

# ADVANCE

## Online Catalogue Guide

(Release 6.82)

September 2000

*NOTE: To navigate in this manual, you can click on:*

- *table of contents headings*
- *index entry page numbers*
  - *blue cross-references*
- *Acrobat bookmark list headings, at the left.*

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Software Described ADVANCE Library System  
Release 6.82 (September 2000)

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# 1

## Introduction

---

### Purpose

The *Online Catalogue Guide* is both a tutorial and an operational guide for the Online Catalogue users.

### Contents

Chapter 2 of this guide is a discussion on accessing menus and functions, and includes a function/menu map.

Chapter 3 is a tutorial that describes how to print moneyaccess and start using the Online Catalogue.

Chapter 4 is an alphabetical list of search options available in OPAC, which screens they are available on, as well as, how they are used and the results of their use.

Chapter 5 is a discussion on common screen displays, their purpose, as well as, their functionality in a given search.

Chapter 6 is a tutorial that describes how to browse through the Online Catalogue indexes.

Chapter 7 describes the principals and features of Keyword Searching. It covers such topics as, keyword search types, word search tools, basic steps, expert searching and word search options and special features.

Chapter 8 describes how to use the Direct Key Searches portion of the Online Catalogue. It covers such topics as, types of searches, requests and options.

Chapter 9 describes Reserve Book Room searching. The basis of different searches, and how they are used.

Chapter 10 describes how to view information about the libraries' hours of operation.

Chapter 11 is a discussion on accessing a list of stopwords and leading articles that the system removes from index entries and search strings.

Chapter 12 describes how to set up the Online Catalogue so that patrons can view their own circulation information.

Chapter 13 describes how to customize the Online Catalogue.

Appendix A provides general instructions on accessing screens and editing fields in ADVANCE.

Appendix B is a general ADVANCE glossary.

### Other Documentation

Consult other guides for related information:

- For general ADVANCE setup, refer to the *Utilities Management Guide*.
- For details on printing reports, refer to the *Reports Guide*.

### Typographical Conventions

Two special text styles are used in this guide:

1. The screen identifiers, the text that you can enter, and screen messages are in a monospace font style. Examples: “OSC”, “Y”, “A1”, “Enter the code you wish to add”.
2. The names of screen fields and options, and cross-references to section or manual titles, are in **italics**. Examples: “RESERVED AREA”, “Exit”, “see *Setup Options*”.

**Angle brackets** around the name of a key mean press the key. For example, “<ENTER>” means press (or pressing) the ENTER key.

### Generic Examples

Because system behaviour can be tailored by the library’s system managers to meet local needs, the screens and options shown in this document may not match exactly the ones at your library.

Some sample screens may be shown shorter than they actually are. This occurs when blank lines have been deleted to reduce space requirements.

# 2

## Overview

---

This chapter provides:

- a discussion of accessing menus and functions
- a map of the Online Catalogue menus and functions.

General instructions on accessing screens and editing fields throughout ADVANCE are provided in Appendix A, *Using ADVANCE*.

## Accessing the Menus and Functions

Any Online Catalogue Module function can be accessed directly by entering its screen identifier on any Online Catalogue menu, or indirectly by stepping through menus.

An index of screen identifiers is provided in the *Index*, at the end of the guide, and a list of menus and directly accessible screens is provided in the *Online Catalogue Menu Map* section. The main menus are described on the following pages.

The menus are customizable. Whether you must go through one or two menus to reach the Online Catalogue function you want, depends on the port setup and individual access levels on your system.

Customizing menus, port setup and individual access levels are all discussed in Chapter 13 of this guide (*Online Search Setup*) and in the System Utilities (see *ADVANCE Utilities Management Guide*).

## ADVANCE Master Menu

The screen identifier for the standard ADVANCE MASTER MENU is MM.

```

DD MMM YYYY          Geac ADVANCE Library System (#.##)          P P P P P I I I I I I
HH:DD                Your Library Name

                                MASTER MENU

1. CAT  Cataloguing          4. ACQ  Acquisitions
2. CIRC Circulation          5. SER  Serials Control Menu
3. OPAC Online Catalogue    6. UTIL Utility Menu

                                7. ON   Change User
                                8. OFF  Log Off

Enter the number of your selection and press <ENTER>
or ? followed by <ENTER> for Help :
```

## Online Catalogue Master Menu

Access the full standard ONLINE CATALOGUE MASTER MENU (OPAC) by selecting 3 on the MASTER MENU.

```
DD MMM YYYY          Geac ADVANCE Library System (#.##)          P P P P P I I I I I I I
HH:DD                Your Library Name
```

ONLINE CATALOGUE MASTER MENU

1. SEARCH Search Online Catalogue
2. OLCM Library Calendars Menu
3. DSTOP Stopword Display
4. DART Leading Article Display
5. PAT Patron Display
6. OSUP Online Search Setup
7. ORM OPAC Reporting Menu
8. MM Return to Master Menu

Enter the number of your selection and press <ENTER>  
or ? followed by <ENTER> for Help :

# Menu and Function Map

The menus and functions you may encounter in using the *Online Catalogue Guide* are listed as follows. The user-availability, location, and titles of these items might have been modified by the library. Items in **bold** are menus.

## **MM** ADVANCE Master Menu

### **OPAC** Online Catalogue Master Menu

SEARCH Search Online Catalogue

#### **OLCM** Library Calendars Menu

MCAL Main Library Calendar

GCAL Receiving Display

RCAL Reserve Book Room

DSTOP Stopword Display

DART Leading Article Display

PAT Patron Display

#### **OSUP** Online Search Setup

OI OPAC Indexes

OS OPAC Searches

OSC Search Commands

OSSS Search Selection Screens

OCAL Call Number Listing

OCNL Control Number Listing

OTSL Title Summary Listing

OBD Bibliographic Displays

OPSC TL Status Display Control

#### **OHD** OPAC Holdings Display

OPAC Display Level One

OPAC Display Level Two

OPAC Display Level Four

OPAC Display Level Five

Citation Database Displays

Holdings Threshold Table

Pieces Descriptions

ORW Related Works

OBOC Bib. Output Control

OPC Port Control

OL      OPAC Limiters  
OMST    Material Search Type Codes  
OKT     OPAC Keyword Thesaurus  
CLIST    Cataloguing List Codes

**ORM      OPAC Reporting Menu**

CCR     System Reports  
RW      Report Writer  
ORGC    Report Group Codes  
RPC     Report Prompt Codes

**UTIL    Utility Menu**

AODB    Available OPAC Databases



# 3

## Basic OPAC Searching

---

The ADVANCE Online Catalogue provides you with a fast and effective way to find information in the library. This chapter is a tutorial that describes how to access and start using the Online Catalogue. This chapter includes:

- OPAC Search Tools
- Accessing OPAC
- Steps in Basic Searching
- Search Options and Features

Because this chapter discusses principles of OPAC searching common to both browse and keyword searching, it is recommended that you read this chapter before proceeding.

The next two chapters cover elements common to most OPAC searches.

- Chapter 4 - Search Options - Quick Reference

This chapter is a complete listing and explanation of Search Options.

- Chapter 5 - Search Lists and Record Displays

Describes the different kinds of listings and Record Display screens encountered during an OPAC search. This chapter should be consulted prior to proceeding to the Browse and Keyword chapters.

Chapters 6-8 cover specific OPAC search types in greater detail.

- Chapter 6 - Browse Searching Tutorial

Describes how to do browse searches.

This search method allows you to browse through lists of authors, titles, subjects, series or call numbers. Use this method when the first word(s) of your search term are known.

Call number searches are useful when you want to browse through a classification. This is similar to browsing the shelves for an item.

- Chapter 7 - Keyword Searching

Describes how to search for specific author, title, subject or series words. This search method is useful when precise headings are not known. Chapter 7 also contains information on how to use expert searching. This search technique allows experienced users to combine search commands with Boolean operators, which enables definition of very specific search requests.

- Chapter 8 - Direct Key Searching

Provides a description on how to search using identification numbers, such as ISBN, ISSN, CODEN, LCCN, or LCN. This search method produces a DETAILED DISPLAY screen if an exact match for your request is found in the database. Otherwise, a sorted list of identification numbers is displayed.

- Chapter 9 - Searching for Reserve Documents

Describes how to find items placed on course reserve. *Reserve Documents* are searchable by author, title, class and instructor.

Because ADVANCE can be customized, some of the screen displays in this manual may not match the version of ADVANCE in your library.

- Chapter 10 - Using the Library Calendars Menu

Describes how to access daily and weekly schedules for the library from the Online Catalogue. Separate calendars may be available for each library or sublocation.

- Chapter 11 - Stopword and Article Lists

Describes how to obtain a list of stopwords and leading articles that the system removes from index entries and search string.

- Chapter 12 - Patron Inquiry

Describes how to set up the Online Catalogue so that patrons can view their own information.

---

## OPAC Search Tools

ADVANCE OPAC comes with a number of different 'search tools' to facilitate the searching process:

Help	Library-defined help messages available on all OPAC screens.
Search Selection screens (port or terminal specific)	These screens are library-defined and will list all of the available search types. You can highlight the desired search type using the arrow keys or spacebar. A sample SEARCH SELECTION screen is provided in <i>Basic OPAC Searching</i> .
Search Entry screens	<p>When a search type is selected from the SEARCH SELECTION screen, you are sent to the SEARCH ENTRY screen for the type of search selected. The system prompts for input of the search string or term(s).</p> <p>The text of the search prompt is specific to each type of search.</p> <p>The SEARCH ENTRY screen also displays library-defined help messages specific to each type of search.</p>
Search Entry Prompts	<p>The system prompts you for input of search data at appropriate points in the search.</p> <p>Search entry prompts appear when certain types of options are selected, for example, on the SEARCH SELECTION screen, and in response to the use of certain options, such as <i>Search Jump</i>.</p>
Search Editing Keys	Search statements may be edited before and after executing a search. (For details, refer to <i>Editing Your Search</i> in <i>Search Options and Features</i> ).
Search Options	Options are listed at the bottom of each screen, to allow you to navigate through OPAC and perform various functions during a session. Any option on a screen is valid and may be executed. (For a reference listing of all OPAC options, refer to <i>Search Options Quick Reference</i> . For a detailed description of some of the options, refer to <i>Search Options and Features</i> ).

NOTE: The option line can display in one of two formats, depending on setup. For details, refer to the *ADVANCE Utilities Management Guide*.

### Option Bar format:

This is the format most commonly chosen for public access to OPAC, and is the format used for examples in this manual. With the option bar, you can select an option by using the arrow keys to highlight the desired option, or by entering the first character of the option. When the option is highlighted, a descriptive message appears above the options line.

The options display in the following format:

```
Options:      Enter lines (e.g. 1 or 1,2 or 1,2,4 or 1-4 or 1,3-
4 etc.)
# line(s)    Forward  Backward  Prior screen  Search jump
Modify.Search  Review Search  OPAC parms  New search  Reset
Print #(s)   ? help
```

### Option Line format:

The option line format requires that you enter mnemonic codes to access the desired option, and <ENTER> to scroll through the complete list of options:

```
Options:                                     <ENTER> = scroll opt
ions
# = line(s)          F = Forward          B = Backward
P = Prior screen    SJ = Search jump    M = Modify Search
```

In this format, instead of using the arrow keys to access the *Search Jump* for example, enter SJ.

### Syntax Analysis

Any errors in a search statement which will cause the search to fail are identified. You are then able to correct the errors and proceed with the search. Details are provided in *Keyword Searching*.

## Accessing OPAC

NOTE: Your terminal may be configured to display one of several screens as the initial screen.

## ADVANCE Master Menu

If your terminal displays the main menu, start your search at 1 in the *Basic Steps* section in OPAC Searching.

```
DD MMM YYYY          Geac ADVANCE Library System (#.##)          PPPPP IIIIII
HH:DD                Your Library Name

                                MASTER MENU

1. CAT  Cataloguing          4. ACQ  Acquisitions
2. CIRC Circulation          5. SER  Serials Control Menu
3. OPAC Online Catalogue     6. UTIL Utility Menu
                                7. ON   Change User
                                8. OFF  Log Off

Enter the number of your selection and press <ENTER>
or ? followed by <ENTER> for Help : :
```

An example of a MASTER MENU is shown; the menu appearing on your system may differ from this one because ADVANCE can be customized to meet individual library requirements.

The MASTER MENU lists, by number, the selections available. To search the Online Catalogue, enter 3 or type OPAC and <ENTER>.

The ONLINE CATALOGUE MASTER MENU appears.

## OPAC Master Menu

If your terminal displays the OPAC MASTER MENU, start your search at 2 in the section *Basic Steps in OPAC Searching* on page 3-14.

```

DD MMM YYYY          Geac ADVANCE Library System (#.##)          P P P P P I I I I I I
HH:DD                Your Library Name

                        ONLINE CATALOGUE MASTER MENU

                        1. SEARCH  Search Online Catalogue

                        2. OLCM   Library Calendars Menu
                        3. DSTOP  Stopword Display
                        4. DART   Leading Article Display

                        5. PAT    Patron Display

                        6. OSUP   Online Search Setup
                        7. ORM    OPAC Reporting Menu

                        8. MM     Return to Master Menu

Enter the number of your selection and press <ENTER>
or ? followed by <ENTER> for Help :
```

Eight choices are available from the ONLINE CATALOGUE MASTER MENU:

1. ***Search Online Catalogue*** allows you to search the library's collection in many ways: browse, keyword, call number, numeric and reserve room searching.
2. ***Library Calendars Menu*** provides information about the libraries' hours of operation.
3. ***Stopword Display*** provides a display of stopwords which are ignored by the system in keyword searches.
4. ***Leading Article Display*** provides a display of leading articles ignored in sorting for browse searches.
5. ***Patron Display*** allows the patron to check their own circulation related information.
6. ***Online Search Setup*** allows the library to customize many of the OPAC features.

7. **OPAC Reporting Menu** provides the library with the ability to access, modify and create reports.
8. returns you to the **Master Menu**.

To access OPAC Search, enter 1 at the prompt and <ENTER>.

The SEARCH SELECTION screen appears.



## OPAC Search Selection Screen

If your terminal displays the OPAC SEARCH SELECTION screen as the initial screen, start your search at 3 in the steps in the *Basic Searching* section.

The SEARCH SELECTION screen is completely library defined, and therefore may not be exactly the same as the one displayed. The library will be able to define multiple search selection screens, as well as, have complete control over which selection screens are displayed at each OPAC station. The library will also be able to link multiple SEARCH SELECTION screens together to create “layered” options.

```

      W e l c o m e   t o   t h e   O n l i n e   C a t a l o g u e

LOOK FOR THE FIRST WORD IN THE:          LOOK FOR ANY WORD IN THE:
  Subject                                Subject
  Title                                  Title
  Author                                 Author
    Personal Name
    Corporate Name                       Notes
    Conference Name
  Series
  All of the Above
  Call Number

DIRECT KEY SEARCHES:                     RESERVE DOCUMENTS:
  ISBN/ISSN                               Title
  CODEN                                   Author
  LCCN                                     Course Name
  Control Number                          Course Details
  LCN                                       Instructor
  Music Publisher Number

Select your choice using the <SPACEBAR> or Arrow Keys, then press <ENTER>.
For HELP, type "?" then press <ENTER>. To EXIT, type "E" then press <ENTER>.
Enter the Subject

```

## Search selection options

<i>&lt;Enter&gt;</i>	Allows you to perform the currently highlighted search option.
<i>Space bar</i>	Allows you to move to the desired search option.
<i>Arrow keys</i>	Allows you to move to the desired search option in the respective direction.
<i>Exit</i>	To exit from the SEARCH SELECTION screen, enter E and <ENTER>. Only users specified by the library are eligible to use this command.
<i>Help</i>	Activates the online help screen.

## Choosing a Search Method

The sample SEARCH SELECTION screen lists all of the search types available.

Depending on the information needed and the information you have, some search methods may be more efficient than others in solving your search request.

### *Look For The First Word In The:*

These browse searches display sorted lists of authors, corporations, conference names, titles, subjects, series, or call numbers.

### All of the Above:

ADVANCE allows you to search all indexes for their search terms. Use this search method when you do not know which index to use, or you want to see which of the indexes includes your search term.

### *Look For Any Word In The:*

*Word* searches look for words in a title, author, subject or series. All titles or headings containing the word(s) are displayed. This type of search can be broad or narrow in scope, depending on the number of terms or search commands in your search statement.

Word searches are useful starting points when precise headings or titles are not known.

You can also search across all indexes: title, author, subject or series. The results display every occurrence of the search term.

*Expert* searches can be used when you are familiar with the search commands structure. This method allows you to do complex cross-index

searches. Special syntax is required to use this method of searching. The boolean operators, and, or, not, xor, can also be used in expert searching. Refer to the section on *Expert Searching*.

**Direct Key Searches:** *Direct Key* searches allow you to find an item by entering an identification number such as ISBN, ISSN, CODEN, LCN, Library of Congress card or Control numbers, as well as Music Publisher Number.

