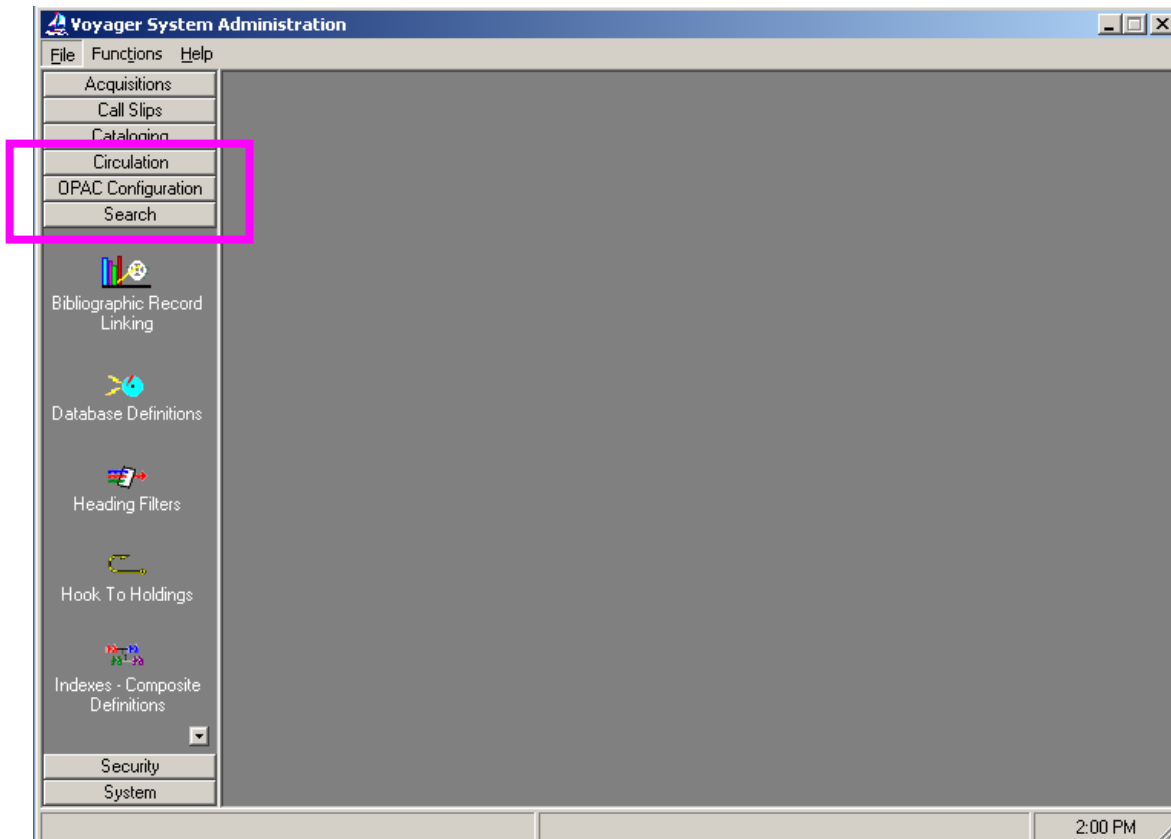


VOYAGER SYSTEM ADMINISTRATION IN I-SHARE LIBRARIES

PART 5: OPAC






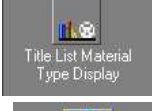

Legend:

- Consortial Rule for setting value(s)**
- CARLI Recommendation for setting value(s)**
- Does not apply; Or, Do not change this value**

S.A. 7.2 *Voyager 7.2 System Administration User's Guide (October 2010)*

Note: Although this Chapter still refers to documentation for Voyager 7.2 the settings and optional setting directions remain the same.

SYSTEM ADMINISTRATION / WEBVOYÁGE

I.	Introduction	3
II.	OPAC Overview	4
III.	 Database Definitions Required Database Definitions.....	5
IV.	 Indexes - Composite Definitions Required Search Configurations.....	7
V.	 Indexes - Field Weighting Field Weighting	9
VI.	 Title List Material Type Display Material Type Definitions	10
VII.	 Cluster Maintenance Circulation changes for WebVoyáge	12
	A. Cluster Name	14
	B. OPAC Circ Desk.....	15
VIII.	Optional Updates: Call Slips.....	16
	A. Call Slip Enabling.....	16
	B. Enabling “Call Slip Item Required” Option	19
	1. “Call Slip Item Required” Is Checked.....	19
	2. “Call Slip Item Required” Is Not Checked.....	19
	C. Required Fields for Call Slip Form when “Call Slip Item Required”	20
IX.	Optional Updates: Additional Request Forms.....	22
X.	Optional Updates: Additional Database Definitions	24
XI.	Optional Updates: Additional Search Configurations.....	25
XII.	Optional Updates: Title List Column Names.....	27
XIII.	Optional Updates: Location Limit Groups	29
XIV.	Optional Updates: Holdings Sort Groups.....	32

NOTE: Screen shots that appear throughout this document have been taken from a variety of databases. The settings do not always represent the values your library should be using for your policies. I-Share rules and recommendations for settings (when applicable) are found in the explanations of each chapter of the I-Share System Administration documentation.

Reference Pages: S.A. 7.2, pages 7-1 through 8-92

I. INTRODUCTION

This chapter of the I-Share System Administration document is an annotated supplement to the Circulation, OPAC Configuration, and Search portions of the full *Voyager 7.2 System Administration User's Guide*. Use this chapter to learn the I-Share consortial requirements and recommendations for the settings in the Circulation, OPAC Configuration, and Search portions of the System Administration (SysAdmin) module. Along with the ExLibris-produced *Voyager SysAdmin User Guide*, this document should be used as a guideline for profiling and configuring your Voyager system in the I-Share environment.

The *Voyager 7.2 System Administration User's Guide* contains additional information and explanations and should be consulted when further detail on any topic is needed. This is particularly true of the keystrokes or mouse-clicks needed to move from one part of SysAdmin to another. That level of detail is intentionally excluded in this document.

The sections in this chapter are arranged in the order that the different parts should be edited when a library is first implementing Voyager as an I-Share participating library. Some parts of Search SysAdmin build upon each other, so doing the initial data entry work in the order outlined in this document should make this process more efficient for library staff.

Much of the work to configure your OPAC is done by CARLI and/or Ex Libris staff; however, there are several steps that must be done by library staff to support both VuFind and WebVoyage. The following document will describe those steps and some of the optional configurations you might wish to do.

II. OPAC OVERVIEW

After your production data loads, but prior to announcing your OPAC address to your users, several required updates must be done in SysAdmin. CARLI staff will do most of these updates for you; some will be tasks your staff will need to complete.

NOTE: Tasks that your library is required to do are noted in bold and are prefaced with “LIBRARY DOES.” Tasks that the CARLI Office staff will complete for you are prefaced with “CARLI DOES.”

There are also optional updates that you may choose to do at any time after you’ve accepted your production data loads. **These optional updates will be done by your own staff**, and the instructions on how to do those tasks are outlined in Sections VIII - XIV.

The following items require work in SysAdmin to support your OPAC:

- **Certain database definitions**
- Certain search configurations
- Field weighting for relevance ranking
- Material type definitions
- **Circulation Cluster Name and OPAC Circulation Desk selection**

Optional items that you may configure in SysAdmin include:

- Call Slip function
- Additional request form types
- Additional database definitions (beyond what is required)
- Additional search configurations (beyond what is required)
- Title list column names (except for what is disallowed)
- Location limit groups
- Holdings sort groups

These optional items will be discussed at the end of the chapter.



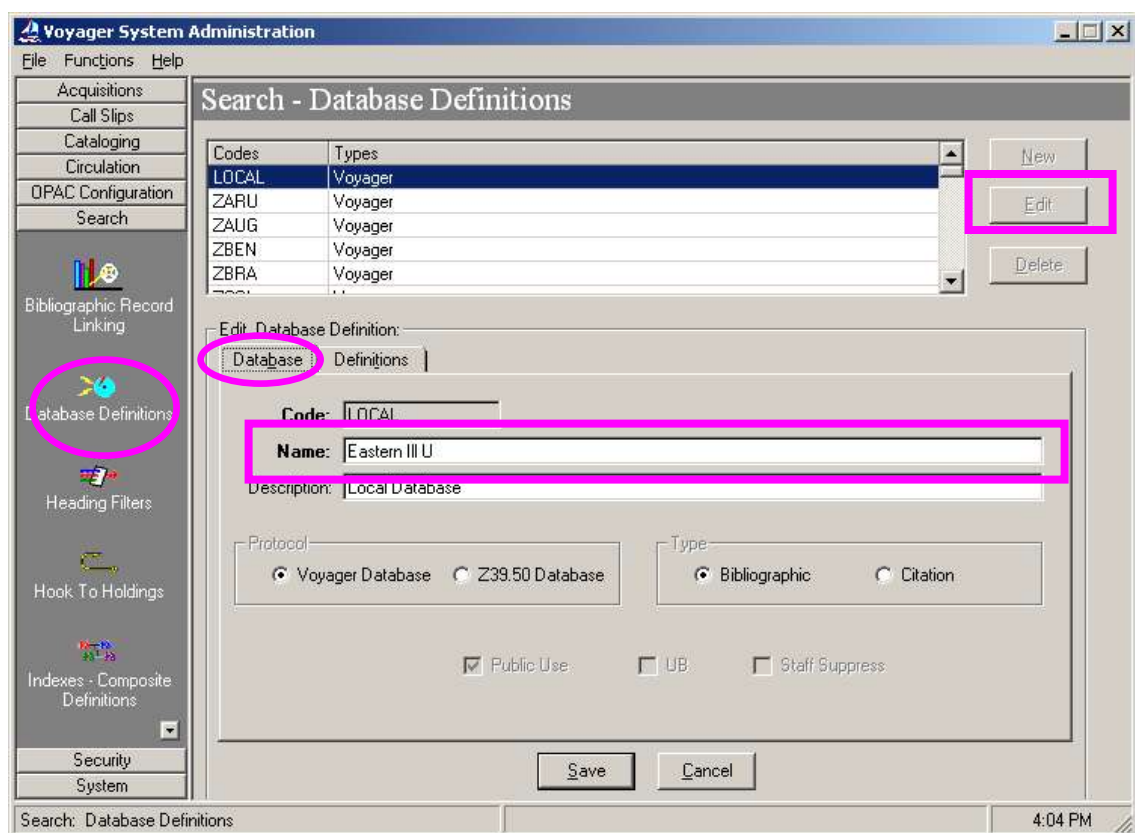
III.

