



Traverse des Sioux Library System

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12/12/06 jdemars/mjohland

Item processing shortcuts

1. Right click on the *Call Number & Item Maintenance* wizard. Click *Properties*.

NOTE: Right clicking on the wizard will allow you to permanently set your default properties. When you close WorkFlows, the system will prompt you as to whether you want to save those properties. Say YES if you wish to keep them. Say NO if you want it to revert back to previous defaults.

2. Set default preferences. Search preferences: Keyword, General, and All. Then scroll down and set item type and home location. If you are processing all of one kind of item, such as DVDs, you could also set a default price. Finally select a default item category 1 and 2. Click OK.

Note: Many libraries set their home location to *INPROCESS*, to allow them to add holds for their patrons before putting the item on the shelf. Be sure to also follow steps 12 & 13 if you do this!

3. Scan the EAN in the Search For box. If the title is in the database, you'll go to the item display screen.
4. Find a library that shows a call number that matches yours, if possible, to avoid changing that info later.
5. Click *Add Call Number*, then OK. Add the barcode to the item and scan the barcode into the item ID field. Most of the info should be entered as default. If there are no additional changes, click on *Save*. Then click *Return to Search* to continue with the next item.
6. After adding all the items, you can create labels.
Note: Ask John Miller to set up a custom label report template to fit your spine labels.
7. Go to the Reports Toolbar. Schedule New Reports. Double click on your Custom Labels Report.
8. Click on the Item IDs tab, and scan the items you have just entered. Click *Save*. Then *Run Now*. Wait a few moments while the report runs.
9. Click Finished Reports. Highlight your labels report and click *View*. Then click the red x to close the log of the report. Go back to WorkFlows, and you'll have a Print Preview of your sheet of labels.

10. Edit the labels as needed, then print the page.

Note: If you don't have a full page of labels to run, run through the printer so it goes from the outside tray straight through to the back tray—the page seems to stay cleaner. Also, when you want to re-use that page, the program will let you start printing your labels anywhere on the page you choose.

11. At this point, many libraries like to add holds on behalf of their patrons.

12. When you added your items, if you set the home location to INPROCESS, you must set the home location back to ONSHELF.

13. To change home location from INPROCESS to ON-SHELF, go the Cataloging Toolbar, Items group, and click the Global Modification wizard. Set the home location to ON-SHELF. Wand in the items.

Note: You must use your TECH login to access this function.

14. Your items are ready to go to the shelf, or use the Check Item Status wizard to generate a hold slip for your patron.