MODIFYING CIRCULATION WINDOW DISPLAYS

Note: *If M3 v1.6 was your first installation of M3, graphic cells appear by default in the Patron and Item panes for all modes.*

You can modify the MARC fields and font characteristics that display in the Circulation window. You can also configure different displays for each transaction mode (Loan, Return, Renew, Reserve, and Status) in each pane (Patron, Item, Transactions). M3 Circulation includes default settings for all of these situations, but you can reconfigure as appropriate for your library.

Modifying the Patron Pane Display

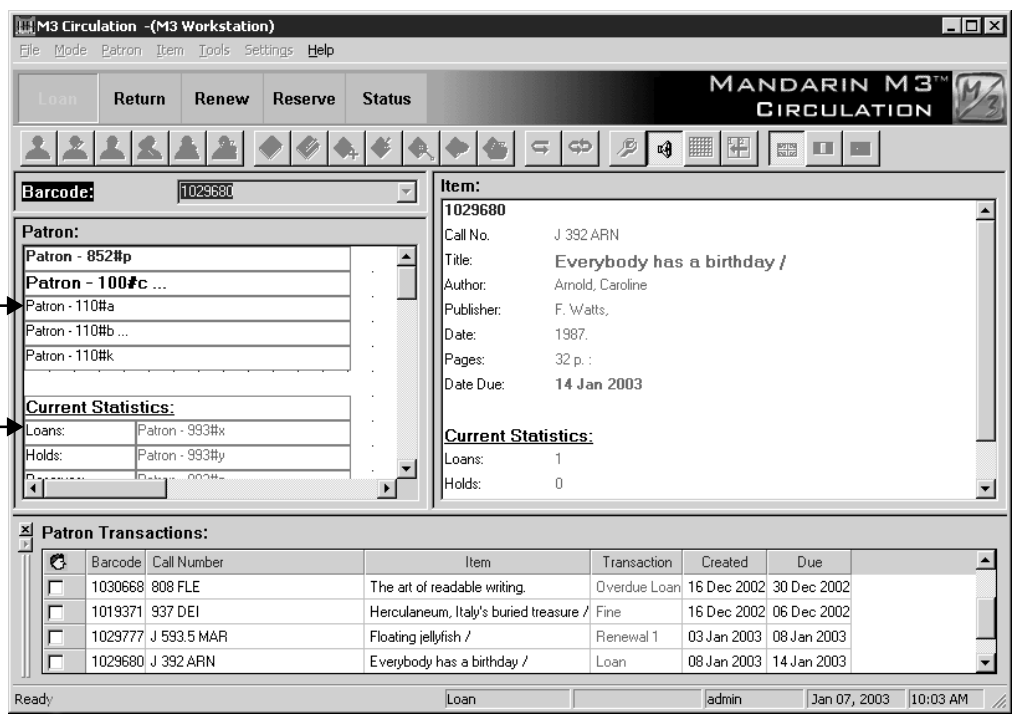
1. Click the toolbar button corresponding to the transaction mode to be modified (**Loan**, **Return**, **Renew**, **Reserve**, or **Status**). Changes made to one mode will not apply to the other modes; you must modify each mode individually.

Tip: *Create a dummy patron record to use during administrative tasks such as display modifications.*

2. Right-click in the Patron pane. This opens a command menu (Figure 5.9).
3. Click **Design Mode**. This changes the Patron pane to the Design mode, with information displaying in data cells (Figure 5.77).

FIGURE 5.77

Tip: *If a grid does not display in the Patron pane, right-click in the pane, then click* ***Show Grid****.*

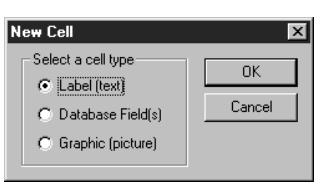


Database field cell

Label cell

4. To create a new cell, click where you want the cell in the Patron pane, then drag to the desired size. This displays the New Cell dialog box (Figure 5.78).