REQUIRED DATABASE DEFINITIONS

Databases “defined” in your SysAdmin are databases from which you can read data in your instance of WebVoyáge or in your Voyager staff clients. CARLI will create definitions for each of the other I-Share databases in your SysAdmin as part of your “UB Integration.” **LIBRARY DOES: You will update the definition of your “Local” database.** This update will determine the way your institution’s name appears in the list of “Remote” databases in your library’s Cataloging client’s Search box and, if you enable your instance of WebVoyáge to search databases other than your local Voyager database, will determine the way your institution’s name appears in the list of all databases searchable via WebVoyáge.

There are other database definitions that are optional and will be discussed in Section X of this chapter.

Defining your Local Database

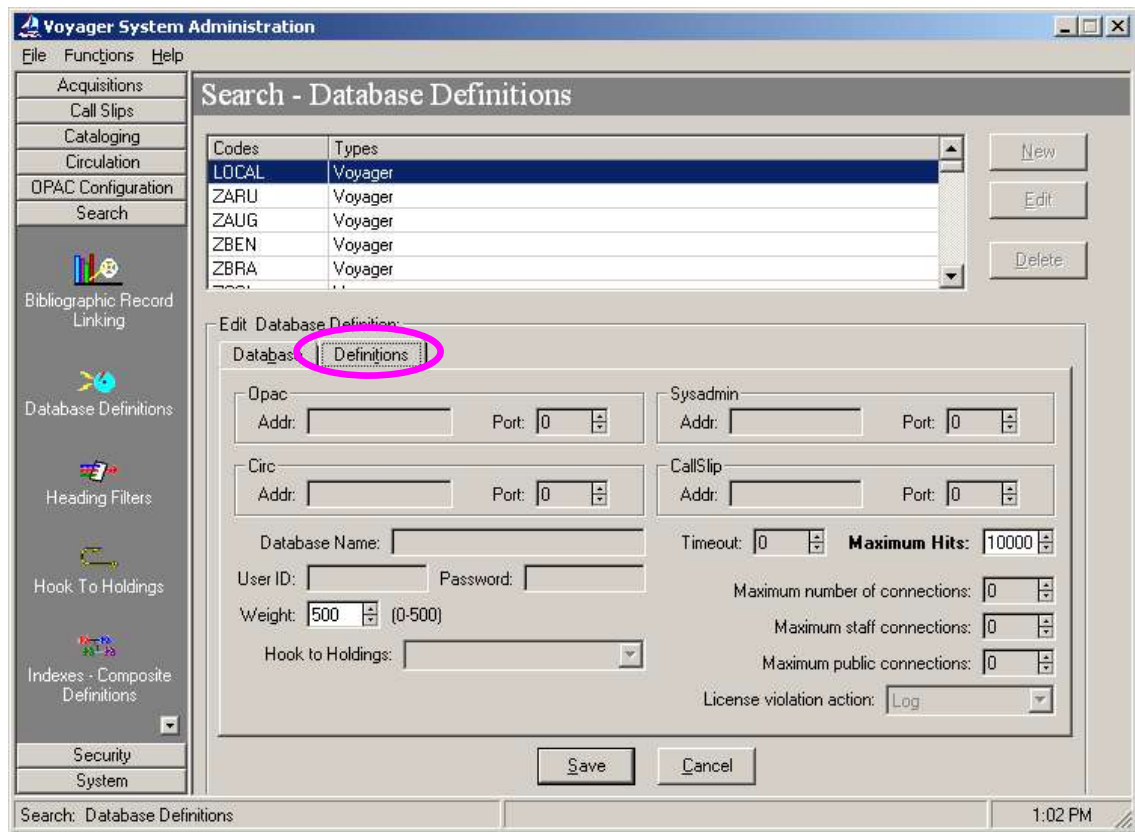


Click on the Database Definitions icon under the Search tab.

Choose the LOCAL database (at the top of the list) and click on [Edit].

Edit the NAME section of the Database tab.

When finished editing the Name, click [Save].



Click on the Definitions Tab to see the default definitions information. This information does not need to be changed.



IV.

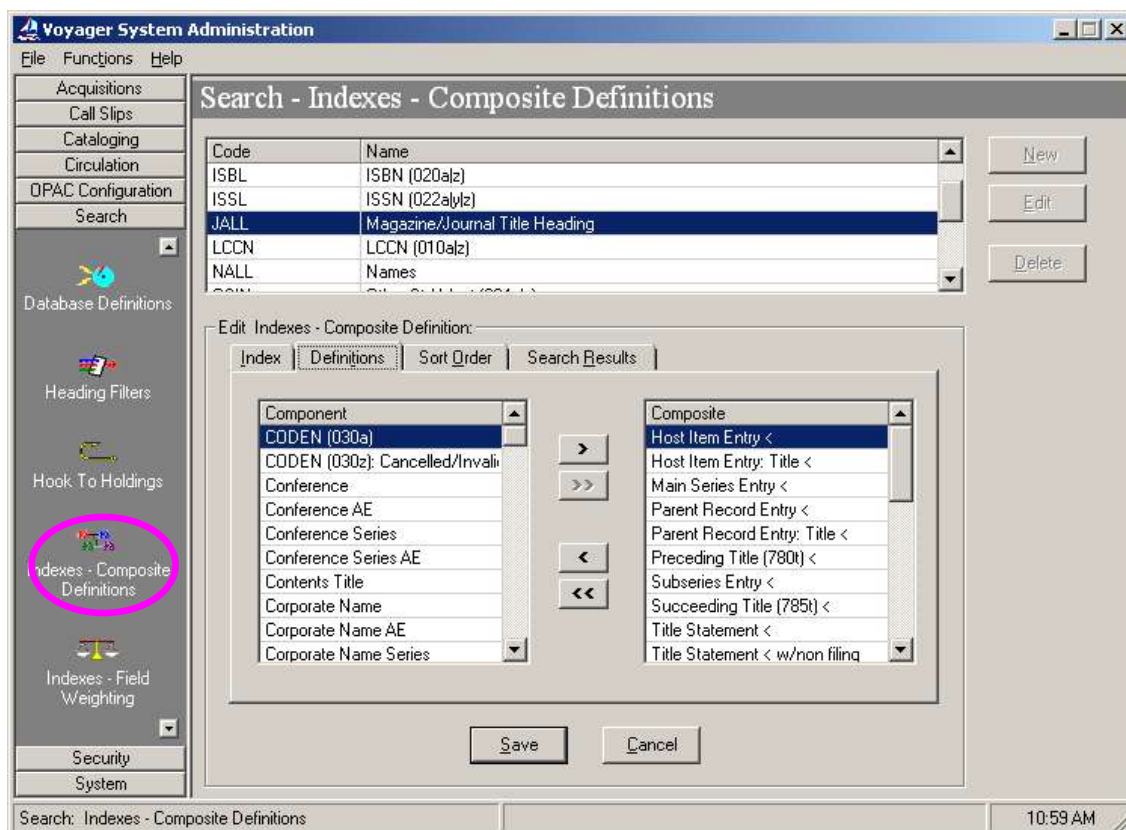
REQUIRED SEARCH CONFIGURATIONS

When ExLibris does your production bib data load they will build all the indexes (with all the “search configurations”) that are present in every other I-Share database. The search configurations set will affect both WebVoyáge and Voyager staff clients (but not VuFind) and will determine how searches are performed. These search configurations include several left-anchored search as well as keyword search capabilities. To learn more about Voyager indexes in the I-Share environment, please refer to:

<http://www.carli.illinois.edu/products-services/i-share/opac#voy-index>

Search configurations beyond the consortially-required ones are optional and will be discussed in Section XI of this chapter.

Composite Definitions



Click on the Indexes – Composite Definitions icon under the Search tab to see the different composite definitions available.

⊕ Many of these are pre-populated by CARLI and should not be edited. To see the individual “component” search definitions that make up each “composite” definition, choose a definition and click [Edit].

V.



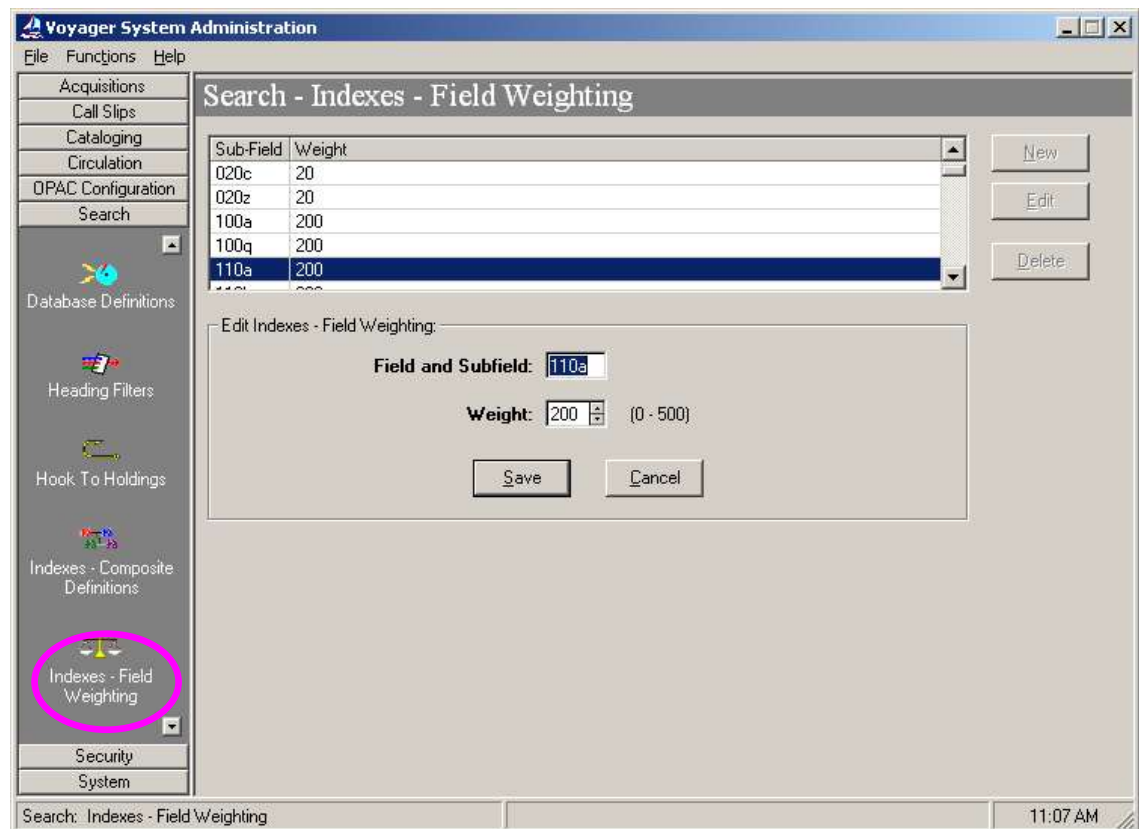
FIELD WEIGHTING

CARLI DOES: CARLI Office staff will edit your field weights after you accept your bib data load. Please do not edit these definitions. Field Weight is one of several factors that affect relevance ranking of “Any Word Anywhere” search results in WebVoyage.

