

Set Properties

Understanding Properties

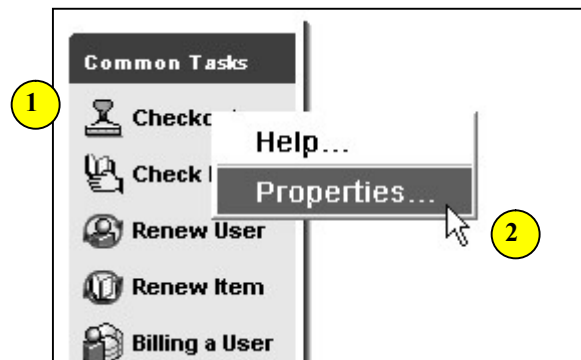
Each wizard has properties which provide screen defaults and various control settings for each wizard. A set of default properties for wizards are provided and stored in a system file on the server. The ITC administrator can customize those properties for the site (recommended for all "generic" properties), or for a group of users. These customizations are saved on the host to a file specified by the library system administrator (system-level properties). However, local properties for the workstation can also be saved to a property.dat file by the staff user.

When a client session is started, the system-level properties file is downloaded to the workstation along with the properties defined for this user's User Access policy. When a wizard is used, the system first loads the system-level properties, **but any locally-defined properties take precedence over the system-level properties.**

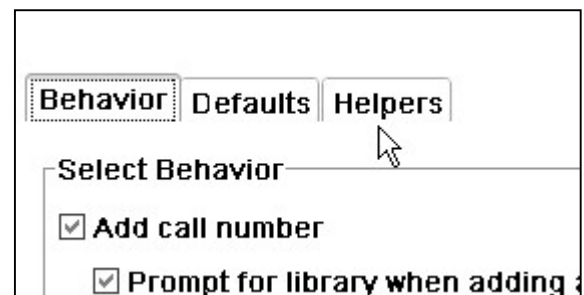
NOTE: *Only users with a user access level of administrator or supervisor can change Behavior and Helper properties. Supervisors can access wizard properties on individual workstations, and any changes are saved locally.*

Selecting Properties

1. To display properties for a specific wizard:
 - **PC users**, place your mouse over a wizard's icon and **right click** on the mouse.
 - **MAC users**, hold down the **ctrl** button and **click** on the mouse
2. **Select** Properties to display each wizard's Set Properties window, containing the following folders:
 - Behavior
 - Defaults
 - Helpers.



These folders display the current settings for the wizard and allow you to change these settings. These changes will be displayed the next time the wizard is used.



NOTE: *If a folder does not contain any information, the folder will not display. For example, the Checkout wizard does not contain any Defaults properties*

3. Behavior

In the Behavior folder, you can preset selected field values and select which next steps and/or folders will display with a specific wizard or helper. Some wizards will contain an At End of Wizard screen area, in which you can select which next step buttons display at the end of the wizard work flow or select which action the wizard should automatically perform as the last step of the wizard.

NOTE: *This folder only displays to users at the supervisor and administrator access level. Contact your ITC if you need changes here.*

4. Defaults

In the Defaults folder, you can preset field values and select which information will display with a specific wizard or helper.

5. Helpers

In the Helpers folder, you can select which helpers will display with a specific wizard or helper. You can also configure properties for helpers by clicking on the platform under the helper name. (ex: Item Search and Display wizard, select the Helpers tab, Configure Options for Item Search.)

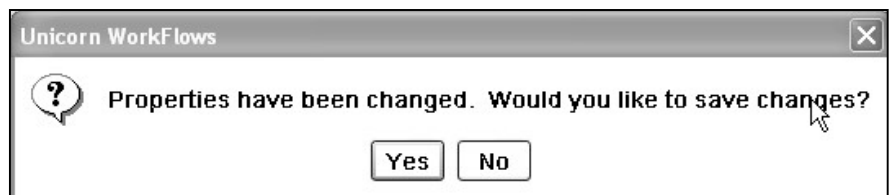
CAUTION: *Changes you make to a helper's properties apply globally whenever this helper is used.*

NOTE: *This folder only displays to users at the supervisor and administrator access level.*

Saving Properties

If you want to save your property changes permanently:

1. **Exit** the workstation.
2. **Select** Yes to save the changes to your local workstation.
3. **Log in** and your changes will be there.