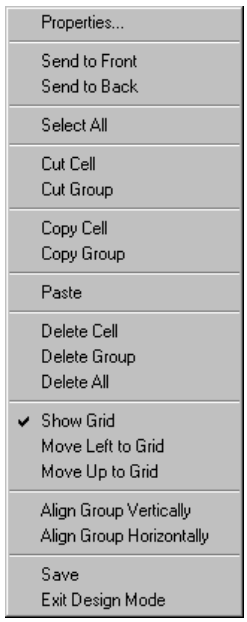
FIGURE 5.78



Note: If M3 v1.6 was your first installation of M3, graphic cells appear by default in the Patron and Item panes for all modes.

5. Click the type of cell you want to create, then click **OK**.
6. To modify cells, right-click a cell or group of cells. This opens a command menu (Figure 5.79).

FIGURE 5.79



Tips:
- *When selected, a cell appears with a yellow background.*
- *To resize a cell, drag the box in the lower right corner of the cell to the desired size.*
- *To move a cell, drag it to the desired location. If it is part of a group of cells (displaying in blue), this moves the entire group.*

Several of the options in this menu are explained here:

Tip: You can also double-click a cell to display the Properties dialog box.

- ***Properties*** – Depending on the type of cell you select (label cell, database field cell, or graphic cell), a Properties dialog box appears. See the following three sections, "Modifying a Label (Text) Cell," "Modifying a Database Field Cell," and "Modifying a Graphic Cell" for instructions on modifying each cell type.
- ***Send To Front*** and ***Send To Back*** – If cells are overlapping, select a cell and click one of these options to send the cell to the front or back of the overlapping cells.
- ***Select All*** – Creates a group of all cells, including any cells that are out of view. Use the scroll bar to view all cells.

Tip: You can create a group of cells by pressing CTRL and dragging the mouse to select the desired cells. Cells in a group appear outlined in blue. Groups allow you to cut, copy, paste, delete, and align multiple cells. You can ungroup a group of cells by clicking outside of the group.

- ***Cut Cell*** and ***Cut Group*** – Deletes the cells from the display and stores it on the clipboard.
- ***Copy Group*** – If you use this option to copy a group, then click **Paste**, the new group is pasted on top of the original group. You can then drag the new cells to a new location.
- ***Paste*** – Pastes the last cut or copy operation. To paste multiple cells, create a group, click **Copy Group**, and then click **Paste**.
- ***Move Left to Grid*** – Aligns the selected cell with the grid line to the left of the cell.
- ***Move Up to Grid*** – Aligns the selected cell with the grid line directly above the cell.
- ***Align Group Vertically*** – Vertically aligns the group with the selected cell.

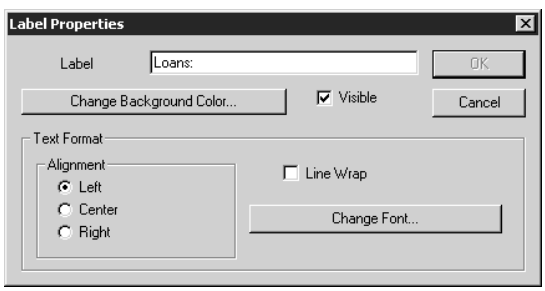
- ***Align Group Horizontally*** – Horizontally aligns the group with the selected cell.

7. When finished modifying the display, right-click in the Patron pane. In the command menu, click **Save**.
8. Right-click again in the Patron pane. In the command menu, click **Exit Design Mode**. This exits the Design mode.