⊕ CARLI’s field weighting was developed by the ILCSO OPAC Customization and the Database Reindexing task forces. These field weights are and should be kept consistent across all I-Share databases for consistent searching results. Do not change the assigned field weights. More information can be found at:

<http://www.carli.illinois.edu/products-services/i-share/opac/fld-wts-4relev>

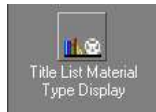
Field Weighting



To see field weights, choose the Indexes – Field Weighting icon under the Search tab.

A list of MARC subfields and their associated weights will appear.

VI.

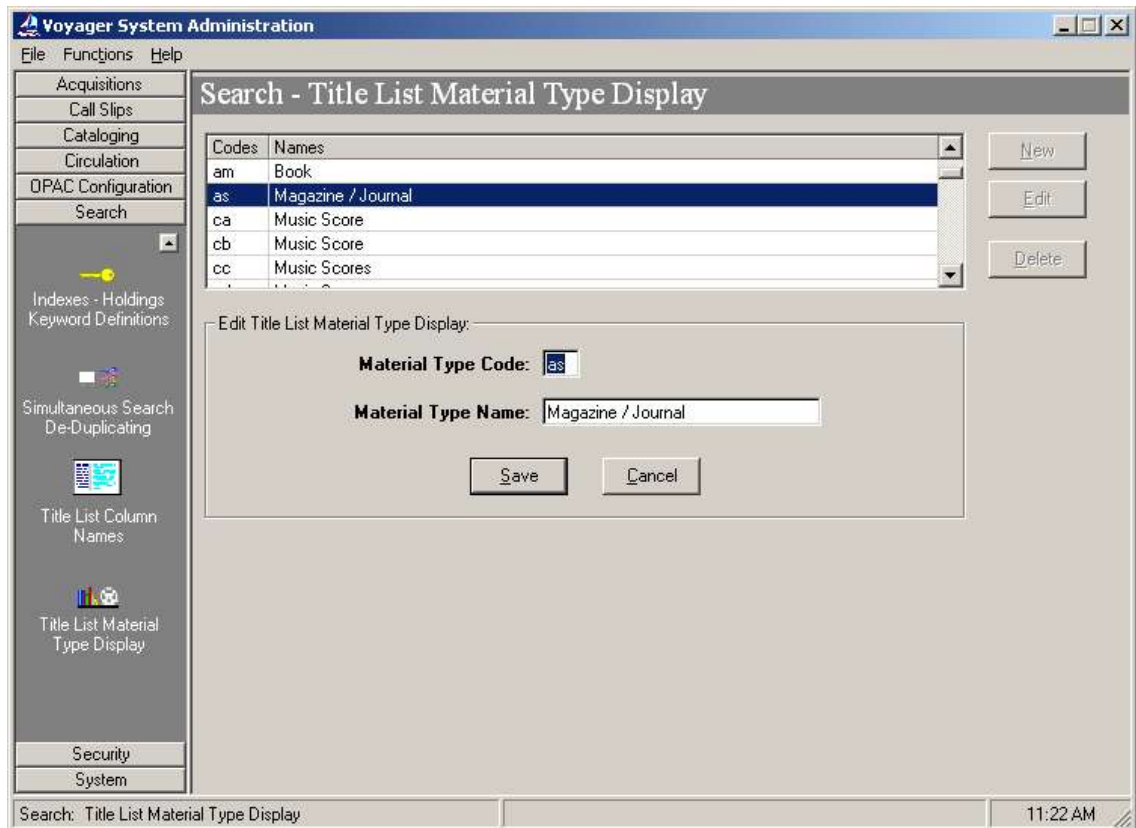


MATERIAL TYPE DEFINITIONS

After you accept your bib data load, CARLI DOES: CARLI Office staff will add material type definitions to your Voyager instance. Please do not edit these definitions.

Material type definitions are translations of MARC record type and bib-level code combinations that display in the Format column on the Titles page in WebVoyage. CARLI's definitions keep these code translations in sync with WebVoyage format limit options and are consistent across all I-Share catalogs.

Title List Material Type Display in SysAdmin



Choose Title List Material Type Display icon in the Search tab.

In this area you can see the material type code and the name that is associated with it. These code/name pairs affect what users see in WebVoyage.

Below is an example of a search result from WebVoyage that illustrates the code/name pairs from the material type display. When search results are returned from an "Any Word Anywhere" search, the format is displayed. The record type and bib level code

combination is also used for limiting results by format, and I-Share catalogs keep the names of format limit options similar to the names of the formats themselves:

WebVoyage Titles Page includes Format column, depending on type of search executed:

#	Relevance	Full Title	Date	Format
<input type="checkbox"/> <u>1</u>	✓✓✓✓✓	Journal for the scientific study of religion [microform].	1961	Magazine / Journal
		Library Location: Microfilm Cabinets - Periodical Stacks	Call Number: MF J86fs	Status: Available
Advanced Search		Journal for the scientific study of religion	1961	Magazine /

[New Search](#) [I-Share Catalog](#) [Renew Books/My Account](#) [New in the Catalog](#) [Quit](#) [Help](#)

Search Limits

Now Searching: Aurora University Library

- Limits apply to title and keyword searches only.
- Select ways of limiting your searches below, then click the Set Limits button.
- Limits remain in effect until you specifically clear them or exit the catalog.
- Choose multiple limits within a single menu box by holding the CTRL or Apple key while selecting.

Set Limits
Search Limits

Language: English

Arabic

Location: Curriculum Collection
Jenks Collection
Juvenile Collection

Year of Publication: Only
 After the year above
 Before the year above
 The year above, up to and including

Primary Format: Books
Magazines/Journals
Films/Videos

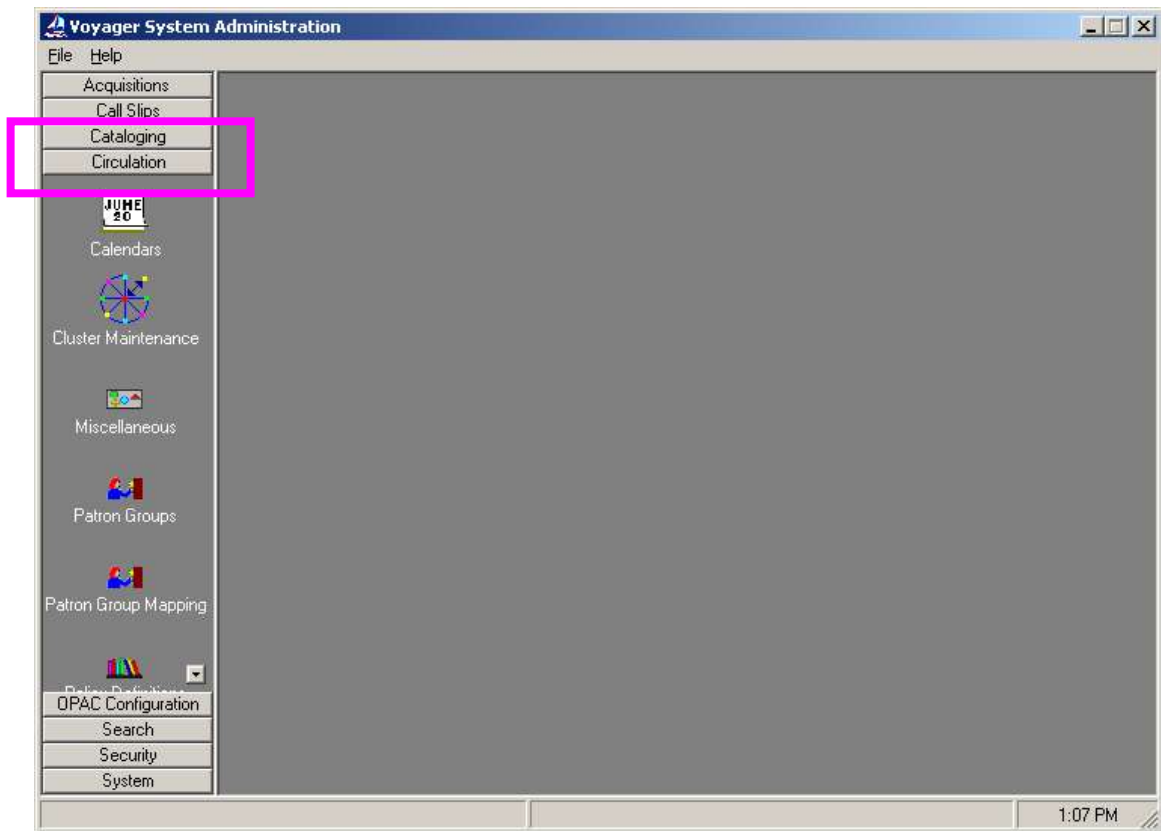
Additional Format Specification: Microforms
Atlases/Maps
Globes

[New Search](#) [I-Share Catalog](#) [Renew Books/My Account](#) [New in the Catalog](#) [Quit](#) [Help](#)

VII.



