC at the same time)

No = tags in bib record in SmartPort display without descriptive labels

Search preferences

Type: KEYWORD

Index: Title

Library: ALL

Editor display options

MARC View

**Descriptive view**

Display fixed fields

Display descriptive labels (for entries)

Call number default values

Show shelving key

**Item tree defaults**

Item tree display collapsed

**Item tree display expanded**

Extended Info Display Options

Display staff note on item list

Display public note on item list

Cataloging – Common Tasks  
***Item Search and Display wizard***  
Property Settings -Defaults tab

[Descriptive view](#) displays the Bibliographic record with the fixed field elements at the top of the record as you are used to seeing it

[Display descriptive labels](#) shows record tags with descriptions instead of just tag numbers

Default selection of [Item tree display collapsed](#) shows call numbers without their barcodes

Default selection of [Item tree display expanded](#) shows call numbers with all their barcodes

## Cataloging – Common Tasks *Item Search & Display* wizard

Property Settings  
Defaults tab ...(cont)

Select tabs you wish to view  
for bills, checkouts, orders,  
and holds

Configure information  
displayed within those tabs  
as you wish

Behavior **Defaults** Helpers

**Extended Info Display Options**

- Display staff note on item list
- Display public note on item list

Show bookings

Show holdings

Show serial control

**Bills Tab**

- Show bills
- Library: All libraries
- Bills type: All

**Checkouts Tab**

- Show checkouts
- Charge ownership: Checkout library
- Library: All libraries
- Checkouts type: Active

**Selectionlists Folder**

- Show Selectionlists Folder
- Library: Full access to all libraries
- Status: None

**Orders Tab**

- Show orders
- Library: Full access to all libraries
- Orders type: All

**Holds Tab**

- Show holds
- Library type: Placed at library
- Library: All libraries
- Holds type: Active

Display property page:  Wizard Startup  Never

**Behavior** Defaults Helpers

Search Library Preferences

Search library list type:  Search by library

Search by search library group

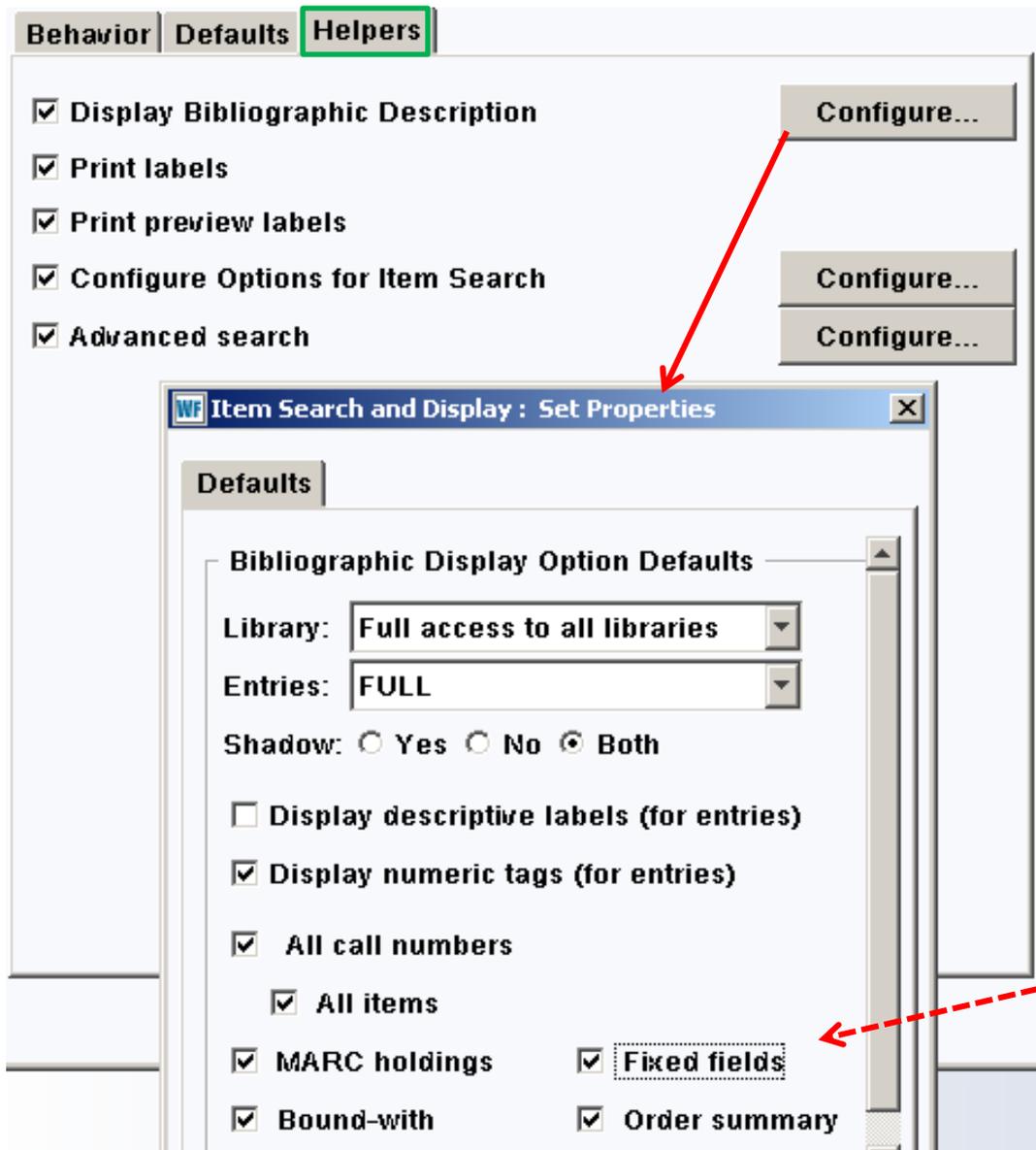
Search by library or search library group

Search library list:

ALL

Cataloging – Common Tasks  
***Item Search and Display wizard***  
Property Settings  
Behavior tab

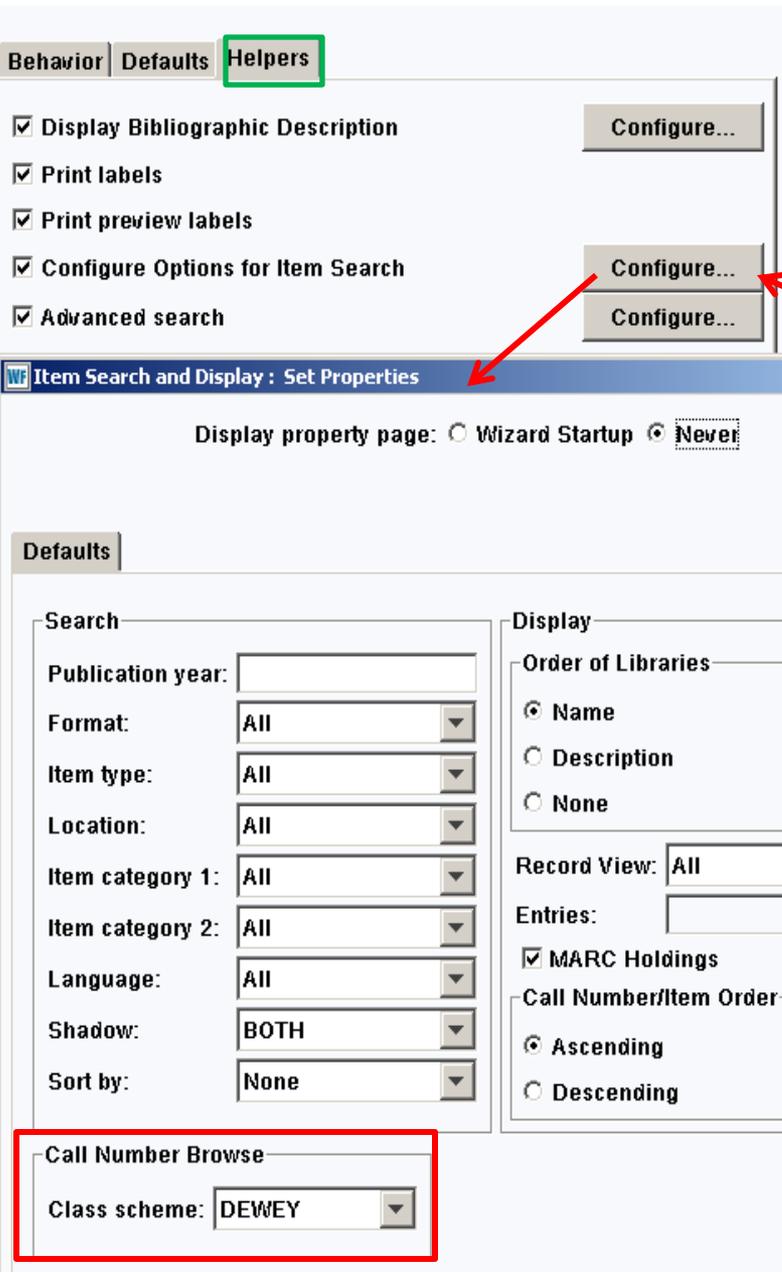
Delivered defaults shown for  
search options



Cataloging – Common Tasks  
***Item Search and Display wizard***  
Property Settings  
Helpers tab

Clicking on the raised bar for the option to Display Bibliographic Description enables you to configure additional options for entry as shown at the left

***Note: You need to be able to see the fixed field as it is from this area of the bibliographic record that the system pulls the periodical's publication frequency***



## Cataloging – Common Tasks

### ***Item Search and Display wizard***

#### Property Settings

Helpers tab – raised bar to Configure Options for Item Search

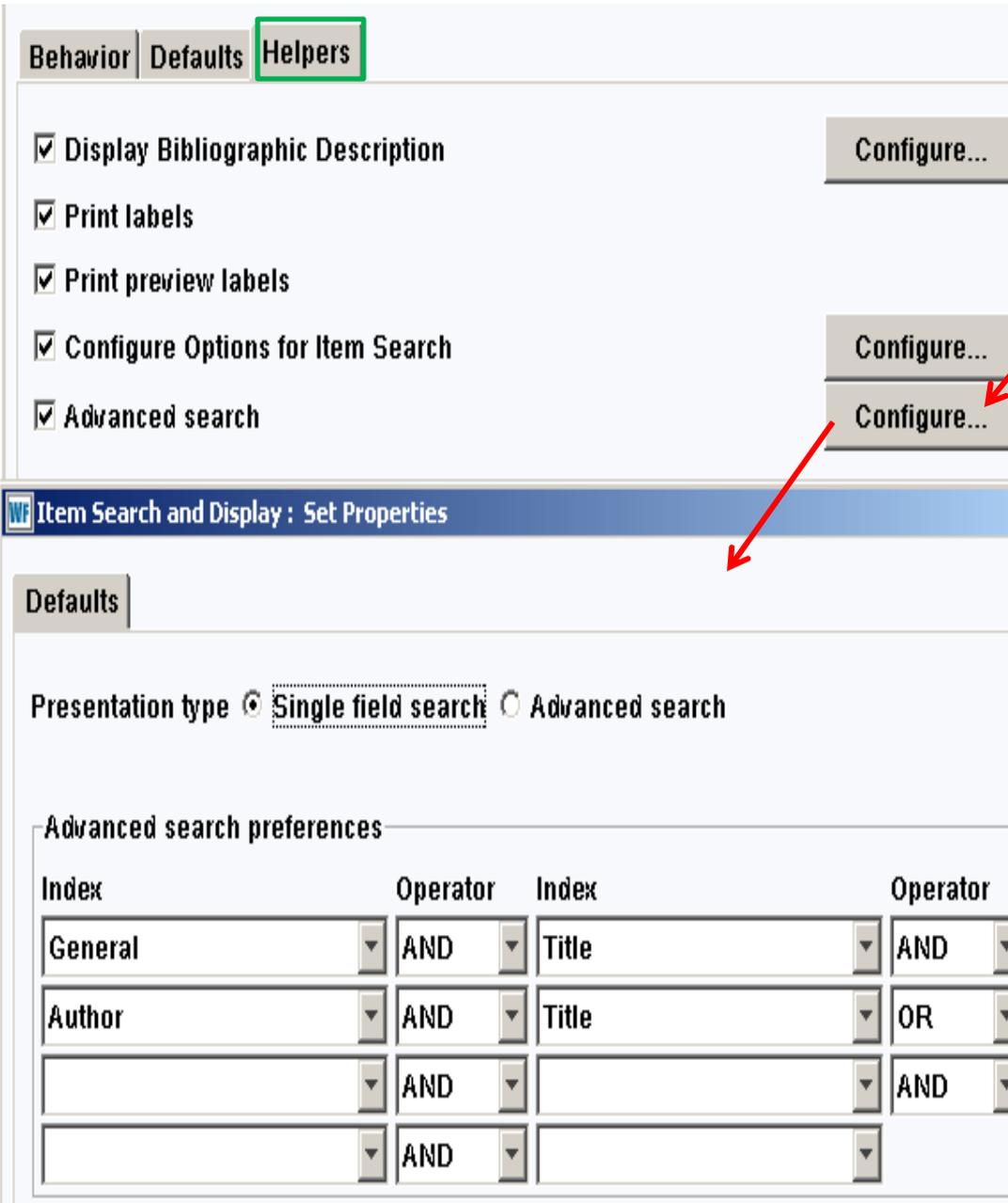
These are system delivered defaults

Change these settings if you wish to limit a search to one or more of these options