**Reserve Documents:** *Reserve Documents* searches allow you to find items placed on course reserve. The search displays an alphabetical list of authors, titles, classes and instructors. Library items temporarily moved to reserve status will be shown as *On Reserve* from any search, but you will only be able to determine course and instructor information from a Reserve Documents search.

Reprints or personal copies (items not owned by the library) placed on Reserve are not listed in Browse or Word Search, and may only be located through a Reserve Document Search.

**Search Results** OPAC displays search results in an ordered hierarchy from the most general level (browse lists) to the most specific level (record displays). Whether the initial results of your search are displayed in a listing or a Detailed Display depends on several factors:

- the type of search
- whether or not there was a unique match on the search term
- number of citations retrieved
- OPAC setup:
  - minimum titles to list
  - unique match for browse searches
  - exact match for Direct Key searches.

**Some Terms Defined** A cross-heading keyword search is an Expert search in which you have entered multiple command codes (even if the same, e.g. SW= fish AND SW=sea). This search retrieves records rather than headings, and searches without regard to which individual headings contain which individual words (as though all the headings were combined into one). Cross-heading searches can also be defined for single search commands in the OPAC Searches (OS) table.

A **multi-index** keyword search is a search done in more than one index, either because you have specified multiple indexes by entering multiple command codes (e.g. *SW= fish AND AW=brown*), or because you have used a search type that is set up to search multiple indexes (e.g. *All of the Above*).

A **within-heading** keyword search applies the search string and operators to individual headings rather than individual records.

- Levels for Each Search Type
- The following screens display when the specified search is done.
- BROWSE SEARCHES (Author, Title, Subject, Series, All of the Above)**
- 1) Heading Browse List
  - 2) Title Summary List
  - 3) Detailed Display (Brief or Full)
    - Level 1 or 2 for single-part
    - Level 1 or 4 for multiparts
- BROWSE SEARCHES (Call Number),  
DIRECT KEY SEARCHES (ISBN/ISSN, LCN, etc.)**
- 1) Browse listing
  - 2) Detailed Display (Brief or Full)
    - Level 1 or 2 for single-part
    - Level 1 or 4 for multiparts
- KEYWORD SEARCHES:**
- 1) Title Summary List
  - 2) Detailed Display
    - Level 1 or 2 for single-part
    - Level 1 or 4 for multiparts

## Basic Steps in OPAC Searching

1. Select Online Catalogue from the ADVANCE MASTER MENU and <ENTER>. The OPAC MASTER MENU displays.
2. Select SEARCH from the OPAC MASTER MENU. The SEARCH SELECTION screen defined for your terminal displays.
3. Select a search type on the SEARCH SELECTION screen by pressing the arrow keys or space bar until the selection you want to use is highlighted and <ENTER>. The SEARCH ENTRY screen appears.

```
Online Catalogue - Search Entry Screen

Author Search
  Enter the name of the AUTHOR last name first

Example:
  Shakespeare
  Twain

Enter the name of the Author:
```

Or, select one of the search types from the SEARCH SELECTION screen and enter your search terms directly, and <ENTER>. If you use this method, the SEARCH ENTRY screen is skipped. See step 5.

4. The SEARCH ENTRY screen includes a library defined help message describing how to do the selected search.

At the bottom of the SEARCH ENTRY screen a search prompt displays. Enter your search term(s) following the prompt and <ENTER>.

Depending on your search type, and the way your OPAC is set up, one of the following will display:

- Browse Listing - for Browse and Direct Key searches (see *Browse Listings in Search Lists and Record Displays*).
  - Title Summary Listing - (see *Summary Listings* on page 5-4).
  - Detailed Display - (see *Summary Listings* on page 5-4).
5. If a Browse Listing is on display: highlight the # *line(s)* option, and enter the number of the line or line(s) you wish to display. <ENTER>. The following screen is an example of a HEADING BROWSE screen.

```

Online Catalogue - Heading Browse
Your Search: A=MCMURT

      AUTHOR                                     Number of Titles
1. McMinn, Howard Earnest, 1891-                1
2. McMinn, Winston Gregory                     1
3. McMurray, George R., 1925-                  1
4. McMurry, Charles Alexander, 1857-          1
5. McMurry, Donald Le Crone, 1890-            1
6. McMurry, Frank Morton, 1862- joint author   1
>>>
7. McMurtrie, Douglas C. (Douglas Crawford), 1888-1944 2
8. McMurtry, Jo, 1937-                         1
9. McMurtry, Larry                             2
10. McNally, Fiona                             1
11. McNally, Raymond T., 1931-                 1
12. McNamara, Jo Ann, 1931-                    1
13. McNamara, John E.                          1

...Continued...
Options:  Enter lines (e.g. 1 or 1,2 or 1,2,4 or 1-4 or 1,3-4 etc.)
# line(s) Forward Backward Prior screen Search jump
Modify search Review search OPAC parms New search Reset
Output #(s) ? help

```

Depending on the type of listing and your OPAC setup, one of the following will be displayed:

- Title Summary Listing
- Detailed Display, either Brief or Full

```
Online Catalogue - Title Summary
Series Search: P=BAJA

  Author..... Title..... Year
1. Bull, James Hunter, Journey of James H. Bull, Baja      1965
   1817-1904      California, October 1843 to January...
2. Cavallero Carranco, The pearl hunters in the Gulf of      1966
   Juan          California, 1668; summary report of t...
3. Guillen, Clemente, Clemente Guillen, explorer of the South 1979
   1677-1748      : diaries of the overland expeditions...
4. Cooke, Edward,   English privateers at Cabo San Lucas : 1979
   Captain        the descriptive accounts of Puerto...

4 titles in list
Options:  Enter lines (e.g. 1 or 1,2 or 1,2,4 or 1-4 or 1,3-4 etc.)
# line(s)  Prior screen  Sort  All  Modify search  Review search
OPAC parms  New search  Reset  Output #(s)  ? help
```

6. If a call number, direct key browse listing or a title summary listing is on display: highlight the # *line(s)* option, and enter the number of the line or line(s) you wish to display. <ENTER>.

The Detailed Display will appear.

7. The Detailed Display provides bibliographic and holdings information, such as call number, locations of various copies, circulation status, and so forth.



Library		Locn	Call Number	Ltype	Status / Due date
1.	CAM1	stacks	823.1 MAC c.1	2week	In Library
2.	CAM2	stacks	823.1 MCM	GEN1	Not Available

Online Catalogue - BRIEF DISPLAY (2 of 2 titles)  
 Number of holdings :2  
 AUTHOR :McMurtry, Larry  
 TITLE :Lonesome dove  
 Year :1985.  
 SUBJECT :Fiction  
 LANGUAGE :ENGLISH

Last Page  
 Options: See next record  
 See next See previous # item Prior screen Extend search  
 Full display Limit List Output Holds Order display Review search  
 OPAC parms New search Reset ? help

If your selection from the previous listing resulted in the retrieval of more than one bibliographic record, the number of records is indicated by the display in the upper right corner of the screen, for example: '2 of 2 titles' indicates that this is the second of 2 Detailed Displays. You can use the *See next* and *See previous* options to display the other Detailed Displays.

The Detailed Display offers several options not available on other screens. These include:

- # item Access the detailed holdings for monographs and Serials holdings displays.
- Extend Search Access the RELATED WORKS screen (see [Extending Your Search to Related Works](#) on page 3-27).
- Holds or Hold Title Allows you to place holds subject to library-specified restrictions.
- Order Display Allows you to view order details for items acquired through the ADVANCE Acquisitions Module.

8. Highlight the # item option to display more holdings information for a specific item.

```

                                Main Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)

AUTHOR          :Sullivan, Eloise
TITLE           :Library Journal
LANGUAGE        :ENGLISH

L4 The following copies are held, select one for more detail.
1.  ACAD CAM3
    y.1997:v.1:n.11-y.1998:v.1:n.1 ??? v.106:i.7,v.112:i.2-v.112:i.4
    v.194 y.1997:v.1:n.5-y.1998:v.1:n.4,y.1998:v.1:n.6-y.1998:v.1:n.7,
    y.1998:v.1:n.55-y.1998:v.1:n.88 v.99999
2.  ACAD CAM3 RBR
    v.32:n.19,v.100:n.24 v.9999:i.45
3.  ACAD CAM3 YK QA 76.5 .B9 c.1
    v.95:n.1,v.95:n.2,v.95:n.3,v.95:n.4,v.95:n.5,v.120:n.12
4.  ACAD CAM1
    v.95:n.3-v.95:n.5,v.120:n.12
5.  ACAD CAM1 A/V QA 76.5 .B9 c.2
    v.120:n.12
32 item(s) in list.
Options:
# item  Forward  Prior screen  Extend search  Full display
Limit list  Output  MARC  Hold title  Order display  Review search
OPAC parms  New search  Reset  ? help
```

*Obtaining Serials  
Summary Holdings*

If the item you have selected is a serial, the Detailed Display will provide a list of all the subscriptions held by the library, indicating the summary holdings for each subscription. To view the detailed holdings:

1. Highlight the # *item* option using the arrow key, and enter the number of the subscription you want to see. <ENTER>.

**Start a New Search**

This completes the basic steps in OPAC searching. To return to the SEARCH SELECTION screen, highlight the *New Search* option and <ENTER>.

# Search Options and Features

## Editing Your Search

A simple editor comprised of a subset of Leditor functions is provided with the ADVANCE OPAC allowing you to edit your input at a number of points during a search. The editor is set to insert mode as a default.

### The available edit functions are:

backspace	Deletes the character to the left of the cursor, one character at a time.
<ESC> D	Deletes the character under the cursor.
<space>	Inserts a space.
up arrow	Move to the line above.
down arrow	Move to the line below.
right arrow	Moves the cursor to the right.
left arrow	Move the cursor the left.

Searches may be edited on any screen or option where you are prompted for input:

- on the SEARCH SELECTION screen on the input line below the search types list
- on the SEARCH ENTRY screen on the input line after the prompt
- on the prompt after using the *Search Jump* option
- on the SYNTAX ANALYSIS screen for word searches using the Edit Search prompt
- on the MODIFY SEARCH screen (for details, see [Modifying Your Search](#) on page 3-32)
- on all other screens where you are prompted for input, for example: the DETAILED DISPLAY screens after using the *Limit list* option

## Using the Search Jump Option

The *Search Jump* option is available on all of the Browse Listings; Heading Browse, Call Number Listings, Direct Key Listings and on the WORDS BROWSE screen in Keyword Searching only. This option can be used to start a NEW search directly from any of these lists, without returning to the SEARCH SELECTION screen. From WORD searches, the *Search Jump* option is only available when you have used the *Extend Search* option and selected a line from the RELATED WORKS screen. For more details, see [Extending Your Search to Related Works](#) on page 3-27.

1. Highlight the *Search Jump* option and <ENTER>. A search prompt will appear:

Enter new search term :

2. Enter another search term and <ENTER>. The system will redo your search using the new search term.

NOTE: *Search Jump* will only provide searches within the current index. For example, if you had done a Browse search in the Author Index and selected the *Search Jump* option, and entered a subject term, the system will search your term in the AUTHOR index. To change indexes, you must return to the SEARCH SELECTION menu.

If you wish to search in another index without returning to the SEARCH SELECTION screen, you can use the *Extend Search* option at any Detailed Display. For details, see [Extending Your Search to Related Works](#) on page 3-27.

Or, if you are familiar with the OPAC Search Commands, you can use the *Edit Search* option on the MODIFY SEARCH screen to change the index searched.

## Using the # Line(s) option

This option is available on all lists, unless your port/terminal is setup for the # *line(s) Select Proceed* options. It enables you to move from one level to the next during your search.

To select a line or line number from the list, highlight the option by using the arrow key to position the cursor over the option, or type the initial letter of the option to move to the option. When the option is highlighted, a message appears in the *OPTIONS:* line on the bottom of the screen:

Enter lines (e.g. 1 or 1,2, or 1,2,4 or 1-4 or 1, 3-4, etc).

Enter the line(s) you want and <ENTER>.

You may also select this option without first highlighting it, by simply entering the line number(s) you want. If a single line was selected, a DETAILED DISPLAY screen may appear.

If multiple titles are linked to a single heading, a Title Summary List may be displayed. Refer to the *Search Listings* and *Record Displays* chapter for details on the types of lists that are displayed when the # *line(s)* option is selected.

## Using the # Line(s) Select Option and the Proceed Option

These options are activated when the OPAC parameter 'AutoSelect and View' is set to NO. They replace the # *line(s)* option on all browse and summary listings. For details, refer to the OPAC Port Control table.

The # *line(s) select* option is used exactly the same way as the #*line(s)* option, and when highlighted, displays a similar message:

Select lines (e.g. 1 or 1,2 or 1,2,4 or 1-4 or 1,3-4 etc.)

However, after entering your line number(s), the system does not immediately proceed to the next level of information (another listing or Detailed Display). Instead, the selected line(s) are highlighted, and the cursor returns to the # *line(s) select* option. This allows you to page backwards and forwards in the list, and select all the line numbers you want. Then, when you are finished selecting the line numbers, you may use the Proceed option to display the next level - Summary Listing or Detailed Display.

This option is also available on the BROWSE WORDS screen for Keyword Searches. On this screen it is used to select words to be added to your search statement.

1. Highlight the option and enter the line number(s) you wish to select.
2. The system highlights the lines you have selected, and displays a message on the bottom of the screen, for example, if you are at a Summary List (example):

19 headings in list, 2 headings selected

If you are at a Browse list, the message (example):

... Continued ... 1 heading selected

since you have not yet defined a finite list.

3. Highlight the *Forward* or *Backwards* option and <ENTER>.
4. Highlight the #*line(s) select* option again and enter your number(s) and <ENTER>.
5. When you are ready to display the next level of screen (Summary List or Detailed Display), highlight the *Proceed* option and <ENTER>.
6. The Summary List or Detailed Display appears.

## Using the OPAC Search Parameters Option

OPAC has the capability to define port-specific search and display parameters, and to provide users at specific workstations with the capability to view and change these parameters during an online search.

The default parameters are also set in the OPC table (*OPAC Setup* chapter), which also defines whether or not you can change the parameters.

The four parameters which may be set during a search are:

1. Qualifier Code

Searches in the OPAC may now be qualified to search subsets of the database based on OPAC Qualifier Codes setup by the library. For example, from the Children's Department terminal you may wish to search a subset containing only children's material. These qualifier codes may be defined to provide this capability.

2. Detailed Display Default

There are two types of Detailed Display - Brief and Full. This parameter allows you to specify which one will be the display when you access a Detailed Display.

3. Auto Select and View

This allows you to activate or de-activate the *# line(s) select* and *Proceed* options.

These options allow you to page backwards and forwards through a Browse or Summary Listing, selecting line numbers from different pages, and then use *Proceed* to view the details.

If this is de-activated, the next level of search results is displayed as soon as you enter the line(s).

4. Number of Display Lines

This allows you to change the number of lines displayed for each entry in Browse and Summary Listings.

### Accessing the OPAC Search Parameters Screen

1. On the SEARCH SELECTION screen, type the hidden option OP and <ENTER>. The OPAC SEARCH PARAMETERS screen is displayed. Note that this option is the default provided with ADVANCE. Your library may change the mnemonic used.

2. On most of the other OPAC screens, the option *OPAC parms* is available. Highlight this option and <ENTER>.

The OPAC SEARCH PARAMETERS screen will be displayed.

```
OPAC Search Parameters

Current Qualification          : none

Default to Bibliographic Display : Brief
(Brief, Full, MARC)

Automatically Select and View   : Yes
(Yes, No)

Number of Display Lines        : 4
(0=No Limit, n=Up To n Lines)

Options:  Resume the current search
Resume search  Change options  Reset parameters  New search  Reset
? help
```

### Changing the Search Parameters

1. Highlight *Change Options* and <ENTER>.
2. The cursor is placed at the Current Qualification field
3. To change the qualifier, you can either:
  - enter a known code and <ENTER>
  - type ?? to access a browse list of qualifier codes, from which you can use # *line* to retrieve one of the codes into the field. <ENTER>.

After <ENTER>, the cursor will move to the next field.

To leave the qualifier as is, <ENTER> to move to the second field

4. At the second field (Default to Bibliographic Display) :
  - enter either B and <ENTER>, or F or M and <ENTER>, or



- <ENTER> to leave as is and move to the next field
5. At the third field (Auto Select and View):
    - enter *Yes* to inhibit the *# line(s) select* and *Proceed* options and display only the *# line(s)* option on Summary and Browse Lists and <ENTER>, or
    - enter *No* to activate the *# line(s) select* and *Proceed* options
    - <ENTER> to leave as is and move to the next line
  6. At the fourth field (Number of Display Lines):
    - enter 0 to allow the entire text of multi-line headings to display in Browse and Summary Lists and <ENTER>, or
    - enter a number to specify the maximum number of lines for each item in a list
    - <ENTER> to exit the option line

NOTE: You may use the up and down arrow keys to move up from the fourth field and down from the first field. The down arrow will not work on the fourth field. The up arrow will not work on the first field.