CIRCULATION CHANGES FOR WEBVOYÁGE

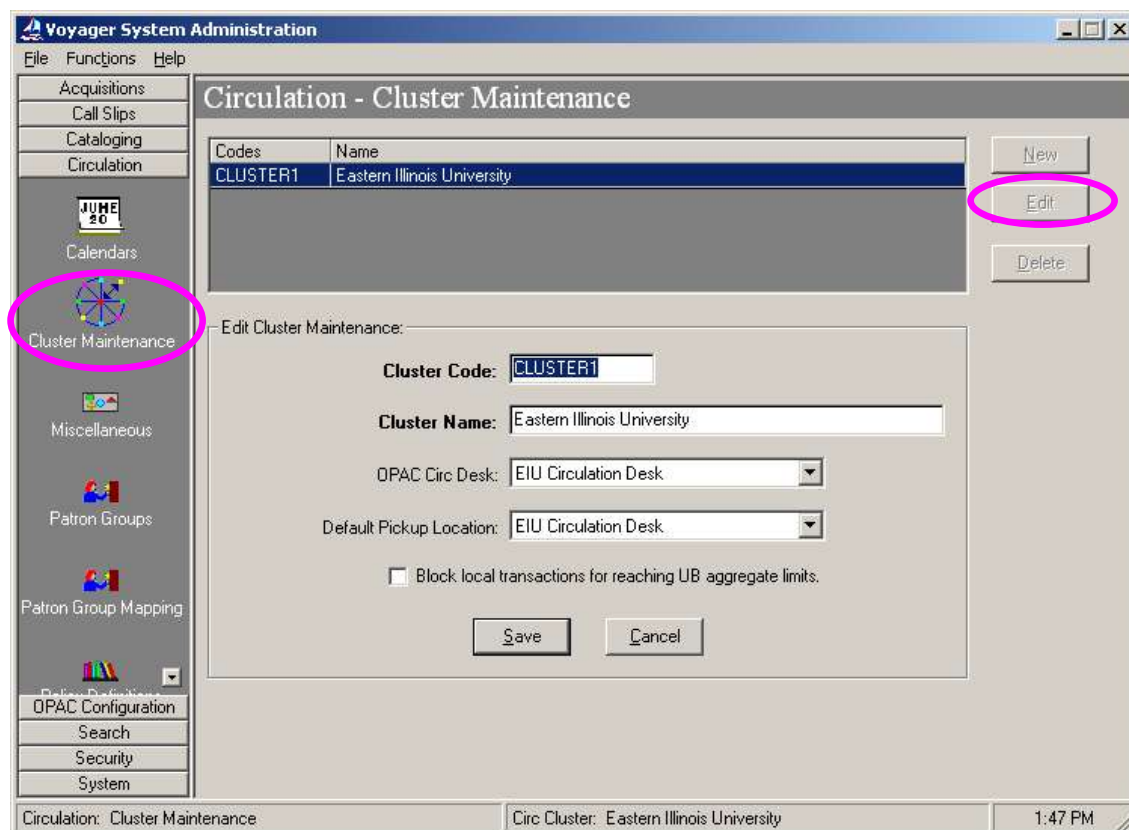


Libraries must update two items in the Circulation section of SysAdmin after their bib loads have been completed, for OPAC configuration purposes. The first is Circulation Cluster Name. **LIBRARY DOES: Library staff must edit the Circulation Cluster Name.** The Circulation Cluster Name is essential for requesting items and for access to My Account. The Cluster Name is the form of institution name that displays in the drop-down list of home libraries on the login page in every instance of WebVoyage and in the drop-down list of libraries on the Account Creation page in VuFind. The Circulation Cluster Name also displays in the Circulation staff client's dropdown lists for patron's or item's library.

The second item under the Circulation section of SysAdmin that relates to the OPAC and that must be configured after bib loads have been completed is choosing the correct OPAC Circ Desk location. **LIBRARY DOES: You must choose your primary circulation HAPPENING location for this.** It determines the circulation policies for user-initiated requests and renewals and is essential for requesting items and for access to the My Account feature.

The steps below outline how to change your Circulation Cluster Name and how to choose your OPAC Circ Desk.

Changing Cluster Name and OPAC Circ Desk Location



Select the Cluster Maintenance icon from the Circulation Tab.

CLUSTER1 should already be highlighted.

Click [Edit] to call up Cluster Maintenance features.

Enter appropriate changes to your Cluster Name and HAPPENING location (see details below)

Click [Save] to save all changes.

A. *CLUSTER NAME*

⊕ **LIBRARY DOES:** Edit your Cluster Name to spell out your institution in full (if possible). The maximum number of characters allowed for your Cluster Name is 56. Use easy-to-understand abbreviations, if necessary, to ensure your Cluster Name is under 56 characters in length. For example: Southern Illinois University School of Medicine in Springfield was shortened to “Southern Illinois University School of Medicine (Spfld).”

B. OPAC CIRC DESK

⊕ LIBRARY DOES: Choose your primary circulation **HAPPENING** location in the **drop-down list**. Large and complicated libraries will sometimes create an OPAC-specific circulation **HAPPENING** location for this purpose.

When you have made the appropriate changes to Cluster Name and OPAC Circ Desk, click [Save].

VIII. OPTIONAL UPDATES: CALL SLIPS

The first of the OPTIONAL updates you may wish to make is to enable Call Slip requesting. A call slip request allows your patron to request your items from your catalog. Library staff process Call Slip requests, pull items from the shelf to fill the requests, and hold the items for the patron to pick up. Most I-Share libraries support Call Slip requests.

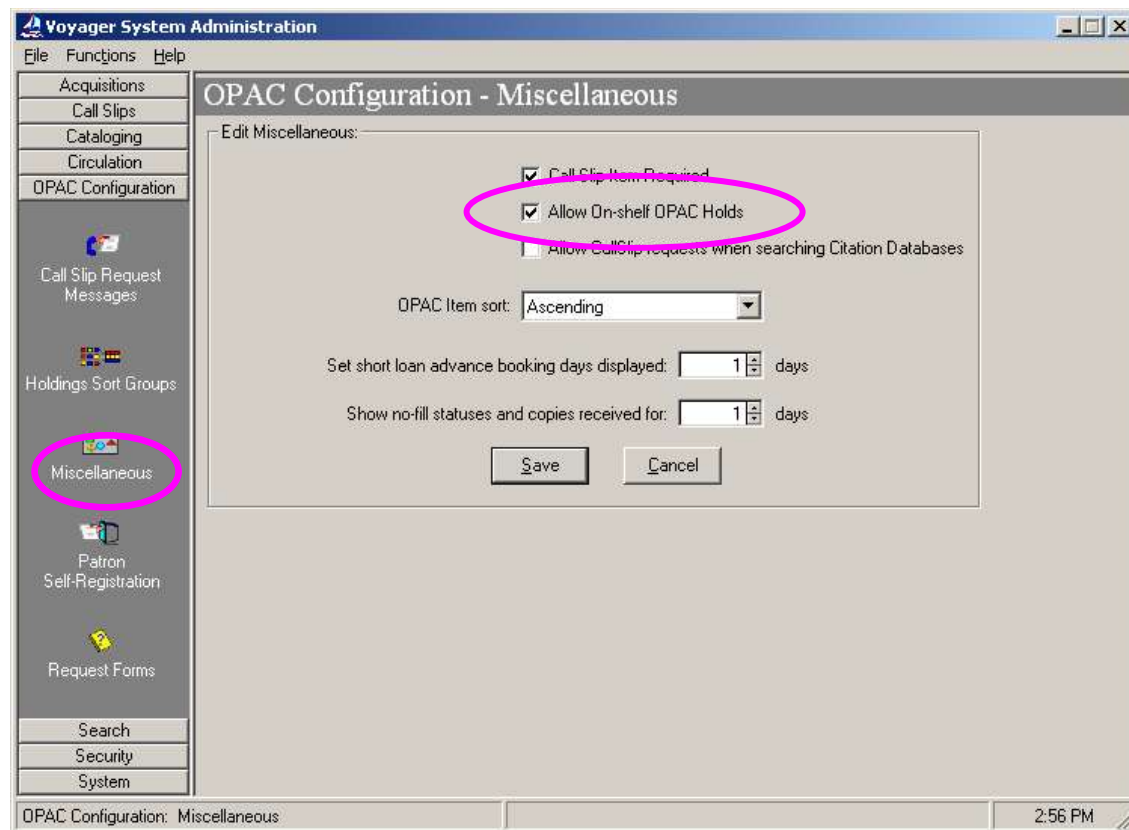
If your institution wants to support Call Slip requests, you must configure the Call Slip Form itself and check one or two settings in the “Miscellaneous” tab of SysAdmin. You also have to check “Call Slip” in the Patron Group-Item Type policy matrix.

⊕ Please notify CARLI when you decide whether or not to allow Call Slip requests so CARLI can hide or display request links in the OPACs, as appropriate.

A. CALL SLIP ENABLING

If you choose to allow Call Slip requesting in your local catalog, the following are the steps you must take to enable it.

Enabling On-Shelf OPAC Holds



Click on the Miscellaneous icon under OPAC Configuration.