***For a shelflist browse of your library's call numbers, select the class scheme used most in your library***

***When the Item Search and Display wizard is open, these configuration options display when clicking on the helper shown below***





## Cataloging – Common Tasks

### ***Item Search and Display wizard***

#### Property Settings

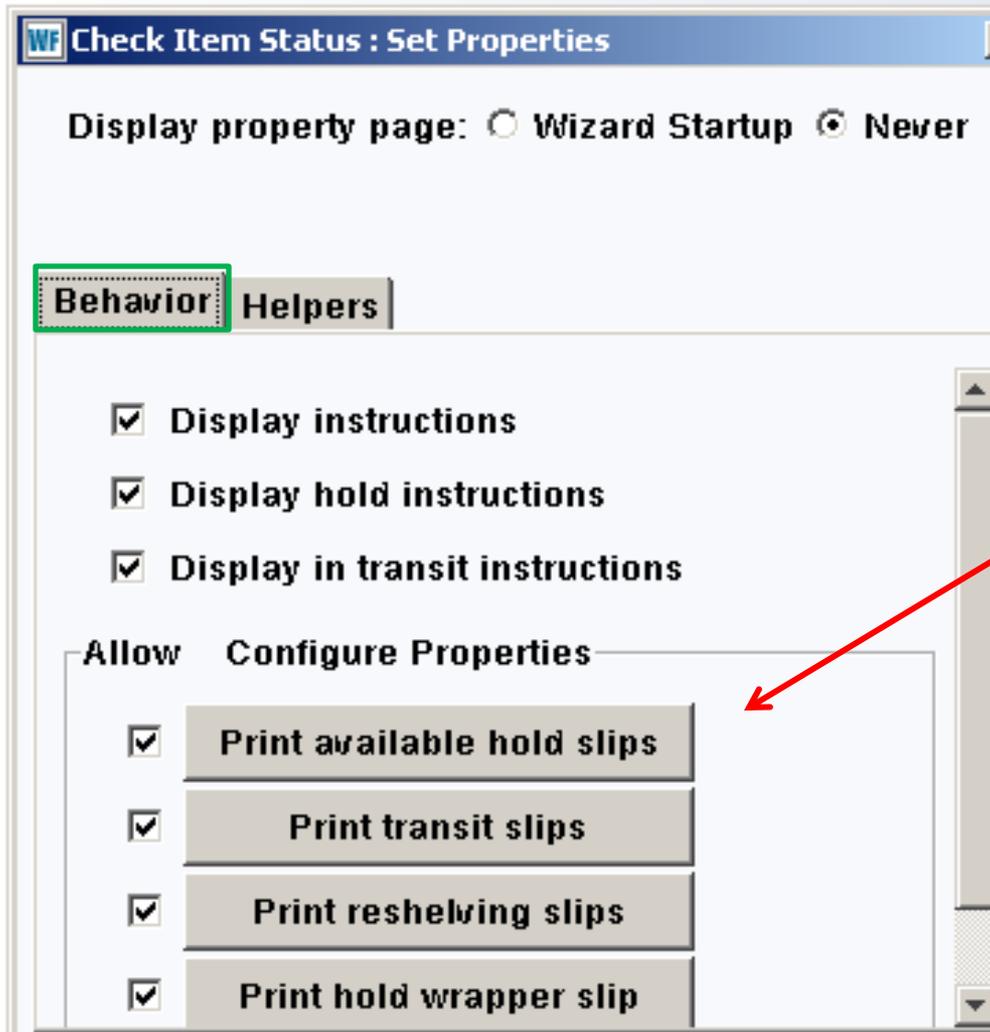
Helpers – raised bar to configure options for Advanced search

Select options as desired for combined searches

***When the Item Search and Display wizard is open, these configuration options display when clicking on the helper shown below***



***This helper works like a toggle; click on it again to close this search option***



## Cataloging – Common Tasks

### ***Check Item Status wizard***

Property Settings

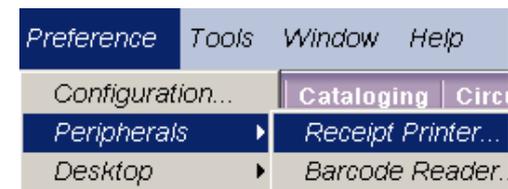
Behavior tab

Click on raised bars to select more options if you chose to allow printing

*Enter your own text*

***Note: The print option in the raised bar allows you to enter text for each type of hold slip***

***Be sure you've configured your receipt printer under Preference in the Menu options as shown below***



**Behavior** | Helpers

- Display instructions
- Display hold instructions
- Display in transit instructions

Allow **Configure Properties**

- Print available hold slips**

---

**WF** Check Item Status : Set Properties

**Defaults**

Receipt header:

Receipt fields:

Receipt footer:

Allow date formatting description

Date format description:

## Cataloging – Common Tasks

### ***Check Item Status wizard***

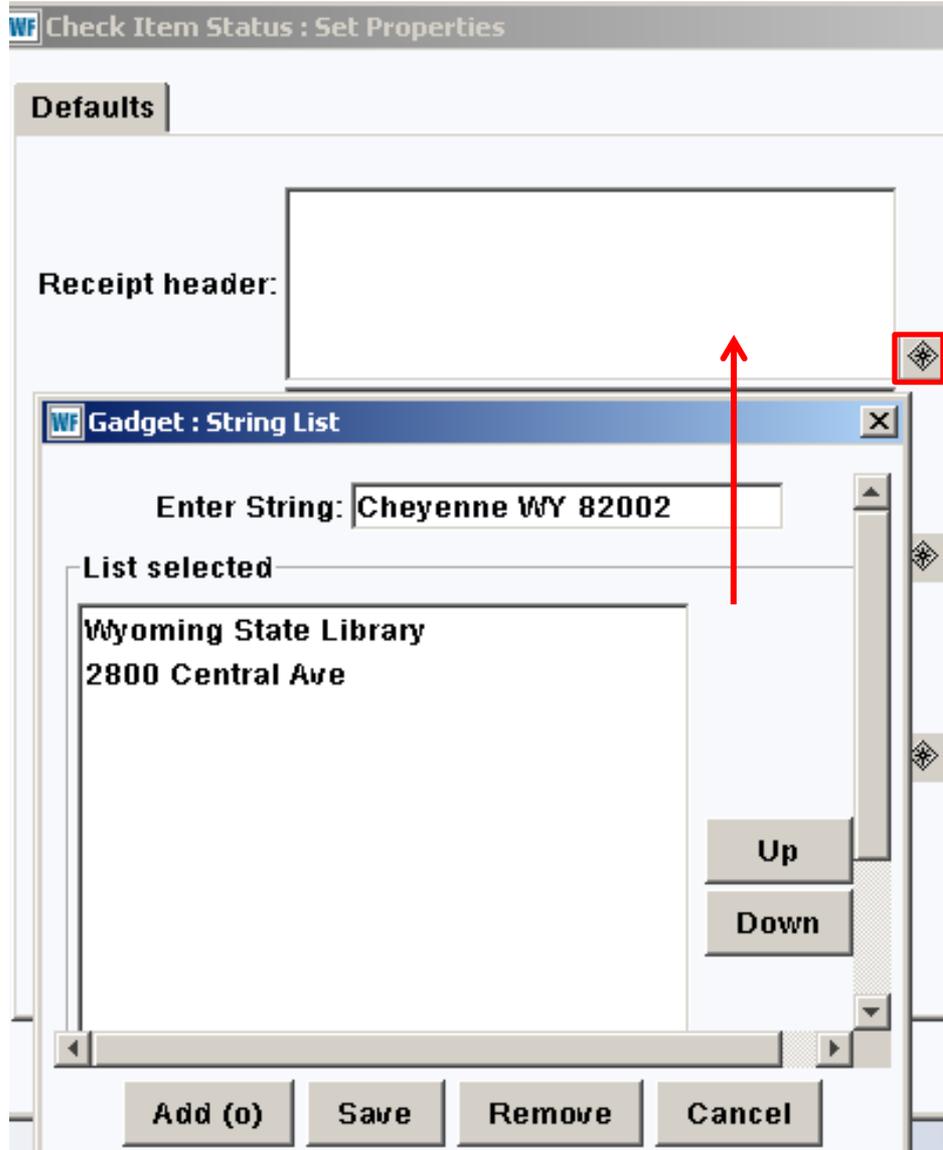
#### Property Settings

Behavior tab – clicking on raised bar for “Print available hold slips” results in display of template

Use the gadget next to each text box to either enter strings of text of your choosing (Receipt header and Receipt footer) or make selections from a list of pre-selected options (Receipt fields) as shown below; use arrows to move selections

**WF** Gadget : Receipt fields

List to choose from	List selected
Author	Call number
Call number	Title
Comment	Name
Current time	
Email	
Expires	
Item ID	
Level	
<b>Name</b>	
Phone number	
Pickup library	
Placed	
Range	
Title	
User ID	



## Cataloging – Common Tasks

### ***Check Item Status wizard***

#### Property Settings

Behavior tab – raised bar for “Print available hold slips” retrieved template; click on gadget next to each area

Receipt header

Click on the gadget for Receipt header to display the window shown here

Enter desired information as shown:

Click on the Add button to add each line to the receipt header (or just hit the enter key on your keyboard)

Each line of text can be re-arranged within the header by using the up or down button

Click the Save button when finished

WF Check Item Status : Set Properties

Display property page:  Wizard Startup  **Never**

**Behavior** | Helpers

Display instructions  
 Display hold instructions  
 Display in transit instructions

Allow    Configure Properties

**Print available hold slips**  
 Print transit slips  
 Print reshelving slips  
 Print hold wrapper slip

WF Check Item Status : Set Properties

**Defaults**

Receipt header:  
Wyoming State Library  
2800 Central Ave  
Cheyenne WY 82002

Receipt fields:  
Call number  
Title  
Name  
Pickup library

Receipt footer:  
Thank you for using the  
Wyoming State Library.