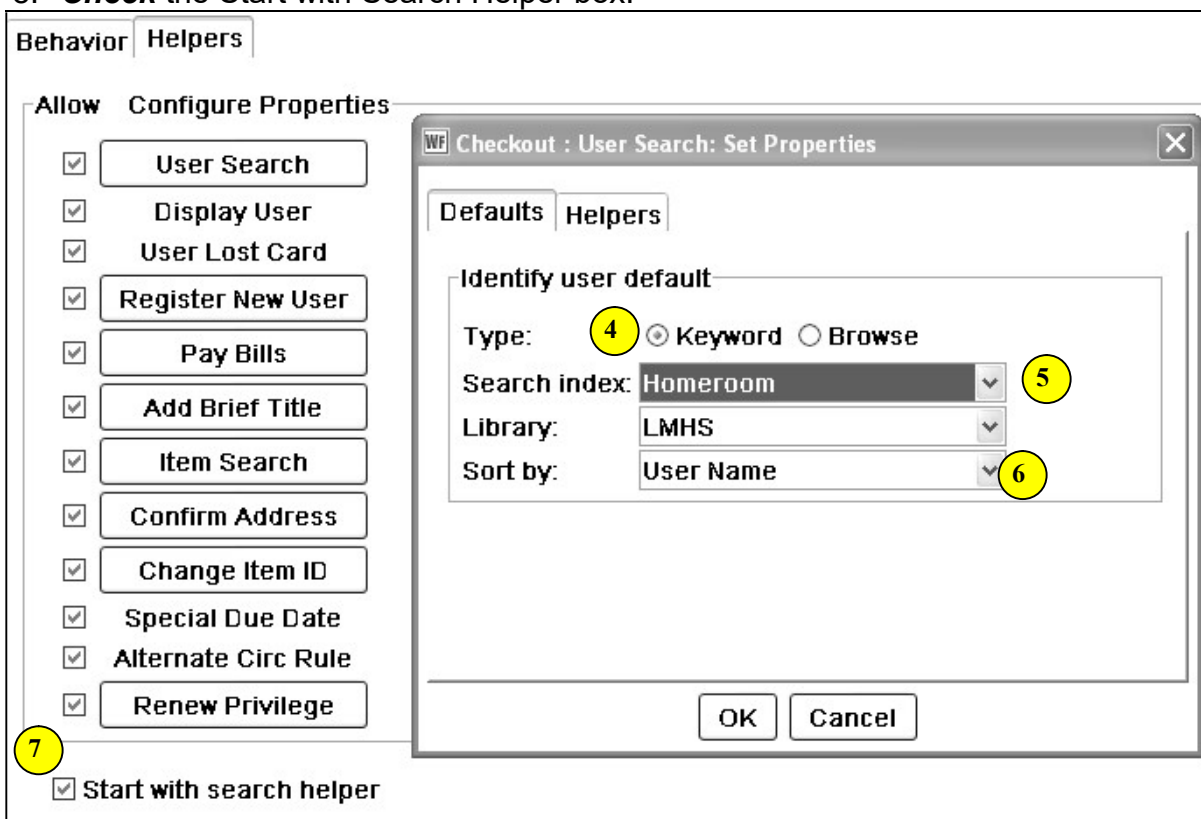
TIP: *You have the option of displaying the Set Properties screen every time a wizard is selected. This may be helpful for some of the cataloging wizards.*



Note: For more detailed information or specific questions, use HELP wizard.

Situation: Students come to the library by class. Librarian wants to quickly checkout by using their names rather than scan a barcode.

1. **Right click** on Check Out on the Common Tasks Toolbar.
2. **Click** on Properties
3. On the Helpers tab, **click** on the User Search button, NOT the checkbox.
4. **Click** the Defaults tab.
5. **Select** Keyword for Type.
6. **Set** Search Index to Homeroom.
7. **Set** Sort by to User Name.
8. **Check** the Start with Search Helper box.



How to use this setting:

1. In checkout, **click** on User Search Wizard.
2. In the search box, **enter** homeroom number exactly as it appears on the student records.
3. **Select** student from the list.
4. When you are ready for next student, **click** on Check out to new user.
Your list will still be there and you can select the next student.

NOTE: The search index can be made anything you wish from the menu (alt ID, Name, etc.). However, it will become the default search index in **all** wizards, not just

checkout.

Situation: You are going to catalog a large number of items with similar properties (item group, price, funding source, etc.)

1. **Right click** on Add Item Wizard.
2. **Select** Properties.
3. On Defaults tab, **select** the common properties your items have. The example below shows DVDs purchased with grant money for \$19.95 each.

Behavior
Defaults
Helpers

Index: Title

Library: Full access to all libraries

Editor display options

MARC View Display fixed fields

Descriptive view Display descriptive labels (for entries)

Extended Info Display Options

Display staff note on item list

Display public note on item list

Item required default values

Type: AUDVISUAL Permanent

Home location: AVAILABLE Circulate

Shadow item

Item optional default values

Price: \$19.95 Item category 1: DVD

Media desk: Item category 2: GRANT

How to use this setting:

1. **Click** on Add Item.
2. **Display** the correct record.
3. The default values you entered will automatically appear on the screen, so you just need to **enter** call number and barcode number.