Additional Admin Settings

How to set up a copy location

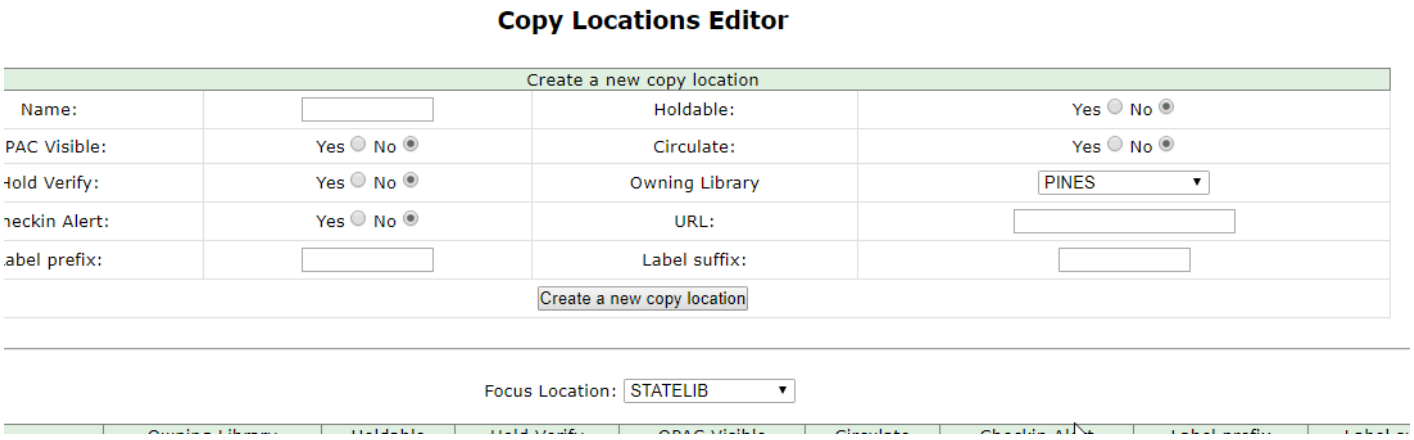
You will need to have Local Admin permissions to make these changes, or have your Local Admin complete this for you.

If you are **not** using on-order holds, use **these** instructions. If you **are** using on-order holds, follow these instructions.

No on-order holds

1. Go to **Administration→Local Administration→Copy Locations Editor.**

2. Change the focus to your library system.



3. Fill in the top portion of the Copy Locations Editor.

- Name the copy location ON ORDER.

The copy location should be exactly “ON ORDER”, not On Order or ON-ORDER. This allows better reporting later on.

- OPAC Visible: No
- Hold Verify: No
- Checkin Alert: No
- Holdable: No

- Circulate: No
- Circulating Library: Your focus branch

4. Click “Create a new copy location.”

5. A pop-up will appear to confirm that your changes were saved.

6. Scroll down the list of copy locations for that branch to confirm that you see the new ON ORDER location with its defaults as all red X's.

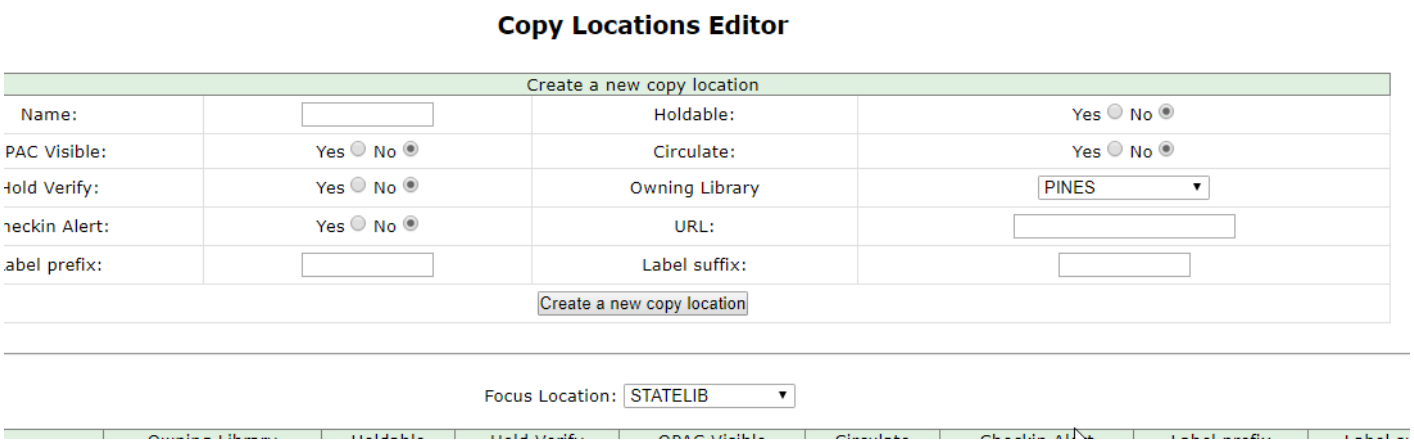
7. Change the focus to your next branch and repeat.