Modifying a Label (Text) Cell

To make changes in the Label Properties dialog box (Figure 5.80):

FIGURE 5.80

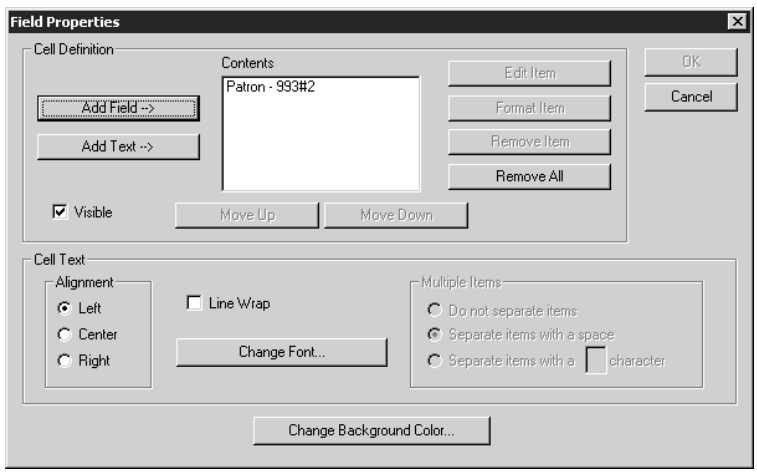


1. In the **Label** box, type any new text you want to display in the cell.
2. To change the background color of the cell, click **Change Background Color**. This displays the Color dialog box. Choose a color, then click **OK**.
3. To make the cell and its contents invisible in Display mode, clear the **Visible** check box.
4. Under **Alignment**, select the desired text alignment.
5. If you want the text to wrap to the next line if it is too long to display in the cell, select the **Line Wrap** check box. NOTE: You may need to increase the height of the cell to make the wrapped text visible.
6. To change the font, click **Change Font**. This displays the Font dialog box. Change settings as desired, then click **OK**.
7. When finished, click **OK**.

Modifying a Database Field Cell

To make changes in the Field Properties dialog box (Figure 5.81):

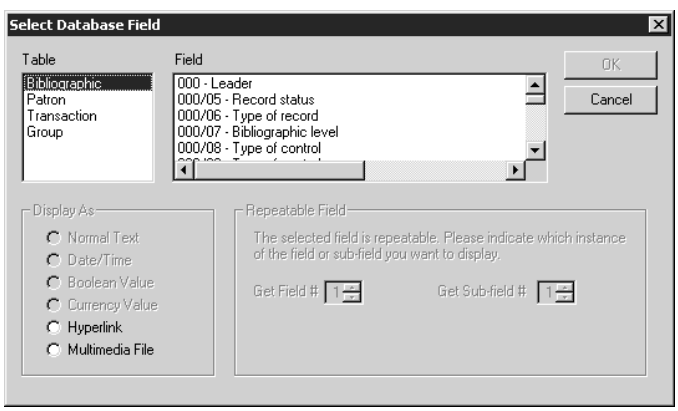
FIGURE 5.81



*The **Contents** box displays items in the order they appear in the cell. To change the order, select an item and click **Move Up** or **Move Down**.*

1. To add a field to a cell, click **Add Field**. This displays the Select Database Field dialog box (Figure 5.82).

FIGURE 5.82



2. To make changes in this dialog box:
   A. In the **Table** list, select the table containing the data you want to display.
   B. In the **Field** list, select the record field you want to display.
   C. Under **Display As**, select the format in which you want the field to display.
   D. If the field is repeatable, select an option under **Repeatable Field**.
   E. When finished, click **OK**. This returns you to the Field Properties dialog box (Figure 5.81).
3. To add text to the cell, click **Add Text**. This displays the Add Text dialog box. Type the text you want to display, then click **OK**.
4. To make the cell and its contents invisible in Display mode, clear the **Visible** check box.

