



Configure Wizards to “Start with User Search Helper” Guide

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This guide will help you configure WorkFlows wizards to open the User Search Helper each time that wizard is opened. You will learn how to turn this on using the checkbox “Start with search helper” in the Properties settings of a WorkFlows wizard. This can save you time and the effort of having to click the User Search every time you may need it. Note, however, that this will replace the initial prompt to scan in a user barcode and consider only changing those wizards where you think this will be helpful.

The User Search Helper can be configured to open on loading within these wizards:

- Checkout
- Display User
- Modify User
- Copy User
- Confirm Address
- Renew Privilege
- Suspend User
- Remove User
- Mark Item Lost
- Place Hold
- Display User Holds
- Modify Holds for Users
- Remove User Hold
- User Claims Returned
- Modify Due Dates

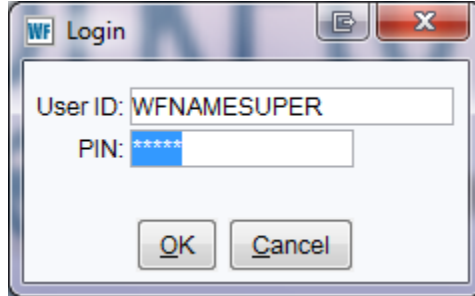
This change must be made in your SUPER user account in WorkFlows, sometimes called the supervisor login.

Please note a few things:

- Not all wizards that have the User Search Helper can be configured to “start with search helper”.
- Configuring one wizard does not carry through to the other wizards with User Search Helper.
- Read this guide through the end. If you don’t save your configuration upon logging out, then the changes you made will be lost.

1) Log into WorkFlows using the Supervisor login:

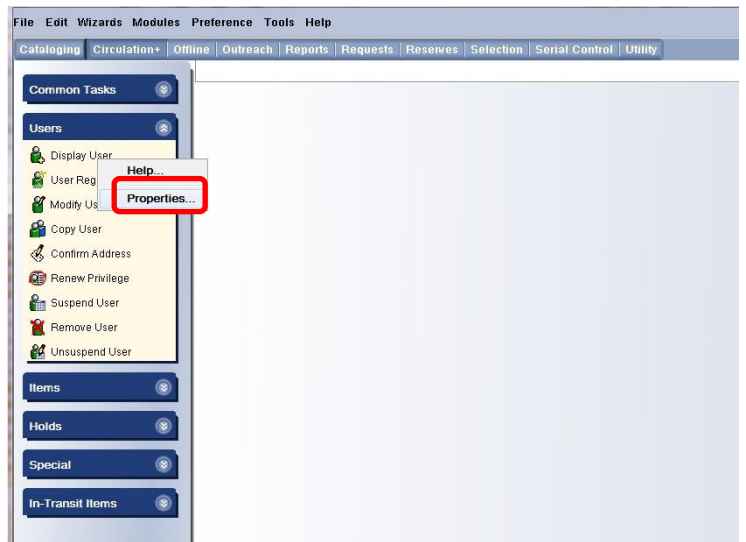
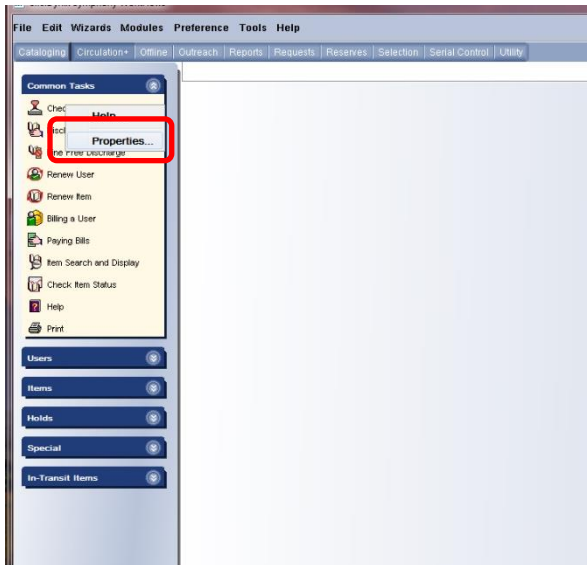
- Enter your WorkFlows library name followed by SUPER. The pin is also SUPER.
Example:



2) In the Circulation module:

- Right click on the name of the circulation wizard that you want to set.
- Let click to select Properties from the drop-down menu.

