

## Setting Up Preferences – Part 1

This iRIMS Tip will be broken down into three parts, as there is a lot of information to be covered. This tip will provide an overview of how you can customize your preferences in iRIMS to speed up some of the redundant tasks. Since the typical iRIMS user does not use all of the modules in iRIMS, only these tabs will be covered: General, View, Files, Folders, Boxing, Flow, and Labels. This iRIMS tip will cover the **General** tab in the preferences.

To access your preferences select the **File** menu from the main toolbar in iRIMS and select **Preferences** (see Figure 1.1)

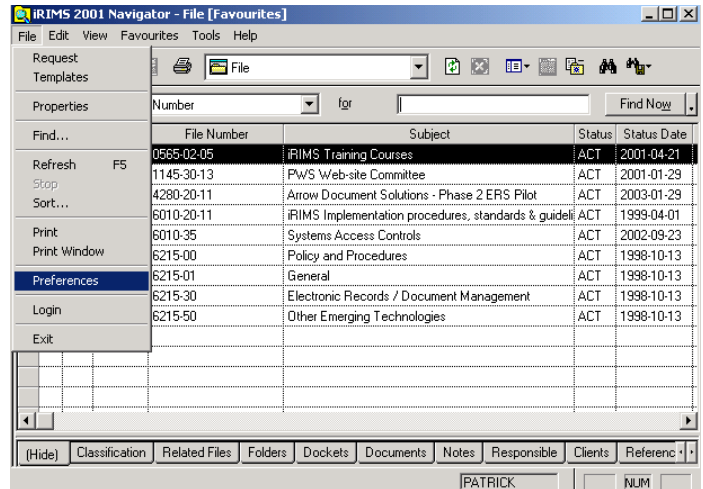


Figure 1.1 – iRIMS Preferences

### General Tab (Figure 1.2)

The first tab that will be opened in your preferences is the **General Tab**. The following bullets will describe what each of the items represent under the **General Tab**.

#### Start Up View

Specifies the view that iRIMS will start in when launched. IE: If you're always working with Boxes, change this to **Box**.

#### Start Up Mode

- **Normal**: Main window will be launched at the default size
- **Maximized**: Main window will be launched to take up the full screen.
- **Minimized**: Main window will be launched minimized in the task bar.

#### Row Count:

Identifies the number of records to be returned for a search or in a list. Example: If your search results have more than 99 records then a message will popup.

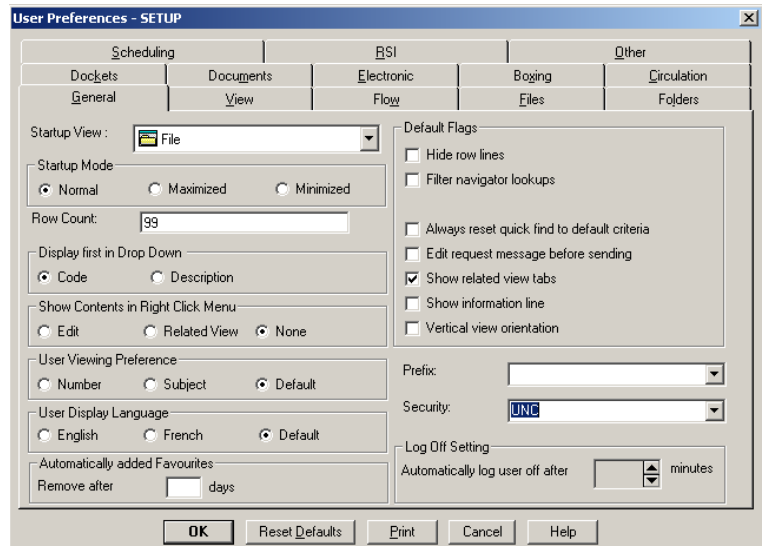


Figure 1.2 - General Tab

### Display First in Drop-Down:

- **Code:** If selected, the Code will appear first followed by a description in lookup dropdowns. Ex. ACT – Active.
- **Description:** If selected, the Description will appear first followed by the Code in lookup dropdowns. Ex. Active – ACT.

### Show Contents in Right Click Menu:

- **Edit:** Clicking the right mouse button will display the contents of Edit menu. (This is the same menu found on the menu bar at the top of the iRIMS Navigator window).
- **Related View:** Clicking the right mouse button will display the contents of Related View menu.
- **None:** Clicking right mouse button displays contents of Related View menu.

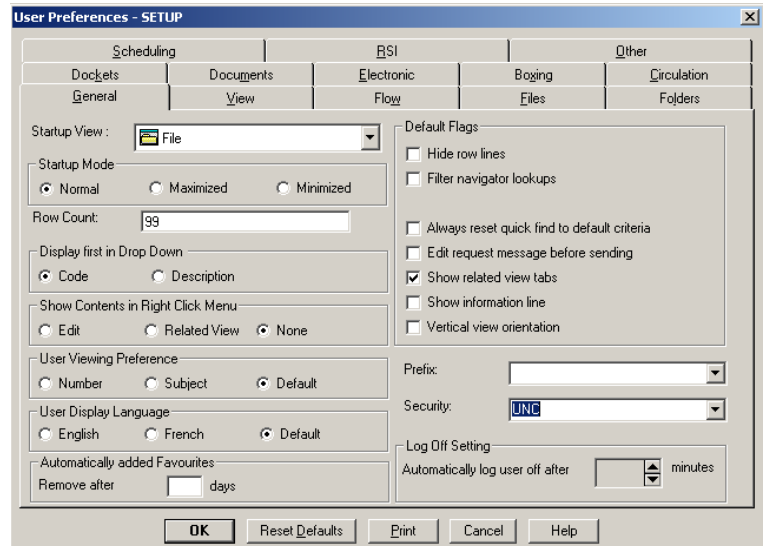


Figure 1.2 - General Tab

### User Viewing Preferences:

- **Number:** Sorts lists by Prefix and File Number order.
- **Subject:** Sorts Lists by Prefix and Subject in alphabetical order.
- **Default:** Displays iRIMS by sort order selected when the patron was initially created.

### Default Flags:

- **Hide Row Lines:** Enables you to hide the horizontal row lines on the iRIMS desktop.
- **Filter Navigator Lookups:** When selected, clicking any navigator icon to conduct a search will filter the search by the prefix selected on the previous window. For example, on the file insert window if you select a specific prefix then click on the navigator button beside the File Number field, the internal navigator will appear, any search you do here will now be filtered by the prefix you selected on the previous screen.
- **Always reset quick find to 'default criteria':** This ensures that the default Quick Find criteria that you enter on the view tab is reset each time you change back to the view. Otherwise the last criteria you used would still be shown in the Search In: field.
- **Edit request message before sending:** This flag brings up the E-Mail window for editing before the request is sent. This is related to folder and box requests.
- **Show information line:** This flag controls if the information line is shown in the top of iRIMS windows. The information line is a line of text that will appear at the top of the iRIMS navigator window that can be configured to give tips and ideas about the window you are currently on.
- **Vertical view orientation:** Switches the default horizontal view to a vertical view. This means Main View and Related View will be displayed side by side instead of Main View on top of Related View.

**Prefix:** Allows a user to change the default Prefix that appears on insert windows (the only prefixes you will see in the drop-down are those that you have been given permissions to view by the iRIMS Administrator).

**Security:** Allows a user to change the default Security that appears on insert windows (you will only be able to see security values that you have access to).