### Resetting the Search Parameters

1. If you changed the search parameters but are unsatisfied, use the *Reset Parameters* option to set the parameters back to their original setting. <ENTER> and the parameters re-display as originally set.
2. To reset the parameters and return to the SEARCH SELECTION screen, use the *Reset* option. <ENTER>.

### Resuming the search with the new search parameters

1. Use the *Resume Search* option and <ENTER>. This will return you to the screen at which you used the *OPAC parms* option.

NOTE: Changes to the Qualifier, Autoselect and view, and Number of Lines parameters will be effected immediately on all lists. If you used the *OPAC parms* option at the Detailed Display, the change to the Default Bibliographic display will be seen immediately.

### Beginning a New Search with the new parameters

1. Use the *New Search* option and <ENTER>. This will return you to the SEARCH SELECTION screen. If you have changed the parameters, a

message will display at the top right of the SEARCH SELECTION screen:

Parameters changed

## Extending Your Search to Related Works

You may use the *Extend Search* option on the DETAILED DISPLAY screens to initiate a browse search for Related Works based on the headings that appeared in the Detailed Display for the current record. Using this option, you are able to do call number browsing (much like browsing shelves), as well as subject, author and series browsing. There is no limit to the number of related searches that may be done from a single Detailed Display. Also see [Related Works](#) on page 13-93.

To extend your search to related works:

1. Highlight the *Extend Search* option on the DETAILED DISPLAY screen and <ENTER>. The RELATED WORKS screen appears.

```

Online Catalogue - Related Works
Your Search: S=HORSES

Heading                                     No. of Items
Title :
  1. Veterinary obstetrics and zootechnics           1
Author:
  2. Beeman, Howard Newell, 1891-                   1
Subject
  3. Veterinary Obstetrics                           1
  4. Horses                                           8
Call Numbers
  5. SF887 .B4

Options:
# line  Forward  Backward  Prior screen  Review search  OPAC parms
New search  Reset    ? help

```

Indexes containing the heading are displayed above each numbered heading.

2. Highlight the *# line* option and enter the number representing the term and index you wish to search. <ENTER>.
3. A browse list displays (for example, if you selected a number representing the record's subject, the subject browse list displays).

4. You may use any of the options available at the browse list, and continue your Related Works search indefinitely from any Detailed Display selected in the process.
5. Use the *Prior Screen* option to back up through your search, or the *Review Search* option to resume your search at a specific point. See [Reviewing Your Search](#) on page 3-29.

## Reviewing Your Search

A new feature of the OPAC is the logging of all significant steps in a search, with the option to display this log.

The *Review search* option is available from all Browse, Title Summary, Detailed Display, and many other screens within OPAC. It may be executed at any point in your search.

1. To review your search, highlight the *Review search* option and <ENTER>. The REVIEW SEARCH screen is displayed.

```

Online Catalogue - Review Search

1. You executed the search:
   S=HORSES
2. You selected 1 item(s) from the title summary listing
3. You selected the related works option from title
   Veterinary obstetrics and zootechnics
4. You selected call number SF887 .B4
5. You selected 1 item(s) from the call number listing
6. You selected the related works option from title
   Diagnostic and therapeutic techniques in animal reproduction
7. You selected the following heading from the Related Works
   Stock and stockbreeding

** Last Screen **
Options:   Enter specified line number
# line   Prior screen   OPAC parms   New search   Reset   ? help

```

## Resume Your Search

Use the *# line* option to resume the search at a specified point. In the example given, if you highlight the *# line(s)* option and enter 4 and <ENTER>, you will be returned to the extended search browsing call number screen. You can proceed with your search from that point.

To resume your search at the screen where you used the *Review Search* option, highlight *Prior Screen* and <ENTER>. You will be returned to the screen where you used the *Review Search* option,

Or, use the *# line* option and select the last line in the display.

## Sorting Summary Listings

All browse listings are sorted alpha-numerically. However, sorting of Summary Listings (see *Search Listings* on page 5-2 for details on Summary Listings) may be automatic or optional. This is controlled by settings in OPAC Port Control (OPC), table 2, Sorting Control (see *OPAC Port Control* on page 13-100). This table also controls the maximum allowed to be sorted, and the number of seconds that will elapse before you will be prompted to continue or quit a sort in progress.

### Automatic Sorting

If automatic sorting is allowed, the system sorts all items in Title Summary Listings after you have entered your search statement, before displaying the actual listings.

### Optional Sorting

If your OPAC is set up for Automatic Sorting, the *Sort* option is still available on Summary Listings which are unsorted due to sorting thresholds specified in OPC.

If your OPAC is set up for OPTIONAL sorting, Summary lists will only be sorted when you use the *Sort* option.

Using the *Sort* option:

1. Highlight the *Sort* option and <ENTER>.

If you use the *Sort* option at a Title Summary List, the system displays a message and new options become available:

```
Sorting options: 1=Author/Title, 2=Title/Author, 3=Publica-
tion Date
```

```
Options: Enter one of the sorting options
```

```
Sort option Previous prompt New search Reset ? help
```

## Title Summary List Sort Options

- Sort Options* This option is highlighted. Enter 1, 2 or 3 depending on your choice of sort and <ENTER>. The system proceeds with the sort.
- Previous prompt* Use this option to return to the normal Title Summary list option and not execute the sort.

### Sorting Time-out

If there are a large number of headings or titles to be sorted, a message displays indicating the progress of the sort:

For example, in response to a subject word search on *united*

```
Sorting 3454 headings, Percentage complete: 18%
```

If the specified number of seconds to time-out elapses before the sort is completed, the system stops the sort and provides the message:

```
Your sort has TIMED OUT. Please select an option from below.
```

Your options are:

- Continue* To continue the sort from where it timed out, select the option *Continue* and <ENTER>. The system continues the sort until completed or times out. When completed, the sorted listing will be displayed.
- Quit* To discontinue the sort, select the option *Quit*. The unsorted summary listing displays.
- Interrupting the Sort** Press any key to interrupt the sort in progress. The system displays a message:
- ```
You INTERRUPTED the sort. Please select an option from below  
and displays the options available when a sort times out.
```

## Modifying Your Search

The *Modify Search* option is available from the HEADING BROWSE and TITLE SUMMARY screens. The MODIFY SEARCH screen is also displayed automatically by the system whenever a keyword search results in zero items. This option allows you to manipulate the current search in one of three ways:

1. Allows you to display the details of a keyword search showing the individual counts at each word and boolean calculation. From this area, you can see all the relevant information about the boolean calculation and can delete undesired terms from the search.
2. The option to EDIT your search statement, including the ability to change the index being searched.
3. The option to limit the title list of your current search by Publication Date, Edition, Language, Material Search Type (e.g. monographs, serials, music, video, etc.), Publisher, and Series Volume.

After modifying your search in any of the above three methods, use the *Proceed* option to execute the new search. When selected, the system advances the search by executing the new search. If you modified the search via method 1 or 2, the new search is executed and you will then be taken to the appropriate screen for that search. If the search was only modified using method 3, you will return to the same screen from which you selected the *Modify Search* option. In all three cases, the search modification becomes part of the search history and therefore, you can “back up” through the search modification itself.

### Method 1 - Displaying and Deleting Terms for a Keyword Search

When a Modify Search is used within a keyword search, the screen appears showing the “top” level of the boolean expression and the details. The top level of the boolean expression is the last boolean operation to be performed and all others of the same order of precedence; for example, `SW=indians ((united states) OR americ* OR canad*) customs` is executed as:

1. AND the terms *united* and *states*.
2. Take all the words starting with *americ* and OR that with the previous result.
3. Take all the words starting with *canad* and OR that with the previous result.



4. AND that result with *indians* and *customs*.

```

Online Catalogue - Modify Search
Your Search: SW=INDIANS ((UNITED STATES) or AMERIC* or CANAD*) CUSTOMS

Search Words/Terms                                Found   Results
SW=INDIANS and ((UNITED and STATES) or AMERIC* or...      4
1.   INDIANS   370     370
2.   and ((UNITED and STATES) or AMERIC* or CANAD*)      4517    206
3.   and CUSTOMS   180      4

Options:   Expand Search Term
# Expand   Delete #   Edit search   Change limits   Prior screen
Review search   OPAC parms   New search   Reset   ? help

```

The first line of the display shows the final expression and, in the *Results* column, the number of titles.

The following, numbered lines of the display show each of the elements that made up the final expression. For each element (three in this example), the system shows the number of titles for each individual element (*Found*), and the running total after including the term in the full expression (*Results*).

If you wish to see greater detail about any one element, use the *# Expand* option on it. The system expands the element into its subcomponents. The only elements which can be expanded are those which contain a boolean operation or truncated term. In the above example, the only element which can be expanded is #2. After selecting this option, the system replaces the existing display with the break-down of this portion of the boolean expression.

```
Online Catalogue - Modify Search
Your Search: SW=INDIANS ((UNITED STATES) or AMERIC* or CANAD*) CUSTOMS

Search Words/Terms                                Found   Results
((UNITED and STATES) or AMERIC* or CANAD*)      4517
1. (UNITED and STATES)                          3347   3347
2. or AMERIC* (6 words)                         990    4315
3. or CANAD* (4 words)                          219    4517

Options:      Expand Search Term
# Expand  Delete #  Top  Up  Edit search  Change limits
Prior screen  Review search  OPAC parms  New search  Reset  ? help
```

In this example you can then expand to the third level of the expression by choosing element 1, 2 or 3.

You can return the display to previous levels by using one of the two options *Up* or *Top*. *Up* returns you to the level immediately above (the previous) level. *Top* returns you to the first display which was shown when you entered the MODIFY SEARCH screen.

While expanding a word search, you can delete selected elements by using the *Delete #* option.

### Method 2 - Editing Your Search

This option puts you into a line editor. From here, you are free to modify the search in any way including changing the search command code, thus changing the index to be searched. For example, if you started the above search by entering `TW=indians ((united states) OR americ* OR canad* customs` which then resulted in no found items, you could use the *Edit Search* option to change the `TW` to `SW`, `<ENTER>` and then use the *Proceed* option to execute the same search against the Subject Index.

```

Online Catalogue - Modify Search
Your Search: TW=INDIANS ((UNITED STATES) or AMERIC* or CANAD*) CUSTOMS

Search Words/Terms                               Found   Results
TW=INDIANS and ((UNITED and STATES) or AMERIC* or... 0
1. INDIANS   46      46
2. and ((UNITED and STATES) or AMERIC* or CANAD*) 1885    9
3. and CUSTOMS                                    19      0

New Search: SW=INDIANS ((UNITED STATES) or AMERIC* or CANAD*) CUSTOMS
Options:   Expand Search Term
# Expand  Edit search  Change limits  Proceed  Prior screen
Review search  OPAC parms  New search  Reset   ? help

```

### Method 3 - Search Limits

Search limits can be imposed on the following six fields: Publication Date, Edition, Language, Material Search Type, Publisher and Series Volume. Search limits are imposed at the title summary level only. The TITLE SUMMARY screen masks out the titles which do not fit the criteria on an “as you go” basis. The resultant title count appearing on the bottom of the screen will not indicate the number of results after limits. The system then examines each title as you *Forward* through the list. An additional counter indicating the number of titles which have been tested thus far is added to the usual end of page message. After the system has tested all items in the list, the final count is displayed in the end of the page message.

NOTE: If the system is set to automatically sort the title list, or if you select to sort the list, the system will test all the items during the sorting process and the final count will be presented.

Limits can be imposed by using the *Change Limits* option from the option line. A partial screen is displayed showing the six possible fields which can be used with limits and you will be positioned on the prompt for the Publication Date limit.

```
Online Catalogue - Modify Search
Your Search: SW=INDIANS ((UNITED STATES) or AMERIC* or CANAD*) CUSTOMS
```

```
With Publication Date
With Edition
With Language
With Material Search Type
With Publisher
With Series Volume
```

```
for example : -1991 or 1980- or 1980-1991 or 1990,1992
Or use <tab> to negate the change
Use <tab> to switch from WITH to WITHOUT the specified dates
```

Each limit field allows you to enter a list of possible values separated by commas. The system normally checks for the presence of the entered string(s) within the field on the database. If you wish to test for an exact match, surround the value by either single (') or double (") quotations.

### Field Limits

The publication date, unlike the other criteria, can also be entered as a range: `-year` (on or before the year), `year-` (on or after the year), and `year-year` (on or between the years).

Entering `??` at the language prompt, produces a browse a list of MARC language codes. You may enter one or more language codes separated by commas.

Entering `??` at material search type produces a list of Material Search Types Codes if you have initiated your search from OPAC; if your search was made from any other module, a browse list of MARC Material Codes will be displayed. Regardless, you can enter one or more Material Search Code(s) and/or MARC Material Code(s) separated by commas. Material Search Type Codes are defined in the Material Search Type Codes (OMST) table which is accessed from the ONLINE SEARCH SETUP MENU. Implementing this table allows OPAC users to search for items based on library defined material types which can included one or more MARC material types.

NOTE: Normally all limits are considered to be entered such that the items meeting the criteria are the ones you wish to display. If you find it more convenient to define the items which are **not** to be displayed, `<TAB>` while on the field for which the limit is to be inverted. After

<TAB>, the word “With” immediately preceding the limit’s name will be changed to “Without”.

When modify search is used within a word search, active limits are displayed on the initial screen immediately above the currently expanded terms.

On all other types of searches, the initial screen contains the change limits screen in place of the expanded terms section.

NOTE: When modify search is used from within an extended (related works) search, the search can only be modified through the use of limits.

## Using the Browse Option

If your OPAC port record is set to proceed directly to the detailed display for unique string matches on browses, the system may display a browse option on the TITLE SUMMARY or DETAILED DISPLAY screens. That is, in a browse search, if there is only one heading which starts with the search term, and that heading appears in only one index and does not have a see or see also reference, the system automatically proceeds to the next level of search (either TITLE SUMMARY or DETAILED DISPLAY) without stopping on a browse screen. On the screen at the next level, the Browse option is available. This allows you to *Browse all headings in index*, that is, return to the Browse screen that was skipped.

## Placing a Hold

The library is able to restrict the ability to place holds on library items by sublocation. For more details, refer to *Holds Control* in the *Circulation Management Guide*. Libraries that allow patrons to place holds can use either the *Title hold* or the *Holds* option, depending on library setup.

The *Title hold* option allows patrons to place a title hold from the DETAILED DISPLAY screen. The *Holds* option allows patrons to view and place holds from the HOLD QUEUE DISPLAY screen.

## Title Hold

The *Title hold* option is available if patrons at this sublocation are permitted to place holds but not see the hold queue.

1. Search to obtain a listing.
2. Select a line number and <ENTER>.
3. When the DETAILED DISPLAY screen appears, select Hold Title.  
The option lines are replaced with:

```
Number of Copies: x           Number of Holds : x
Please enter your library card barcode or <ENTER> :
```

In the example x represents a number.

When a barcode is entered, the system might display a screen similar to the one shown, prompting you for a pick-up location. Some libraries may set up the system to skip this.

```
10:37AM                LIBRARY LOCATIONS                04 JUN 93

1. Univ   STACKS   ADVANCE University   Offsite storage AU
2. Univ   CAM3    ADVANCE University   University Lib #3
3. Univ   CAM2    ADVANCE University   University Library #2
4. Univ   LRC     ADVANCE University   Learning Resource Center
5. Univ   CAM1    ADVANCE University   Main University Library
6. Univ   ALII    ADVANCE University   Music Library

You are currently at the location on line 5
```

```
Enter the location from which the item should be collected when ready.
If you Exit, then the pickup location will be AU CAM1
Options:  Enter specified line number
? help  # line  Exit
```

Select the location where you want to pick up the item, then enter the line number and <ENTER>. The DETAILED DISPLAY screen reappears and the option line is replaced with the message:



Your HOLD IS PLACED and has an expiry date of "05-30-93".  
Press <ENTER>

## Hold

The *Hold* option is available if patrons at this sublocation are permitted to see the hold queue (for details, see the *Circulation Management Guide*) and includes, if the library chooses, the ability to place, show and cancel holds. To place a hold:

1. Search to obtain a listing.
2. Select a line number.
3. The DETAILED DISPLAY screen appears.
4. Select *Hold*

The HOLD QUEUE DISPLAY screen appears. The first part of the screen lists the title, author, identification number, the number of holds and the number of items available. The columns in the middle of the screen may provide some of the following information:

|                |                                                                                                                       |
|----------------|-----------------------------------------------------------------------------------------------------------------------|
| Type           | Type of hold: <i>H</i> for hold or <i>B</i> for materials booking.                                                    |
| PR             | Priority level patron groups may be set up with different priority levels.                                            |
| Hold Item/Type | Either the barcode number (if hold item is captured) or Title Hold (if hold item not yet captured).                   |
| Hold Status    | Indicates the status of the item or pending action.                                                                   |
| Patron ID/Name | The patron name appears on the screen if the online catalogue has been set up to display patron's names.              |
| Group          | The patron group identifier displays in this column if the online catalogue has been set up to display patron's names |
| Hold Date      | Date the hold was placed.                                                                                             |
| Exp. Date      | Date the hold will expire, that is, when the library will stop searching for the item.                                |

The information and options available on the HOLD QUEUE DISPLAY screen are determined when the system is set up.

