



Handout:

Advanced Setup

in WorkFlows

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Overview

In this online training session:

- We will be looking at basic information on preference and property settings and how to change them, as well as how these settings are stored in WorkFlows.
- We will learn how to set up WorkFlows to print patron information, to recognize a receipt printer, and to change the location of a wizard. These involve the preference settings.
- We will look at how to tell WorkFlows what to print on receipts, such as date due slips, bill payment receipts, and available hold slips.
- We will also see how to set up WorkFlows to print reports, such as your RHA.
- And we will demonstrate how to copy preference and property settings from one computer to another.

We will start the training with about a page-and-a-half of background information, which is not essential for you to know completely in order to do advanced setup, but it will help you greatly in understanding why you are doing what you are doing. We'll then spend most of our time on practical procedures .

Background

If you try to use WorkFlows immediately after it is installed on your circ computer, WorkFlows will not work properly. What might occur, among other things, is that an item might not be flagged to fill a hold, the default library for user registration might not be your library, helpers might not appear correctly, or receipts that you might want to print will not print. Basically, you won't be able to rely on WorkFlows to circulate properly.

Before you can circulate properly, there are many settings that must be set up. Among other things, these settings tell WorkFlows how you want each wizard to "behave," what default selections you want to appear, and what helpers you want to be available.

Fortunately, SAILS has been able to standardize almost all of these many settings and can now import them for you very easily during installation. You only need to customize a few settings: those that pertain specifically to your library and any standard settings that you feel need changing to fit your particular library's procedures.

The Preference and the Property files

WorkFlows stores all of these settings on your computer in two files: the **Preference** file and the **Property** file.

- The **Preference** file contains many of the settings for the **menu options**, such as File and Preference. These control the display and function of WorkFlows on your **workstation**.

For example, there is a setting under the **Preference** menu option that tells WorkFlows whether or not your workstation uses a **receipt printer**.

- The **Property** file contains the settings for the **toolbars**, such as Circulation and Cataloging. These control the behavior and the display of the **wizards**.

For example, there is a setting in the **Circulation** toolbar for the **User Registration** wizard that tells WorkFlows to default to your library when you are registering a patron (if that is how your library set up the property).

For another example, the property file stores the information that you print on your receipts.



How to change preferences and properties

Once WorkFlows is installed and the preferences and properties are established on your computer, you can change them, as necessary, but that usually won't be too often.

Here are a couple of notes if you decide to go back and change one of your preferences or properties:

- you **do not** need to be logged in to Windows as an **administrator**,
- the changes you make only apply to the **current Windows** (not WorkFlows) user.

When you start your computer in the morning, many libraries only log into Windows using one user ID for all circulation staff members. However, some libraries have set up more than one Windows user on their computer – each user has its own login.

If you change a preference or property while logged in to Windows as a particular user, the change only applies to that user on that computer.

Changing a **preference** is simple:

1. Click on the **menu bar** (for example, click **File**).
2. Select the option (for example, **Print Setup**) that you want to change.
3. Make the change.

For preferences, when you close WorkFlows, you **are not** prompted to save the changes – you do not need to take any action to save them.

To change a **property**:

1. **Right-click** the **wizard** that you want to change.
2. Click **Properties**.
3. Select the **Behavior**, **Defaults**, or **Helpers** tab.
4. Make the change.
5. For properties, when you close WorkFlows, you **are** prompted to save the changes. If you want these changes to stay in effect when you open WorkFlows in the future, you must click **Yes**.

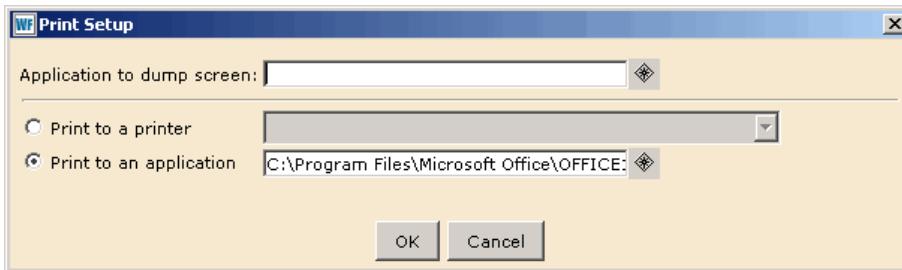
Preference settings

When you change a preference setting:

- You can be logged in as either Circ or Tech.
- The change goes into effect **immediately** (except for the Multiple Windows Mode setting).
- When you close WorkFlows, you **are not** prompted to save the changes – you do not need to take any action to save them.

