

Topic: Wizard Properties

Related Topics: Local Tool Bar Management bulletin #2

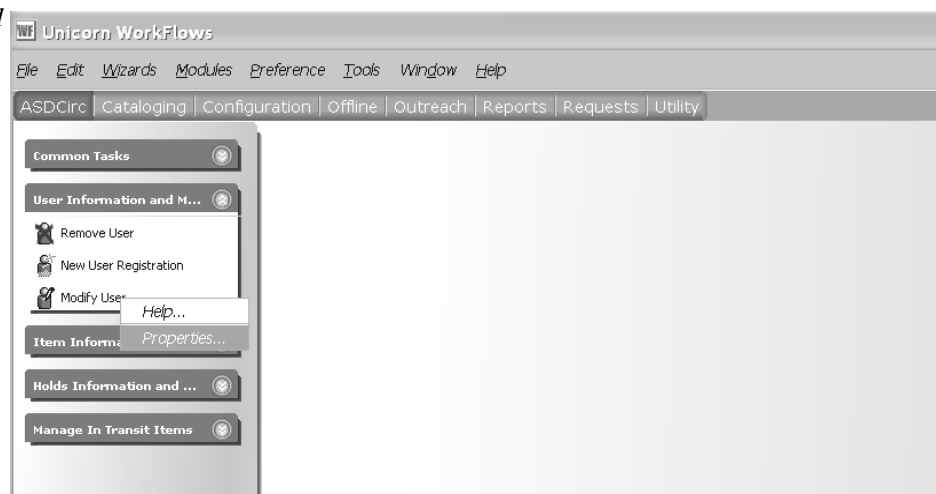
Introduction: Each wizard has properties which provide window defaults and various control settings for each wizard. Any changes made to properties are saved on that user's workstation (computer). There are two choices on the wizard property window:

1. Wizard Startup: Displays the Set Properties window the first time you access the wizard until you end the wizard session or log off the client
 2. Never: Does not display the Set Properties window the first time you access the wizard. If Never is selected and you want to open the Set Properties window, point to the wizard's tool bar button, right-click, and then click Properties on the shortcut menu.
- If a tab does not contain any information, the tab will not display. For example, the Checkout wizard does not contain any Defaults properties.
 - If you right click on a wizard and properties is grayed out, the wizard properties can not be customized.

Use steps to display or modify properties for a specific wizard

1. Place the insertion point over a wizard's icon (example New User Registration *Figure 1*)
2. Click the right mouse button
3. Click **Properties** to display each wizard's Set Properties window
4. After you exit/close Workflows you will be prompted by a dialog box whether you want to save changes

fig 1



Notes: If you set properties using the right-click method, when exiting the client, you will be prompted whether or not to save changes to properties. If properties are set when using the wizard (a left mouse click), changes are not saved when exiting the client.

Common properties settings: Item Search

- Type - KEYWORD
- Index - Title
- Library – ALL

Item Search : 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)

Call number default values

Show shelving key

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: Unpaid

Orders Tab

Show orders

Library: Full access to all libraries

Orders type: All

Checkouts Tab

Show checkouts

Charge ownership: Checkout library

Library: All libraries

Checkouts type: Active

Holds Tab

Show holds

Library type: Placed at library

Library: All libraries

Holds type: All

Call Number and Item Maintenance

- Library – Select your school from the drop down list
- Type – Biography
- Location - STACKS

Call Number and Item Maintenance : Set Properties

Display property page: Wizard Startup Never

Behavior | Defaults | Helpers

Search preferences

Type: KEYWORD

Index: Item ID

Library: ALL

Editor display options

MARC View Display fixed fields

Descriptive view Display descriptive labels (for entries)

Call number default values

Library: LIBRARY_RE Shadow call number

Class scheme: DEWEY Show shelving key

Extended Info Display Options

Display staff note on item list

Display public note on item list

Item required default values

Type: BIOGRAPHY Permanent

Home location: STACKS Circulate

Shadow item

Item optional default values

Price: \$

Media desk:

Item category 1:

Item category 2:

OK Cancel