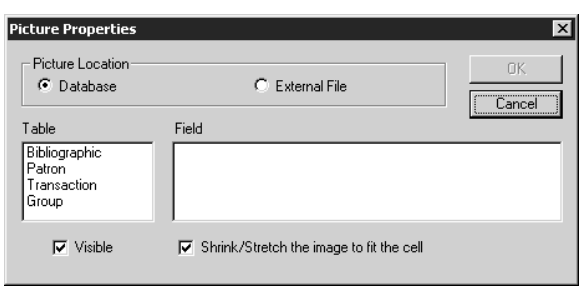
Tip: You can also double-click the item to display the Select Database Field dialog box.

5. To edit an item, select the item in the **Contents** box, then click **Edit Item**. This displays the Select Database Field dialog box (Figure 5.82). To make changes, follow the procedure explained in step 2.
6. To format an item, select the item in the **Contents** box, then click **Format Item**. This displays a Format dialog box corresponding to the format you selected in step 2C. Make changes as desired, then click **OK**.
7. To remove an item from the cell:
   - To remove one item, select the item in the **Contents** box, then click **Remove Item**. This removes the item.
   - To remove all items, click **Remove All**. This removes all items and places an "Undefined Field" entry in the cell.
8. Under **Alignment**, select the desired text alignment.
9. To make the text wrap to the next line if it is too long to display in the cell, select the **Line Wrap** check box.
10. To change the font, click **Change Font**. This displays the Font dialog box. Change settings as desired, then click **OK**.
11. Under **Multiple Items**, indicate how you want to separate multiple items in this cell.
12. To change the background color of the cell, click **Change Background Color**. This displays the Color dialog box. Select a color, then click **OK**.
13. When finished, click **OK**.

Modifying a Graphic Cell

To make changes in the Picture Properties dialog box (Figure 5.83):

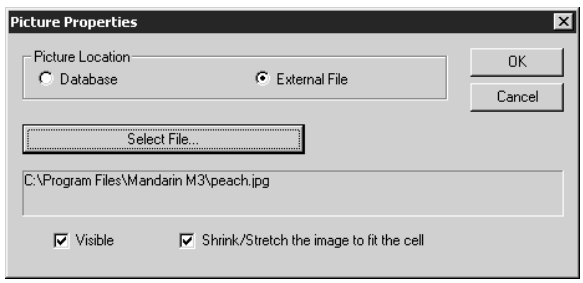
FIGURE 5.83



Tips:
- *To import pictures into your M3 database, see "Using M3 Picture Manager" on page 4-50.*
- *To add a picture field to a record, see "Adding a Picture Field to a Bibliographic or Patron Record" on page 5-37.*

1. Under **Picture Location**, click **Database** or **External File**.
   - If you choose **Database**, select the table containing the data you want to display in the **Table** list, then select the field you want to display in the **Field** list.
   - If you choose **External File**, click **Select File**. This displays the Open dialog box. Navigate to the location of the file you want to open, then click **Open**. This displays the path and file name in the Picture Properties dialog box, as shown in Figure 5.84.

FIGURE 5.84



2. To make the image invisible in Display mode, clear the **Visible** check box.
3. If you want the image to fit the dimensions of the cell, select the **Shrink/ Stretch the image to fit the cell** check box. NOTE: If the image is larger than the cell and you do not select this check box, only a portion of the image will appear in the cell.
4. When finished, click **OK**.

Modifying the Item Pane Display

1. Click the toolbar button corresponding to the transaction mode to be modified (**Loan**, **Return**, **Renew**, **Reserve**, or **Status**). Changes made to one mode will not apply to the other modes; you must modify each mode individually.