Printing patron and item information

1. Go to the **File > Print Setup**.



2. Clear the **Application to Dump Screen** field so that it is **blank**. This controls the **Print Screen** option in the **File** menu.

You can use this if you want to display a list of items in Item Search and Display. When you select **File > Print Screen**, WorkFlows displays the information in your browser where you can print it.

3. Click the **Print to an application** button. This controls how to print when you use the **Print User** helper.

Use one of these two options:

- Clear the field so that it is **blank**. If you use the **Print User** helper, WorkFlows displays the information in your browser where you can print it. If the display looks like it is HTML code, use the following option instead.
- Use the gadget on the right to select the following file:

C:\Program Files\Microsoft Office\[your version of Office]\Winword.exe

If you use the **Print User** helper, WorkFlows displays the information in Microsoft Word where you can print it.

Barcode reader

Whether or not your library uses barcode readers/scanners, do the following:

1. Go to **Preference > Peripherals > Barcode Reader**.
2. Make sure that the **Barcode reader available** box is **unchecked**.

Although this may not seem logical, we have found this setting to be correct for SAILS barcode scanners.

Receipt printer settings

If your library *does not* use a receipt printer

1. Go to **Preference > Peripherals > Receipt Printer**.
2. Make sure that the **Receipt printer available** box is **unchecked**.
3. Click **OK**.
4. Skip the rest of the **Receipt Printer Settings** section.

If your library *uses* a receipt printer

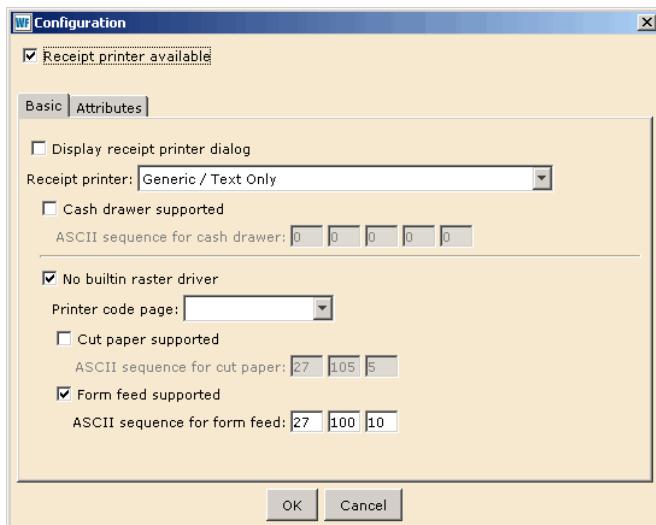
Although the following is not a WorkFlows setting, if you use a receipt printer, you must first set your Windows **Default Printer** to **Generic/Text**.

1. In **Windows**, select **Start > [Settings] > Control Panel > Printers and Faxes**.
2. Look for the check mark near the **Generic/Text** printer signifying that this is the default printer. If the check mark isn't there, **right-click** the printer and click **Set as Default Printer**.
If you don't see the Generic/Text printer, you first need to set one up. Please contact SAILS Support if you need help with this.
3. **Right-click** the **Generic/Text** printer and click **Properties**.
4. Click the **Advanced** tab.
5. Make sure the following buttons are checked:
 - Spool print documents so program finishes printing faster.
 - Start printing immediately.
6. Click **OK**.

From this point on, if you want to print a Word or Excel document from this computer, you will need to select your laser or ink jet printer in the **Print dialog box** before printing. Even though you make this selection, the Generic/Text receipt printer remains your default printer.