16:28 HOLD QUEUE DISPLAY 07 JUN 1993

LCN.....: 10029729 No. of holds : 2 No. of pieces : 2  
TITLE...: Lonesome dove  
AUTHOR..: McMurtry, Larry

| TYPE | PR | HOLD ITEM/TYPE | PATRON ID / NAME                     | GROUP | HOLD DATE         | EXP.DATE          |
|------|----|----------------|--------------------------------------|-------|-------------------|-------------------|
| 1.   | H  | 80 Title Hold  | 20000002004002<br>SMITH, AMY JOANNA  | P2    | 06-07-93<br>15:18 | 06-14-93<br>23:59 |
| 2.   | H  | 70 Title Hold  | 20000002001474<br>CARTER, GARY DUANE | P1    | 06-07-93<br>15:18 | 06-14-93<br>23:59 |

\*\*\* End of list

Options:

Backward Forward Prior screen Hold Show/Cancel New search  
? help

## Hold Queue Options

*Hold* Selecting *Hold* allows patrons to place a hold. The system prompts:

Number of Copies : 2    Number of Holds : 4

Please enter your library card barcode number or <ENTER>

<ENTER> returns you to the HOLD QUEUE DISPLAY screen. When a barcode is entered, you may be prompted to enter a location where the item can be picked up. Some libraries may not provide this choice.

If the choice is available, select the location where you want to pick up the item. Enter the line number at the prompt and <ENTER>. The option line is replaced with the message:

Your HOLD IS PLACED and has an expiry date of "06-30-93".  
<ENTER>

*Show/Cancel* When *Show/Cancel* is selected, the system prompts for entry of a barcode. The HOLDS BY PATRON screen appears. This displays all the holds placed by the patron and allows them to cancel a specific hold or cancel all holds by selecting *Cancel all*.

To cancel a specific hold select *Cancel hold #* and enter the line number of the item or title hold that you want to cancel. The hold is removed and the screen is re-displayed to show the remaining holds.

# 4

## Search Options Quick Reference

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In addition to the search type options presented on the OPAC SEARCH SELECTION screen (the 'OPAC WELCOME screen'), search options are displayed across the bottom of each screen in OPAC. Many of the options are available on all of the screens. Some of the options are available only on specific screens.

If the terminal is set up in option bar mode, the cursor highlights one of the options as a default when a screen is initially displayed. You may use the arrow keys to move around and highlight the option you want. Or, you may type the first character of the option you want to use, and the option will be highlighted. <ENTER> to execute the option.

When an option is highlighted, a description of the option displays in the Option: input area.

If the option name includes a number symbol, '#', you must enter a valid number after highlighting the option and <ENTER>, in order to execute the option. Alternatively, just enter the number, and the option will be selected. <ENTER> to execute.

This alphabetical list describes all the options available in OPAC, and explains the results of using the option on various types of lists and records. For further information about the specific type of lists and records, refer to *Search Lists* and *Records Displays*.

## Search Options Listing

- All* Available on the TITLE SUMMARY LISTS screen. If selected, it displays the DETAILED DISPLAY screen (Brief and Full Displays) for all items in the summary list.
- All* This option is available on the DETAILED DISPLAY screen for serial titles. If selected, it displays holdings information for all subscriptions in the list.
- Backward* Available on all lists and multi-screen DETAILED DISPLAY screens (Brief or Full Displays) and allows you to scroll back to the previous screen of text.
- Brief display* Available on the DETAILED DISPLAY screen (Full Display). If selected, it displays the Bibliographic information in a briefer form.
- Browse* (Browse all headings in index). This option is available on the TITLE SUMMARY or DETAILED DISPLAY screen when you enter a unique search string and the system proceeds directly to one of these screens. This option takes you back to the Browse listing.
- Browse search* Available on the SEARCH SYNTAX ANALYSIS screen in Keyword Searching. Displays the WORD BROWSE screen. If selected, it allows you to retrieve word(s) from the words list into the search statement.
- Cancel #* Available on the HOLDS BY PATRON screen after the entry of the patron ID. Allows the patron to cancel a specific hold.
- Cancel all* Available on the HOLDS BY PATRON screen after the entry of the patron ID. If selected, it prompts for confirmation, and cancels all of this patron's holds.
- Change options* Available on the OPAC PARAMETERS screen and allows you to change the current search parameters.
- Change limits* Available on the MODIFY SEARCH screen. If selected, it displays a template and allows you to use implicit relational operators to limit the search by publication date, edition, language, material type, publisher and series volume.

|                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>Component record</i> | Available on the DETAILED DISPLAY screen (Brief and Full Display) for a Header Record. If selected, it presents the Detailed Display for the Component Record.                                                                                                                                                                                                                                                                                                                                                                                      |
| <i>Continue</i>         | Displays after a SORT operation has timed out. If selected, the system continues the sort. See also SORT.                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <i>Delete #</i>         | Available on the MODIFY SEARCH screen. It is used to delete one or more of the listed terms from the boolean expression.                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <i>Edit search</i>      | Available on the SEARCH SYNTAX ANALYSIS screen. It is also for word searches available on the MODIFY SEARCH screen.                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <i># Expand</i>         | If used, the cursor is placed in position to edit the search statement. This option is available on the MODIFY SEARCH screen.                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <i>Extend search</i>    | Available on the DETAILED DISPLAY screen (Brief and Full Display). Selecting this option displays the RELATED WORKS screen and allows you to use the author, subject, title, series, and call number data from the current record to initiate a browse search directly from the displayed record. There is no limit to the number of Extend Searches that may be done starting from one record. Use the <i>Prior Screen</i> option to back up through your search or use the <i>Review Search</i> option to resume your search at a specific point. |
| <i>Forward</i>          | Available at lists and multi-page DETAILED DISPLAY RECORDS screens (Brief or Full Display). If selected, scrolls to the next page.                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <i>Full display</i>     | Available on the BRIEF DISPLAY screen. If selected, displays more complete Bibliographic information than the BRIEF DISPLAY screen.                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <i>Header record</i>    | Available on the DETAILED DISPLAY screen (Brief and Full Display) for a component record. If selected, presents the Detailed Display for the Header Record.                                                                                                                                                                                                                                                                                                                                                                                         |
| <i>? help</i>           | Available on most screens. If selected, displays a library-defined help message.                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <i>Hold title</i>       | Available on the DETAILED DISPLAY screen (Brief and Full Display) if you are permitted to place holds but are not allowed to see the hold queue. If selected, it prompts you for input of your barcode and other security measures and allows you to place a hold.                                                                                                                                                                                                                                                                                  |

- Hold* Available on the HOLD QUEUE DISPLAY screen, and is only accessible if you are permitted to see the Hold Queue Display. If selected, it prompts you for input of your barcode and other security measures and allows you to place a hold.
- Holds* Available on the DETAILED DISPLAY screen (Brief and Full Display) if your library allows you to place holds and see the Hold Queue on items. If selected, it displays the Hold queue.
- #item* Available on the DETAILED DISPLAY screen (Brief and Full Display). Selecting this option results in a Holdings Display. For a more detailed description, see [Search Lists and Record Displays](#) on page 5-1.
- If the item is a Serial with Summary Holdings, the option will display the Summary Holdings for that subscription. For a more detailed description, see [Search Lists and Record Displays](#) on page 5-1.
- #line* Available on the REVIEW SEARCH screen. If selected, it allows you to select the point from which you wish to resume your search. See also the *Review search* option.
- This option is also available on the RELATED WORKS screen and when selected, it allows you to select an author, title, subject, Series, or call number to initiate a browse search directly from a Detailed Display.
- #line(s)* Available on the BROWSE LISTS, and SUMMARY LISTS screens. Use this option to select 1 or more items from the screen on display and move to the next level of display.
- When using this option from a HEADING BROWSE or HEADING SUMMARY screen in an author, subject, or series search, if the selected heading is linked to more than one bibliographic record, or more than one line is selected, a title summary list will appear. Otherwise, a DETAILED DISPLAY screen (Brief or Full Display) will appear.
- When using this option from a HEADING BROWSE or HEADING SUMMARY screen in a Title Search, the DETAILED DISPLAY screen will be displayed immediately.
- #line(s) select* Available on Browse Lists and Summary Lists if the OPAC OPAC Port Control table (OPC) page 4 line 1 *Auto Select and View* field is set to 0 (see [OPAC Port Control](#) on page 13-100). Used in conjunction with the *Proceed* option.



- Selecting this option allows you select line#(s) from as many pages of the list as desired, before asking for a the next level of display. After the line numbers have all been selected, use the *Proceed* option to display the TITLE SUMMARY screen or Details (from Title Summary).
- Limit list* Available on the DETAILED DISPLAY screen (Brief and Full Display). If selected, you are prompted for entry of a code to limit the display.
- MARC* Available on the DETAILED DISPLAY screen (Brief or Full Display screens). This option allows you to see the MARC record details. This is useful when the library has not defined all tags for display in OPAC. Availability of this option at specified workstations is determined by OPAC Port Control Setup. For more details, refer to the *OPAC Setup*.
- Modify* Available for browse and word searches. Displays the MODIFY SEARCH screen and allows you to limit searches by date, edition, language, material, publisher, serials volume/part. Note that all searches may be pre-qualified by library location prior to executing a search as well as during a search through the use of the *OPAC parms* option.
- It also provides the ability to edit your search. For more details, refer to *Modify Search*.
- New search* Clears the existing search and returns you to the search selection screen. At this point you may start another search.
- Omit term* Available on the SEARCH SYNTAX ANALYSIS screen for word searches. If selected, it will delete the highlighted terms from the search string and display new search results.
- OPAC parms* Available on all screens if you are an authorized user. If selected, displays the OPAC SEARCH PARAMETERS screen to allow you to display/change the current parameters for OPAC qualifier, default for Detailed Display, and number of display lines in Heading and Summary Lists. For more details, refer to [Changing the Search Parameters](#) on page 3-24.
- Order display* Available from the DETAILED DISPLAY screen (Brief or Full Display) if you are an authorized user. If selected, displays order information for items ordered through the ADVANCE Acquisitions Module.
- Output, Output #* Available on the HEADING BROWSE , HEADING SUMMARY, TITLE SUMMARY, Call Number Listing, Control Number Listing, BRIEF/FULL DISPLAY, DETAILED DISPLAY, and RESERVE MATERIALS DISPLAY screens. Allows you to print selected bibliographic information. Or, if you have

the add-on product RefLink, the bibliographies can be downloaded or emailed to a workstation.

*Print* Replaced by *Output* option.

*Print #* Replaced by *Output #* option.

Allows you to print selected bibliographic records, in one of three formats.

After the *Output* or *Output #* option is chosen, you are offered a choice of Print formats, based on the Library's OPAC setup.

*Summary* prints call number and title; *Formal* prints the bibliographic information but not the call number; *Complete record* prints all bibliographic information including description and notes.

PRINT A BIBLIOGRAPHY

You may select any one of the following printout formats:

- 1)Summary listing [call number and title only]
- 2)Formal bibliography [does not include call number]
- 3)Complete record [includes call description, notes, etc.]

Enter your selection:

Select the type of printout you want. Enter the number at the prompt or <ENTER> to cancel the print request and return to the previous screen.

If a number selection is made and you <ENTER>, the PRINTING SUMMARY DISPLAY screen appears:

## Printing Summary Display

This printout will cost, \$0.00

Do you still want this printout? (Y/N) : Y

Please type in a heading you would like on the printout.  
This will identify the printout as being yours...

Enter your name/heading :

If you answer yes, ADVANCE responds with:

Please type in a heading you would like on the printout.  
This will identify the printout as being yours.  
Enter your name/heading:

Enter a heading and <ENTER>. The message:

Press <ENTER> to send to system printer, (E)nd:

appears. <ENTER> to send the record to the printer. A message appears telling you that the printing is now underway. When the display is printed the message: <<Printing>> Entry # x appears.

To stop the printing before the record is sent to the printer, enter E.

*Prior screen* Available on most screens. It displays the screen at the previous level. For example, *Prior screen* at the BRIEF DISPLAY might display the title browse or title summary screen.

NOTE: Some screens are by-passed by the *Prior Screen* option; for example, the SYNTAX ANALYSIS and word browse screen in word searches. These screens only appear where the search had errors. After the errors are corrected, they do not remain as part of the search history.

*Proceed* Available on the BROWSE and SUMMARY LISTS screens if OPAC Setup Table OPC (OPAC Port Control) page 4 line 1 Auto Select and View is set to 0. Used in conjunction with the *#line(s) Select* option.

After the line numbers have all been selected, use the *Proceed* option to display the next level of results. This option is also available on the MODIFY SEARCH screen to allow you to continue your search with the Modified Search Statement.

- Quit* Available after a SORT operation has Timed out or you have interrupted an automatic sort or optional sort.
- Previous prompt* This option becomes available when the *Sort* option is used at a Title Summary Listing. If selected, previous prompt deactivates the *Sort* option and re-displays the Title Summary List options.
- Reset* Available on most screens. If selected, it clears the existing search and puts your workstation back to the original login/startup state, i.e. resets all session parameters to their default values, resets search selection screen to the opening screen and resets to standard language and returns to the search selection screen.
- Resume search* Available on the OPAC PARAMETERS screen. If selected, it allows you to resume your search at the point where you were when the *OPAC parms* option was chosen.
- Review search* Available on most OPAC screens. If selected, this option presents a display of all the steps taken in the search thus far and allows you to resume the search from any point.
- Search jump* Available on HEADING and WORD BROWSE LISTS screens. This option prompts you for a new term to search in the same index. Note that *Search Jump* cannot be used to change the index being searched.
- See next* Available on the DETAILED DISPLAY screen (Brief and Full Display) when more than one bibliographic record has been selected from a list. If selected, it displays the next DETAILED DISPLAY screen (Brief and Full Display).
- See previous* Available on the DETAILED DISPLAY screen (Brief and Full Display) when more than one bibliographic record has been selected from a list. If selected, it displays the previous DETAILED DISPLAY screen (Brief and Full Display).
- Show/cancel* Available on the HOLDS BY PATRON screen if circulation is setup to allow patrons to place/cancel holds. If selected, the system prompts you for input of patron ID.
- Sort* On Title Summary Lists:  
Displays three types of sort option: Author, Title/Author, Date. Enter your choice and the system will begin the sort.

- Top* Available on the MODIFY SEARCH screen. The option only appears when modifying a word search and you have expanded one of the terms. Selecting this option will return you to the top of the boolean expression, i.e. this first level of the boolean expression which was displayed where you first entered the modify search.
- Up* Available on the MODIFY SEARCH screen. The option only appears when modifying a word search and you have expanded one of the terms. Selecting this option will return you up one level in the boolean expression.



# 5

## Search Lists and Record Displays

---

This chapter presents the most common screen displays encountered in the OPAC and describes their purpose and functionality.

## Search Listings

There are two basic types of listings which display when a search is executed, varying according to the setup of the Online Catalogue and the type of search executed. Note that these screens are customizable using the OSUP table.



## Browse Listings

Browse lists are the first level of search results which may display in response to a Browse or Direct Key search. The scope of Browse Listings is limited only by the OPAC Search Qualifier used, and the index searched. When a browse listing is displayed you can page backwards and forwards, to the beginning and end of the index, subject to the OPAC Qualifier.

There are three types of Browse Listings:

a. Heading Browse Listings

These are the initial display in response to a browse search on Author, Title, Subject, Series, All.

b. Call Number Listings

These display in response to a call number browse.

c. Direct key Browse Listings

These display in response to a search by ISBN/ISSN, CODEN, LCCN, LCN, Control Number, Music Publisher's Number.

## Summary Listings

Title Summary Listings are differentiated from Browse Listings in that they comprise a subset of the database created in response to your search, and you can page forwards or backwards only to the beginning or end of this finite list.

Title Summary Listings appear after selections are made on the Heading Browse and are the first level list of Keyword Search results for cross-heading searches and searches which involve Notes.

## **SEE and SEE ALSO References**

See and See Also references are displayed directly in Heading Browse Listings.

## **Title Counts**

Title counts are included on all Heading Browse Listings.

---

## OPAC Port Control and Search Listings

Certain settings in OPC OPAC Port Control have an effect on whether or not all listings will appear in response to a search.

### Unique Match

A unique match occurs when:

- only one heading is found that starts with the search string
- the heading appears in only one index
- the heading does not have see or see also references.

### Browse Searches

For Browse Searches, if field 6 of the table's Listings Screen is set to 1 (proceed directly to Detail for unique match), a unique match on a heading will skip the heading browse screen and proceed directly to:

- Detailed Display

If the number of titles linked to the heading is less than the Minimum Titles to List setting in OPC, or

- Title Summary Listing

If the number of titles linked to the heading is equal to or greater than the Minimum Titles to List Setting in OPC.