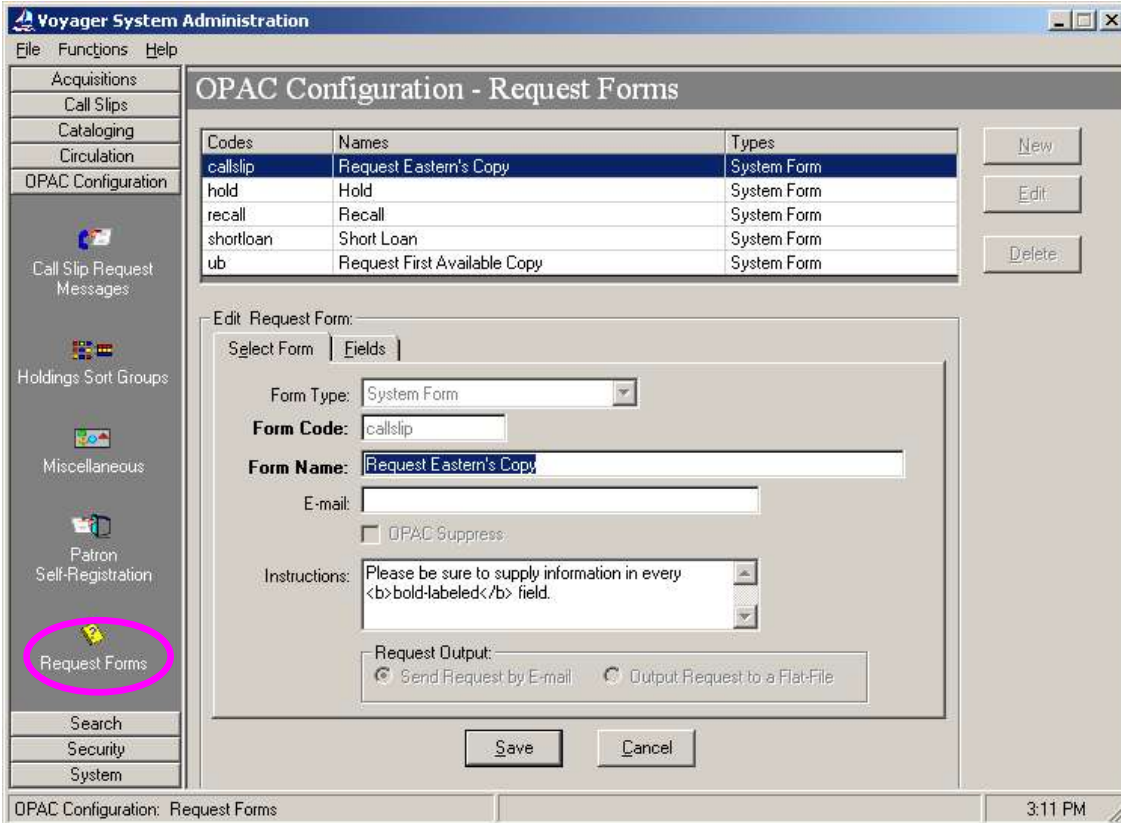
Tick the box next to “Allow On-shelf OPAC Holds.” (This is another name for Call Slip requests and differs from plain Voyager “Holds.” Plain “Holds” are placed against charged items. On-shelf OPAC Holds are requests placed against items that are available and on-shelf.)

Click [Save] to save your changes.

After you have allowed On-shelf OPAC Holds, you next need to customize your Call Slip form. The Call Slip form is the form seen by your users in your instance of WebVoyage (but not VuFind) when they request your materials.

WebVoyage Customization Guidelines used to say this form should be kept consistent across the consortium. The consistency was to maintain similarity between the UB request form seen in I-Share/the UC and your Call Slip request form. UB requests are now placed in the VuFind interface to the I-Share union catalog, but CARLI still recommends consistent wording on the Call Slip request form.

Configuring Call Slip Form



The screenshot shows the Voyager System Administration interface. The left sidebar has a menu with 'Request Forms' highlighted in a pink circle. The main window is titled 'OPAC Configuration - Request Forms' and contains a table of request forms. Below the table is an 'Edit Request Form' section with fields for Form Type, Form Code, Form Name, E-mail, OPAC Suppress, Instructions, and Request Output.

Codes	Names	Types
callslip	Request Eastern's Copy	System Form
hold	Hold	System Form
recall	Recall	System Form
shortloan	Short Loan	System Form
ub	Request First Available Copy	System Form

Edit Request Form:

Select Form | Fields

Form Type: System Form

Form Code: callslip

Form Name: Request Eastern's Copy

E-mail:

OPAC Suppress:

Instructions: Please be sure to supply information in every bold-labeled field.

Request Output:

Send Request by E-mail Output Request to a Flat-File

Save Cancel

Choose the Request Forms icon under the OPAC Configuration tab.

Highlight the Call Slip line (“callslip” under the Codes heading) and click [Edit]

Change the Form Name to “Request X’s Copy” where X is your institution’s name.

Change the Instructions to something like the following suggested text: “Please be sure to supply information in every bold-labeled field.”

NOTE: Changes on the Fields tab are usually not necessary.

Click [Save] to save your changes.

B. ENABLING “CALL SLIP ITEM REQUIRED” OPTION

Libraries that choose to allow Call Slip requesting also face the decision whether or not to allow Call Slip requests in WebVoyage for objects that are not described by an item record. (Libraries that do want to allow Call Slip requests on serial volume holdings for which item records do not yet exist, for example, would not want to check “Call Slip Item Required.”) Checking “Call Slip Item Required” affects when users see the Call Slip Request Form and what the form looks like when they do see it. Note that VuFind requires an item record to be present in order to process a request; the “Call Slip Item Required” setting (even if left unchecked) has no effect on VuFind.

For more information on “Call Slip Item Required,” see S.A. 7.2, page 7-21.

1. “Call Slip Item Required” Is Checked

If “Call Slip Item Required” is checked, then the Call Slip Request form is simpler (it lacks a row where users can type in the enumeration or chronology of the requested piece) and Bib/MFHDs without items attached are not requestable. Although users can begin a request, after selecting the Call Slip request type they see:



Your request failed in this library's catalog. No items are available for requests.

Additional copies may be available at other sites.

2. “Call Slip Item Required” Is Not Checked

If “Call Slip Item Required” is not checked, the Call Slip form is more elaborate and Call Slip requests are possible even when no item record is present. The following are two examples from WebVoyage:

Example when Call Slip Form is more elaborate (user chooses item or supplies information)

Library Catalog Request: Request first available UIUC copy	
Title:	Advances in accounting.
Instructions:	Search and order by completing form, choose a pickup site. Only Faculty, Staff, and Graduate Students may select the pickup location of Campus Mail (offices only).
<input checked="" type="radio"/> Select a local item:	v.21 (2005) c.1 
<input type="radio"/> Specify an item (if not listed above):	Volume <input type="text"/> Date <input type="text"/> Year <input type="text"/> 
Choose pick-up library:	UIUC MAIN STACKS DESK
Library Borrower ID:	<input type="text"/>

Library Catalog Request: Request DePaul's Copy	
Title:	ILCSO test record
Instructions:	Please be sure to supply information in every bold-labeled field.
Specify an item (if not listed above):	Volume <input type="text"/> Date <input type="text"/> Year <input type="text"/>
Choose pick-up library:	LPC CIRCULATION <input type="button" value="v"/>
Library Borrower ID:	<input type="text"/>
Note:	<input type="text"/>
<input type="button" value="Submit Request"/> <input type="button" value="Clear Form"/>	

<ul style="list-style-type: none"> Acquisitions Call Slips Cataloging Circulation OPAC Configuration Call Slip Request Messages Holdings Sort Groups Miscellaneous Patron Self-Registration Request Forms Search Security System 	<h3>OPAC Configuration - Miscellaneous</h3> <p>Edit Miscellaneous:</p> <p><input checked="" type="checkbox"/> Call Slip Item Required</p> <p><input checked="" type="checkbox"/> Allow On-shelf OPAC Holds</p> <p><input type="checkbox"/> Allow CallSlip requests when searching Citation Databases</p> <p>OPAC Item sort: <input type="text" value="Ascending"/></p> <p>Set short loan advance booking days displayed: <input type="text" value="1"/> days</p> <p>Show no-fill statuses and copies received for: <input type="text" value="1"/> days</p> <p style="text-align: center;"> <input type="button" value="Save"/> <input type="button" value="Cancel"/> </p>
<p>OPAC Configuration: Miscellaneous 2:56 PM</p>	

Click on the Miscellaneous icon in the OPAC Configuration tab.

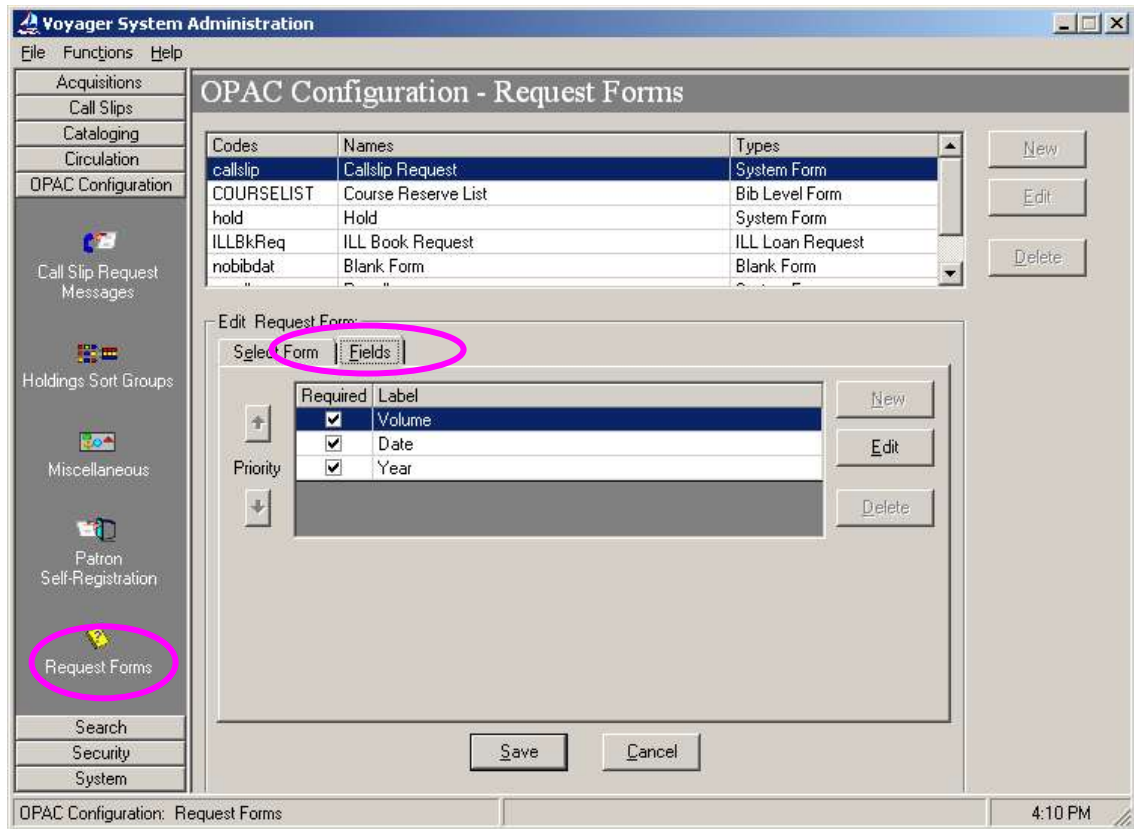
Tick the box next to “Call Slip Item Required.”