__Tip:__ Create a dummy item record to use during administrative tasks such as display modifications.

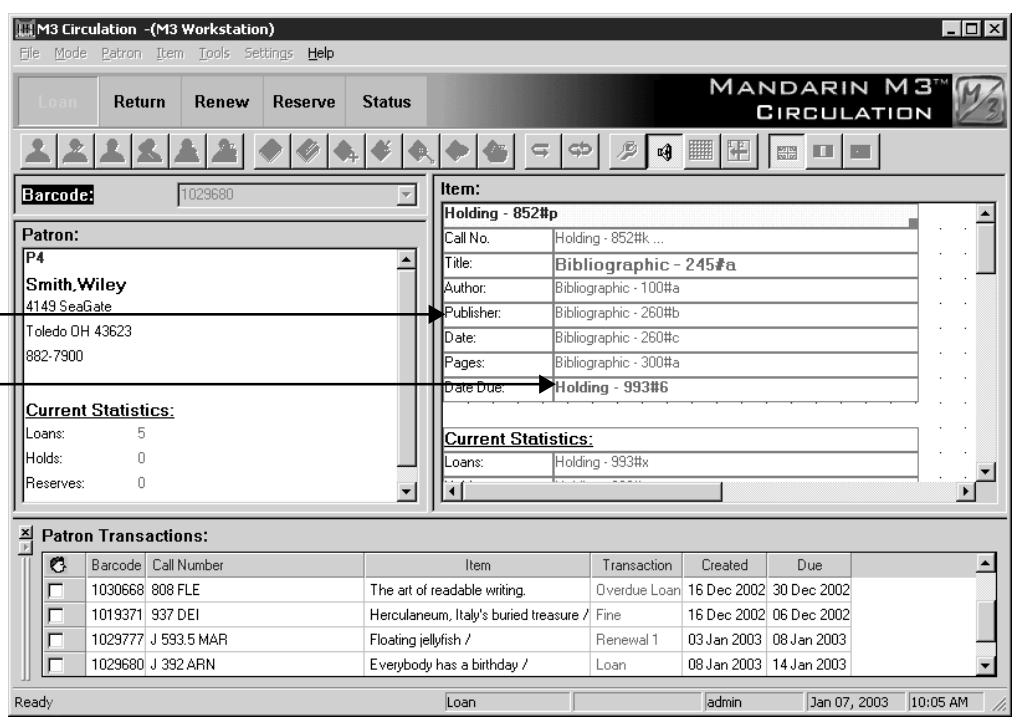
2. Right-click in the Item pane. This opens a command menu (Figure 5.9).
3. Click **Design Mode**. This changes the Item pane to the Design mode, with data displaying in cells (Figure 5.85).

FIGURE 5.85

__Tip:__ If a grid does not display in the Item pane, right-click in the pane, then click __Show Grid__.

Label cell

Database field cell



4. Follow steps 4 through 8 beginning on page 5-59 to modify the data displayed in the Item pane, substituting the word “item” for “patron” in the procedure.

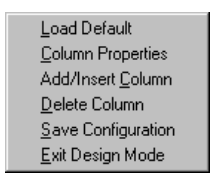
Modifying the Transactions Pane Display

There are three Transactions pane displays: Patron, Item, and Library Transactions. Each has a different display configuration. This section explains how to modify the Patron and Item displays for the Transactions pane. To modify the Library Transactions display, see “Modifying the Transactions Pane for Library Transactions” on page 5-66.

To modify the Patron or Item displays for the Transactions pane:

1. Click the toolbar button corresponding to the transaction mode to be modified (**Loan**, **Return**, **Renew**, **Reserve**, or **Status**).
2. In the **Barcode** box, type the patron (or item) barcode, and then press ENTER (or scan the barcode).
3. Right-click in the Transactions pane. This opens a command menu (Figure 5.10).
4. Click **Design Mode**. This changes the Transactions pane to the Design mode and clears the pane.
5. In the Transactions pane, right-click the column heading of the column you want to edit. This opens a command menu (Figure 5.86).