### Direct Key Searches

Similarly for Direct Key Searches, if field 7 of the table's Listings Screen is set to 1 (proceed directly to Detail for exact match), an exact match search will skip the Browse Listing screen and proceed directly to the Detailed Display.

## Heading Browse Listings

There are heading browse lists for the Subject, Title, Author, Series, and All, and Browse Listings for Call Number and Direct Key Searches.

Heading Browse screens appear when a browse search is executed, either from a browse search selected from the SEARCH SELECTION screen or from using the *#line* option of the RELATED WORKS screen (refer to the option *Extend Search* in *Search Options*, or to *Extending Your Search*.)

You are placed at the page in the index where the term is found, or if there is not a direct match, at the point in the index where the term would appear. Upon the initial search or immediately after a search jump the symbol >>> will appear in the middle of the screen. The next line will be the matched entry or the entry which would appear after the search term.

This screen is displayed after a browse search on the subject *history*.

```
Online Catalogue - Heading Browse
Your Search: S=HISTORY

      Subject                                Number of Titles
1. Historical materialism                      2
2. Historical museums -- United States -- Directories 1
3. Historical Society of Pennsylvania -- Catalogues 1
4. Historiography                             7
5. Historiography -- Addresses, essays, lectures 1
6. Historiography -- Collected works          1
>>>
7. History, Ancient                          2
8. History, Ancient -- Addresses, essays, lectures 1
9. History, Ancient -- Maps                  1
10. History, Ancient -- Portraits            1
11. History -- Book reviews -- Periodicals  1
12. History -- Fiction                       1
13. History in literature                     2

...Continued...
Options:
# line(s) Forward Backward Prior screen Search jump
Review search OPAC parms New search Reset Output # ? help
```

## Heading Browse — ALL of the Above Listings

The heading browse screen presented for an *All of the Above* browse search indicates in which index each heading appears.

This Heading Browse screen is displayed after an *All of the Above* search has been executed:

```

Online Catalogue - Heading Browse
Browsing ALL: ALL=FISH

      ALL                               Number of Titles
1. Fischer, Norman, 1943-                (Author)      1
2. Fischer, R. Dietrich (Rainer Dietrich), 1919- (Author)      1
3. Fischer, Robert E.                   (Author)      1
4. Fischer, Rudolf, 1860-1923           (Author)      1
5. Fischer, Stanley                     (Author)      1
6. Fischer, Wolfram                     (Author)      1
>>>
7. Fish as food                         (Subject)     1
8. Fish control                         (Subject)     2
9. Fish Creek, Wis. Peninsula Music Festival. Orchestra (Author)     4
10. Fish-culture                        (Subject)     7
11. Fish-culture -- Africa              (Subject)     1
12. Fish culture -- California          (Subject)     1
13. Fish-culture -- Canada -- Maritime Provinces (Subject)     1

...Continued...
Options:
# line(s) Forward Backward Prior screen Search jump
Review search OPAC parms New search Reset Output # ? help

```

### Heading Browse - SEE and SEE ALSO references

See and see also references appear in heading browse lists, immediately following the heading(s) from which they are traced. The next sample screen illustrates a see reference to Twain from Clemens. Selecting either Clemens or Twain will display a TITLE SUMMARY screen listing the 15 titles linked to the heading Twain.

```
Online Catalogue - Heading Browse
Your Search: A=CLEMEN

AUTHOR                                     Number of Titles
1. Cleaver, Charles Grinnell                1
2. Clebsch, Alfred, 1833-1872              1
3. Clecak, Peter                           1
4. Clegg, Peter, joint author              1
5. Clegghorn, James                        1
6. Clem, Ralph S.                          1
>>>
7. Clemen, Carl Christian, 1865-           2
8. Clemens, Fred W., 1884-                1
9. Clemens, Michael J.                    1
10. Clemens, Paul G. E., 1947-            1
11. Clemens, Samuel Langhorne, 1835-1910
12. [see] Twain, Mark, 1835-1910         15
13. Clemens, William Alvin                1

...Continued...
Options:
# line(s)  Forward  Backward  Prior screen  Search jump
Review search  OPAC  parms  New search  Reset  Output #  ? help
```



## Heading Browse - SEE ALSO References

In the following example, a browse search was conducted on the subject Music. The resulting list indicates the terms (SEE ALSO) related to the subject Music.

You can select one or more SEE ALSO references to go to a Title Summary listing of the titles associated with those see also references. You may also select other, regular headings along with the SEE ALSO references.

```

                                Online Catalogue - Heading Browse
Your Search: S=MUSIC

      Subject                                Number of Titles
1. Mushrooms -- Europe                      2
2. Mushrooms -- Identification              1
3. Mushrooms -- Morocco                    1
4. Mushrooms -- North America -- Identifi- 1
   cation
5. Mushrooms -- Ontario -- Ottawa district 1
6. Mushrooms -- United States -- Identifi- 1
   cation
>>>
7. Music                                    7
8.  [see also] Accordion music              2
9.  [see also] Chamber music                14
10. [see also] Chimes                       1
11. [see also] Concertos (Chamber orchestra) 1
12. [see also] Counterpoint                 1
13. [see also] Harmony                      1

  (continued)

...Continued...
Options:
# line(s) Forward Backward Prior screen Search jump
Review search OPAC parms New search Reset Output # ? help

```

## Other Browse Listings

### Call Number Browse Listing

The following screen illustrates the first level results of a call number search

```
Online Catalogue - Call Number Listing
Browsing Call Numbers: C=QA23

      Call Number      Title
1. QA16 .M35          Manipulative activities and games in the...
2. QA20.C65 P36 1980  Mindstorms : children, computers, and powerful...
3. QA21 .C3           Vorlesungen uber geshichte der mathematik
4. QA21 .H58          Geschichte der Mathematik
5. QA21 .H58 1957     The history of mathematics
6. QA21 .K525         Mathematics, the loss of certainty
7. QA22 .R4           Das exakte Denken der Griechen; Beitrage zur...
>>>
8. QA26 .K5313        Development of mathematics in the 19th century
9. QA27.I4 B2         Mathematical research in India : (A brief review)
10. QA27.P67 K7813 1980 A half century of Polish mathematics : remembra...
11. QA27.U5 M37 1977  The Bicentennial tribute to American mathematic...
12. QA27.5 .H95 1976  Women and the mathematical mystique : proceedin...
13. QA28 .M4          Denkweisen grosser Mathematiker; ein Weg zur...

...Continued..., 0 titles selected
Options:
# line(s) Select  Proceed  Forward  Backward  Prior screen
Search jump  Review search  OPAC parms  New search  Reset  Output
? help
```

## Direct Key Browse Listing

```
Online Catalogue - Control Number Listing
Your Search: I=0800600343

      ISN                Title
1. 0800605780           Jewish and Christian self-definition/ edited by E.
                        P. Sanders. ...
2. 0800606264           A History of Christian doctrine : in succession to
                        the earlier work of G. P. Fisher, published in ...
3. 0800606272           The future of creation : collected essays / Jurgen
                        Moltmann ; [translated by Margaret Kohl]. ...
>>>
4. 0800606345           Paul and power : the structure of authority in the
                        primitive church as reflected in the Pauline...
5. 080060637X           Prison or paradise? : The new religious cults / A.
                        James Rudin, Marcia R. Rudin. ...
6. 080060699X           The New Testament and homosexuality : contextual
                        background for contemporary debate / Robin...
7. 0800607341           Torah : from scroll to symbol in formative Judaism
                        / Jacob Neusner. ...
```

...Continued...

Options:

```
# line(s)  Forward  Backward  Prior screen  Search jump
Review search  OPAC parms  New search  Reset  Output #  ? help
```

## Title Summary Lists

Title Summary Lists are displayed when multiple titles are selected from a Heading Browse using the *#line(s)* option.

Title Summary Lists are also the initial search results displayed in response to a cross-heading (or 'expert') word search (for example, SW=united SW=states, or SW=united states when set to do cross-heading searches in the OPAC Searches [OS] setup table).

The screen displayed is an example of a Title Summary List which displayed after selecting a multi-title series heading from a heading browse list in a series browse search.

```
Online Catalogue - Title Summary
Series Search: SE=BAJA

  Author..... Title..... Year
1. Bull, James Hunter, Journey of James H. Bull, Baja      1965
   1817-1904      California, October 1843 to January...
2. Cavallero Carranco, The pearl hunters in the Gulf of      1966
   Juan          California, 1668; summary report of t...
3. Guillen, Clemente, Clemente Guillen, explorer of the South 1979
   1677-1748      : diaries of the overland expeditions...
4. Cooke, Edward,   English privateers at Cabo San Lucas : 1979
   Captain        the descriptive accounts of Puerto...

4 titles in list
Options:
# line(s)  Prior screen  Sort  All  Modify  Review search
OPAC parms  New search  Reset  Output #  ? help
```

---

# Record Displays

## Bibliographic and Holdings Information

The OPAC bibliographic and holdings displays provide the most specific level of search results. These are presented to you after using the *#line(s)* option to move through the intervening levels (Browse and Summary Lists), or when there was a Direct match, or when the number of titles retrieved is fewer than the Minimum Titles to List set for your port/workstation.

### Citation Database Searches

Citation Database is a separately purchased, add-on product. The screens for the Citation Database look somewhat different than the screens for the main Online Catalogue database.

In particular, holdings information on the Detailed Display is presented differently:

- if the library has copy set and summary information on the periodical which contains the cited article, the screen displays the information under the message:

The library has the following holdings of this periodical

- if the library does not have information on the periodical, the screen displays the message:

THE LIBRARY DOES NOT HOLD THIS PERIODICAL

To determine whether or not the library has the periodical, the system searches the ISSN referenced in the citation.

## Detailed Display

The Detailed Display provides bibliographic and holdings information, and access to the *Extend Search* option as well as other options not specific to Detailed Displays. The Bibliographic information can either be brief (the BRIEF DISPLAY) or full (the FULL DISPLAY). One of these formats will be the default when the detailed display for a bibliographic item is accessed.

## Full Display

```

Main Online Catalogue - DETAILED DISPLAY      (1 of 1 titles)

AUTHOR          :Bogor, Indonesia. Kebun Raja
TITLE           :An alphabetical list of plant species cultivated in the
                :Hortus Botanicus Bogoriensis
SUBJECT         :Plants, Cultivated -- Indonesia -- Bogor
LANGUAGE        :ENGLISH
PUBLISHER       :Bogor, Pertjetakan Archipel,
PUB. DATE       :1957.
DESCRIPTION     :xxiii, 266 p. illus., fold. map. 25 cm.
NOTES           :At head of title: Republic of Indonesia. Foundation for
                :Nature Reasearch (Botanic Gardens of Indonesia) (Lembaga
                :Pusat Penjelikidan Alam, Kebun Raya Indonesia) with the
                :support of the Council for Sciences of Indonesia
                :(Madjelis ilmu Pengetahuan Indonesia)
                :"This new catalogue is copied from Dakkus' List. It has
                :been made up to date as far as possible."--Introd.

1 item(s) in list.
Options:
# item  Forward  Prior screen  Extend search  Brief display
Limit list  Output  MARC  Hold title  ILL request  Order display
Review search  OPAC parms  New search  Reset  ? help
```

## Brief Display

| Main Online Catalogue - BRIEF DISPLAY |                                                                                        |               |                    | (1 of 1 titles) |        |
|---------------------------------------|----------------------------------------------------------------------------------------|---------------|--------------------|-----------------|--------|
| AUTHOR                                | :Bogor, Indonesia. Kebun Raja                                                          |               |                    |                 |        |
| TITLE                                 | :An alphabetical list of plant species cultivated in the Hortus Botanicus Bogoriensis. |               |                    |                 |        |
| SUBJECT                               | :Plants, Cultivated -- Indonesia -- Bogor                                              |               |                    |                 |        |
| LANGUAGE                              | :ENGLISH                                                                               |               |                    |                 |        |
| CURRENT LOCATION & COPIES HELD:       |                                                                                        |               |                    |                 |        |
|                                       | Location                                                                               | Collection    | Call Number/Copy # | Status / Due    |        |
|                                       | -----                                                                                  | -----         | -----              | -----           |        |
| 1.                                    | ACAD ALII                                                                              | SPEC          | REF QK73.B65 A47   | Available       |        |
| 1 item(s) in list.                    |                                                                                        |               |                    |                 |        |
| Options:                              |                                                                                        |               |                    |                 |        |
| # item                                | Prior screen                                                                           | Extend search | Limit list         | Full display    | Output |
| MARC                                  | Hold title                                                                             | ILL request   | Order display      | Review search   |        |
| OPAC parms                            | New search                                                                             | Reset         | ? help             |                 |        |

Below the bibliographic section of the Detailed Display is the holdings information, which describes where to locate copies and what the status of each copy is.

The library defines which information from the item record will display in this area of the DETAILED DISPLAY screen, and the labels for the display. Typically, this would include:

- The name of the institution where the copy is held.
- The building where the collection is located.
- The name of the collection where the copy is held.
- The specific call number used to locate the copy on the shelf.
- *Status/Due*: This indicates whether the copy is on loan or in a location other than the shelf.
- *Due Date*: If the copy is checked-out, the specific date when it is due back in the library is given. Available at the Level 2 and Level 5 OPAC Display

## Holdings Displays

ADVANCE displays all holdings information whether single-part, multi-part and serial items in the same way. Holdings information is based on the USMARC Level 5 Holdings standards with Geac specific modifications. (See the *Holdings Management Guide*.)

ADVANCE supports level 1, 2, 4 and 5 holdings. (Level 3 is not used.)

Starting at Level 1, each level provides progressively more detailed holdings information. Ideally, your system provides the maximum amount of information with the least effort expended by the patron. That is, the patron's search provides the requested information without paging through numerous screens. Achieving this efficiency is influenced by certain setup tables. See *OPAC Holdings Display* on page 13-55.

Level 1 displays location information.

Level 2 is used to display copies of single-parts. It provides location information and includes piece information, and circulation status. Electronic copies of single-part titles are displayed at this level.

Levels 4 and 5 describe multipart or serial holdings. Level 4 displays location information and summary holdings statements for every copy of a multipart or serial held by the library. Electronic copies of multipart and serial titles are displayed at this level.

Level 5 provides detailed information about a specific copy of a multi-part or serial.

### *Content of Level Display*

Determined by choices made on the setup tables for each of the holdings levels. See *OPAC Holdings Display* on page 13-55.

### Screen Display

The OPAC DETAILED DISPLAY consists of two parts: the top part of the screen displays bibliographic information; the lower half of the screen displays holdings information.

### Bibliographic Display

Determined by choices made on the Bibliographic Displays (OBD) table on the ONLINE SEARCH SETUP menu.

NOTE: Placeholder locations do not display in OPAC.



## Level 1

Displays the broadest level of holdings information by listing the locations where the title is held but offers no details. Use the *# item* option to obtain the next level of information. If this option is not available it indicates that the system is displaying the maximum information.

## Example Display

```
Online Catalogue - BRIEF DISPLAY          (1 of 1 titles)

Author(s)      :Howard, Sidney Coe, 1891-1939
                :Bridges, Herb, 1928-
                :Boodman, Terry C.
                :Mitchell, Margaret, 1900-1949. Gone with the wind
Title          :Gone with the wind, the screenplay
Year          :c1989.
Subject       :United States -- History -- Civil War, 1861-1865 -- Drama
Language      :English

HELD AT THE FOLLOWING LOCATIONS, CHOOSE ONE FOR MORE DETAIL
1.  ADVLIB Central GENERAL
2.  ADVLIB Central MRR
3.  ADVLIB Central NLS/BPH

3 item(s) in list.
Options:
# item  Prior screen  Extend search  Limit list  Full display  Output
MARC   Holds   ILL request  Order display  Review search  OPAC parms
New search  Reset   ? Help
```

Level 2

Displays holdings information for single-part items including the location (down to the copy number), circulation, and piece information. Electronic copies of single-part titles display at this level.

Example Display

```
Online Catalogue - BRIEF DISPLAY (1 of 1 titles)

Author(s)      :Howard, Sidney Coe, 1891-1939
                :Bridges, Herb, 1928-
                :Boodman, Terry C.
                :Mitchell, Margaret, 1900-1949. Gone with the wind
Title          :Gone with the wind, the screenplay
Year          :c1989.
Subject       :United States -- History -- Civil War, 1861-1865 -- Drama
Language      :English

CURRENT LOCATION & COPIES HELD:
  Location      Collection      Call Number/Copy #      Status / Due
  -----
1.  ADVLIB Central  GENERAL      c.1                    On Order
2.  ADVLIB Central  GENERAL      c.2                    On Order
3.  ADVLIB Central  GENERAL      c.3                    On Order
4.  ADVLIB Central  GENERAL      c.4                    On Order
5.  ADVLIB Central  GENERAL      c.5                    On Order
10 item(s) in limited list.
Options:
# item  Forward  Prior screen  Extend search  Full display
Limit list  Output  MARC  Holds  ILL request  Order display
Review search  OPAC parms  New search  Reset  ? Help
```

## Level 4

Displays when a title is a numbered publication either a multipart or serial and includes a summary holdings statement for every copy. Electronic copies of multipart and serial titles display at this level.