Cataloging – Common Tasks

***Check Item Status wizard***

Property Settings

Behavior tab

“Print available hold slips” raised bar

Text of available hold slip created by clicking on gadget next to each text box

*Enter your own text*

WF Check Item Status : Set Properties

Display property page:  Wizard Startup  Never

Behavior **Helpers**

Allow Configure Properties

Item Search

Change Item ID

Start with search helper

WF Check Item Status : Item Search:Set Properties

Behavior **Defaults**

Search Library Preferences

Search library list type:  Search by library

Search by search library group

Search by library or search library group

Search library list: ALL

Behavior **Defaults**

Search preferences

Preferred search type:  Keyword  Browse  Exact

Preferred search index: Title

Preferred search library:

Cataloging – Common Tasks

### ***Check Item Status wizard***

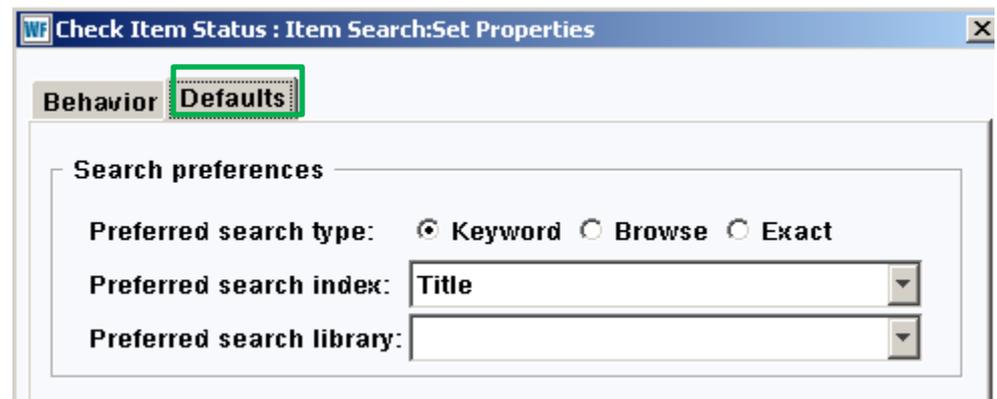
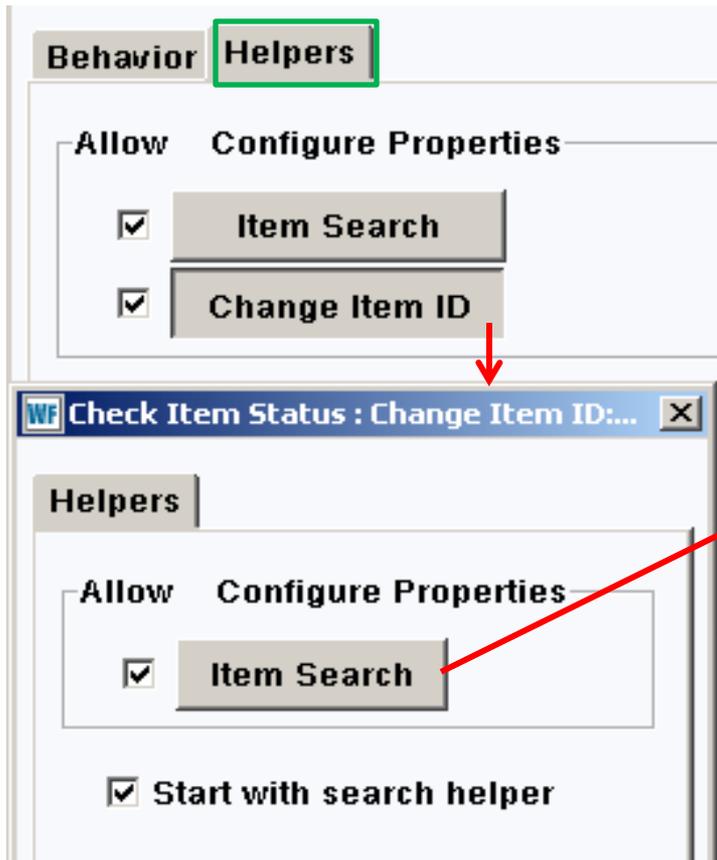
Property Settings

Helpers tab

Raised bar for “Item Search” –  
Behavior tab

***Note: within the window of the Item Search raised bar there are two tabs in which to set search options: Behavior tab and Defaults tab***

***Both are shown at left***



Cataloging – Common Tasks  
**Check Item Status wizard**  
Helpers tab – raised bar  
“Change Item ID”

**Note: within the window of the Change Item raised bar - Item Search bar, there are two tabs in which to set Options search: Behavior tab and Defaults tab**

**Both are shown above**

**WF Add Title : Set Properties**

Display property page:  Wizard Startup  Never

Behavior **Defaults** Helpers

**Title default values**

Format: MARC Entries template: FULL

Shadow title Entries:

Add item when creating title

**Editor display options**

MARC View  Display fixed fields

Descriptive view  Display descriptive labels (for entries)

**Call number default values**

Library: WSL  Shadow call number

Class scheme: DEWEY  Show shelving key

**Item required default values**

Type: BOOK  Permanent

Home location: STACKS  Circulate

Shadow item

**Item optional default values**

Price: \$  Item category 1:

Media desk:  Item category 2:

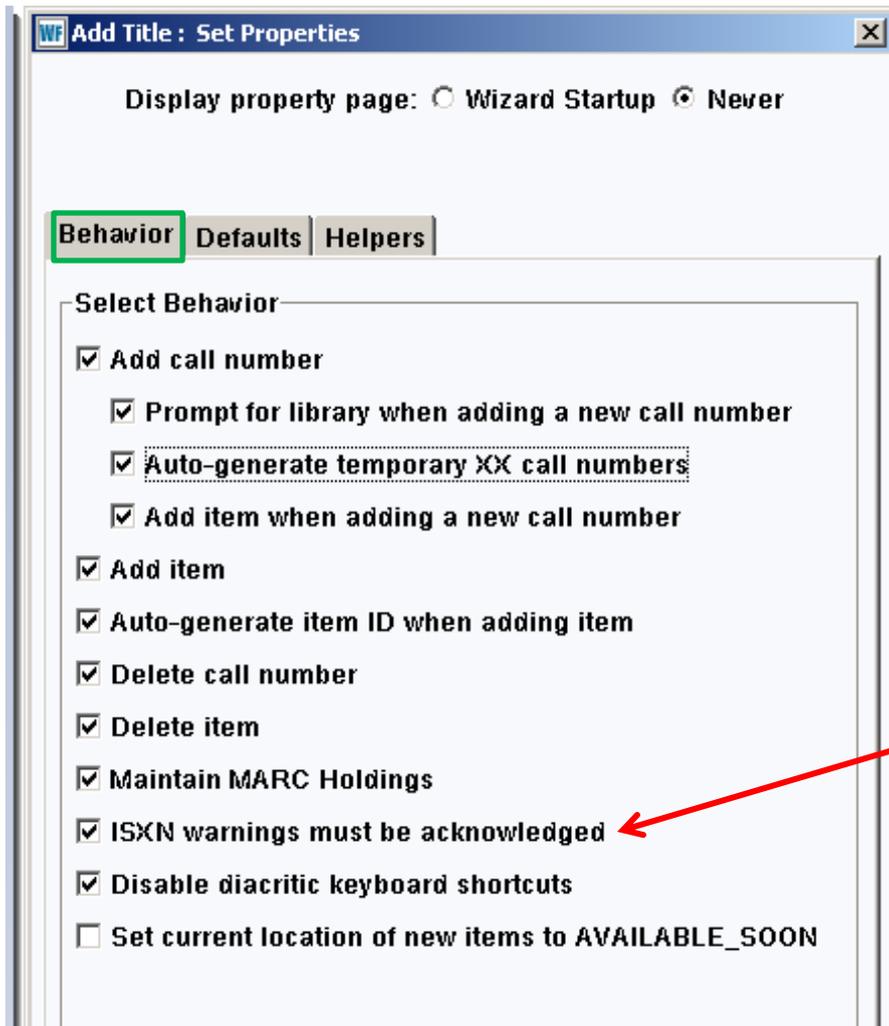
Cataloging – Title Maintenance  
**Add Title wizard**  
 Property Settings  
 Defaults tab

***Format: Be sure to change this to match the format of the material for which you are creating an original record***

Descriptive view shows fixed field elements at the top of the record which makes them easier to fill in

Display descriptive labels if you want to see tag descriptions and not just tag numbers

***Enter your library's code***



## Cataloging – Title Maintenance

### **Add Title wizard**

Property Settings

Behavior tab

Setting properties to auto-generate xx call number and item ID (barcode) help prevent the appearance of the message “Call number already exists” and “Call number is not unique”

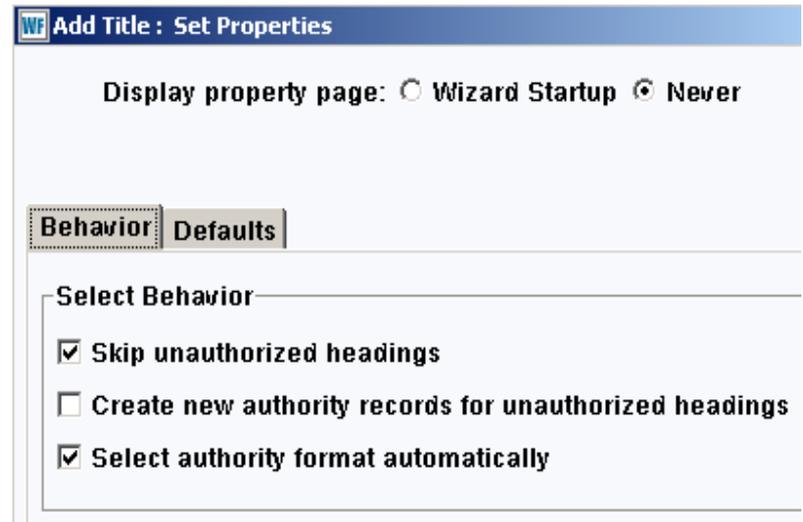
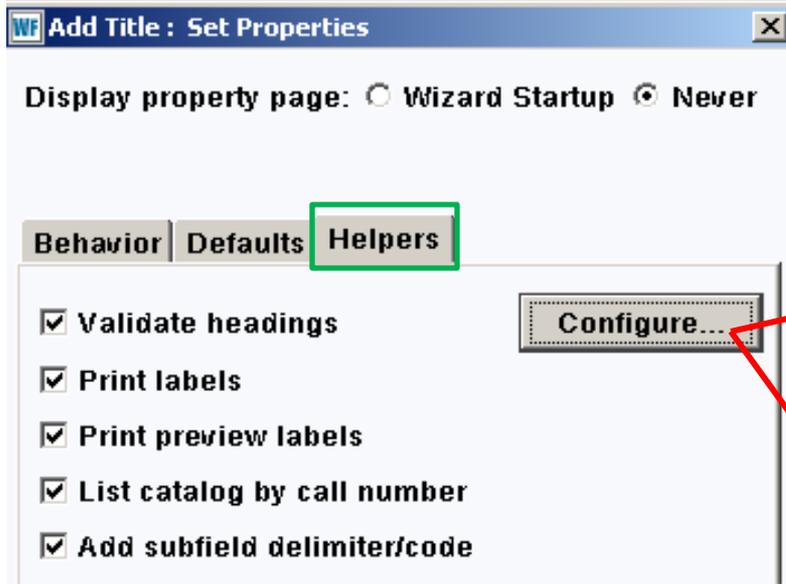
ISXN warning notifies you of the entry of an invalid ISBN or ISSN

*Delete call number*

*Delete Item*

*Disable diacritic keyboard shortcuts*

*Set current location of new items to AVAILABLE\_SOON*



Cataloging – Title Maintenance

### ***Add Title wizard***

Property Settings

Hlpers tab – click on the raised bar to configure Validate headings

Defaults tab: Do not change the default of PROVISIONAL

Behavior tab: Select the option to “Skip unauthorized headings”

