Workstation Settings in CARLX

Before doing anything in CARLX, it is recommended you configure your workstation settings. This will need to be done for each workstation that CARLX has installed. Restarting the client after making changes is always good practice.

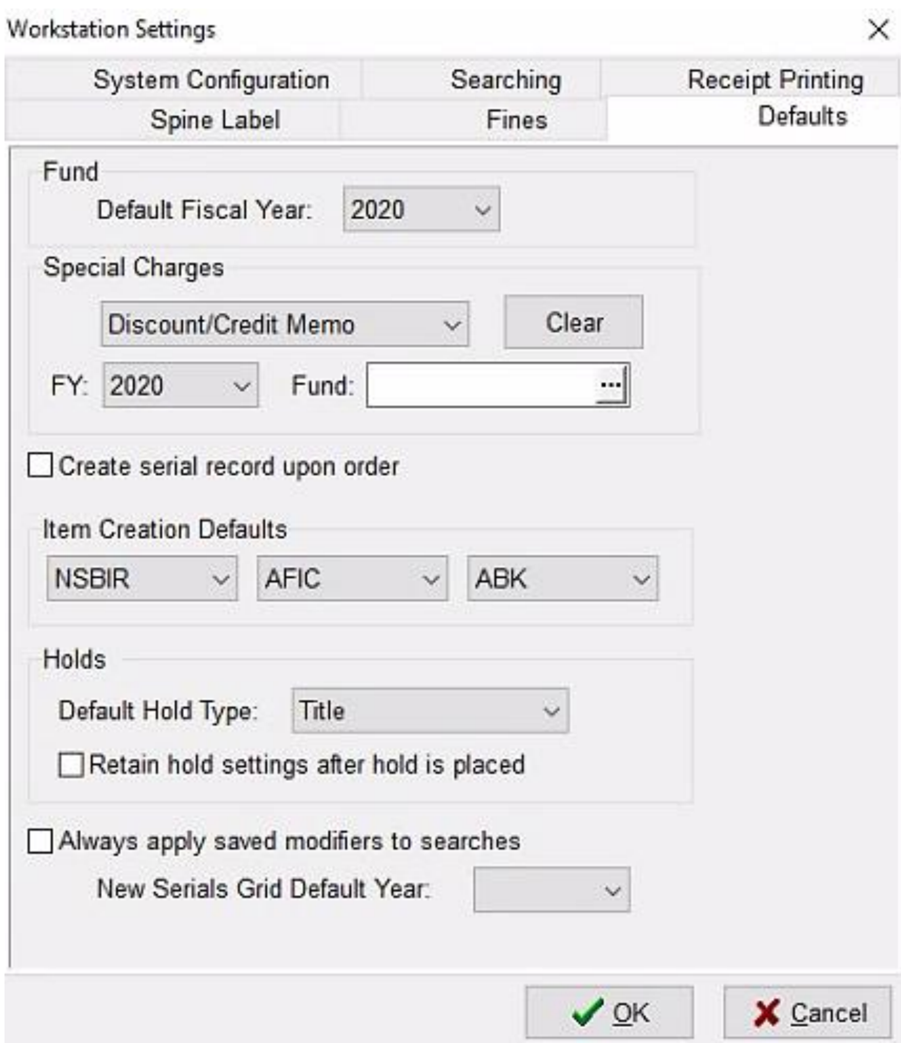
Workstation Settings

Along the top menu in CARLX Staff, go to Tools > Set Workstation Settings or enter <F12>. You will see six tabs to configure.

Defaults

This tab allows you to set default item branch, location, and media types for item creation in Item Information. You can also determine the behavior of the Holds screen by selecting your default hold type, and determine if the settings are reset to defaults after a hold is placed. You may also specify if you would like saved Companion Searcher modifiers always applied to a search within Circulation.

Default Fiscal Year information, and Special Charges defaults for use in Acquisitions. You can determine if you would like a Serials Record created at the point of order, and the default Serials Grid Year.



System Configuration

The most common changes will be Branch and Time Outs.

Branch

Under Branch, select the name of your library. The Number will automatically populate.