## Example Display

```

                                Online Catalogue - BRIEF DISPLAY          (1 of 1 titles)

Author(s)      :World Clean Air Congress (9th : 1992 : Montréal, Québec)
                International Union of Air Pollution Prevention Associations
                Air & Waste Management Association
Title          :Waste management : papers from the 9th World Clean Air
                Congress, Towards the year 2000--critical issues in the global
                environment, Montréal, Québec, Canada, August 30-September 4,
                1992
Year           :1992.
Subject        :Refuse and refuse disposal -- Congresses
                Air quality management -- Congresses
Series         :Critical issues in the global environment; v. 1
Language       :English

LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
  1.  ADVLIB Central GENERAL c.1
      Set: v.1-v.10
  2.  ADVLIB Central GENERAL c.2
2 item(s) in list.
Options:
# item  Forward  Prior screen  Extend search  Full display
Limit list  Output  MARC  Holds  ILL request  Order display
Review search  OPAC parms  New search  Reset  ? Help

```

Level 5

Displays copy information for one copy of a numbered title either a multipart or serial. The circulation status is also included. Piece designations are shown if the information is available and if the appropriate setup has been made in *OPAC Holdings Display* on page 13-55.

Example Display

```
Online Catalogue - BRIEF DISPLAY          (1 of 1 titles)

Author(s)      :Massachusetts. Laws, etc.
                West Publishing Company
Title          :Massachusetts general laws annotated, under arrangement of the
                official General laws of Massachusetts
Year           :[1958-
Subject        :Law -- Massachusetts
Language       :English

Location : AL CENTRAL GENERAL
Issue Number      Status
-----
1. No.9(1997:AUG) Exp issue
2. No.5(1997:JAN)-No.8(1997:AUG) Received

2 item(s) in list.
Options:
# item  Prior screen  Extend search  Limit list  Full display  Output
MARC  Holds  ILL request  Order display  Review search  OPAC parms
New search  Reset  ? Help
```

## MARC Display

The *MARC* option displays the MARC data for the bibliographic record on display on the DETAILED DISPLAY screen.

Whether the *MARC* option is displayed is determined by the library. If the library allows patrons to select this option, ADVANCE displays the Bibliographic record in MARC format.

From this screen, options are available that allow you to view the Leader or the Fixed Field Tag. Selecting *Forward* displays the next screen of the Bibliographic MARC Display, while selecting *Backward* redisplay the previous screen.

```

Online Catalogue - MARC Display                (1 of 1 titles)

Local Control # : 10023003   Transaction type : RECON
Last updated   : 12 FEB 1990 Leader           : pam i020
Format type    : Book & monographs

008          890614s1980   puaa          00110 eng
010 BB a     79025154
035 BB a     AUB10023003
              z AUB10213017
040 BB a     DLC
              c DLC
              d m.c.
              d ORE
020 BB a     0830699465 :
              c $14.95
020 BB a     0830612408 (pbk.) :
              c $9.95

Options:      d
Forward      Backward  Prior screen  Leader    Fixed field tag  New search
? help      Brief display  Full display  Extend search  Review search
OPAC parms  Reset

```

To return to the Detailed Display, select either Full Display and <ENTER> or Brief Display and <ENTER>. The *Prior Screen* option will take you to the previous level, for example, a Title Summary Listing.



# 6

## Browse Searching Tutorial

---

This chapter is a tutorial that describes how to browse through the Online Catalogue indexes. This search method is useful if you know the author's last name, the subject heading you want, or the first word(s) of the title. It allows you to browse through separate lists of authors, corporations, conferences, titles, subjects, series and call numbers. In addition, you can search all the indexes except call number simultaneously.

During a browse search, as in Word Searches or Direct Key Searches, you may:

- use the *Review Search* option to look at the steps you have taken so far and resume the search at any point,
- print a single record or a bibliography using the *Output #* or *Output* options,
- use the *OPAC parms* option to see the current settings or change them.
- use all the other options described in *Basic Searching* and *Search Options Reference*.

Topics covered in this chapter include:

- Basic Browse Searching  
The steps in browsing the indexes and displaying detailed bibliography and holdings information.
- Browsing Subject Indexes
- Browsing Title Indexes
- Browsing Author Indexes
- Browsing Series Indexes

- Browsing ALL Indexes
- Browsing Call Number Indexes



## Basic Browse Searching

Use the options under the *LOOK FOR THE FIRST WORD IN THE* column to look for the beginning portion of an item's title, author, subject or series.

Browse searches are most effective when the first few words or characters of the desired title or heading are known. Word order and spelling are important considerations in this type of searching. For author searches, enter the author's last name first: STEINBECK, JOHN not JOHN STEINBECK. Spelling variations also affect search results. The words THEATRE and THEATER appear in different parts of alphabetical lists.

If exact word order or spelling are not known, use a word search instead. For more details see [Keyword Searching](#) on page 7-1.

## Types of Searches

Several types of browse searches are available:

|                  |                                                                                                                                                                                                                                                                                                                     |
|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Subject          | Subject searches are based on the established form of subject headings as used by your library, sorted alphabetically.                                                                                                                                                                                              |
| Title            | Allows you to search by first word in the title.                                                                                                                                                                                                                                                                    |
| Author           | Allows you to search by <b>ALL</b> personal, organizational or conference names.                                                                                                                                                                                                                                    |
| Personal Name    | Lists <i>only</i> personal names.                                                                                                                                                                                                                                                                                   |
| Corporate Name   | Lists <i>only</i> names of corporations or government bodies.                                                                                                                                                                                                                                                       |
| Conference       | Lists <i>only</i> conference names.                                                                                                                                                                                                                                                                                 |
|                  | Personal, corporate, and conference name searches are types of author searches. You select these searches specifically or you can perform the search by selecting <i>Author</i> . For example, you could request a search for <i>United Nations</i> by highlighting either <i>Author</i> or <i>Corporate Name</i> . |
| Series           | Allows you to search by series.                                                                                                                                                                                                                                                                                     |
| All of the Above | Allows you to search all indexes - author, title, subject, or series headings, simultaneously.                                                                                                                                                                                                                      |
| Call Number      | Displays a sorted list of call numbers.                                                                                                                                                                                                                                                                             |

### To perform a browse search:

1. Highlight an option from the *LOOK FOR THE FIRST WORD IN THE* column of the SEARCH SELECTION screen. (In this example, Author was selected.)
2. <ENTER>.

```
W e l c o m e   t o   t h e   O n l i n e   C a t a l o g u e

LOOK FOR THE FIRST WORD IN THE:          LOOK FOR ANY WORD IN THE:
Subject                                  Subject
Title                                    Title
Author                                    Author
    Personal Name
    Corporate Name
    Conference Name
Series                                    Series
All of the Above                          All of the above
Call Number                                Expert search

DIRECT KEY SEARCHES:                      RESERVE DOCUMENTS:
ISBN/ISSN                                  Title
CODEN                                       Author
LCCN                                       Course Name
Control Number                             Course Details
LCN   Instructor
Music Publisher Number

Select your choice using the <SPACEBAR> or Arrow Keys, then press <ENTER>.
For HELP, type "?" then press <ENTER>. To EXIT, type "E" then press <ENTER>.
Enter the Subject
```

3. The SEARCH ENTRY screen appears.

```
Online Catalogue - Search Entry Screen

Author Search
    Enter the name of the AUTHOR last name first

Example:
    Shakespeare
    Twain

Enter the name of the Author:
```

4. On the bottom of the SEARCH ENTRY screen the prompt: Enter the name of the Author appears. Enter at least the first character of your search string, for example, TWA or TWAIN or TWAIN, MARK.

Alternatively, you may <ENTER> to exit to the SEARCH SELECTION screen.

5. Depending on your setup, one of the following screens appear:

**Proceed on Unique Match turned on:**

The TITLE SUMMARY screen appears.

**Proceed on Unique Match not turned on:**

The HEADING BROWSE screen appears. If there is a match, a message appears at the end of the list indicating the line number. If there is no match, a highlighted line is displayed in the centre of the screen where the item would be found otherwise.

6. Select the line(s) you want and proceed to the DETAILED DISPLAY screen for the selected titles **or** select the Browse option to display the HEADING BROWSE screen for the current search.

```
Online Catalogue - Heading Browse
Your Search: A=TWAIN

AUTHOR                                     Number of Titles
1. Tutorow, Norman, E.                      1
2. Tuuk, Hermanus Neubronner van der, 1825-1894 1
3. Tuve, Rosemond, 1903-                    1
4. Tuxen, Reinhold, 1899-1980               2
5. TVA/EPRI Workshop on Factors Affecting Power Plant Waste Heat
   Utilization (1978 : Atlanta, Ga.)         1
>>>
6. Twain, Mark, 1835-1910                    15
7. Twardzik, Louis F., joint author          1
8. Tweedie, Alexander, 1794-1884, ed        1
9. Tweedle, John, 1936-1981                  1
10. Tweeten, Luther G.                       3
11. Twenhofel, William Henry, 1875-         1
12. Twentieth Century Fund                   2

...Continued...
Options:  Enter lines (e.g. 1 or 1,2 or 1,2,4 or 1-4 or 1,3-4 etc.)
# line(s) Forward Backward Prior screen Search jump
Review search OPAC parms New search Reset Output # ? help
```

Select the line(s) you want.

7. Use the arrow keys or enter the first character of an option to highlight the option. As an example, highlight the *#line(s)* option and type 1-5 to capture the first five items on the list. <ENTER>.
8. A title summary screen is displayed, with only those 6 titles listed. A sample TITLE SUMMARY screen is displayed in *Getting Started - Basic Searching* and in *Search Lists and Record Displays*.

### Obtain bibliographic and holdings details

9. Highlight the *# line(s)* option and enter the line(s) for which you want to display the bibliographic and holdings details. <ENTER>.
10. The DETAILED DISPLAY screen appears.

```

                                Online Catalogue - BRIEF DISPLAY                (1 of 1 titles)
  Number of holdings :1

AUTHOR          :Hodges, Lewis H.
TITLE           :Building antique doll house furniture from scratch
Year            :c1980.
SUBJECT         :Doll furniture
                :Miniature furniture
LANGUAGE        :ENGLISH

   Library   Locn      Call Number      Ltype      Status / Due date
   -----   -
1. CAM1     stacks    TT175.5 .H63      2week      In Library

Last Page
Options:
# item  Prior screen  Extend search  Full display  Search copy  Output
MARC   Holds  Order display  Review search  OPAC parms  New search
Reset  ? help

```

11. Highlight the desired option using the arrow keys or by typing the first character of the option, <ENTER>.

If you selected more than one line number, on the TITLE SUMMARY screen, the see next option will be available on the Detailed Display. Use the *See Next* option to view the next Detailed Display.

### Holdings Display

12. Use the # item option to see the holdings display.

**Ending Your Search**

13. At any screen, highlight the *New Search* option and <ENTER>. This will return you to the SEARCH SELECTION screen (OPAC WELCOME screen).

## Browsing Subject Indexes

Highlight *Subject* under *SEARCH FOR THE FIRST WORD IN THE* column and follow the search steps described on the previous pages.

## Browsing Title Indexes

Highlight *Title* under *SEARCH FOR THE FIRST WORD IN THE* column and follow the search steps described on the previous pages.



## Browsing Author Indexes

There are four types of author searches:

- Highlight *Author* to search for all kinds of names.
- Highlight *Personal Name* to search for personal authors only.
- Highlight *Corporate Name* to search for corporate authors only (for example, Government bodies, company name).
- Highlight *Conference Name* to search for conference name only.

Follow the search steps described on the previous pages.

## Browsing Series Indexes

Highlight *Series* to search for Series Titles, including materials such as periodicals, annuals, author, title series, and monograph series, depending on library setup.

## Browsing All Indexes

All the indexes of the browse search — title, author, subject and series — can be searched simultaneously:

Use the arrow keys or space bar to highlight *All of the Above* from the column labelled *LOOK FOR THE FIRST WORD IN THE* and <ENTER>.

The Heading Browse List that results from an All of the Above browse search identifies, for each item in the list, the index in which it appears. For example, an *All of the Above* search on *fish* results in the following display:

```

                                Online Catalogue - Heading Browse
Browsing ALL: ALL=FISH

      ALL                                Number of Titles
1. Fischer, Norman, 1943-                (Author)      1
2. Fischer, R. Dietrich (Rainer Dietrich), 1919-    (Author)      1
3. Fischer, Robert E.                    (Author)      1
4. Fischer, Rudolf, 1860-1923            (Author)      1
5. Fischer, Stanley                      (Author)      1
6. Fischer, Wolfram                      (Author)      1
>>>
7. Fish as food                          (Subject)      1
8. Fish control                          (Subject)      2
9. Fish Creek, Wis. Peninsula Music Festival. Orchestra (Author)      4
10. Fish-culture                         (Subject)      7
11. Fish-culture -- Africa                (Subject)      1
12. Fish culture -- California            (Subject)      1
13. Fish-culture -- Canada -- Maritime Provinces (Subject)      1

...Continued...
Options:  Enter lines (e.g. 1 or 1,2 or 1,2,4 or 1-4 or 1,3-4 etc.)
# line(s) Forward  Backward  Prior screen  Search jump
Review search  OPAC parms  New search   Reset       Output #    ? help

```

Option selections are the same as those available from other alphabetical search screens.

## Browsing Call Number

The call number browse list display includes the classification numbers, Cutter numbers, and any dates which are used as part of the base call number. It excludes volume, part and copy level data, as well as call number prefixes and suffixes.

Call number prefixes (e.g. Ref.), classification numbers, Cutter numbers, call number suffixes (e.g. Curr yr only), volume, part and copy data, are available on the detailed bibliographic and holdings displays. The detailed display is obtained by entering the line number at the options prompt.

1. Select Call Number Searches from the SEARCH SELECTION screen and <ENTER>.
2. The CALL NUMBER LISTING screen appears.

```

Online Catalogue - Call Number Listing
Browsing Call Numbers: C=QA23

    Call Number      Title
1.  QA16 .M35       Manipulative activities and games in the...
2.  QA20.C65 P36 1980 Mindstorms : children, computers, and powerful...
3.  QA21 .C3        Vorlesungen uber geshichte der mathematik
4.  QA21 .H58       Geschichte der Mathematik
5.  QA21 .H58 1957  The history of mathematics
6.  QA21 .K525      Mathematics, the loss of certainty
7.  QA22 .R4        Das exakte Denken der Griechen; Beitrage zur...
>>>
8.  QA26 .K5313     Development of mathematics in the 19th century
9.  QA27.I4 B2      Mathematical research in India : (A brief review)
10. QA27.P67 K7813 1980 A half century of Polish mathematics : remembra...
11. QA27.U5 M37 1977 The Bicentennial tribute to American mathematic...
12. QA27.5 .H95 1976 Women and the mathematical mystique : proceedin...
13. QA28 .M4        Denkweisen grosser Mathematiker; ein Weg zur...

...Continued...
Options:  Enter lines (e.g. 1 or 1,2 or 1,2,4 or 1-4 or 1,3-4 etc.)
# line(s) Forward  Backward  Prior screen  Search jump
Review search  OPAC parms  New search   Reset       Output #    ? help

```

# 7

## Keyword Searching

---

This chapter describes the principles and features of Keyword Searching in the ADVANCE Online Catalogue. Topics covered include:

- Keyword Search Types
- Word Search Tools
  - Search Commands
  - Truncation
  - Boolean Operations
  - Search Syntax Analysis
  - Dictionary Browse
  - Stopwords
  - Search Term Thresholds
- Basic Steps in Word Searching
  - Multi-Word Searches
- Expert Searching
  - Using the Search Commands
  - Using Expert Searching
  - Cross-heading Searches
- Word Search Options and Special Features
  - Automatic Syntax Analysis
  - Modifying a Keyword Search

## Keyword Search Types

Keyword search types are listed under the column *LOOK FOR ANY WORD IN THE* on the SEARCH SELECTION screen.

- |                  |                                                                                                                                                                                                                                                                      |
|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Subject          | Use <i>Subject</i> searches to see subject headings used by this catalogue that contain the search words.                                                                                                                                                            |
| Title            | Use <i>Title</i> searches when some of the words of the title are known.                                                                                                                                                                                             |
| Author           | Use <i>Author</i> searches when any part of the name of the author or organization is known (personal, corporate, or conference names).                                                                                                                              |
| Notes            | Use <i>Notes</i> to search for words in the notes fields of bibliographic records.                                                                                                                                                                                   |
| Series           | Use <i>Series</i> searches when some of the words in the series title are known.                                                                                                                                                                                     |
| All of the Above | Use this method to search the same word(s) across all the indexes simultaneously: title, author, subject, series, and possibly notes.                                                                                                                                |
| Expert Searches  | Allows you to search using search commands. Expert searches allow experienced users to do all of the other kinds of searches, in addition to complex cross-index, cross-heading searches, using search commands. Expert Searches allows searching by barcode number. |

## Word Search Tools

All search tools described in Search Tools in the chapter *Basic OPAC Searching* on page 3-1, are available in Keyword Searching. In addition, ADVANCE OPAC provides special search tools for Keyword Searches.