Add subfield delimiter/code

Modify Title : Set Properties

Display property page:  Wizard Startup  Never

Behavior **Defaults** Helpers

Search preferences

Type: KEYWORD

Index: Title

Library: ALL

Editor display options

MARC View  Display fixed fields

**Descriptive view**  Display descriptive labels (for entries)

Add empty entries Entries template: BRIEF

Call number default values

Show shelving key

**Item tree defaults**

Item tree display collapsed  Item tree display expanded

Extended Info Display Options

Display staff note on item list

Display public note on item list

Tab Display Preference

Control

**Bibliographic**

MARC Holdings

Call Number/Item

Cataloging – Title Maintenance

**Modify Title wizard**

Property Settings

Defaults tab

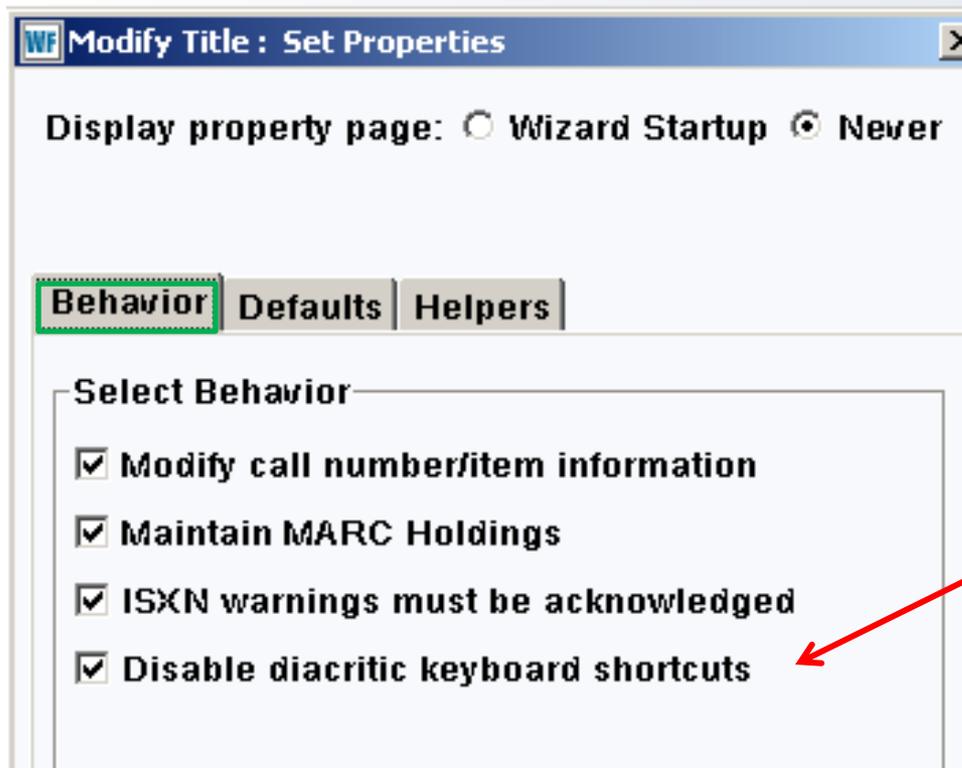
Descriptive view displays the fixed field elements at the top of the record with Help available upon right click within each fixed field

Display descriptive labels shows tags with descriptions instead of just tag numbers

Item tree display collapsed shows just the call numbers as the default

Item tree display expanded shows the call numbers and all their barcodes

*Tab Display Preference*



Cataloging – Title Maintenance

### ***Modify Title wizard***

Property Settings

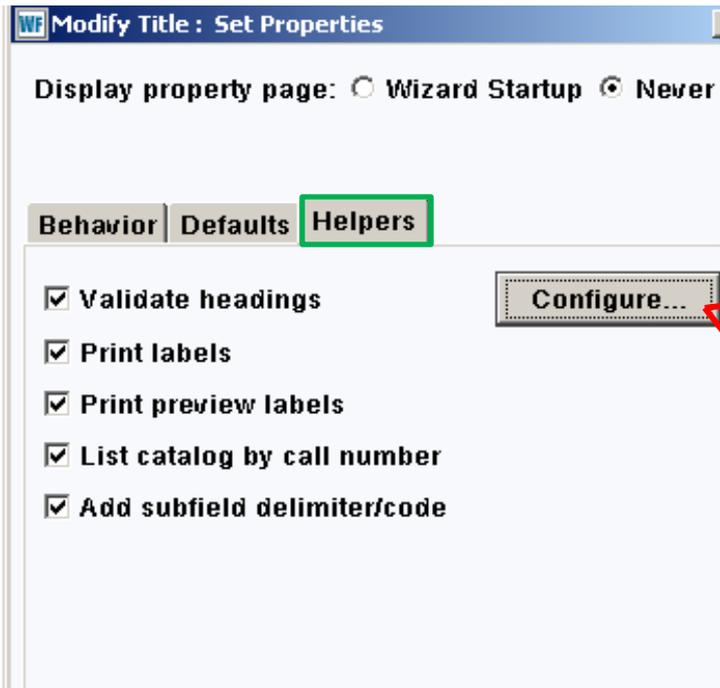
Behavior tab

ISXN warning alerts you if invalid ISBNs or ISSN have been entered

### *Disable diacritic keyboard shortcuts*

Diacritics are found in the Symbol Table under Tools in the Menu bar

If this last option is un-checked you can insert diacritics only from the table by using the insert button in the diacritics table



Cataloging – Title Maintenance

### ***Modify Title wizard***

Property Settings

Helpers tab - click on the raised bar to configure

Validate headings

Defaults tab: Do not change the default of  
PROVISIONAL

Behavior tab: Select option to “Skip  
unauthorized headings”

Add subfield delimiter/code

## Cataloging – Title Maintenance

### ***Duplicate Title wizard***

Property Settings

Defaults tab

***Format: Be sure to change the Format to match the type of record you are creating  
If you are creating the sound recording version from the print version, the new record format must be changed to MUSIC so the new record indexes correctly and has the correct defaults in the fixed field***

Duplicate Title : Set Properties

Display property page:  Wizard Startup  Never

Behavior Defaults Helpers

Search preferences

Type: KEYWORD

Index: Title

Library: ALL

Title default values

Format: MARC

Shadow title

Add item when creating title

Editor display options

MARC View  Display fixed fields

Descriptive view  Display descriptive labels (for entries)

Descriptive view shows the fixed fields at the top of the record and provides Help by right clicking within each fixed field

Display descriptive labels to see a description of each tag instead of just the tag number

## Cataloging – Title Maintenance

### ***Duplicate Title wizard***

#### Property Settings

#### Defaults tab ...(cont)

Select your library

Select your class scheme

*Item tree display collapsed* defaults  
to a view of just the call numbers

*Item tree display expanded* defaults  
to a view of call numbers and all their  
barcodes

Select item type to match the new  
material you're cataloging

Select location for new item

Duplicate Title : Set Properties

Display property page:  Wizard Startup  Never

Behavior **Defaults** Helpers

Descriptive view  Display descriptive labels (for entries)

Call number default values

Library:   Shadow call number

Class scheme:   Show shelving key

Item tree defaults

Item tree display collapsed  Item tree display expanded

Extended Info Display Options

Display staff note on item list

Display public note on item list

Item required default values

Type:   Permanent

Home location:   Circulate

Shadow item

Item optional default values

Price:  Item category 1:

Media desk:  Item category 2:

Cataloging – Title Maintenance  
***Duplicate Title wizard***

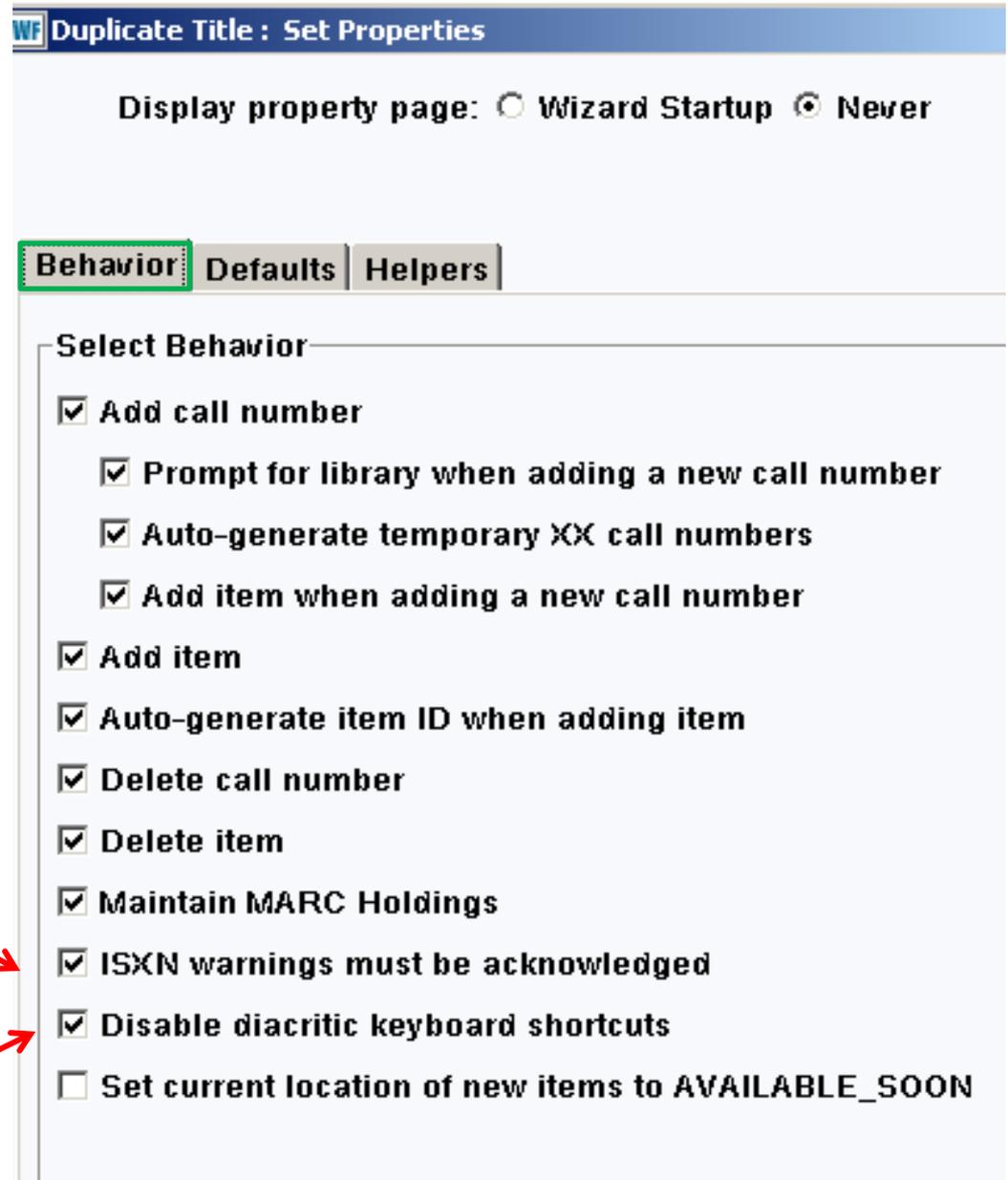
Property Settings - Behavior tab

These defaults are the same as those in the Behavior tab of the Add Title wizard

Setting properties to auto-generate xx call number & barcode help prevent the appearance of the messages Call number already exists & Call number is not unique

ISXN warning notifies you of the entry of an invalid ISBN or ISSN

*Delete options for call number/item*  
*Disable diacritic keyboard shortcuts*  
*Set current location of new items to AVAILABLE\_SOON*



Diacritics can be added only from the Symbol Table under Tools in the Menu bar if this is un-checked <sup>28</sup>

WF Duplicate Title : Set Properties

Display property page:  Wizard Startup  Never

Behavior Defaults **Helpers**

Validate headings

Print labels

Print preview labels

List catalog by call number

Add subfield delimiter/code

Configure..