Next, set your receipt printer setting in WorkFlows:

1. Select **Preference > Peripherals > Receipt printer**.



2. Make sure that the **Receipt printer available** box is **checked**.
3. In the **Basic** tab, **uncheck** the **Display receipt printer dialog** box, if it is checked.
4. Select your receipt printer in the **Receipt printer** drop-down box. This is usually **Generic/Text Only**.
5. **Check** the **No builtin raster driver** box, if it is unchecked.
6. If your printer is capable of cutting the paper automatically at the end of a receipt (you can determine this by trial and error), **check** the **Cut paper supported** box.
7. Enter 27 105 5 for the **ASCII sequence for cut paper** boxes.
8. **Check** the **Form feed supported** box.
9. Enter 27 100 10 for the **ASCII sequence for form feed** boxes. If you find that the receipt is too long, enter a number less than 10 in the right-most box.
10. Click **OK**.

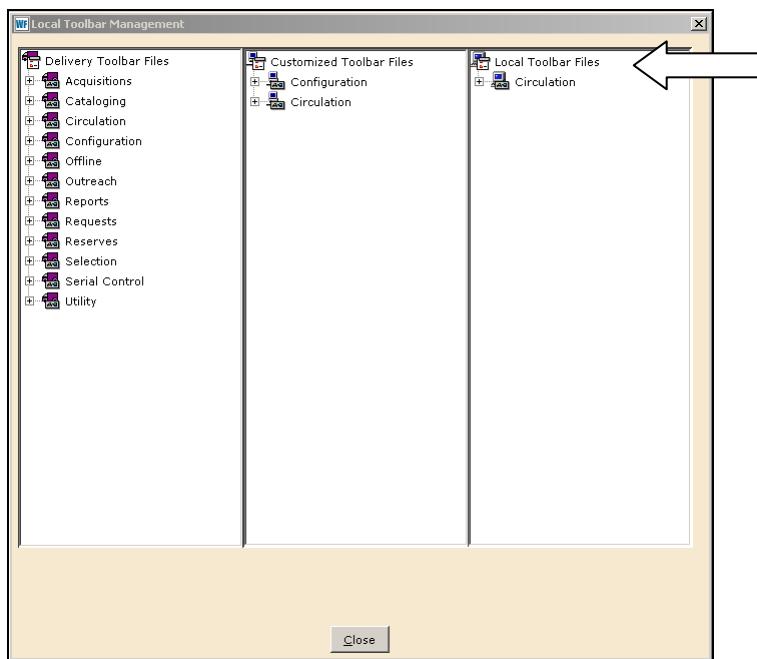
Unfortunately, even though you might change the **font settings** on the **Attributes** tab, the printing does not change on the receipts, due to the way WorkFlows and the receipt printers need to be set up.

Changing the location of a wizard

You may find that you are using a wizard often and that you want to move it to the Common Tasks group of wizards, if it is not there. You can use toolbar management to do this.

To move a wizard, such as Discharging Bookdrop, to the Common Tasks group of wizards:

1. Go to **Preference > Desktop > Current toolbar > Local toolbar management.**



If you do not see **Circulation** under **Local Toolbar Files** in the right column, do the following:
In the middle column, under **Customized Toolbar Files**, right-click **Circulation** and click **Copy to Local**.

2. In the **Local Toolbar Files** column, click the plus box to expand **Circulation**.
3. Locate the wizard you want to move, in this case **Discharging Bookdrop**.
4. Right-click **Discharging Bookdrop** and click **Remove**.
5. Right-click a wizard, such as **Discharging**, in the **Local Toolbar Files** column beneath which you want to place the **Discharging Bookdrop** wizard.
6. Click **Paste After**.
7. Click the **Close** button.

Multiple windows mode

The **Multiple windows mode** option has nothing to do with Microsoft Windows.

You must check the **Multiple Windows Mode** box. This prevents certain errors from occurring when you use WorkFlows. It also allows you to view more than one wizard at a time.

1. Go to **Preference > Desktop > Desktop Setup**
2. **Check the Multiple Windows Mode box.**

If you need to check this box, you must restart WorkFlows before this takes effect.

