

About Workstation Settings

Most types of customized settings (column settings, print templates, etc.) are saved to the server and associated with the workstation name (*not* the login name).

Because the settings are now stored on the server, it is possible to clear cookies or switch computers and restore the settings simply by recreating the workstation name. This also makes it possible to share settings between multiple computers, and for LocalAdmins to modify settings remotely without needing to physically visit each computer.

Scenarios

Multiple staff use the same computer and want to share settings

If multiple staff members, each with a different login, use the same computer, and that computer is only set up with one workstation name (eg, ARL-BOG-CIRC01), then everyone using that computer will see the same settings. If each staff member uses a separate Windows login on that computer, then the same workstation name should be created under each Windows login. If one staff member alters settings, they will be altered for all staff members using the same workstation name.

Multiple staff use the same computer but each wants their own settings

If multiple staff members, each with a different login, use the same computer, but each staff person wants to manage their own settings, then set the computer up with a workstation name for each staff person (eg, CPRL-A-sally, CPRL-A-joe, CPRL-A-jennifer).

A staff member wants to share settings between multiple computers or browsers

If a staff member moves between different computers and/or browsers, the same workstation name can be set up on multiple computers (or on the same computer between both Chrome and Firefox), and those settings will be available on each machine. Changes made to one computer will be reflected on all computers using the same workstation name. For example, if Joe uses a desktop and a laptop and wants to share settings between them, he can use the workstation name of CPRL-A-joe on both of them.



Keep in mind that this may present conflicts if the computers do not have the same environment, such as identical printer access.

A staff member needs to log in as if she or he is at a different location

It is often useful for some staff (particularly LocalAdmins) to be able to log in as if they are at a different library in their system. To do this, use the same login, but set up a workstation for each branch (eg, CLAYTN-HQS-joe, CLAYTN-JON-joe, CLAYTN-LOV-joe). Settings changed on one workstation name will not affect settings on another workstation name.

A library wants all circ machines at a branch to have the same settings

If a library has several circ machines and wants all staff that use the machines to see the same settings regardless of which they log in to, the same workstation name can be used on all of the machines (eg, FRRLS-FA-CIRC).

The advantage of this is that if something needs to be changed (for instance, the checkout print template is changed to feature a different upcoming event), then it only needs to be changed on one machine and the change will carry through to the other machines. This can also be done remotely, so a LocalAdmin at a central location could have workstations set up for each circ profile at each branch, and be able to log in and update them all by switching between workstations. This can only be done in environments where all of the workstations have an identical setup with identical printers.



Warning: PINES does NOT recommend doing this because it removes the ability to tell which physical machine an action took place on (for example, which machine a bill was paid on, or which machine a circulation override was performed on).

It will also create confusion if one staff member changes a setting because it affects other staff members.

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