WF Duplicate Title : Set Properties

Display property page:  Wizard Startup  Never

Behavior **Defaults**

Authorization level:

Source:

WF Duplicate Title : Set Properties

Display property page:  Wizard Startup  Never

**Behavior** Defaults

Select Behavior

Skip unauthorized headings

Create new authority records for unauthorized headings

Select authority format automatically

## Cataloging – Title Maintenance

### ***Duplicate Title wizard***

#### Property Settings

Helpers tab – click on the raised bar to configure Validate headings

Defaults tab: Do not change the default of PROVISIONAL

Behavior tab: Select the option to “Skip unauthorized headings”

Add subfield delimiter/code

Display property page:  Wizard Startup  Never

Behavior **Defaults** Helpers

Search preferences

Type:

Index:

Library:

Item tree defaults

Item tree display collapsed  Item tree display expanded

Extended Info Display Options

Display staff note on item list

Display public note on item list



Cataloging – Title Maintenance  
**Delete Title wizard**  
Property Settings  
Defaults tab

***Use this wizard to delete the bib record when you remove the last barcoded item from the record  
Call numbers and item records can also be deleted using the Call Number & Item Maintenance wizard***

Select your desired search options

Select item tree display expanded so you can see all the barcodes attached to a call number

You decide if you want to see the notes on an item record or not when you delete the item

Display property page:  Wizard Startup  Never

**Behavior** Defaults Helpers

Select Behavior

- Delete title when deleting last call number or last item
  - Prompt for confirmation before deleting title
- Delete only items for search library

Description	Call Number/Item
<input type="checkbox"/> 39092055852018 - 1 - BOOK - ADMIN	
<input type="checkbox"/> 025.431 DEWEY 22 V.3 - PARK	
<input type="checkbox"/> 39092055850012 - 1 - BOOK - ADMIN	
<input type="checkbox"/> 025.431 DEWEY 22 V.4 - PARK	
<input type="checkbox"/> 39092055850020 - 1 - BOOK - ADMIN	
<input type="checkbox"/> OFC 025.431 DEWEY : V.1 - UINT	
<input type="checkbox"/> 39092059543977 - 1 - REF-BOOK - PROF_COLL	
<input type="checkbox"/> OFC 025.431 DEWEY : V.2 - UINT	
<input type="checkbox"/> 39092059543928 - 1 - REF-BOOK - PROF_COLL	
<input type="checkbox"/> OFC 025.431 DEWEY : V.3 - UINT	
<input type="checkbox"/> 39092059543878 - 1 - REF-BOOK - PROF_COLL	
<input type="checkbox"/> OFC 025.431 DEWEY : V.4 - UINT	
<input type="checkbox"/> 39092059543829 - 1 - REF-BOOK - PROF_COLL	
<input checked="" type="checkbox"/> Z 696 .D519 22ND ED. 2003 VOL. 1 - WSL	
<input checked="" type="checkbox"/> 39092057320675 - 1 - BOOK - STACKS	
<input type="checkbox"/> 39092057320683 - 2 - BOOK - CHECKEDOUT - Can't Circ	
<input type="checkbox"/> Z 696 .D519 22ND ED. 2003 VOL. 2 - WSL	
<input type="checkbox"/> 39092057320691 - 1 - BOOK - STACKS	
<input type="checkbox"/> 39092057326623 - 2 - BOOK - CHECKEDOUT - Can't Circ	



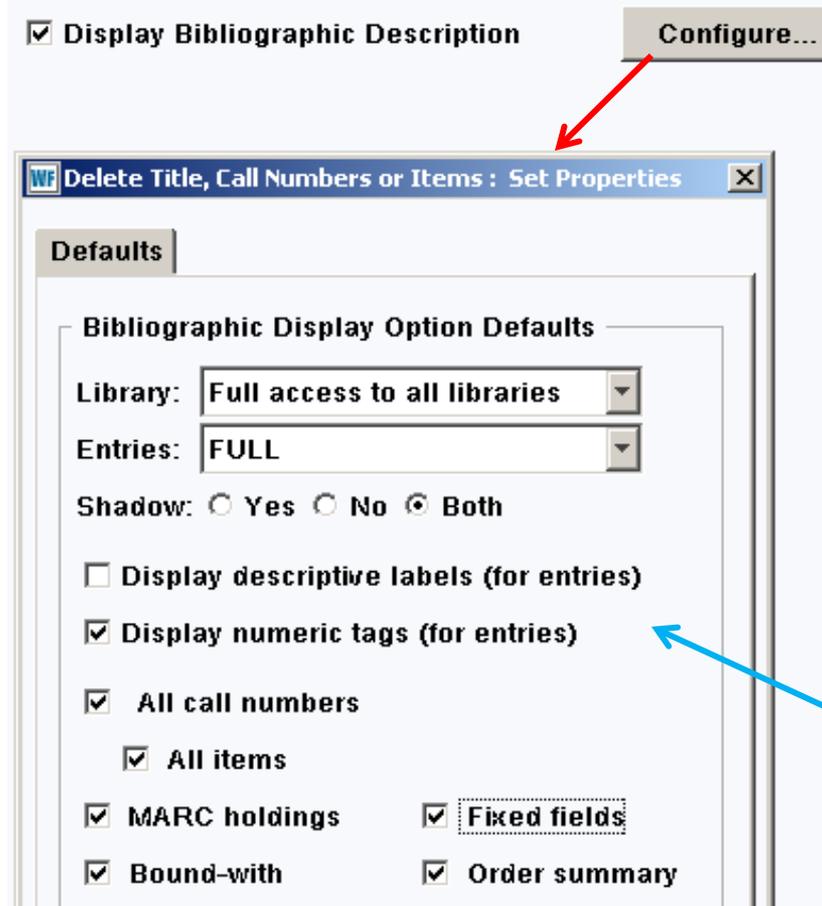
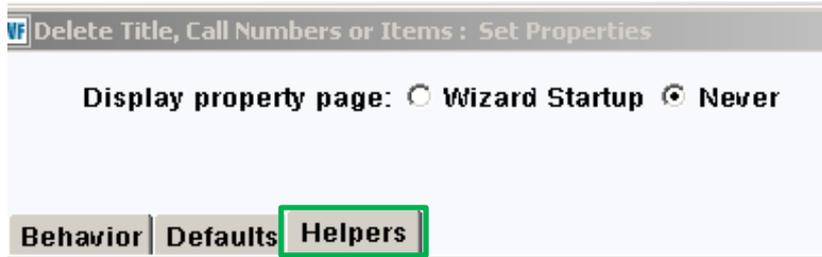
Cataloging – Title Maintenance

**Delete Title wizard**

Property Settings

Behavior tab

***It is recommended that you choose the options shown above  
To ensure that you delete only items belonging to your library; the  
system provides check boxes next to only your items if selecting the  
third option shown above***



Cataloging – Title Maintenance

### **Delete Title wizard**

Property Settings

Helpers tab

Clicking on the raised bar to configure the options to Display Bibliographic Description results in the Defaults window displayed at the left

You can just accept the defaults or change them as you wish

*Display descriptive labels  
and/or  
Display numeric tags*

WF Display Authority : Set Properties

Display property page:  Wizard Startup  Never

Defaults

Lookup Defaults

Preferred search type: BROWSE

Authority index: LCNAME

Editor Display Options

MARC View  Display fixed fields

Descriptive view  Display descriptive labels (for entries)

Extended info

Cataloging – Title Maintenance  
**Display Authority wizard**  
Property Settings  
Defaults tab

Browse search is the best option

Select the authority index you wish to search, LCNAME for personal and corporate names, LCSUBJECT for all types of subject headings, FLOATSUB for floating subdivisions

Descriptive view displays the fixed field at the top of the record

The option to Display descriptive labels to see tag descriptions instead of just tag numbers is very helpful if you're not used to viewing authority records

WF Add Item : Set Properties

Display property page:  Wizard Startup  Never

Behavior **Defaults** Helpers

Search preferences

Type:

Index:

Library:

Editor display options

MARC View  Display fixed fields

**Descriptive view**  Display descriptive labels (for entries)

Item tree defaults

Item tree display collapsed  Item tree display expanded

Extended Info Display Options

Display staff note on item list

Display public note on item list

Item required default values

Type:   Permanent

Home location:   Circulate

Shadow item

Item optional default values

Price:  Item category 1:

Media desk:  Item category 2:

## Cataloging – Item Maintenance

### **Add Item wizard**

Property Settings - Defaults tab

[Descriptive view](#) shows fixed fields at top of record as you are used to seeing them

[Display descriptive labels](#) shows descriptions for each tag instead of tag numbers only

### *Item tree defaults*

[Item tree display collapsed](#) shows just call numbers (Good option to use when viewing items linked to serials records)

[Item tree display expanded](#) shows each barcode under each call number

Select item type

Select home location



Cataloging – Item Maintenance

**Add Item wizard**

Property Settings

Behavior tab

Auto-generate item ID to avoid getting the message that call number already exists

*Optional: Set current location...to AVAILABLE\_SOON*

Cataloging – Item Maintenance

**Add Item wizard**

Property Settings

Helpers tab

Select options to print labels if using Label Designer wizard

WF Edit Item : Set Properties

Display property page:  Wizard Startup  Never

**Defaults** Helpers

Search preferences

Type:

Index:

Library:

Editor display options

MARC View  Display fixed fields

**Descriptive view**  Display descriptive labels (for entries)

Item tree defaults

Item tree display collapsed  Item tree display expanded

Extended Info Display Options

Display staff note on item list

Display public note on item list

Cataloging – Item Maintenance

***Edit Item wizard***

Property Settings - Defaults tab

*Item tree defaults*

Item tree display expanded shows the barcode associated with each call number

Display item notes

WF Edit Item : Set Properties

Display property page:  Wizard Startup  Never

Defaults **Helpers**

Print labels

Print preview labels

Cataloging – Item Maintenance

***Edit Item wizard***

Property Settings - Helpers tab

Select options to print labels if using Label Designer wizard

Display property page:  Wizard Startup  Never

Behavior **Defaults** Helpers

Item Values

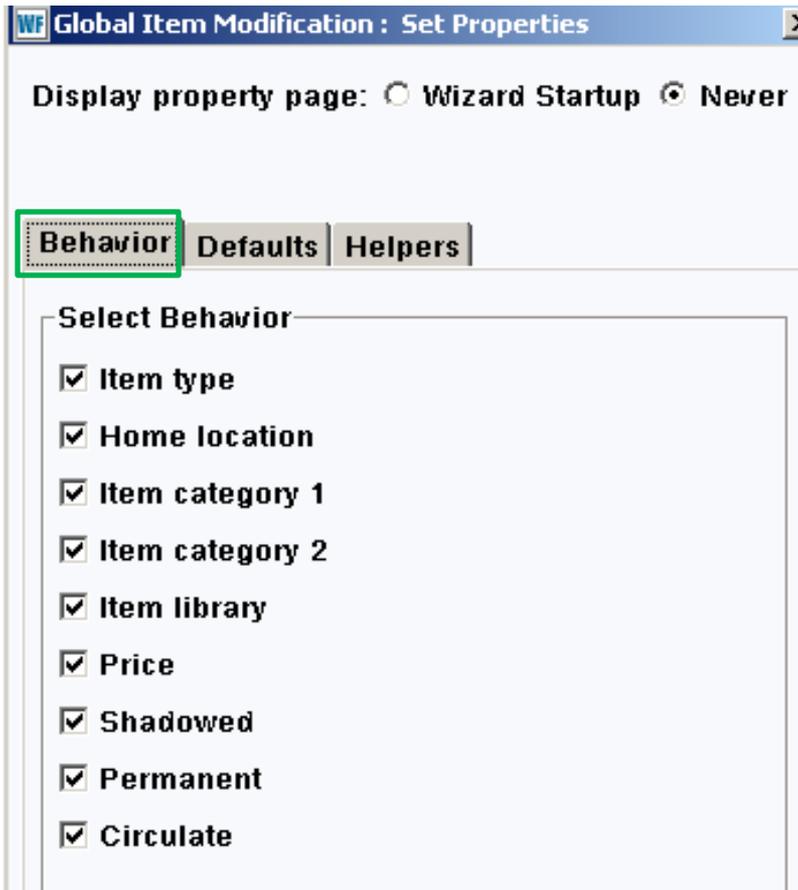
Item type:	»Will not be modified ▼
Home location:	»Will not be modified ▼
Item category 1:	»Will not be modified ▼
Item category 2:	»Will not be modified ▼
Item library:	»Will not be modified ▼
Shadowed:	»Will not be modified ▼
Permanent:	»Will not be modified ▼
Circulate:	»Will not be modified ▼
Price:	\$