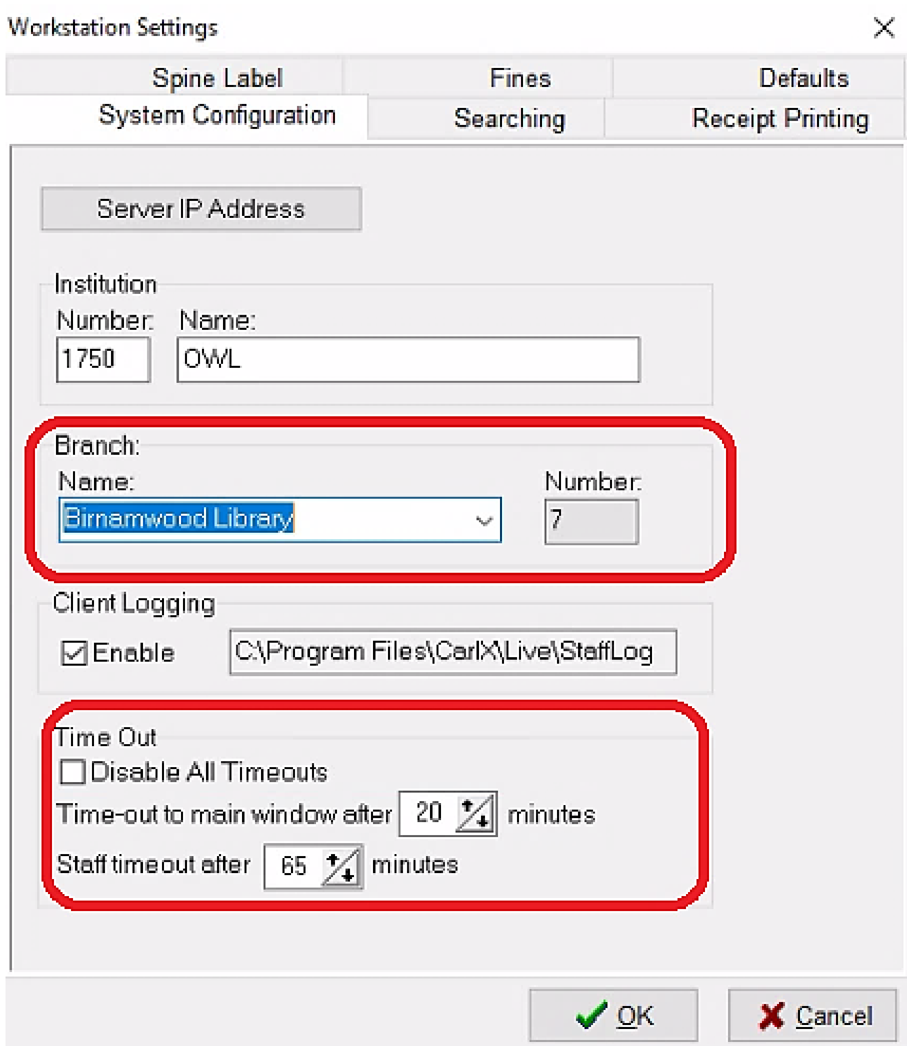
Time Out

For Time Out, you can change the times CARL can remain idle before closing all functions to the main window (Time-out to main window after … minutes) and log out altogether (Staff timeout after … minutes).

Adjust times using the arrows next to the minute boxes, or type in the appropriate number of minutes. We set these very conservatively for security reasons; however, we realize 5 minutes is probably not reasonable for working. Please keep security in mind when setting the Time Outs. The maximum amount of time you can select is 99 minutes. "Main window…" time out must be shorter than "Staff timeout." Please do not disable the time outs.

Institution and Client Logging

Institution should say "OWL" and Client Logging should have "Enable" checked.