FIGURE 5.86



6. If you want to delete the column or insert a new column, click the appropriate command.

   OR

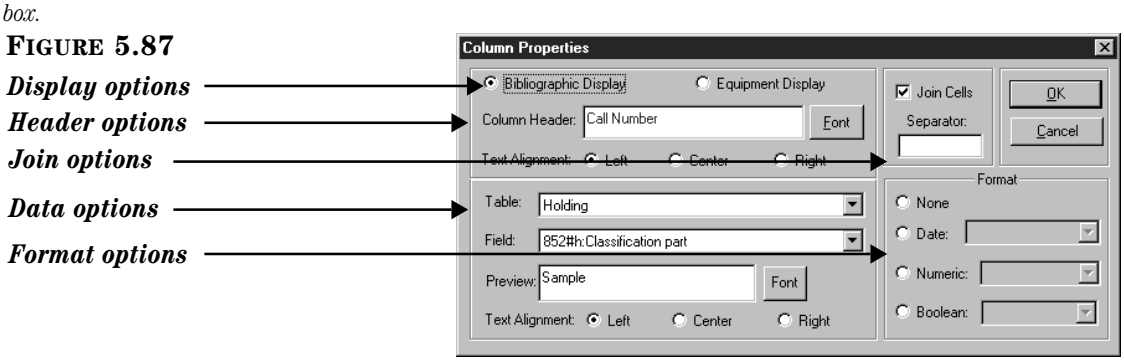
   If you want to revert to the default settings for the Transactions pane, click **Load Default**.

   OR

   If you want to edit the properties of the selected column, click **Column Properties**. This displays the Column Properties dialog box (Figure 5.87).

Tip: You can also double-click the column heading to open the Column Properties dialog box.

FIGURE 5.87



Edit the column properties as desired:

- ***Display options*** – Each column has different display properties for bibliographic items and equipment items. Bibliographic display settings apply when the transaction involves a bibliographic item, and equipment display settings apply when the transaction involves an equipment item. Therefore, you may want to click **Bibliographic Display** and select the settings used for bibliographic items, then click **Equipment Display** and select the settings used for equipment items.
- ***Header options*** – To establish display properties for the column header:
  - A. In the **Column Header** box, type the column heading text.
  - B. To change the font properties for the column data, click **Font**. This displays the Font dialog box. Modify the font properties as desired, then click **OK**.
  - C. Click a **Text Alignment** option to establish the text justification for the column header.
- ***Join options*** – If the information in this cell should be joined with the information displayed in the cell to the right (the information is combined and displays in the left cell):
  - A. Select the **Join Cells** check box.
  - B. In the **Separator** box, type a space, comma, or any other text to separate the content of the two cells.
- ***Data options*** – To set up the data that displays in this column:
  - A. In the **Table** list, select the table containing the data you want to display.
  - B. In the **Field** list, select the record field you want to display.
  - C. To change the font properties for the column data (as shown in the sample text in the **Preview** box), click **Font**. This displays the Font dialog box. Modify the font properties as desired, then click **OK**.
  - D. Click a **Text Alignment** option to establish the text justification for data in the column.
- ***Format options*** – If the column data requires a consistent format, click an option (**Date**, **Numeric**, **Boolean**), and then click the desired format in the corresponding list.

7. When finished editing entries for this column, click **OK**.
8. Repeat steps 5 through 7 for each column you want to modify in the Transactions pane.
9. When finished, right-click in the Transactions pane. In the command menu (Figure 5.86), click **Save Configuration**. (Or, to revert to the default settings for the Transactions pane, click **Load Default**.)
10. Repeat steps 1 through 9 for each transaction mode you want to modify in the Transactions pane.

11. When finished, right-click in the Transactions pane. In the command menu (Figure 5.86), click **Exit Design Mode**. This exits the Design mode.

Modifying the Transactions Pane for Library Transactions

To modify the Library Transactions display for the Transactions pane:

1. On the **Mode** menu, click **Library Transactions**.
2. Right-click in the Transactions pane. This opens a command menu (Figure 5.73).
3. Click **Design Mode**. This changes the Transactions pane to the Design mode and clears the pane.
4. Follow the procedure in steps 5 through 11 beginning on page 5-64.