Cataloging – Item Maintenance  
**Global Item Modification wizard**

Property Settings

Defaults tab

Use drop down menu to select desired option for each item value



## Cataloging – Item Maintenance

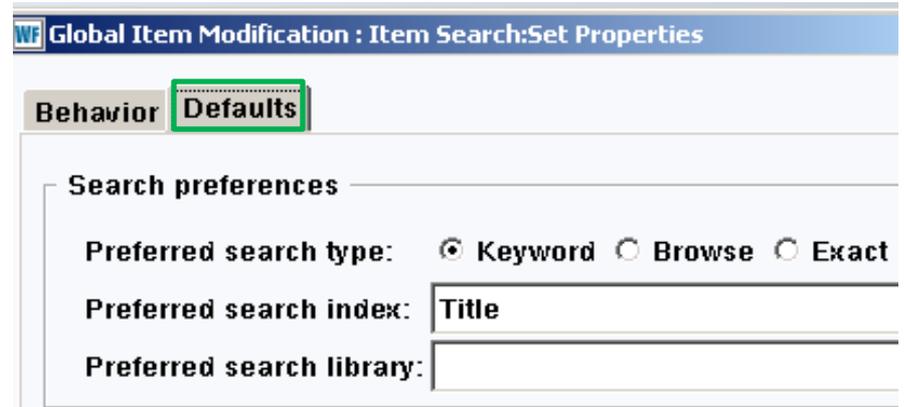
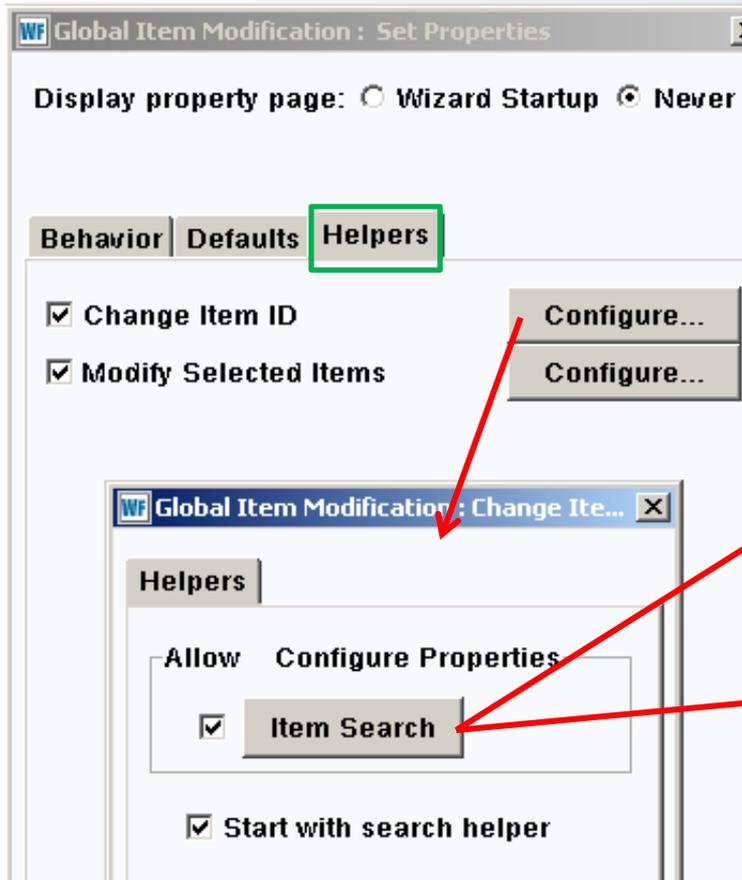
### ***Global Item Modification wizard***

Property Settings

Behavior tab

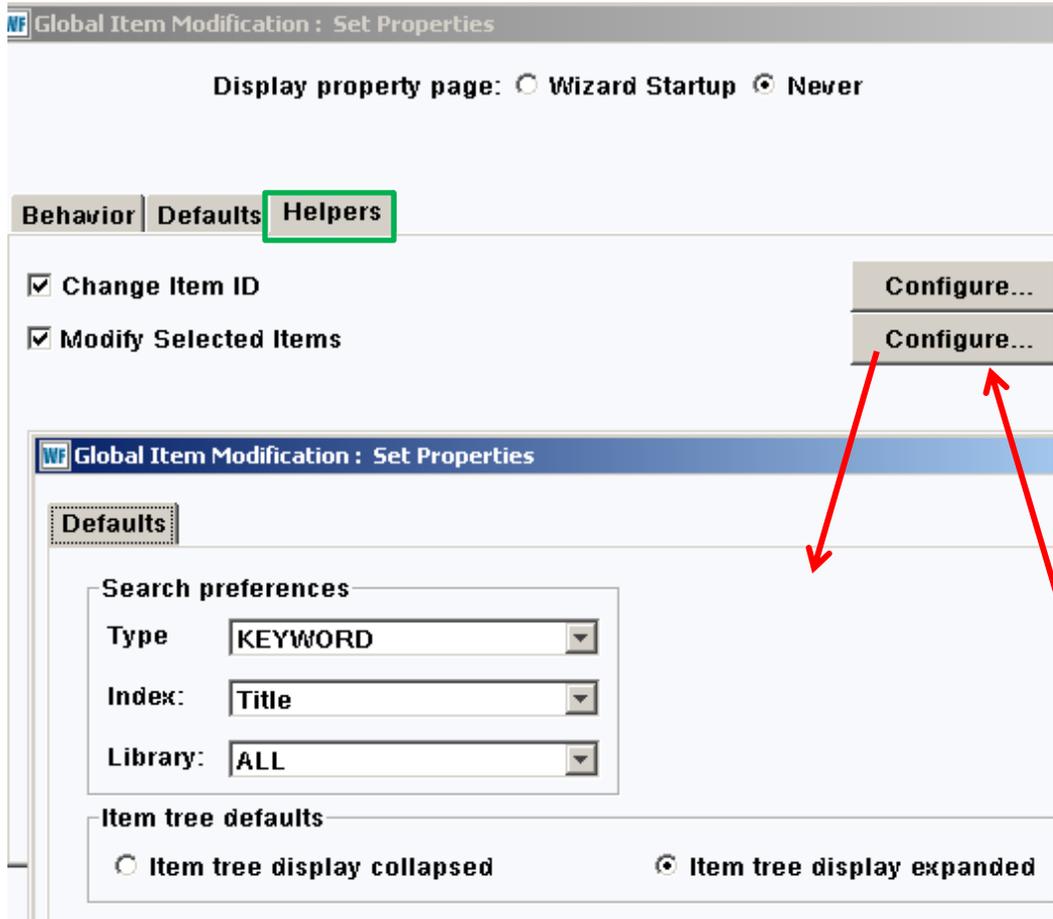
Select which items characteristics you want  
To edit globally

Select or clear any of the item check boxes



Cataloging – Item Maintenance  
**Global Item Modification wizard**  
 Property Settings  
 Helpers tab

Clicking on the raised bar to configure options to Change Item ID results in the display of an Item Search window  
 Clicking on the raised bar in this Item Search window results in the display of two additional tabs: Behavior and Defaults as shown above



Cataloging – Item Maintenance  
**Global Item Modification wizard**

Property Settings

Helpers tab

Configure options for *Modify Selected Items*

Item tree display expanded is recommended

*Option to configure the Modify Selected Items helper*

Display property page:  Wizard Startup  Never

Behavior Defaults Helpers

- Allow receiving
- Allow editing of item barcodes

Transit and Holds Processing:

- Make items available at owning library/location; do not trap items to satisfy holds
- Make items AVAILABLE\_SOON; do not trap or transit items to satisfy holds
- Transit items to owning library; do not trap or transit items to satisfy holds
- Trap and/or transit items to satisfy holds, make remaining items AVAILABLE\_SOON
- Trap and/or transit items to satisfy holds, make remaining items in transit to owning library

Label printing

- Print labels for items added to the catalog
  - Automatically
  - Print preview

## Cataloging – Item Maintenance *Add Ordered Items to Catalog wizard*

Property Settings

Behavior tab

For libraries using Acquisitions, this wizard allows the loading of OnOrder items to the bibliographic record

These are the system defaults

WF Add Ordered Items to Catalog : Set Properties

Display property page:  Wizard Startup  Never

Behavior **Defaults** Helpers

Search Preferences

Preferred search type:  
 Keyword  Browse  Exact  Current

Preferred search index: Title

Item library:

Acquisitions library:

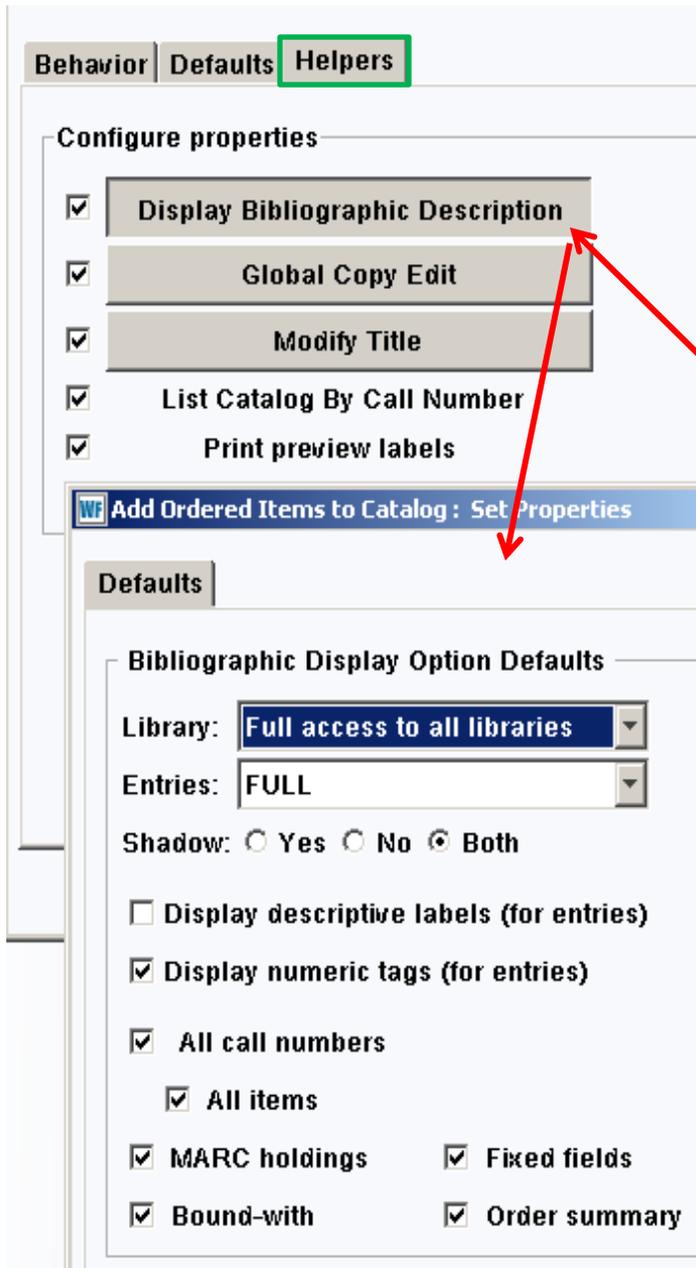
Orderline extended information

Entries to display: FULL

Cataloging – Item Maintenance  
**Add Ordered Items to Catalog wizard**  
Property Settings  
Defaults tab

Select Current as the Preferred search Type and Title and the Preferred search Index