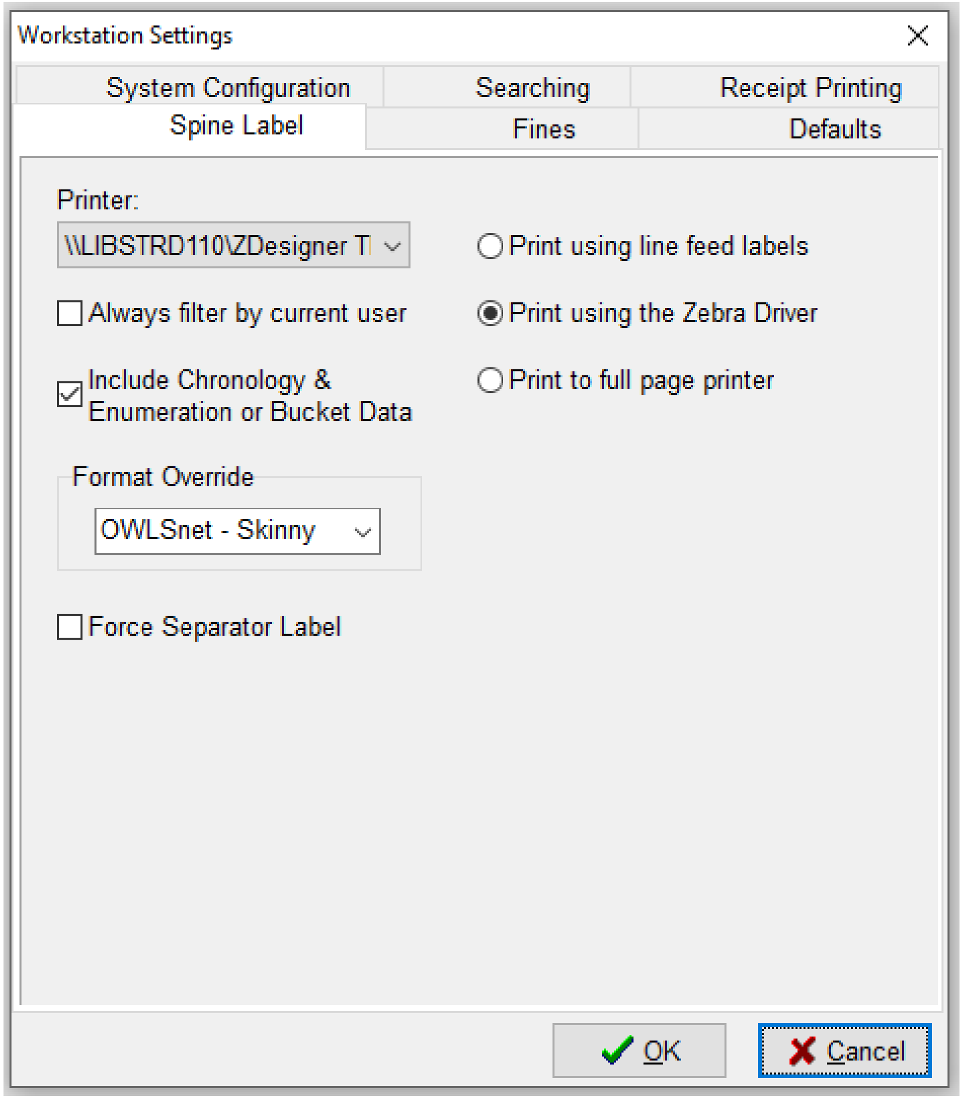
Searching

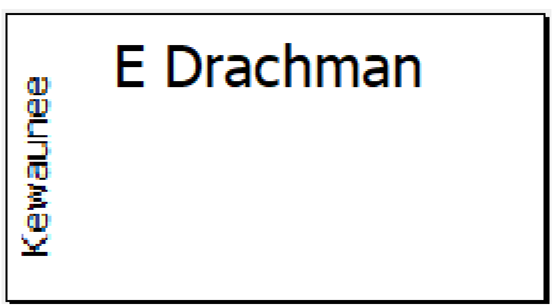
This tab allows you to set search defaults for Item Information, Place Holds, Move Items, Order, Receive, Subscription, and Checkin. All the search keys used when searching for bibs and items are default options.

Spine Label

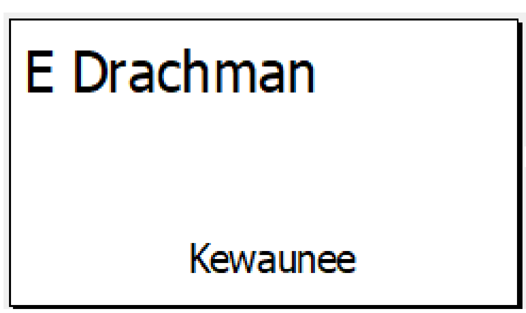
Setting up a spine label printer and spine label templates is done here.

- From Printer, select the spine label printer (often ZDesigner) from the drop-down menu.
- Check “Include Chronology & Enumeration or Bucket Data” to print volume information.
- Select “Print using the Zebra Driver.”
- From Format Override select “OWLSnet - Skinny” or “OWLSnet – Wide.”