## Boolean Operations

The Boolean operators, AND, OR, NOT, and XOR can be used in all keyword searches.

NOTE: To include a Boolean operator in a keyword search enclose the operator in quotation marks. For example, to search for *The Lady's Not For Burning* enter *Lady's "Not" Burning*.

XOR is the "exclusive or" operator. For example, the search statement `gilbert XOR sullivan` finds headings which contain *gilbert* or *sullivan* but not both.

Boolean operators are evaluated in the following order:

1. Terms which contain implicit boolean operators.

The system expands these terms in the following order to create a search statement (this statement is used but not displayed):

- the parts of hyphenated terms, and terms separated by punctuation only, are ANDed. For example, `W=organ-grinder*` becomes `W=(organ AND grinder*)`.
- truncated terms are ORed by the system within parentheses. For example, `W=(organ AND grinder*)` becomes `W=(organ AND (grinder OR grinders))`.
- compound index searches, such as All searches or any library-defined multi-index search commands, are expanded. For example, `W=(organ AND (grinder OR grinders))` becomes `(AW=(organ AND (grinder OR grinders))) OR (TW=(organ AND (grinder OR grinders))) OR (SW=(organ AND (grinder OR grinders)))`.

2. Terms entered within parentheses.

3. The explicit Boolean operators entered by the user, and the implicit AND between terms not explicitly separated by Boolean operators:

AND and NOT are evaluated first, and then OR and XOR, for search expressions entered without parentheses.

For example, the search statement (single index search)

`trees AND orange NOT lemon`

will be evaluated as:

`(trees AND orange) NOT lemon`

and the search will retrieve headings containing both the word



*trees* and the word *orange* but not headings containing the words *trees* and *orange* and *lemon*.

Similarly, the search statement:

a OR b AND c

will be evaluated as:

(b AND c) OR a

and will retrieve headings containing both *b* and *c*, or only *a*, or *b* and *c* and *a*.

Parentheses can be used to alter the order of evaluation.

## Search Commands

When a keyword search is conducted (Author, Title, Subject, Notes, Series, All), the system provides the search commands automatically when you select a search type from the SEARCH SELECTION screen.

In Expert Searches, you must enter one or more search commands explicitly, enabling more complex cross-heading searches. For details, refer to *Expert Searching*.

## Truncation

Truncation searching is useful when you want to retrieve words with the same prefix, but with variable suffixes.

ADVANCE OPAC provides a wildcard character(\*) for prefix and suffix truncation. If \* is the first character in the search word, the system will find all words which end in the characters following the \*. If \* is the last character in the search word, the OPAC will find all words which begin with the characters preceding the \*. In either case, the system will OR all the terms resulting from the truncation.

Only one \* per search word is permitted. If more than one \* is used, OPAC will provide the opportunity to edit the term but will not execute the search.

## Synonyms

Synonym searching is useful when you want to retrieve words with similar meanings.

ADVANCE OPAC provides an expansion character (>) for use as a suffix to a search term. When you use the expansion character, the system includes the synonym term(s) to broaden the search. Synonyms OR all the terms resulting from the expansion of the search term.

Synonyms are specified in the OPAC KEYWORD THESAURUS (OKT) screen which is accessed from the ONLINE SEARCH SETUP menu.

For example, if you perform a search on road>, the search is expanded to road OR boulevard OR crescent OR highway OR lane OR street. (If road is defined with these synonyms.)

## Search Syntax Analysis

Analysis of the search statement is automatically provided by OPAC. If there are any problems with the search statement, the SEARCH SYNTAX ANALYSIS screen is displayed, and you are offered the opportunity to revise the search statement and resume the search.

For details, see *Automatic Syntax Analysis* on page 7-22.

## Dictionary Browse

You are able to browse the word files to find words to insert into the search statement. All Browse List options are fully supported. Note that dictionary browse does not indicate SEE and SEE ALSO references.

## Stopwords

ADVANCE provides for library-defined stopwords specific to each index. When a stopword is the **only** word in a search term for a given index search, the system will retrieve all headings containing the stopword. Otherwise, the system ignores the stopword.

## Search Term Thresholds

ADVANCE allows the library to specify for each port or terminal, the maximum number of terms that can be retrieved by a single truncated term. If the number of expanded terms exceeds this limit, you are taken to the SYNTAX ANALYSIS screen and the system displays the message:  
Too many words found.

You may revise the search statement or override the threshold by entering the hidden option “A” on this screen. The override privilege may also be password-protected. Refer to *Security* in the *Utilities Management Guide*.



## Basic Steps in Keyword Searching

The basic steps described in *Basic OPAC Searching* on page 3-1 are also applicable to Keyword Searching. For details about the use of search commands, refer to *Expert Searching*.

Single-command searches may be executed without the explicit use of the search commands. Multi-command searches require the use of search commands; refer to *Expert Searching*.

The search types Author Word, Subject Word, Title Word, Series Word, All Word, and Notes Word are designed for users not familiar with the search commands. There is no need for you to know the search commands since the system will provide them when you select any of these search types.

1. On the SEARCH SELECTION screen, highlight one of the search types under the *LOOK FOR ANY WORD(S) IN THE* column. <ENTER>.
2. The SEARCH ENTRY screen appears. At the prompt, type the words you wish to search for and <ENTER>. Or, enter the keywords you wish to search directly on the SEARCH SELECTION screen and <ENTER>.
3. If the search was successful, title summary, or detailed display appears.

NOTE: If there were problems with the search syntax or there were no 'hits', the SEARCH SYNTAX ANALYSIS screen is displayed. Refer to *Automatic Syntax in the Word Search and Special Features*.

4. Use the *#line(s)* option to move to the next level.
5. The DETAILED DISPLAY screen appears, providing the specific bibliographic and holdings (and may include the call number, location of each copy, circulation status) information you require.

## Multi-Word Searches

The following description assumes your search command is set up to do within-heading searches. These searches will find all of the headings (and the citations attached to each heading) containing the words in the search term.

Boolean operators may be used in these basic searches to broaden or narrow the search. Words are ANDed by default.

For example, a search for the subject words `fish culture`

1. Highlight *Subject* on the SEARCH SELECTION screen and <ENTER>.
2. On the SEARCHENTRY screen after the prompt, enter `fish culture` and <ENTER>.
3. The system processes the search request and finds all headings containing both words.

It will not retrieve any headings that contain only the word `fish` or only the word `culture`.

### Using OR

Using OR broadens the search and retrieves many more headings.

For example, if you search for the subject words `fish OR culture`, the system retrieves all headings containing the word `fish` or the word `culture` or both words.

### Using Truncation

If you use an \* at the beginning or ending of any of the words in your search term, the system retrieves **all** of the words in the system, for the specified index, containing words which:

- end with the letters following an \*
- begin with the letters preceding an \*

For example, if you enter the title word `govern*`, the system constructs the search statement:

```
TW=govern OR governing OR governor OR government OR  
governmental OR governments
```

and provides a Title Summary of titles containing those words will be displayed.

Note that if the number of terms found exceeds the limit for searches imposed by settings in OPAC setup, the system will inform you by displaying the SEARCH SYNTAX ANALYSIS screen. Refer to *Automatic Syntax Analysis in Keyword Search Options and Features*.

**Multi-index Searches Using the ALL Search Type**

If the *All of the Above* search type is selected, the system will OR the terms in all of the indexes, and construct the search statement: SW=term OR AW=term OR SEW=term OR TW=term (and OR NW=term if notes are included). The search results are presented in a Title Summary list.

```

Online Catalogue - Title Summary
Your Search: W=CHINA

  Author..... Title..... Type Year
1. Smythe, Francis   Camp six; an account of the 1933 Mount   am   1937
   Sydney, 1900-1949   Everest expedition,
2. Martin, Diana    Women in Chinese society /              am   1974
3. Loescher, Gil     China : pushing toward the year 2000 /   am   1981
4. Lu, Yu, 1125-1210. South China in the twelfth century : a   am   1981
   Ju Shu chi. English translation of Lu Yu's travel diaries,
   July 3 - December 6, 1170 /
5. Smythe, Lewis S. C. Lewis S.C. Smythe [microform].          am   1973
   (Lewis Strong Casey)
6. Smythe, Margaret Margaret Garrett Smythe [microform].     am   1973
   Garrett, 1901-

56 titles in list
Options:
# line(s)  Forward  Prior screen  Sort  All  Modify search
Review search  OPAC parms  New search  Reset  Output #(s)  ? Help
    
```

## Expert Searching

“Expert” searching mode requires the use of search commands, and allows you to construct complex search statements using a combination of boolean operators and search commands. You can also conduct cross-heading, as well as within-heading, and multi-index searches.

---

## Search Commands

The standard search commands include:

- A= browse search for personal, corporate and conference names.
- A1= browse search for personal authors.
- A2= browse search for corporate authors.
- A3= browse search for (author) conference names.
- T= browse search for titles.
- S= browse search for subjects.
- SE= browse search for series.
- W= keyword search for authors, titles, subjects, series titles, or notes.
- AW= keyword search for authors (personal, corporate, or conference names).
- TW= keyword search for titles.
- SW= keyword search for subjects.
- SEW= keyword search for series titles.
- NW= keyword search for notes.
- C= call number search.
- I= number search for ISBN/ISSN.
- RA= reserve book room search for author.
- RT= reserve book room search for title.

**Additional Commands** The library may define additional commands for combination (single or cross-heading multi-index searches). For example, you may define a search command for a combination author-title keyword search as ATW=Author/Title word. For more details, refer to *Online Search Setup*.

## Cross-heading Searches

A cross-heading search is always performed when you **use multiple search commands** or if a search command is set up for cross-heading searches. You may repeat the same command for a single index search. For example:

```
SW=fish SW=culture
```

The system looks for **titles** that meet the criteria rather than individual **headings** that meet the criteria. The sample search retrieves Record 1 and Record 2 because each has a subject heading containing *fish* and a subject heading containing *culture*. It is not necessary for both words to occur in the same heading.

A TITLE SUMMARY screen or a DETAILED DISPLAY screen is displayed. The HEADING SUMMARY screen is not retrieved for keyword searches.

The search `SW=fish culture TW=trade` is the same as `SW=fish SW=culture TW=trade` because, in a multiple command expression, the system repeats the same search command for words in a row that do not have their own search commands.

The search `SW=fish culture SW=trade` is the same as `SW=fish SW=culture SW=trade` and retrieves a record if it has subject headings containing the words *fish*, *culture*, and *trade* in any of the headings, together or separate.

The search `SW=fish culture NOT SW=trade` retrieves a record if it has *fish* in a subject heading, has *culture* in a subject heading, and does not have *trade* in any subject heading.

## Multi-index Searches

When a expert search is conducted across indexes (for example, SW=fish AW=brown), a TITLE SUMMARY screen, or a DETAILED DISPLAY screen is displayed. The HEADING SUMMARY screen is not retrieved.

## Using Expert Searches

You may begin an expert search as you would any other search:

1. Highlight *EXPERT SEARCH* on the SEARCH SELECTION screen.
2. <ENTER>. The EXPERT SEARCH ENTRY screen appears.
3. On the EXPERT SEARCH ENTRY screen, enter each of your search terms preceded by a search command followed by '=', for example:

```
SW=(sun OR solar) SW=(power OR energy) AW=(united  
NOT states) AND TW=polic*
```

Or, you may simply use the search commands without highlighting any of the search types, for example:

1. Enter the Search Command followed by '=', for example, SW= and <ENTER>.
2. to request a browse search on subject:

```
Enter S=<ENTER>.
```

NOTE: If you do not include the '=', the system will process your search based on the search type currently highlighted on the SEARCH SELECTION screen. For example, if you enter SW and <ENTER> and the search type Author browse is currently highlighted, the Author Heading Browse list will display.

Or, you may:

1. On the SEARCH SELECTION screen, enter your entire search statement. Examples:

```
A=davidson
```

```
I=0919028659
```

```
SW=(sun OR solar) SW=(power OR energy) AW=(united  
NOT states) AND TW=polic*
```

```
NW=libretto AW=ravel
```



## Keyword Searching Options and Features

All of the OPAC options and features are available in keyword searching. However, there are some additional features that are provided specifically for keyword searching.

## Automatic Syntax Analysis

The SEARCH SYNTAX ANALYSIS screen is displayed under the following conditions:

- one or more of the search terms cannot be found in the word files
- terms cannot be evaluated because of syntax (for example, improper positioning of the parentheses)
- the number of search terms exceeds the limit imposed in the OPAC setup tables.

When the system tries to process a search meeting these conditions, it will display the following screen:

```
Search Syntax Analysis

Your search was:

TW= FISSH or SHRIMP

Word not Found

Options:
Edit Search  Browse Search  Omit this term  Prior screen  New search
Reset      ? help
```

### Syntax Errors and Messages

When the SYNTAX ANALYSIS screen displays in response to any of the following errors (shown on the bottom of the screen above the options lines), the part of the search statement that needs correction will be highlighted. You may use the options on the bottom of the screen to change your search statement.

**Word not found**

Displays if one or more of the search terms are not in the word files.

**Too many words found**

Displays if the maximum number of search terms expanded from one truncated term has been exceeded.

**Invalid Search Command**

Displays if the search command entered is not recognized by the system, for example if you entered `SB=test <ENTER>` where `SB=` is not a valid search command.

**Cannot use an expert search command**

Displays if the command to invoke expert searching is used as part of a search statement.

**Only keyword type searches can be used within a boolean expression**

Displays if you have entered, for example:  
`SW=horses AND T=racing.`

Note that the search `T=horses AND SW=racing` would not produce an error message; the system would just do a title browse search on the heading *horses and sw=racing*.

**No search command specified**

Displays if you have not used a search command in expert search mode, on the SEARCH ENTRY screen.

**Expert searches must specify a search**

Displays if you have selected EXPERT SEARCHING on the SEARCH SELECTION screen, and you entered text without preceding it by a search command.

**Missing Left Parenthesis**

Displays if the search statement does not include a left parenthesis for each right parenthesis.

**Missing Right Parenthesis**

Displays if the search statement is missing a right parenthesis.

**Dangling Boolean Operator**

Displays if one or more of the Boolean operators is not followed by a term or a search command.

**Dangling Search Command Code**

Displays if a search command is not followed by a term to search.

**You can only use left or right truncation and not both**

Displays if any of the terms contain both ending and beginning truncation, or if any of the terms contain embedded truncation.

**No words in expression**

Displays if after editing your search you have removed all of the words in the search statement.

**Authority searches can only contain one command code**

Used only for searching the Authorities database from the Cataloguing Module.

**Only one database available at this site**

Displays if you attempt to use the expert search command DB=[database] at an institution that only has one database.

**Invalid database specified**

Displays if you enter an invalid database code when you use the DB=[database] command.

**Your current search is not available for the selected database**

Displays when you enter a DB=[database] command from within the search entry screen that does not have access to the specified database.

**You cannot use both the Truncation and Synonym expansion for a single term**

Displays if your search command contains both a wild card character (\*) and an expansion character (>).

**Synonym expansion can only be used at the end of a term**

Displays if your search term contains the expansion character anywhere other than at the end of the search term.

## Search Statement Editing Options

### *Edit search*

This option is highlighted when the SEARCH SYNTAX ANALYSIS screen is first displayed.

1. <ENTER> to execute the *Edit Search* option.
2. The cursor positions itself at the first character of the search statement that caused the problem.
3. Edit your search statement using the backspace delete, delete character, insert character, and arrow keys. When you are satisfied, <ENTER>.
4. The system will process the revised search statement.

### *Browse search*

This option allows you to browse the WORDS file and retrieve selected word(s) into your search statement.

1. Highlight the Browse Search option, and <ENTER>.
2. The WORD BROWSE screen appears, positioning you in the part of the file that is alphabetically closest to the word that was highlighted on the SEARCH SYNTAX ANALYSIS screen.

```
Online Catalogue - Word Browse

Your word: FISSH

      Word                               Word
1. FISHERMAN                            16. FISSION
2. FISHERMANS                           17. FISSIONABLE
3. FISHERMEN                             18. FIT
4. FISHERS                               19. FITMENTS
5. FISHERY                               20. FITNESS
6. FISHES                                21. FITOGEOGRAFICA
7. FISHHOUSE                             22. FITTING
8. FISHIN                                23. FITZGERALD
9. FISHING                               24. FITZPATRICK
10. FISHMAN                              25. FIVE
11. FISHMONGERS                          26. FIXATION
12. FISHPONDS                            27. FIXED
13. FISHWATCHERS                        28. FIXES
14. FISICA                               29. FIXING
15. FISICO                               30. FIXIRUNG

...Continued..., 0 words selected
Options:
# line(s) Select Proceed Backward Forward Prior screen
Search jump OPAC ParmS New search Reset ? help
```

3. Use the *Search Jump* or *Forward* or *Backward* options to move around in the Word Browse file.
4. Use the *#line(s)* option to select a line or line(s) to insert into your search. <ENTER>.
5. The system processes your search and displays a Title Summary Listing or Detailed Display if the search was successful, or displays the SEARCH SYNTAX ANALYSIS screen if the search was unsuccessful.