You will need to create an ON ORDER shelving location for each of your branches **and** at the system level (e.g. CRLS or LOPL).

Using on-order holds

1. Go to **Administration→Local Administration→Copy Locations Editor.**

2. Change the focus to your library system.



3. Fill in the top portion of the Copy Locations Editor.

- Name the copy location ON ORDER.

The copy location should be exactly “ON ORDER”, not On Order or ON-ORDER. This allows better reporting later on.

- OPAC Visible: Yes
- Hold Verify: No
- Checkin Alert: No
- Holdable: Yes

- Circulate: No
- Circulating Library: Your focus branch

4. Click “Create a new copy location.”

5. A pop-up will appear to confirm that your changes were saved.

6. Scroll down the list of copy locations for that branch to confirm that you see the new ON ORDER location with the settings that you specified.

7. Change the focus to your next branch and repeat.

You will need to create an ON ORDER shelving location for each of your branches **and** at the system level (e.g. CRLS or LOPL).

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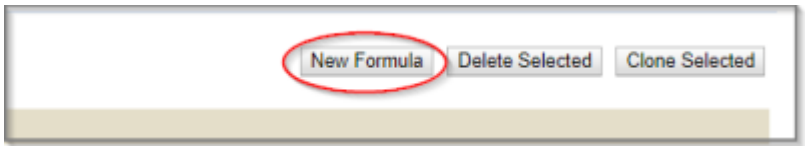
Distribution Formulas

Distribution formulas are intended for use in multi-branch systems to specify the number of copies that should be distributed to specific branches. The formulas are also used for all libraries as line item templates with the batch updater on purchase orders. Formulas can be created and reused as needed.

<fc #ff0000>**Create a new distribution formula**</fc>

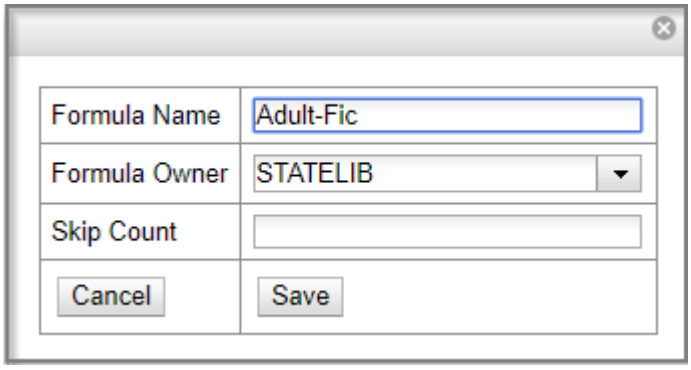
1. Select **Administration→Acquisitions Administration→Distribution Formulas.**

2. Click **New Formula.**



3. Fill in the fields in the pop-up.

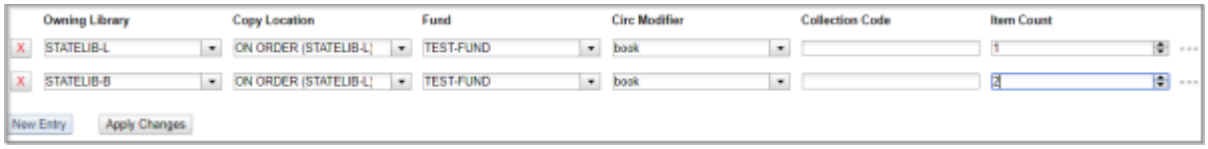
- **Formula name** – The name you would like to use to identify this template
- **Formula owner** – The org unit whose staff can use this formula (e.g. STATELIB)
- **Skip count** – Leave blank



4. Click *Save.*

5. The screen will refresh and you will notice that you are now inside your new distribution formula and ready to add branches and quantities.

6. Click **New Entry**. Each entry is a line in the grid, usually assigned to a particular branch.



7. You can use any combination of fields to create your distribution formulas. You do not need to fill in every field. For example, if you do not want to include fund in your formulas–as in, you would like to manually assign them in selection lists or purchase orders–you can leave that field blank. The available fields are:

- Owning Library
- Copy Location
- Fund
- Circ Modifier
- Collection Code *(only used if you get vendor cataloging)*
- Item Count (quantity)

8. Click **Apply Changes.** The screen will reload. To view your list of distribution formulas, you will need to go back through **Administration→Acquisitions Administration→Distribution Formulas.**

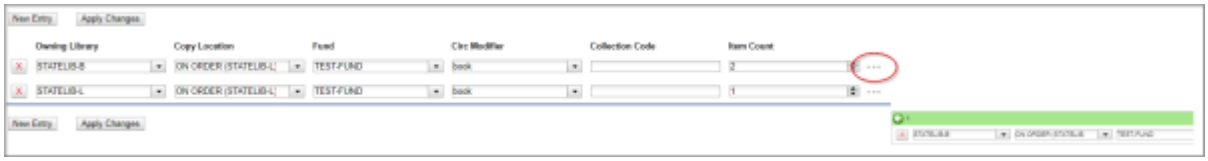
9. When viewing the list of your distribution formulas, the Item Count is the total count of quantities in that distribution formula.