OWLSnet - Wide

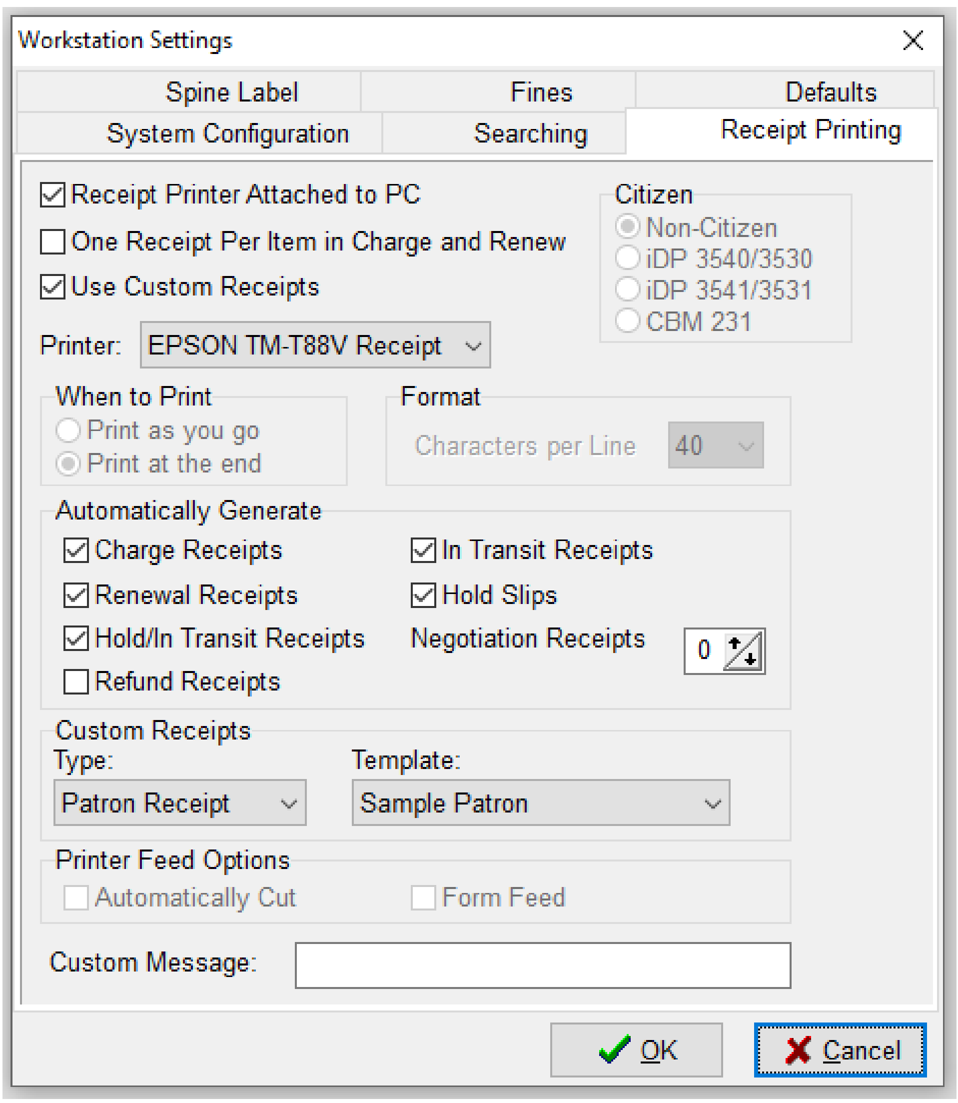


OWLSnet - Skinny

Receipt Printing

This tab tells CARL about your receipt printer and allows you to select your receipt templates. For help selecting or creating custom receipts, please email owlsnethelp@owlsweb.org.

- Check "Receipt Printer Attached to PC."
- Check "Use Custom Receipts."
- From the Printer dropdown choose your printer (EPSON TM-T88V Receipt is common)
- Under "When to Print" select your preference
- Check any receipts under Automatically Generate that you want CARL to print automatically at the end or during (depending on your preference) of the transaction.
- Under "Custom Receipts," add the receipt templates you want to add by selecting the receipt type under "Type".
  - Note: You can save one template for each receipt type. They won't all show but they are saving the template settings.
- A custom message can be added in "Custom Receipt"



Fines

Settings in this tab will determine whether fines are added to a patron's account in the Return and Renew functions. You can make these decisions for Fines (overdue fines) and Claims Returned items.

Under "Post Selected Fines," the following options are available:

- *Prompt (decide on an item by item basis)* will display a big, red box when overdue or claims returned items are returned to let you decide on a case-by-case basis whether to post fines.
- *Do not prompt, but charge fines* will charge fines automatically without showing a big, red box.
- *Do not charge fines and do not prompt* will check in items without charging fines or showing a big, red box.