Click [Save] to save your changes.

C. REQUIRED FIELDS FOR CALL SLIP FORM WHEN “CALL SLIP ITEM REQUIRED”

Libraries that choose to allow Call Slip requesting AND to allow Call Slip requests for objects that are not described by an Item Record ("Call Slip Item Required" is left unchecked) face another decision: which fields to require when users specify the piece they want to request.

Choosing Required Fields When Call Slip Item Not Required



Choose the Request Forms icon under OPAC Configuration.

Choose the Call Slip (Code = "callslip") line and click [Edit].

Click on the "Fields" tab.

Choose the field you want to edit and click [Edit].

Click [Save] once you have made all your changes.

IX. OPTIONAL UPDATES: ADDITIONAL REQUEST FORMS

Local databases use the Call Slip form. There is also a UB request form in WebVoyage, but since UB requesting is now handled via the VuFind interface, this is no longer relevant to I-Share libraries. Other types of request forms can be created for patron use in local WebVoyage catalogs. These forms may include: various ILL request forms, purchase request forms, information request forms, etc. Who may access an optional form is determined by patron type. Patrons authorized for more than one type of form must traverse the request form selection page in WebVoyage.

- CARLI strongly discourages using the Hold request form.
- Since new I-Share libraries' patrons will most likely use VuFind more often than WebVoyage, CARLI generally discourages implementing additional request forms in WebVoyage.

For more information on creating and editing forms that can be created see S.A. 7.2 pages 7-23 through 7-44.

Creating and Editing Optional Request Forms

The screenshot shows the Voyager System Administration interface. The main window is titled "OPAC Configuration - Request Forms". On the left, there is a navigation menu with "Request Forms" highlighted in a pink circle. The main area contains a table of request forms and an "Edit Request Form" dialog box.

Codes	Names	Types
COURSELIST	Course Reserve List	Bib Level Form
hold	Hold	System Form
ILLBkReq	ILL Book Request	ILL Loan Request
nobibdat	Blank Form	Blank Form
recall	Recall	System Form

The "Edit Request Form" dialog box is open, showing the following fields:

- Form Type: ILL Loan Request
- Form Code: ILLBkReq
- Form Name: ILL Book Request
- E-mail: train1@endinfosys.com
- OPAC Suppress
- Instructions: Please fill in appropriate fields to order book.
- Request Output: Send Request by E-mail Output Request to a Flat-File

Click on the Request Forms icon under OPAC Configuration.

Either Click [New] to create a new form or [Edit] to edit an existing form.

Click [Save] to save changes.

Fill in the appropriate information in each tab (for further information see S.A. 7.2 pages 7-23 through 7-44).

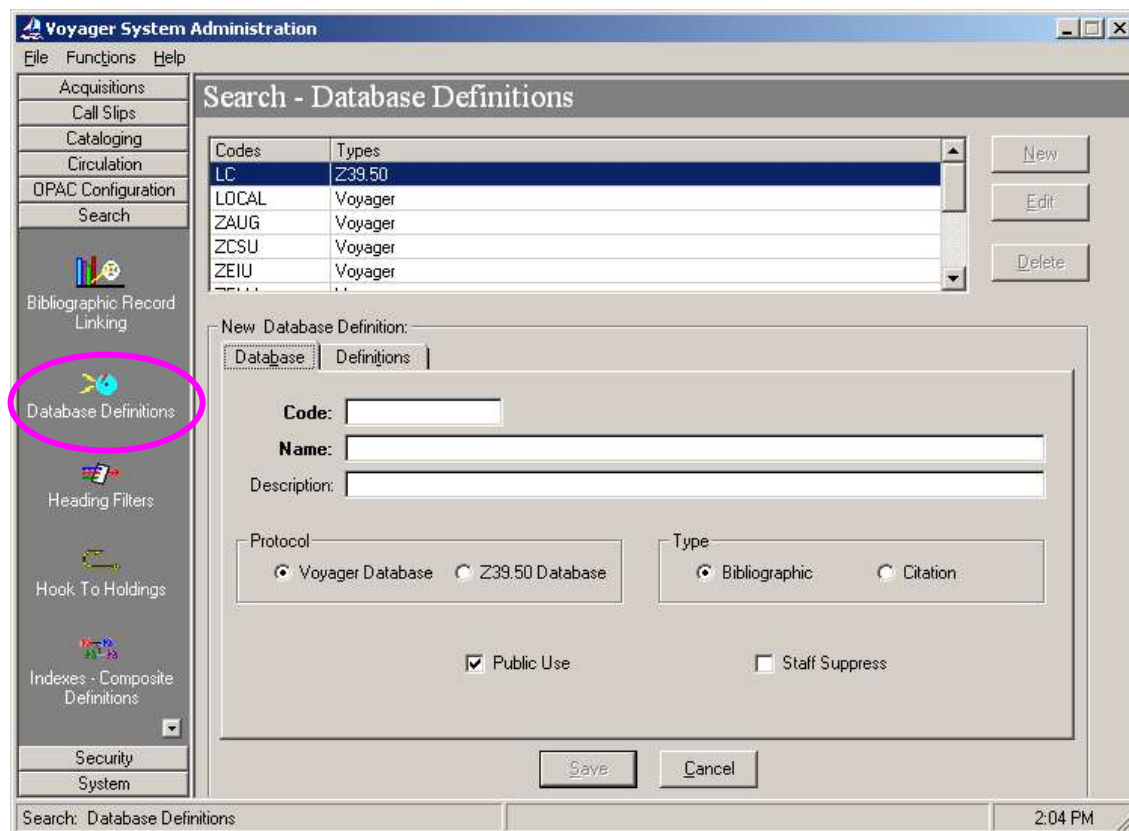
X. OPTIONAL UPDATES: ADDITIONAL DATABASE DEFINITIONS

Additional database definitions can be added to your Voyager instance. “SimulSearch” allows your users to search remote Voyager or Z39.50-accessible databases via your database’s local instance of WebVoyage.

CARLI has opted not to use “SimulSearch” for public access across the I-Share databases because search options were too limited.

Consult S.A. 7.2 pages 8-17 through 8-36 for more information.

Configuring Additional Database Definitions



Choose the Database Definitions icon under Search.

Click on [New] to create a new database definition or [Edit] to edit an existing database definition.

Make sure to fill in both the “Database” and “Definitions” tabs.

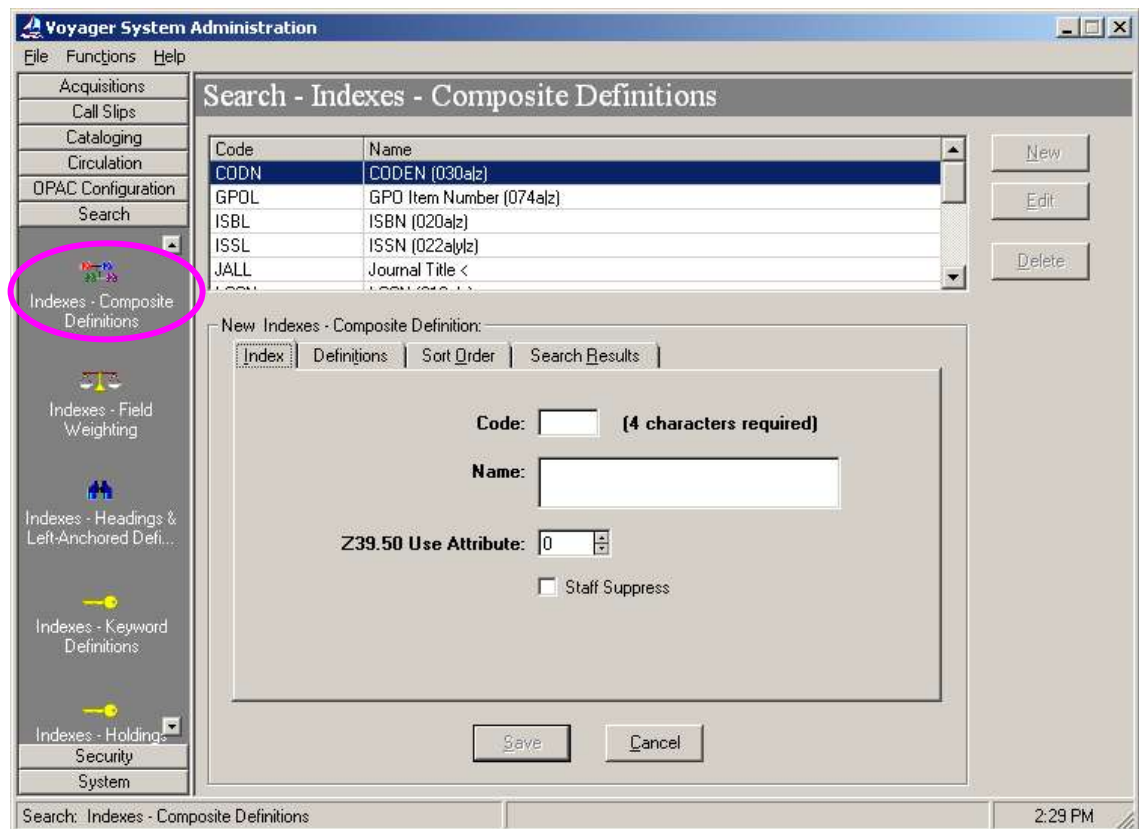
Click [Save] to save changes.

XI. OPTIONAL UPDATES: ADDITIONAL SEARCH CONFIGURATIONS

Your institutions can create new composite or keyword searches and add them to your local WebVoyage.