<fc #ff0000>**Edit an existing formula**</fc>

1. Select **Administration→Acquisitions Administration→Distribution Formulas.**

2. Click on the hyperlinked name of the formula you would like to edit.

3. At this screen, you can add a new entry, edit an existing entry using the drop down menus, or delete an existing entry using the red X beside the entry you wish to delete. If you click and grab the three dots on a particular row, you can reorder your list.



When using a distribution formula, the system will start at the top of the list and work down the list until it runs out of copies. For example, if you are ordering five copies of a title and you apply a distribution formula with entries for seven branches (1 copy each), only the first five branches will receive copies.

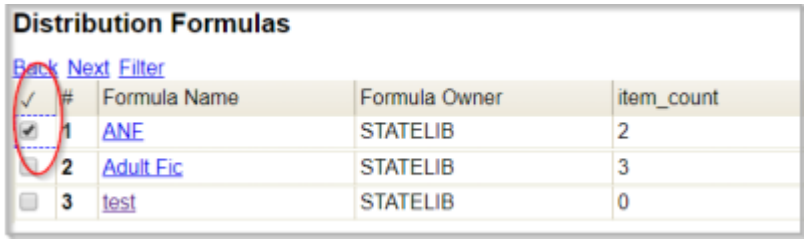
4. Click **Apply Changes** after you have made your changes.

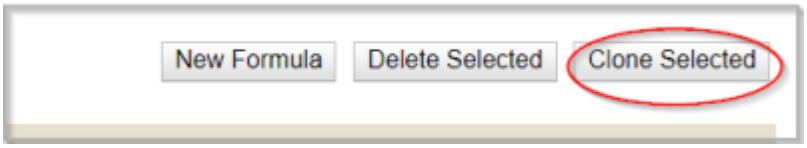
To edit the name of a distribution formula, simply double-click the name of a formula to edit it.

<fc #ff0000>**Clone a distribution formula**</fc>

1. Select **Administration→Acquisitions Administration→Distribution Formulas.**

2. Check the box adjacent to the formula you wish to clone and click **Clone Selected.**





3. Make the necessary changes to your cloned formula and click **Apply Changes.**

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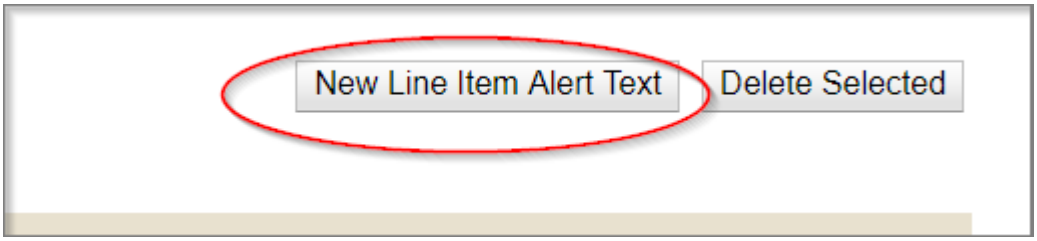
Line Item Alerts

Line item alerts can be used on line items to provide a pop-up when items are received. These need to be created prior to being used for the first time.

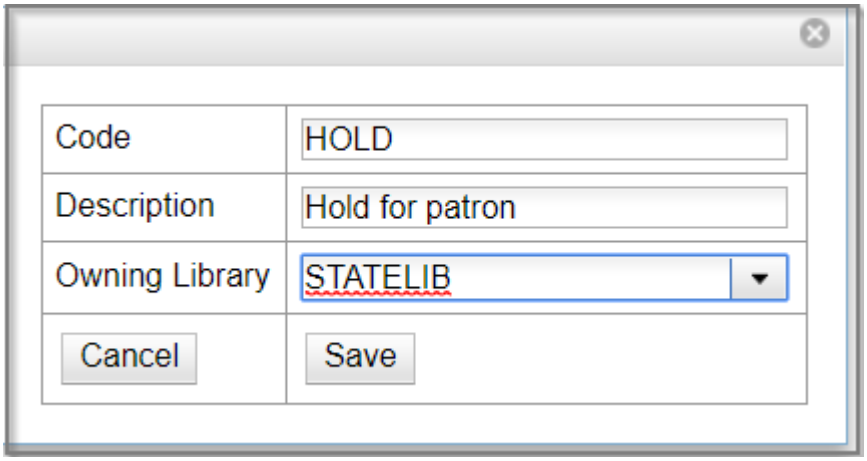
1. Go to **Administration→Acquisitions Administration→Line Item Alerts.**

2. If you have any line item alerts already created, they will display in the list.

3. To create a new alert type, click **New Line Item Alert Text.**



4. This will pop up the alert creation screen. There are only three fields:



- **Code** – This is what you will see when you create an alert on your line items. It should be descriptive, but general. I.E. This will be what is used for this *type* of alert, but it won't have specific details. So, HOLD is good, but “Hold for Mary Smith” is not.
- **Description** – *Optional*
- **Owning Library** – This should be your library system

5. Hit Save to confirm/save your new line item alert, and you will be returned to your list of line item alerts and should now see your new alert type.

To see line item alerts in action, see **Add an Alert** in the Line Items: How To section.

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