

Column Configuration Essentials Guide

Columns in list displays are configurable in each registered workstation. They should be customized and saved for the most common use. Displays can be changed as needed and, if not saved, will revert to the user's defaults.

To Customize Columns:

1. Click the Gear Icon to the right of "page 1."
2. Open Manage Columns.
3. Click *Sort Visible Columns To Top*.
4. Choose columns
 1. Columns with a **green** checkmark will display.
 2. Columns with an **orange X** are hidden.
 3. *Sort Visible Columns to top* as needed.
5. Use the **blue** arrows to move the columns up (to the left of the list) or down (to the right) until they are in the suggested order.
6. When finished, *Close*.
7. From the dropdown, click Save Columns.

Column Configuration Essentials v. 2025 (printable)

For workstation setup and best practice, the following most often used lists with recommended column choices and order are in priority order.

Search

- **Search for Patrons**

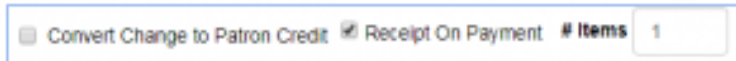
Home Library, Last Name, First Name, Card, Daytime Phone, Mailing: Street 1, Email Address

- **Search for Items by Barcode (also Item Status)**

Owning Library, Title, Location, Call Number, Barcode, Item Status, Checkout Date, Due Date, Date Last Edited, Edited By

Patron Record

- **Check Out**
Title, Barcode, Call Number, Due Date, Remaining Renewals
- **Items Out**
Title, Barcode, Item Status, Call Number, Owning Library, Checkout Date, Due Date
- **Holds**
Title, Current Item (barcode), Status, Request Date, Available Date, Pick Up Library, Queue Position
- **Bills**
Bill #, Balance Owed, Last Billing Type, Title, Note
*If the library always provides a receipt for payments, check *Receipt on Payment*



☐ Convert Change to Patron Credit ☒ Receipt On Payment # Items 1

- **Bills: History**
 - **Transactions**
Bill#, Last Billing Timestamp, Last Billing Type, Title, Total Billed, Total Paid, Last Billing Note
 - **Payments**
Payment ID, Payment Time, Last Billing Type, Title, Payment Type, Amount, Total Paid

Circulation

- **Checkin**
Route To, Location, Checkin Date, Title, Barcode, Due Date, Family Name

*To automatically print hold and Transit Slips, click “Checkin Modifiers” and select “Auto-Print Hold and Transit Slips”

- **Item Status**
Owning Library, Title, Location, Call Number, Barcode, Item Status, Checkout Date, Due Date, Date Last Edited, Edited By
- **Renew Items**
Title, Author, Call Number, Barcode, Family Name, Due Date, Remaining Renewals

- **User Buckets**

Home Library, Main (Profile) Permission Group, Last Name, First Name, Barcode, Daytime Phone, Email Address, Active, Is Deleted, Privilege Expiration Date

Holds

- **Capture Holds**

Route To, Title, Location, Call Number, Author, Barcode, Family Name, Request Date/Time, Shelf Expire Date/Time

- **Pull List for Hold Requests**

Shelving Location, Title, Call Number, Author, Current Item, Request Date

- **Holds Shelf**

User Display Name, Title, Author, Current Item, Status, Available Date, Shelf Expire Time, Notifications Phone Number

Cataloging/Tech. Services

- **Record Buckets Menu**

Favorite, Bucket ID, ISBN, Author (normalized), Title, Publication Year (normalized), TCN Source, Deleted?

- **Record Buckets**

Record ID, ISBN, Title, Author (normalized), Publication Year (normalized), TCN Value, Deleted?, Merge Date, Merged to?

- **Item Buckets**

Circulating Library, Circ. Modifier, Title, Call Number, Barcode, Location, Copy Status, Last Edit Date/Time, Is Deleted

Staff Catalog

- **Record Summary: Item Table**

Location, Call Number / Item Notes, Shelving Location, Barcode, Holdable?, Status, Due Date, Part, Total Circ. Count

- **Record Summary: Record Notes**

BIB Record, Creation Date, Note, Last Edit Date

- **Record Summary: View Holds**

Pickup Library, Requester Username, Current Item, Request Date, Last Targeting Date/Time, Capture Date, Items Status, Hold Status, Queue Position

- **Record Summary: Holdings View**

Owning Library, Call Number, Barcode, Shelving Location, Circulation Modifier, Holdable?, Status, Alerts, OPAC Visible?, Last Circ Date, Total Circ Count, Item Price, Notes