2a) Do this for the CheckOut wizard, Display User wizard, etc. (see complete list on page 1):

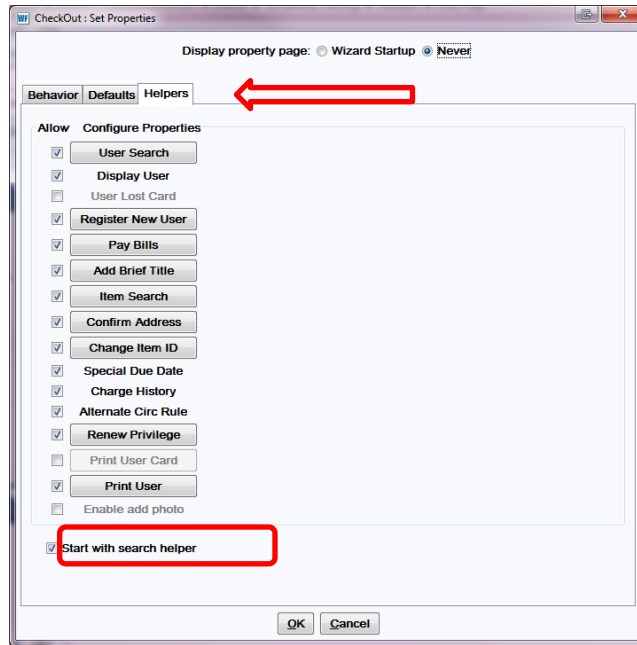


3) Set Properties to “Start with search helper”

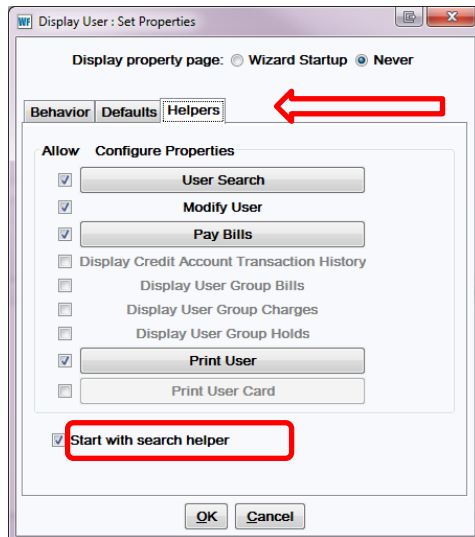
- In the Set Properties popup box of each wizard select the Helpers tab.
- There is a check box labeled “Start with search helper” on the bottom of the Helpers tab.
- Make sure the check box in front of “Start with the search helper” is selected.

This may look a bit different depending on the Wizard you are setting properties for. To save space, this guide will only share demos of a three Wizards’ Set Properties screens.

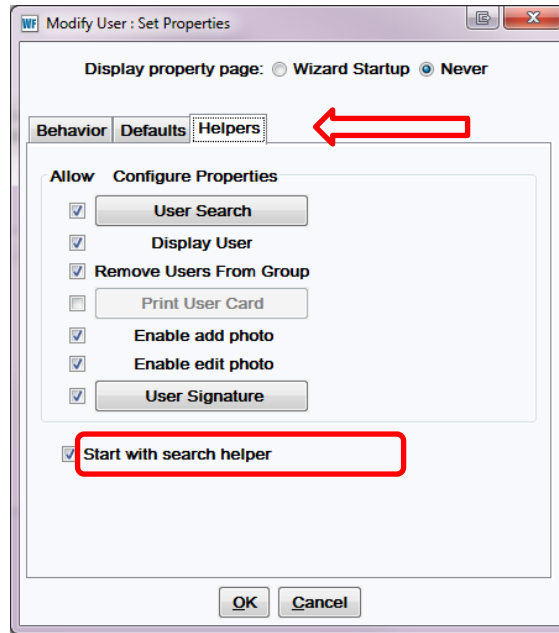
Checkout wizard:



Display User wizard:

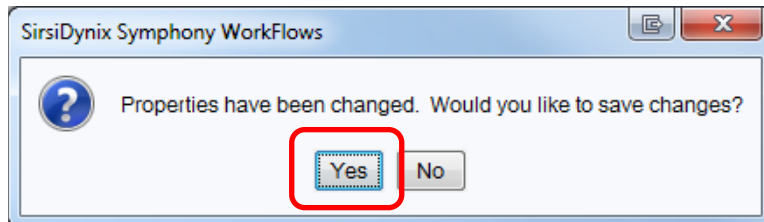


Modify User wizard:



4) You must close the Supervisor session of WorkFlows to save the “Start with search helper” configurations.

When you close this session of WorkFlows you will receive the following popup box:



Click “Yes” to save the settings.

The User Search box will be available the next time you log into WorkFlows on this computer using the CIRC or your assigned cataloging login.

For information on backing up your WorkFlows configuration so that you can copy it over to other computers (or restore it if you get a new computer), see this page on the RSA Support Site https://support.librariesofrsa.org/project/setup-config-backup/#Backup_and_Restore