Making the text on the screen easier to see

You can make the text on your screen easier to see by changing the font settings, such as by increasing the font size or selecting Bold.

Unlike many of the other settings in the menu bar, WorkFlows saves this setting in the **Font** file (located in the **Property** folder).

Go to **Preference > Desktop > Font Settings** to make your changes.

Changing the color of the screen display

To change the color of the screen display:

1. Go to **Preference > Desktop > Desktop Setup**.
2. Select a theme from the **Themes** drop-down box.

Property settings for Circulation

When you change a property setting:

- If you are logged in as **Tech**, you can make changes on the **Behavior**, **Defaults**, and **Helpers** tabs.
- If you are logged in as **Circ**, you can make changes on the **Defaults** tab in some wizards.
- The change goes into effect **immediately**.
- When you close WorkFlows, you **are** prompted to save the changes. If you want these changes to be in effect when you open WorkFlows in the future, you must click **Yes**.

For the most complete and up-to-date list of recommended properties, see the *WorkFlows: Circulation Properties* document on the **SAILS staff Web site** under **Circulation**.

When you set properties, you are usually just checking a checkbox, selecting from a drop-down list, or using a gadget.

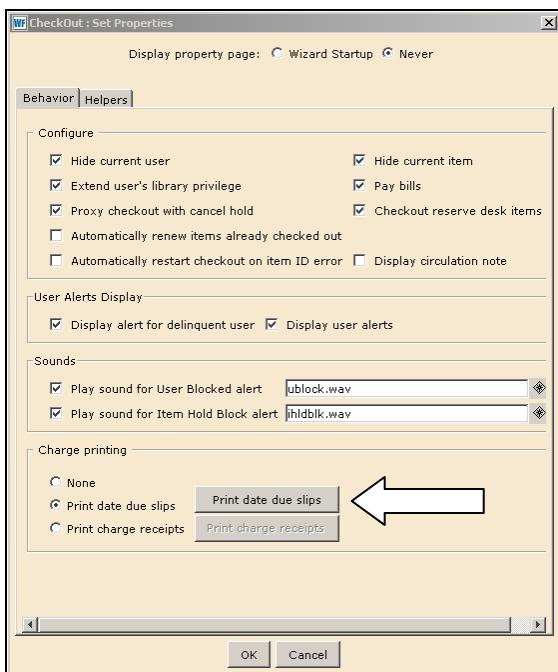
Setting up printed receipts

If you want to print a receipt whenever you use a particular wizard or helper, remember that the receipt will not print out if you have not:

- checked the **Receipt printer available** box in **Preference > Peripherals > Receipt printer**, and
- set the properties for that receipt to tell WorkFlows what information you want to print.

To tell WorkFlows what information to print:

1. Right-click the **wizard**.
2. Click **Properties**.



3. Select the **radio button** for the slip you want to print.
4. Click the **gray button** to the right of the radio button.
5. Enter the information or use the gadget to specify a receipt **header**, receipt **fields**, or receipt **footer**.

If you select **Name** for one of the Receipt Fields, the patron's name will appear for each item on the receipt.

Common types of receipts

The properties for the following wizards and helpers (as well as fields for the three types of receipts) may have been set in your properties as part of SAILS' standard installation and setup process. You may inactivate or customize these as you wish.

Wizard	Button
CheckOut	Print date due slips
CheckOut: Pay Bills helper	Print slip showing payments
Check Item Status	Print available hold slip
Discharging	Print available hold slips
Discharging: Pay Bill helper	Print slip showing payments
Fine Free Discharge	Print available hold slips
Fine Free Discharge: Pay Bills helper	Print slip showing payments
Renew User	Print date due slips

Wizard	Button
Renew User: Pay Bills helper	Print slip showing payments
Renew Item	Print date due slips
Renew Item: Pay Bills helper	Print slip showing payments
Billing a User	Print slip showing payments
Paying Bills	Print slip showing payments
Check Item Status	Print available hold slips
Display User: Pay Bills helper	Print slip showing payments
Place Holds: Pay Bills helper	Print slip showing payments
Place Blanket Holds: Pay Bills helper	Print slip showing payments
Remove User Holds	Print available hold slips
Remove Item Holds	Print available hold slips
Trap Holds	Print available hold slips
Ephemeral	Print date due slips
Ephemeral: Pay Bills helper	Print slip showing payments
Discharging Bookdrop	Print available hold slips
Pending transits	Print available hold slips
Receive transit	Print available hold slips