Enter your library for Item library and Acquisitions library



## Cataloging – Item Maintenance

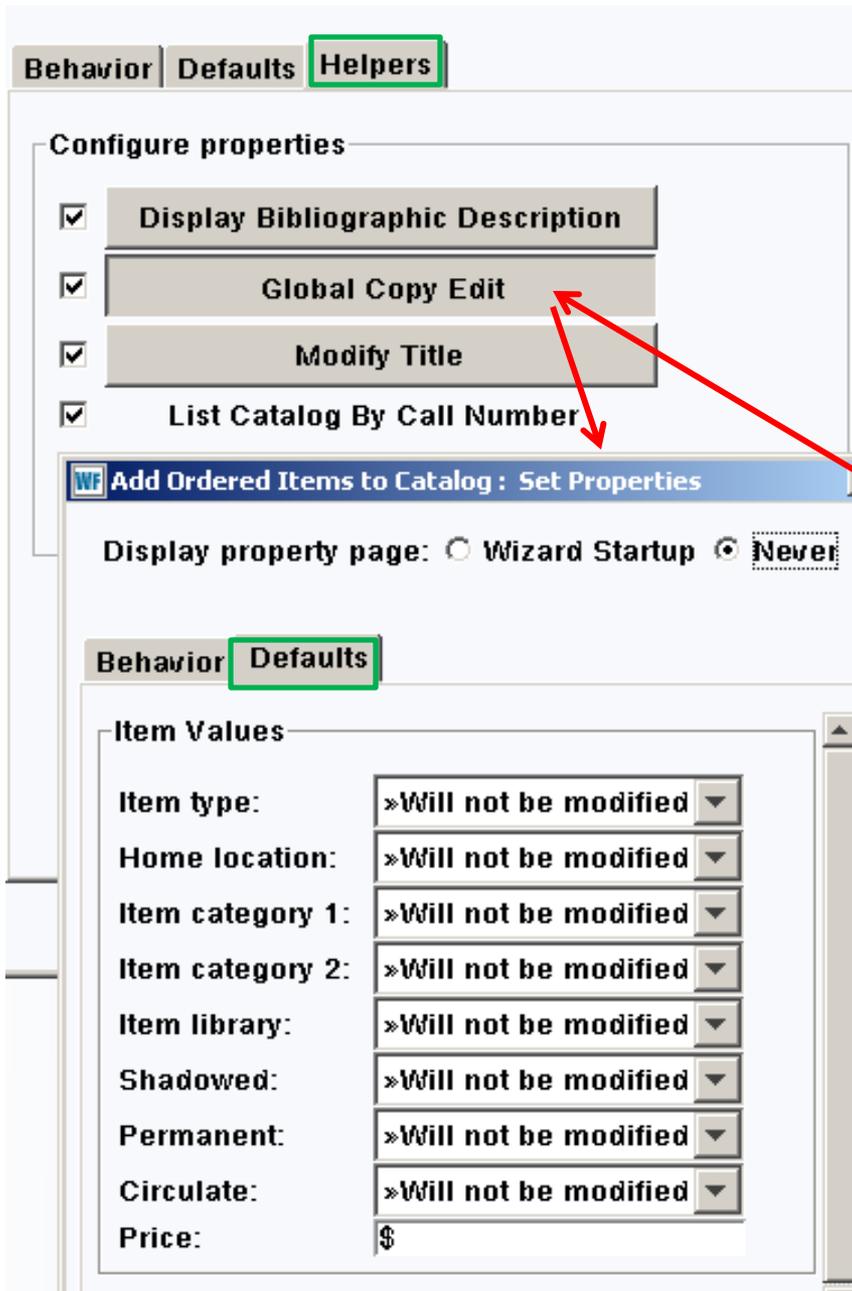
### ***Add Ordered Items to Catalog wizard***

Property Settings  
Helpers tab

Click on raised bar to “Display Bibliographic Description”

Options for bibliographic description shown on the left

Set options as desired



Cataloging – Item Maintenance  
**Add Ordered Items to Catalog wizard**

Property Settings

Helpers tab

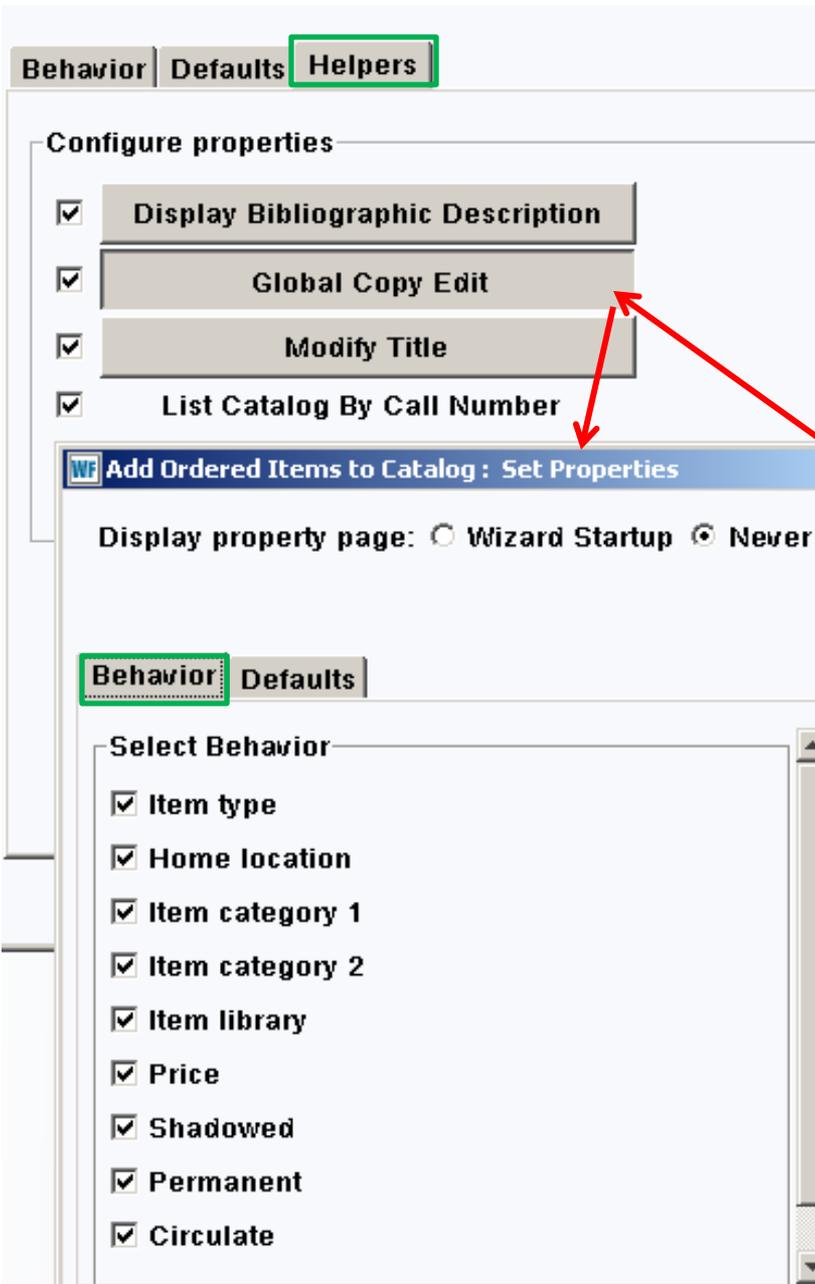
Click on raised bar for “Global Copy Edit”

Global copy edit

Defaults tab

These options are the same as those in the  
Global Item Modification wizard

Set these options as desired

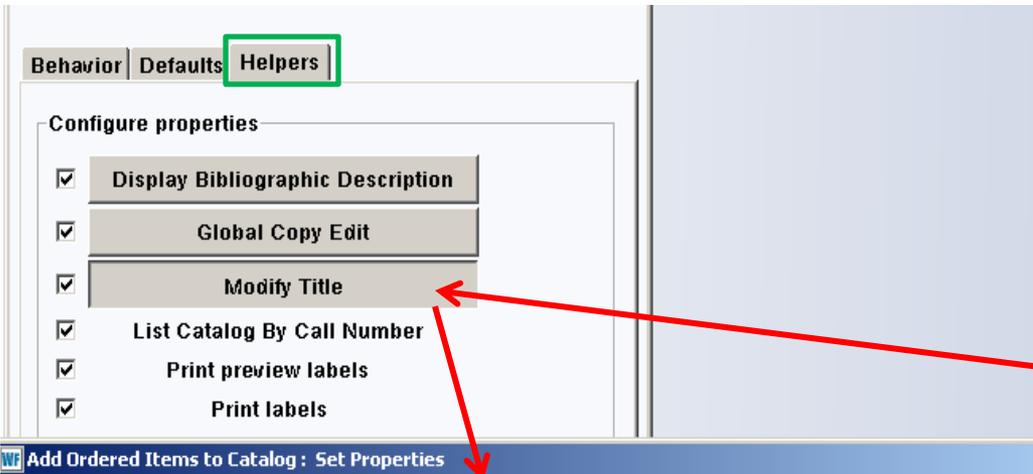


Cataloging – Item Maintenance  
**Add Ordered Items to Catalog wizard**  
Property Settings  
Helpers tab

“Global Copy Edit”  
Behavior tab

These properties are the same as those of  
the Global Item Modification wizard

Set these options as desired



## Cataloging – Item Maintenance

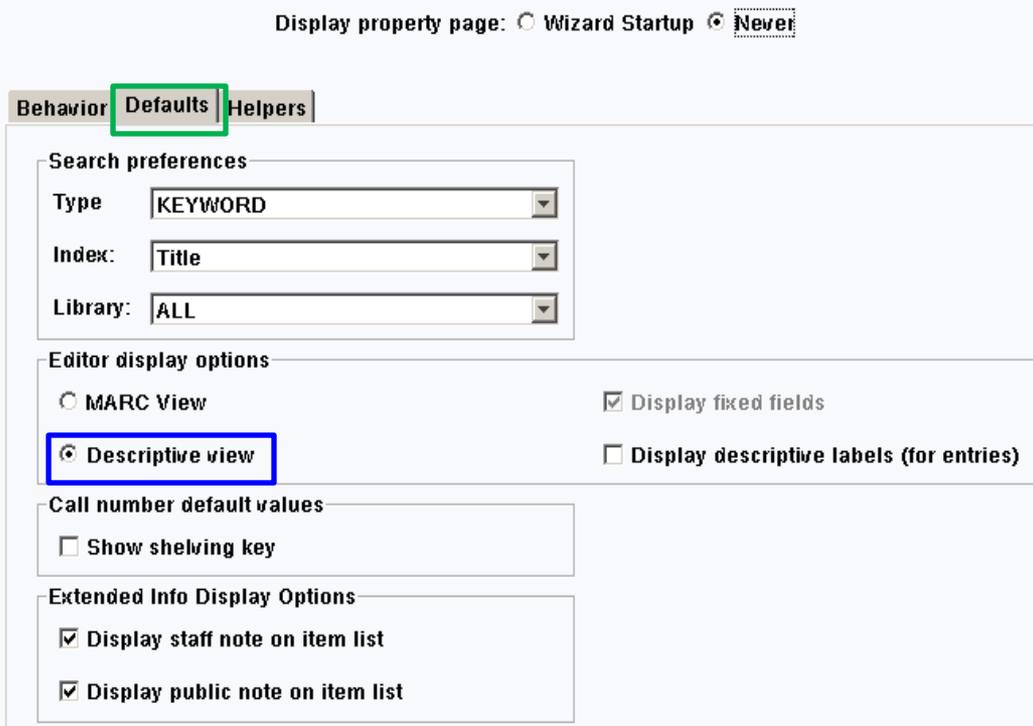
### ***Add Ordered Items to Catalog wizard***