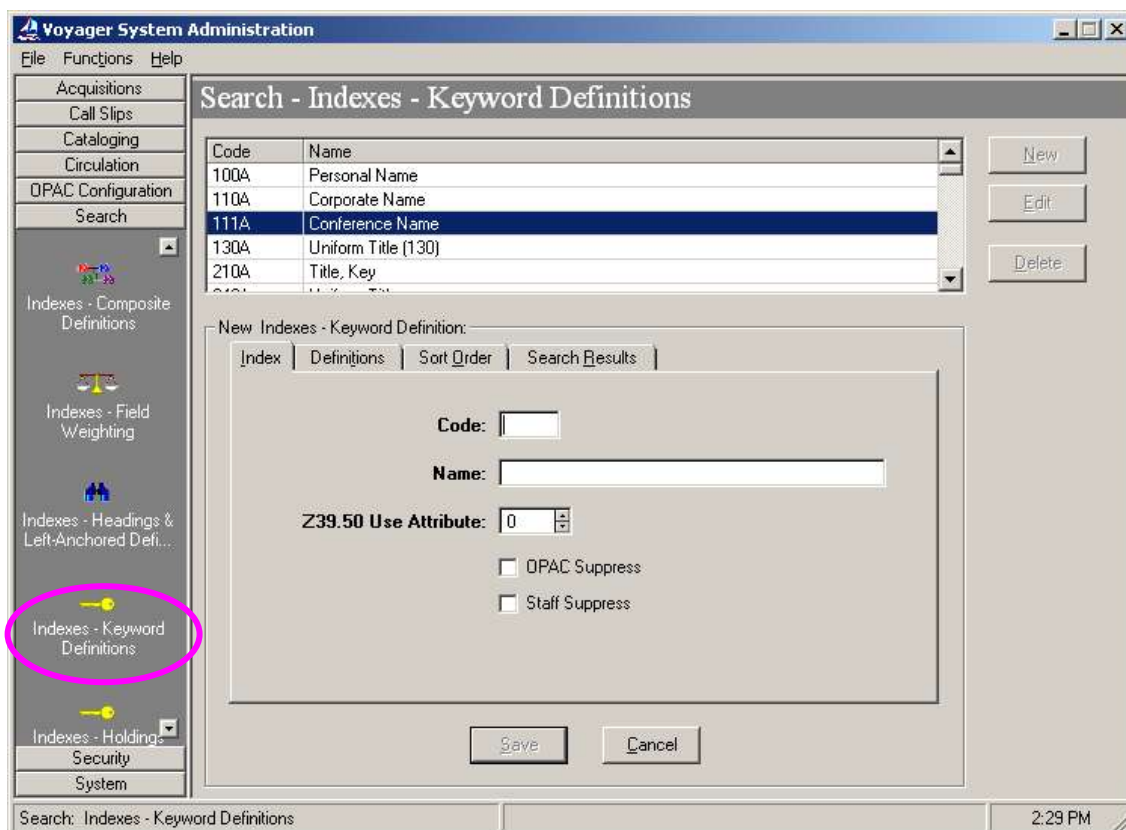
Ø Individual institutions may not modify the searches that are used in “I-Share Local Default” WebVoyage. For further information, see: <http://www.carli.illinois.edu/sites/files/i-share/documentation/voy-index.pdf>. Requests for new left-anchored indexes should go to the I-Share Users’ Group (IUG) for consideration.

Create New Composite Definition



Choose the Indexes – Composite Definitions icon under Search.

Create New Keyword Definition



Choose the Indexes – Keyword Definitions icon under Search.

For either Composite or Keyword Definitions, to create a new definition, click on [New] and fill in all the tabs as appropriate.

NOTE: Keyword searches appear on the WebVoyage Advanced Search page unless you choose “OPAC Suppress” under the “Index” tab. To add a keyword search to the Quick Search page, contact CARLI staff.

NOTE: To have non-keyword searches appear in WebVoyage, they must be added to the Quick Search page. CARLI staff will do this task. Contact support@carli.illinois.edu.

For further information about additional search configurations, see S.A 7.2 pages 8-1 through 8-8.

XII. OPTIONAL UPDATES: TITLE LIST COLUMN NAMES

Title List Column Names affect names of data elements selectable within search configurations, which in turn determine column headings on the Titles Page in WebVoyage and on multi-record search results in Voyager staff clients.

NOTE: Do not modify data elements used in searches in the “I-Share Local Default” WebVoyage. For more information on the indexes used in I-Share library catalogs, see http://www.carli.illinois.edu/sites/files/i-share/documentation/titles_page_columns.xls and http://www.carli.illinois.edu/sites/files/i-share/documentation/i-share_dflt_indexes.xls.

Example of Titles Page in WebVoyage

Search for: neuroscience Search by: Start of Journal/Magazine Title Quick Limit: None

20 records per page Submit Reset

Sort by: [] Change Limits

#	Magazine / Journal Title Heading	Full Title	Publication Place	Publisher
1	Neuroscience	IBRO news	Oxford, New York,	Pergamon Press.
Library Location: Biology		Call Number: 612.805 NEURSUP.		Status: Multiple item statuses. Click for details.

Search for: neuroscience Search by: Any Word Anywhere Quick Limit: None

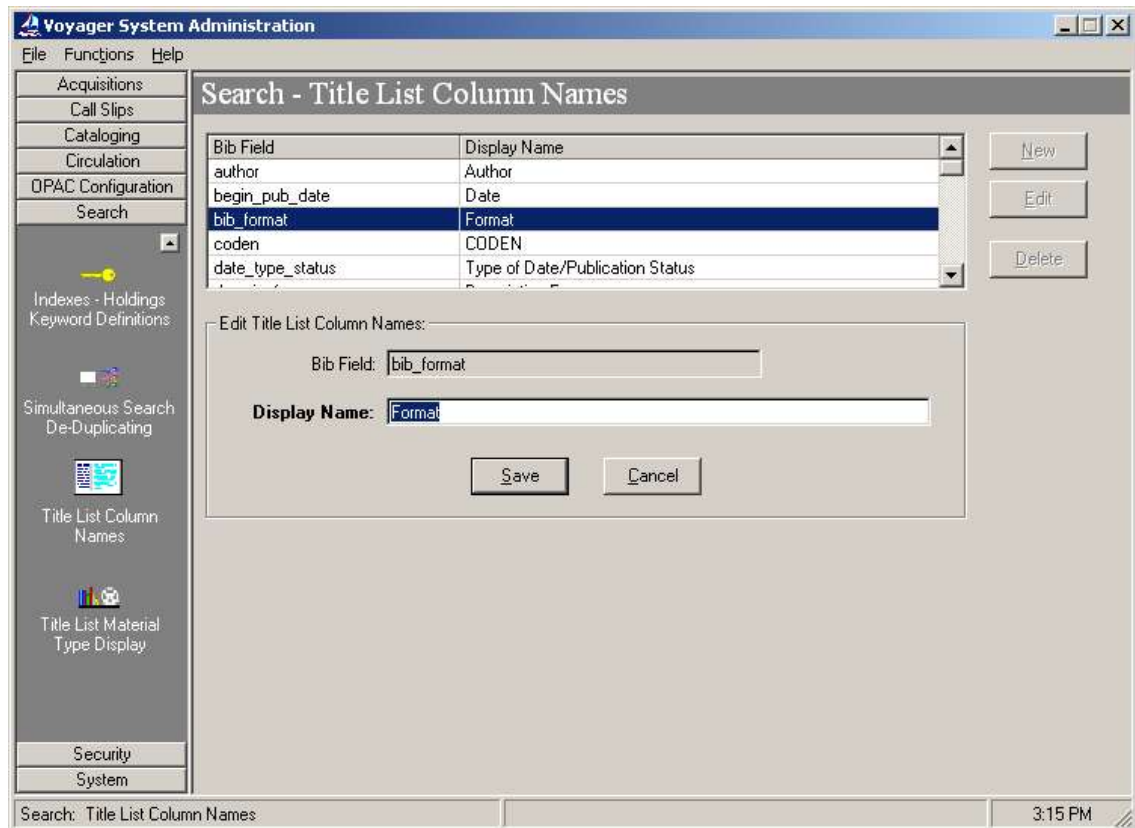
20 records per page Submit Reset

1 21 41 61 81 101 ... 861 Next

Sort by: Relevance Change Limits

#	Relevance	Full Title	Author	Date
1	★★★★★	Complex problem solving : the European perspective / edited by Peter A. Frensch, Joachim Funke.		1995
Library Location: Education		Call Number: 153.43 C738		Status: On Shelf

Editing Title List Column Names



Choose the Title List Column Names icon under Search.

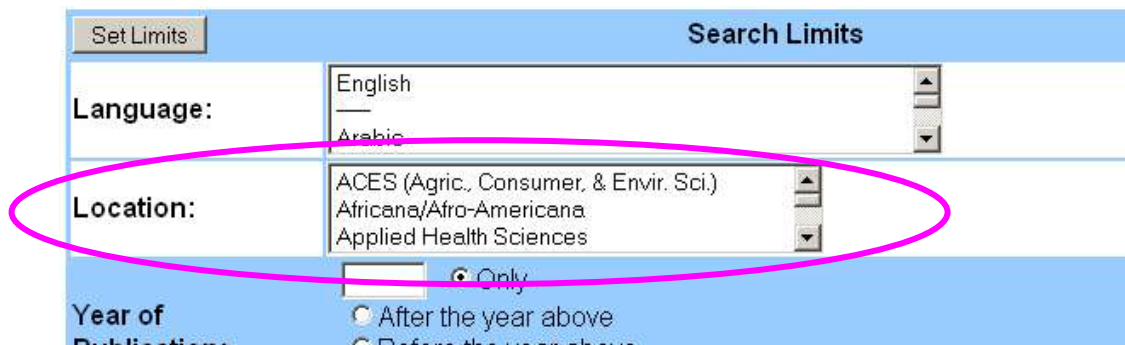
Ø Column names for search results from indexes invoked in the I-Share public catalogs should not be edited. See http://www.carli.illinois.edu/sites/files/i-share/documentation/titles_page_columns.xls and contact support@carli.illinois.edu with any questions.