Print Date Due Slips

Title
 Author
 Item ID
 Date Due

Print Slip Showing Payment

Title
 Author
 Item ID
 Reason for bill
 Amount billed
 Amount paid
 Payment date

Print Available Hold Slip

Name
 Phone number
 Title
 Author
 Item ID

Property settings for Reports

You can change the program with which you view and print your RHA or other reports. You may need to do this if a newer version of Microsoft Word is installed on your computer. You can also select Notepad or WordPad to view and print reports.

You can also set the dimensions of the page. The dimensions suggested below create the proper page breaks for Microsoft Word 2003 for some reports, but it may be difficult to determine the correct settings for other reports.

1. In the **Reports** toolbar, under the **Common Tasks** group of wizards, click **Report Session**.
2. To the right of **Application to view reports**, use the gadget to select a program. For Microsoft Word, select:

C:\Program Files\Microsoft Office\[your version of Office]\Winword.exe

3. To the right of **Application to print reports**, use the gadget to select a program. For Microsoft Word, select:

C:\Program Files\Microsoft Office\[your version of Office]\Winword.exe

4. Near the bottom of the Report Session screen, enter the following numbers:

Page length	57
Page width	80
Top margin	0
Bottom margin	0

5. Click **OK**.

Copying settings from one computer to another

After you are satisfied that the WorkFlows preferences and the properties are established and saved on one computer (the **source computer**), you can then copy the **Preference** and **Property** files – the files that contain those settings – to a **target computer**. The target computer then has the same settings as the source computer.

Important: Please be very careful when you are copying files.

If you have any questions or if you have any difficulty with the procedure, please contact SAILS Support. We will be happy to help you.

Important: The properties for all the toolbars, such as Circulation, Cataloging, and Acquisitions, are all contained in the same Property file. Properties that you do not want to change may have already been set in the target computer.

For example, let's say that the source computer contains the correct **Circulation** properties but not the correct **Cataloging** properties. If the target computer, however, already has the correct cataloging properties set up, and you copy the Property file to the target computer, those cataloging properties will no longer be correct.

Each computer that runs WorkFlows stores the Preference and Property files in the same location. That location is a **folder** that is also called **Property**. These files **do not** have an extension, such as .doc or .txt.

The Preference and Property files are located in:

My Computer > Local disk (C): > Documents and Settings > [Your User Account, such as Staff] > Sirsi > WorkFlows > Property folder

Important: Before you copy settings, it is wise go to the **target** computer and make a copy of the current Preference and Property files and save them elsewhere on your computer, such as on your Windows Desktop. That way, if something should go wrong, you have a copy of your original settings available to restore to the Property folder.

To copy settings:

1. On the **source computer**, make the necessary changes in your settings, close WorkFlows, and save any changes, if necessary.
2. Go to:

My Computer > Local disk (C): > Documents and Settings > [Your User Account, such as Staff] > Sirsi > WorkFlows > Property folder

Copy the Preference and the Property files to a flash drive.

3. On the **target computer**, close WorkFlows, if it is open.
4. Paste the files from the **flash drive** to the **target computer** in.

My Computer > Local disk (C): > Documents and Settings > [Your User Account, such as Staff] > Sirsi > WorkFlows > Property folder

5. On the **target computer**, start and login to WorkFlows as Tech, and verify the new properties.

Sometimes, when you copy these files to a target computer, and you try to print by using either the **Print User** helper or by printing a report from the **Reports** toolbar, WorkFlows displays an **error message** that says something like “the path was not found.” This is usually because the source computer is set up to print via one version of Microsoft Office/Word and the target computer via another. To fix this, change the printer settings from, for example:

C:\Program Files\Microsoft Office\Office11\Winword.exe to
C:\Program Files\Microsoft Office\Office12\Winword.exe