Property Settings

Helpers tab

Click on raised bar for “Modify Title” options

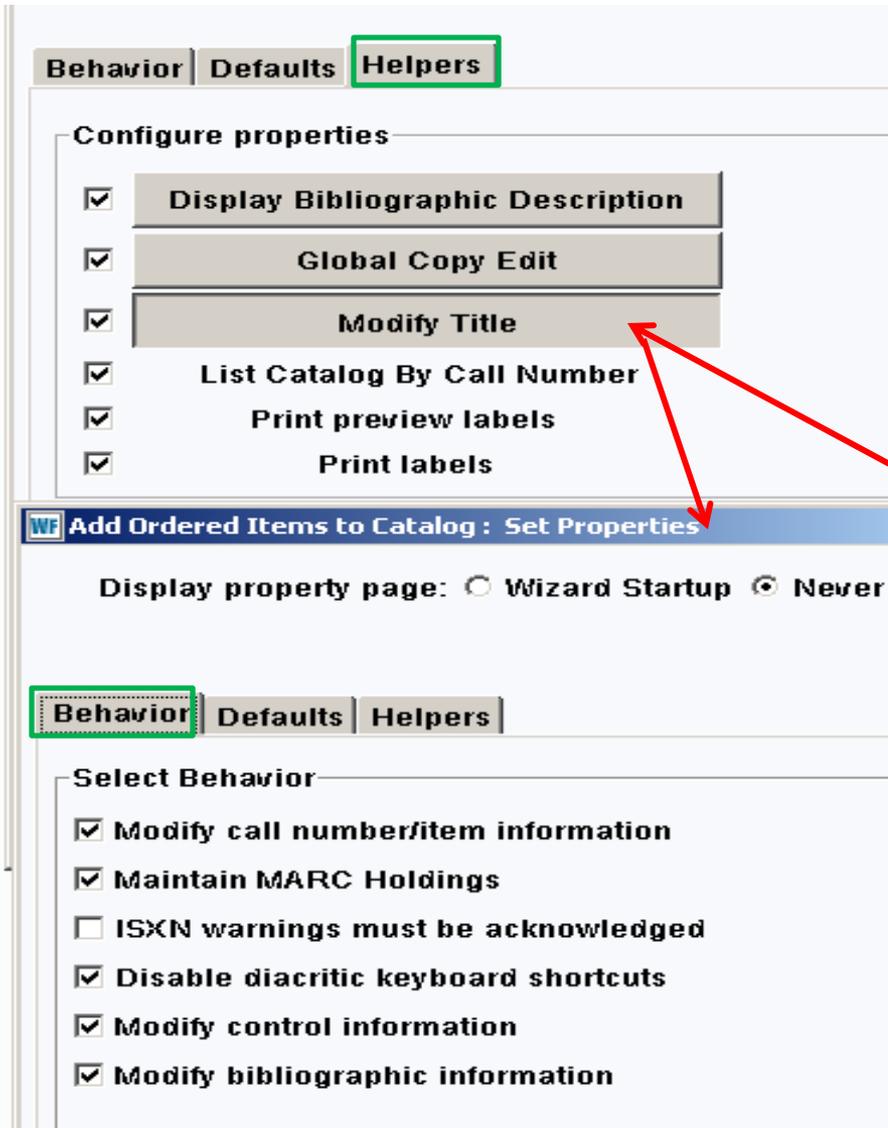
Defaults tab



Set the search options you prefer to use

Set **Descriptive view** to see the fixed field at the top of the window

Display descriptive labels if you want to see tag descriptions and not just tag numbers

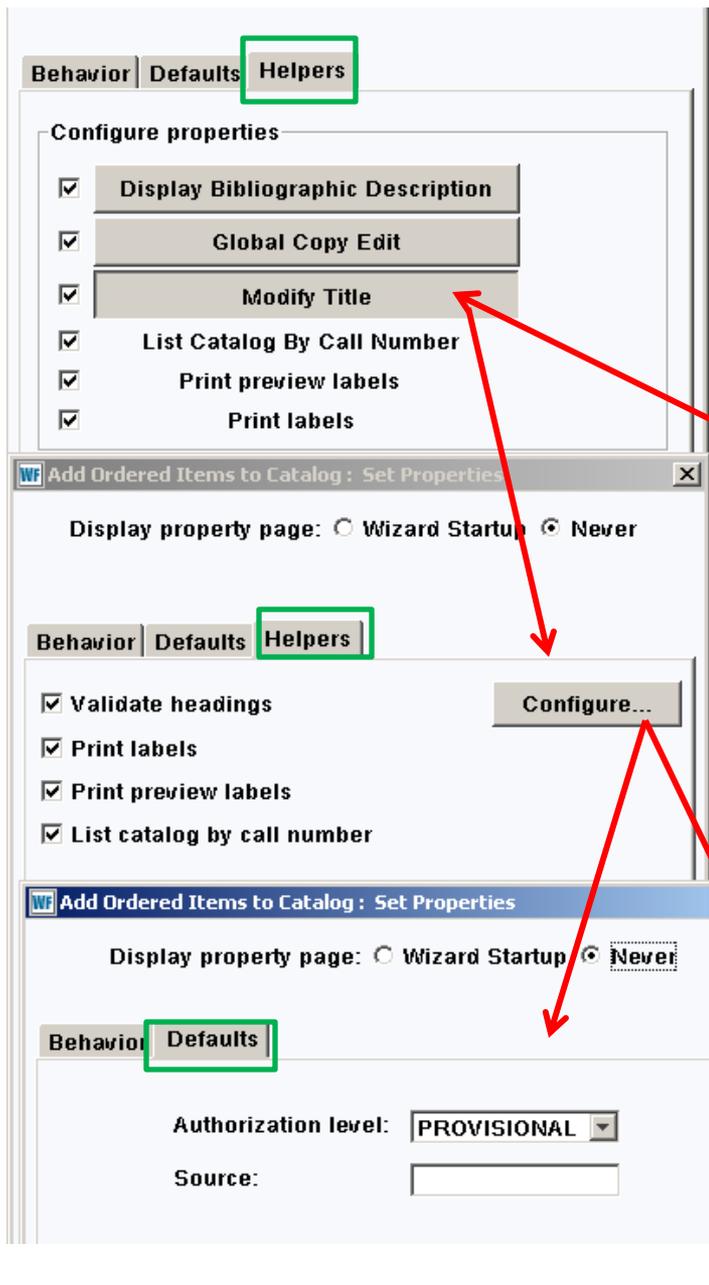


Cataloging – Item Maintenance  
**Add Ordered Items to Catalog wizard**

Property Settings  
Helpers tab

“Modify Title”  
Behavior tab

Set these defaults as desired



## Cataloging – Item Maintenance

### ***Add Ordered Items to Catalog wizard***

Property Settings

Helpers tab

“Modify title”

Helpers tab

Configure Validate headings

Defaults tab sets the options for authority records

Behavior tab sets option to skip unauthorized headings



Behavior **Defaults**

Search preferences

Type: KEYWORD

Index: Title

Library: ALL

Call number default values

Library: WSL

**Item tree defaults**

Item tree display collapsed  Item tree display expanded

Cataloging – Special **Bound-with wizard**  
Property Settings - Defaults tab

Select search options of your choice  
Select item tree display expanded  
so you can see barcodes associated  
with call numbers

*Item tree defaults*

**Behavior** Defaults

Select Behavior

Add call number

Prompt for Library when Adding New Call Number

Property Settings  
Behavior tab

Selecting both of these options  
results in the display of a call  
number helper that enables you to  
add a call number with no item  
record attached to it

Behavior **Defaults** Helpers

Search preferences

Type: KEYWORD

Index: Title

Library: ALL

**Item tree defaults**

Item tree display collapsed  Item tree display expanded

Cataloging – Special  
***Transfer Title, Call Numbers or  
Items wizard***

Property Settings - Defaults tab

*Item tree defaults*

Select Item tree display collapsed if you want to see just the call numbers or select Item tree display expanded if you want to see the barcodes too

Behavior **Defaults** Helpers

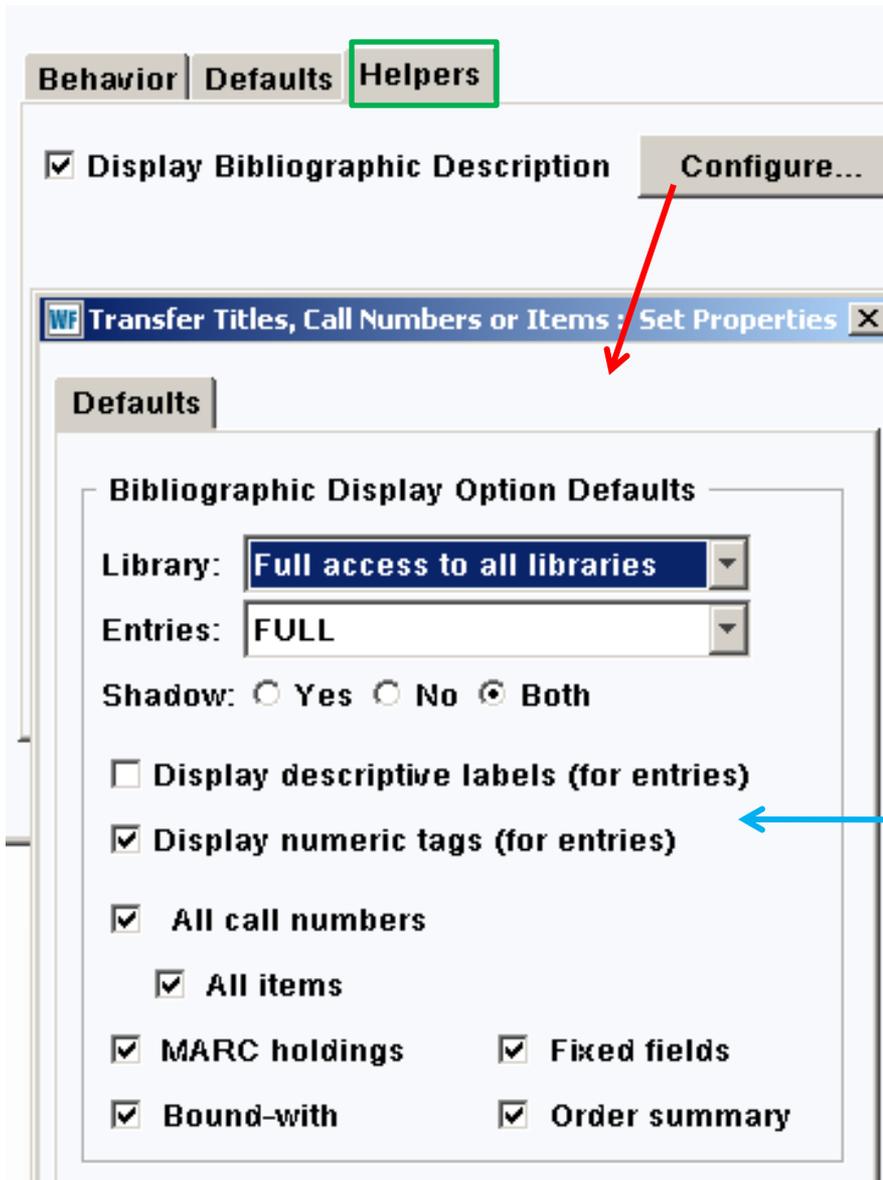
Select Behavior

Allow transfer of all existing call numbers and items in a title:

Prompt for confirmation before transferring all call numbers and items:

Property Settings  
Behavior tab

Allows the transfer of all call numbers and items with a prompt to confirm first



## Cataloging – Special *Transfer Titles, Call Numbers or Items wizard*

Property Settings  
Helpers tab

A helper to Display Bibliographic Record can be found in this wizard; its default configuration options are displayed at left

*Display descriptive labels*  
*Display numeric tags*

Behavior **Defaults** Helpers

Search preferences

Index: Title Control #

Review status: APPROVE

Cataloging library: ALL

Editor display options

MARC View  Display fixed fields

**Descriptive view**  Display descriptive labels (for entries)

Cataloging – Special  
***Review Title wizard***  
Property Settings  
Defaults tab

Review file for records before they  
are loaded into WYLD

Property Settings  
Behavior tab

**Behavior** Defaults Helpers

Select Behavior

**ISXN warnings must be acknowledged**

ISXN warning – This is an option to  
alert you if the ISSN or the ISBN  
in the bib record is incorrect

WF Review Title : Set Properties

Display property page:  Wizard Startup  Never

Behavior Defaults **Helpers**

Validate headings  Add subfield delimiter/code

Configure...

Cataloging – Special  
***Review Title wizard***  
Property Settings  
Helpers tab

Click on the raised bar to configure  
Validate headings

WF Review Title : Set Properties

Display property page:  Wizard Startup  Never

Behavior **Defaults**

Authorization level: PROVISIONAL

Source:

The option to Validate headings displays  
a Defaults tab and a Behavior tab as  
shown on the left

WF Review Title : Set Properties

Display property page:  Wizard Startup  Never

**Behavior** Defaults

Select Behavior

Skip unauthorized headings  
 Create new authority records for unauthorized headings  
 Select authority format automatically