XIII. OPTIONAL UPDATES: LOCATION LIMIT GROUPS

Location Limit Groups appear as limit options on the “More Limits” page in WebVoyage, and as location facets in VuFind, unless they are OPAC Suppressed. Location Limits can also be listed in the Quick Limits list. For more information, see: <http://www.carli.illinois.edu/products-services/i-share/opac/vf-loc-facets> and http://www.carli.illinois.edu/products-services/i-share/opac/wv-cust-within-dflt-wv6#loc_limits. Limit Groups can be groups of one or many holding locations taken from MFHD records.

For more information, see S.A. 7.2 pages 10-64 through 10-69.

Example of Location Limit Groups in OPAC



Example of Location Limits as Quick Limits

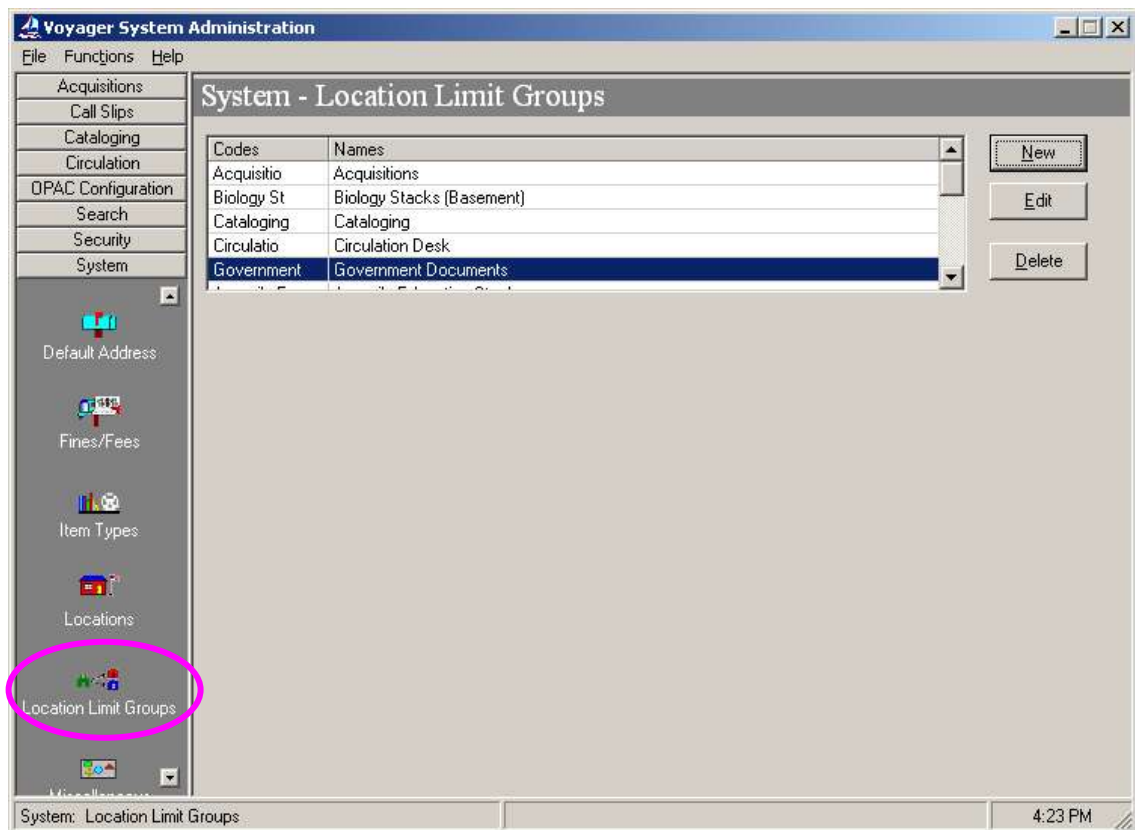
Now Searching: University of Illinois at Urbana-Champaign Library

The screenshot shows a search interface with three tabs: 'Quick Search', 'Advanced Search', and 'Course Reserves'. The 'Quick Search' tab is active. Below the tabs, there is a search input field and a 'Search' button. To the right, there is a 'Search by:' dropdown menu with options like 'Any Word Anywhere', 'Start of Title', 'Author', etc. Below the search input, there is a 'Quick Limit:' dropdown menu. A pink circle highlights this menu, which lists various location-based filters such as 'None', 'Last 5 years', 'Books', 'Magazines/Journals', 'Films/Videos', 'Music scores', 'Music recordings', 'Spoken word recordings', and a list of departments including 'UIUC Online Collection', 'Undergraduate', 'ACES (Agric., Consumer, & Envir. Sci.)', 'Africana/Afro-Americana', 'Applied Health Sciences', 'Architecture & Art', 'Asian', 'Biology', 'Business & Economics', 'Center for Children's Books', and 'Chemistry'. Below the search input, there is a 'Search' button and a 'Feedback' link.

Example of Location Facets in VuFind

The screenshot shows the University of Illinois at Urbana-Champaign Library Catalog search results for 'agriculture'. The search results are displayed in a list format. The first result is 'Agriculture. Published 1895-1972. University of Illinois at Urbana-Champaign. Call Number: 630.5 JOA. Location: Main Stacks. Available. Journal / Magazine'. The second result is 'Agriculture and Commerce, a dialogue : written in autumn 1764. by Agriculture. George Andrew Patrick Published 1765. University of Illinois at Urbana-Champaign. Call Number: Online Resource. Location: *UIUC Online Collection. eBook'. The third result is 'Training for agriculture. University of Illinois at Urbana-Champaign'. The search results are sorted by 'Relevance'. On the right side, there is a 'Results for' section and a 'Narrow Your Search' sidebar. The 'Narrow Your Search' sidebar has a 'Location' facet with options: 'Main Stacks', 'Oak Street Facility', 'ACES (Agric., Consumer, and Envir. Sci.)', 'HathiTrust eResources (public domain)', and '*UIUC Online Collection'. A pink circle highlights this 'Location' facet.

Set Location Limit Groups



Choose the Location Limit Groups icon under System.

Click [Edit] to edit an existing group or [New] to add a group.

Click [Save] after making necessary changes.

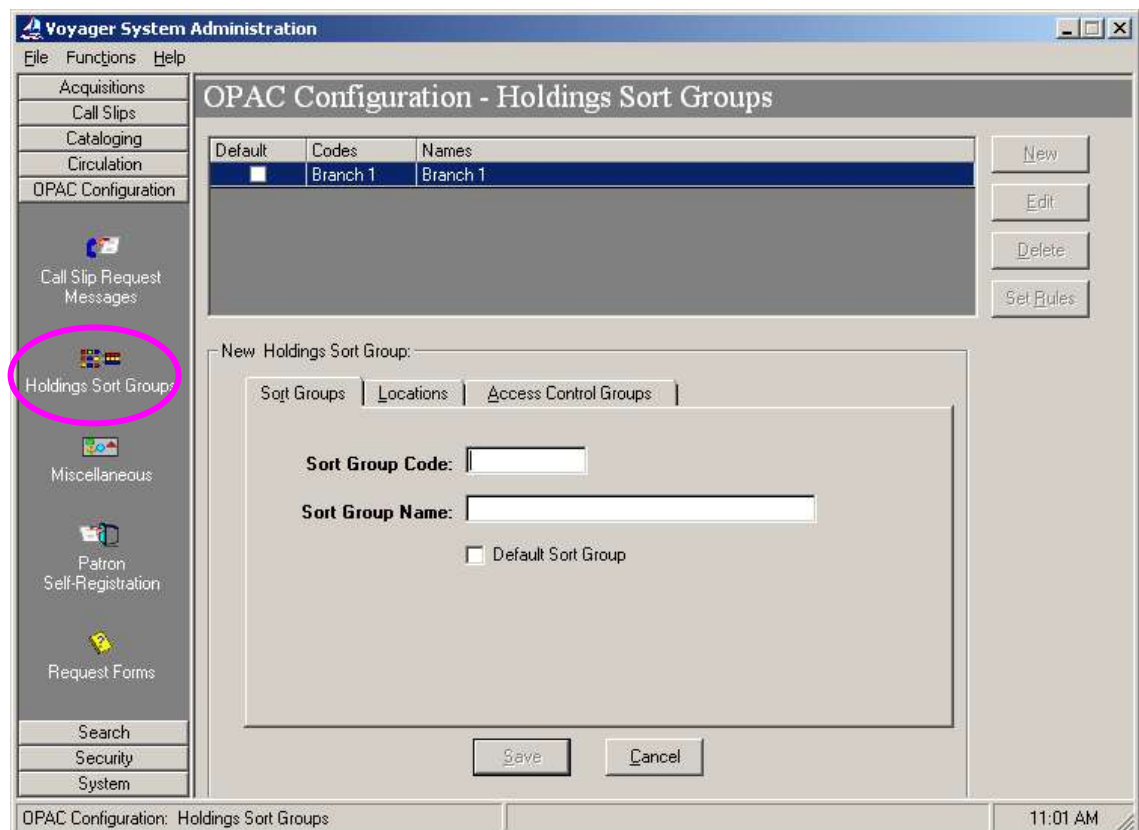
XIV. OPTIONAL UPDATES: HOLDINGS SORT GROUPS

Holdings Sort Groups are intended to override the alphabetical-by-location sequence (based on the locations' OPAC Display Names) in which holdings display when more than one MFHD is attached to a bib record in your database. Holdings Sort Groups allow for customized search result displays for each Access Control Group. The effect can be that search results will show items held at the branch library location where the patron is standing before they show items at other locations in the same library. No I-Share library currently uses Holdings Sort Groups, as far as CARLI Office staff know.

The use of Holdings Sort Groups also requires Access Control Groups to be defined in order to work properly. Set up the Access Control Groups first (based on IP range, Domain Name, etc.).

For further information, see S.A. 7.2 pages 7-8 though 7-19.

Adding Holdings Sort Groups



Click on the Holdings Sort Group icon under OPAC Configuration.

Click [New] to create a new Holdings Sort Group.

Enter the necessary information in each tab (Sort Group, Locations, Access Control Groups) making sure to link the Holdings Sort Group to an established Access Control Group (created in System Administration*System*Access Control Groups).

Click [Save] to save changes.