*Omit this term*

You can use this option to delete the highlighted term from the search statement.

1. Highlight the Omit this term option and <ENTER>.
2. The system processes your search and displays a Title Summary Listing or Detailed Display if the search was successful, or displays the SEARCH SYNTAX ANALYSIS screen if the search was unsuccessful.

*Prior screen*

Note that the *Prior Screen* option does not return to the SEARCH SYNTAX ANALYSIS screen from a Title Summary Listing or a Detailed Display.

# 8

## Direct Key Searching

---

This chapter describes how to use the `DIRECT KEY SEARCHES` portion of the Online Catalogue. Any one of several standard or site-defined identification numbers can be used as a search term. Topics covered in this chapter are:

- **Types of Searches**  
Describes the types of direct key searches available.
- **Requesting a Direct Key Search**  
How to make a search request using an identification number.
- **Options**  
How to use the options offered from the search results.

## Direct Key Searches

ADVANCE allows you to search for items by identification numbers. The numbers that can be searched include:

### **ISBN**

International Standard Book Numbers assigned by publishers to specific editions of the books.

### **ISSN**

International Standard Serial Numbers assigned by the Library of Congress to serial titles.

### **CODEN**

Periodical title abbreviations assigned by the American Chemical Society.

### **LCCN**

Library of Congress Card Numbers.

### **LCN**

Local Control Numbers are assigned by ADVANCE to identify unique records in the library catalogue.

Some libraries may index additional kinds of numbers, such as technical report numbers or record numbers from library bibliographic utilities.



## ID Number Searches

Identification number searches are a quick way to locate existing records for a specific title.

- 1) Start Identification Number Searches from the SEARCH SELECTION screen.
- 2) Select a search type from the column labelled *Direct Key Search*. Alternately, enter a search mnemonic. <ENTER>.
- 3) Once a search type is selected, the SEARCH ENTRY SCREEN appears. A request for the number appears near the bottom of the screen. Enter the information requested.
- 4) <ENTER>.
- 5) If a specific number is entered, a DETAILED DISPLAY screen appears. If there is no exact match to the number requested, a sorted list of ID numbers and titles appears.

```

Online Catalogue - Control Number Listing
Your Search: I=8

      ISN                Title
1. 678005346           History of the Chartist movement, 1837-1854.
2. 70013040            Drug responses in man, a Ciba Foundation volume ;
                        edited by Gordon Wolstenholme and Ruth Porter.
3. 70200264X          Veterinary medicine/ D. C. Blood and J. A.
                        Henderson.
4. 707302633          George Buchanan, tragedies/ edited by P. Sharratt
                        and P.G. Walsh.
>>>
5. 803853815          National costumes from East Europe, Africa and
                        Asia/ Max Tilke.
6. 803998767          Social origins of educational systems/ Margaret
                        Scotford Archer.
7. 804611653          Rome and reform.
8. 80932461X          Operating manual for spaceship earth [by] R.
                        Buckminster Fuller.

...Continued...
Options:
# line(s)  Forward  Backward  Prior screen  Search jump
Review search  OPAC parms  New search  Reset  Output #  ? help

```



# 9

## Searching the Reserve Documents

---

Reserve Book Room searching is the most direct means of locating items on course reserve. Searches may be based on title, author, course, or instructor. Topics included in this chapter are:

- Reserve Documents Catalogue  
An overview of this search method.
- Title  
How to use the title searches.
- Author  
How to use the author search.
- Course Names  
How to view a list of courses.
- Course Details  
Similar to Course but adds the instructors' names.
- Instructor  
How to use the instructor list.

## Searching Reserve Documents

Catalogued library materials placed on course reserve may be accessed through normal online catalogue searches, or more directly through reserve room searches. In standard online catalogue displays, items are described as reserved on Detailed Displays under status/due date and on Holdings Displays under current location. Although the phrase “reserve documents” is used throughout this manual, ADVANCE supports multiple course reserve collections, each with their own location or “agency” codes and their own circulation rules.

### Uncatalogued Items

Uncatalogued reserved items, such as instructors’ personal copies, photocopies of articles, pamphlets, locally published syllabi, and course materials, are accessible only through reserve book room searches.

### *Access to All Reserve Materials*

Both uncatalogued and catalogued course reserve materials can be accessed by five types of reserve book room alphabetical lists:

- Title
- Author
- Course Name
- Course Detail
- Instructor

Reserve searching is similar to other forms of browse list searching in the standard online catalogue.

## Title Search

Searching functions in the standard online catalogue and the reserve online catalogue are very similar. An example reserve title list is shown. To produce a title list follow the steps listed:

1. Select *Title* from the *RESERVE DOCUMENTS* column of the *SEARCH SELECTION* screen.
2. <ENTER>. The Search Entry Screen appears.
3. A prompt appears at the bottom of the screen. Enter the information requested. (In this example, *MUSIC FOR STRING* was entered.) <ENTER>.
4. An alphabetical browse list appears.

```

                                Online Catalogue
Browsing Reserve Title: RT=MUSIC FOR STRING

RESERVE TITLE
1. Museums of Europe
2. Music
3. Music: a design for listening
4. Music and imagination
5. The music business: career opportunities
6. Music for a medieval day
>>>
7. Music for string orchestra
8. Music for strings, percussion and celesta
9. Music for the listener
10. Music in the Renaissance
11. Music in the United States
12. Music industry directory
13. The music makers
14. Music therapy for the autistic child
15. Musica antiqua Bohemica
Last Page
Options:
# line(s)  Forward  Backward  Prior screen  Search jump  Review search
OPAC parms  New search  Reset      ? Help

```

### Reserve Material Display

Using the # *line(s)* option to select one or more items from a title or author alphabetical browse list produces the RESERVE MATERIALS DISPLAY. This screen shows:

- brief bibliographic information about the item
- a list of the courses which have the item on reserve
- a list of holdings for the item

```

                                RESERVE MATERIALS DISPLAY
  (1 of 1 titles)
Author      : Jones, Elwood
Title       : Music for the listner
Pub Date    : 1978
Publisher    : Chicago House

      COURSE      INSTRUCTOR      CALL NUMBER
MUS101      Hammond, Mike      AU PARK RBR ML3561.H3 H66
MUS221      Clark, Richard      AU PARK RBR ML3561.H3 H66

      CAMPUS  LIBRARY  COLLECTION/CALL NUMBER      STATUS/DUE DATE
-----
1. ACAD  PARK      RBR ML3561.H3 H66      In Transit
2. ACAD  PARK      RBR ML3561.H3 H66      In Library
3. ACAD  PARK      ML3561.H3 H66          In Library

Last Page
Options:
# item  Prior screen  Search copy  Output  Order display
Review search  OPAC parms  New search  Reset  ? help
```

## Author Search

The reserve author browse search is like the author search in the standard online search and produces alphabetical lists of authors.

1. Select *Author* from the *RESERVE DOCUMENTS* column of the SEARCH SELECTION screen.
2. <ENTER>. The Search Entry Screen appears.
3. A prompt appears at the bottom of the screen. Enter the information requested. (In this example, JONES DOROT was entered.) <ENTER>.
4. An alphabetical browse list appears.

```

                                Online Catalogue
Browsing Reserve Author: RA=JONES DOROT

RESERVE AUTHOR
1. Joncich, Geraldine M.
2. Jones, Antony John
3. Jones, B. J.
4. Jones, Bessie Judith (Zaban)
5. Jones, David E., 1942-
6. Jones, Donald Richard, 1926-
>>>
7. Jones, Dorothy A.
8. Jones, Elwood
9. Jones, Franklin Day, 1879-
10. Jones, Gwyn, 1907-
11. Jones, Howard Mumford, 1892-
12. Jones, James Earl
13. Jones, John Charles
14. Jones, LeRoi
15. Jones, Maureen
Options:
# line(s)  Forward  Backward  Prior screen  Search jump  Review search
OPAC parms  New.search•  Reset  ? help

```

Using the *# line(s)* option to select one or more items produces the RESERVE MATERIALS DISPLAY. See [Title Search](#) on page 9-3.

## Course Name Search

A course name search produces a list of course titles.

1. Select *Course Name* from the *RESERVE DOCUMENTS* column of the SEARCH SELECTION screen.
2. <ENTER>. The SEARCH ENTRY screen appears.
3. A prompt appears at the bottom of the screen. Enter the information requested. In this example, INTRO TO CINEMA was entered at the prompt. <ENTER>.
4. An alphabetical list appears.

```
Online Catalogue
Browsing Course Name: RK=INTRO TO CINEMA

      COURSE
1. Intl Relations
2. Intro to Archaeology
3. Intro to Art Hist
4. Intro to Atmos Sci
5. Intro to Bus D P
6. Intro to Bus Methods
>>>
7. Intro to Cinematography
8. Intro to Civil Engg
9. Intro to COBOL Prog
10. Intro to Cultl Anthro
11. Intro to Design
12. Intro to Econ Geog
13. Intro to Ed Stats
14. Intro to Forestry
15. Intro to French Lit

Options:
# line(s)  Forward  Backward  Search jump  Prior screen
Review search  OPAC parms  New.search•  Reset  ? help
```



**Reserve Course/Instructor Display**

Using the *# line(s)* option to select one or more items from a course name, course detail, or instructor list produces the RESERVE COURSE/INSTRUCTOR DISPLAY. This screen shows:

- course and instructor information
- a list of items on reserve for the course

```

                                RESERVE COURSE/INSTRUCTOR DISPLAY
                                (1 of 1 courses)

Course Code   :ENGL1002

Class Name    :American History
Instructor ID :Smythe, Katherine
Department    :History                Year           :1989
Meets        :MWF 10:00-10:50        Admin. ID      :H8101
Term         :Spring                 Course Section :2

RBR  TITLE                                     CALL NUMBER      STATUS
1. Yes  History of the United States of Amer+  E178.1 .P2 l821  ...
2. Pend  The Vietnam trauma in American forei+  E183.8.V.5K36   ...
3. Yes  Oil, war, and American security: the+  HD9566.S82      nRBR
4. Yes  Famous Americans in foreign places    RBR PC .E49     ...

Options:
# line  Hold title #  Prior screen  Review search  OPAC parms
New.search  Reset  ? help
    
```

## Course Detail Search

The course detail search produces a list of courses along with associated course information.

1. Select *Course Detail* from the *RESERVE DOCUMENTS* column of the SEARCH SELECTION screen.
2. <ENTER>. The SEARCH ENTRY screen appears.
3. A prompt appears at the bottom of the screen. Enter the information requested. In this example, GEOG OF RES was entered at the prompt. <ENTER>.
4. An alphabetical list appears.

```

                                Online Catalogue
Browsing Course Detail: RD=GEOG OF RES

      COURSE                MEETS                INSTRUCTOR
1. Gen Sociology           MWF 10:00-10:50           Mills
2. Geog of Europe         TTH 2:00-2:50             Kissinger
3. Geog of Europe         MWF 9:00-9:50             Metternich
4. Geog of Land Use       MWF 11:00-11:50           Trump
5. Geog of Latin Am       MWF 9:00-9:50             Bolivar
6. Geog of Latin Am       MWF 4:00-4:50             Villa
7. Geog of Res Use        MTWTHF 8:00-8:50         MacDonald
>>>
8. Geog of the PNW        F 3:00-5:00               Lewis
9. Geog of the US         MWF 8:00-8:50             Gadsden
10. Geog of the US        MWF 11:00-12:50           Kissinger
11. Geog of the US        MWF 3:00-3:50             Seward
12. Geog of Transp        TTH 10:00-10:50           Lionel
13. Geog Photointer       F 8:00-10:00              Addams
14. Geol                  MWF 1:00-1:50             Descartes
15. Geol Oceanog          MWF 11:00-11:50           Beebe

Options:
# line(s)  Forward  Backward  Prior screen  Search jump
Review search  OPAC parms  New search  Reset  ? help

```

Using the *# line(s)* option to select one or more courses produces the RESERVE COURSE/INSTRUCTOR DISPLAY. See [Course Name Search](#) on page 9-6.

## Instructor Search

The instructor search produces a list of instructors and courses.

1. Select *Instructor* from the *RESERVE DOCUMENTS* column of the SEARCH SELECTION screen.
2. <ENTER>. The SEARCH ENTRY screen appears.
3. A prompt appears at the bottom of the screen. Enter the information requested. In this example, RUTHERFORD was entered at the prompt. <ENTER>.
4. An alphabetical list appears.

```

                                Online Catalogue
Browsing Instructor: RL=RUTHERFORD

      INSTRUCTOR                COURSE
1. Rusk                        Dipl Hist
2. Russell                     Appl Program
3. Russell                     Data Struct
4. Russell                     Theory of Comput
5. Rust                         Metallurgy
6. Ruth                        Anat Kinesiol
>>>
7. Rutherford                 Chemistry
8. Rutherford                 Nucl Physics
9. Rutledge                   Hist of Am Rev
10. Sabin                     Bibliography I
11. Sabin                     Hist of the Book
12. Sachs                     Intro to Botany
13. Sade                      Sex Ed
14. Sagan                     Cel Mechanics

Options:
# line(s)  Forward  Backward  Prior screen  Search jump  Review search
OPAC parms  New search  Reset    ? help

```

Using the *# line(s)* option to select one or more courses produces the RESERVE COURSE/INSTRUCTOR DISPLAY. See [Course Name Search](#) on page 9-6.



# 10

## Using the Library Calendars Menu

---

The Library Calendars Menu provides information about the library's hours of operation. It also runs the circulation checkout/checkin days and fines. If the library consists of more than one building or sublocation, a separate calendar is displayed for each location.

A typical *Library Calendars Menu* provides the following information:

- **Main Library Calendar**  
Lists the weekly schedule for the main library.
- **Documents Collection**  
Lists the weekly schedule for the documents collection.
- **Reserve Book Room**  
Lists the weekly schedule for the Reserve Book Room.

## Accessing Calendars

The daily and weekly schedules for the library are available from the Online Catalogue. Separate calendars are displayed for each library or sublocation. To view these calendars:

1. Select *Library Calendars Menu* from the ONLINE CATALOGUE MASTER MENU.
2. The LIBRARY CALENDAR MENU screen appears.
3. At the prompt, enter the number of the calendar you want to see and <ENTER>.

```
04 JUN 1993          Geac ADVANCE Library System (5.0)          MASTER  AU
16:40                Your Library Name
```

```
LIBRARY CALENDAR MENU
```

- ```
1. MCAL  Main Library Calendar
2. GCAL  Documents Collection
3. RCAL  Reserve Book Room
```

```
Enter the number of your selection and press <ENTER>
or ? followed by <ENTER> for Help.
Press <ENTER> to return to previous level :
```

## Calendar Commands

Use the arrow keys or space bar to highlight an option and <ENTER>. Alternately, enter the first letter of an option and <ENTER>. When an option is highlighted, a brief help message appears next to the word Options. Four commands are available from the library calendar displays:

- Help* Displays a help screen.
- Forward* Scrolls the calendar forward one page.
- Backward* Scrolls the calendar backward one page.
- Exit* Use the exit command to leave the calendar display.

## Example Calendar

This screen shows an example of a weekly schedule for the Main Library. For institutions with several sublocations, a calendar can be created for each library.

DISPLAY WEEKLY CALENDAR								06-04-93
CALENDAR : MAIN LIBRARY CALENDAR								
WEEK OF.		MON....	TUE....	WED....	THU....	FRI....	SAT....	SUN....
05-31-93	OPEN	08:30AM	08:30AM	08:30AM	08:30AM	08:30AM	10:00AM	CLOSED
	CLOSE	11:00PM	11:00PM	09:00PM	11:00PM	06:00PM	02:00PM	
06-07-93	OPEN	08:30AM	08:30AM	08:30AM	08:30AM	08:30AM	10:00AM	CLOSED
	CLOSE	11:00PM	11:00PM	09:00PM	11:00PM	06:00PM	02:00PM	
06-14-93	OPEN	08:30AM	QA HOL	08:30AM	08:30AM	08:30AM	10:00AM	CLOSED
	CLOSE	11:00PM	IDAY	09:00PM	11:00PM	06:00PM	02:00PM	
06-21-93	OPEN	08:30AM	08:30AM	08:30AM	08:30AM	08:30AM	10:00AM	CLOSED
	CLOSE	11:00PM	11:00PM	09:00PM	11:00PM	06:00PM	02:00PM	
06-28-93	OPEN	08:30AM	08:30AM	08:30AM	CANADA	08:30AM	10:00AM	CLOSED
	CLOSE	11:00PM	11:00PM	09:00PM	DAY	06:00PM	02:00PM	

Options:    Get more information  
? help    Forward    Backward    Exit



# 11

## Stopword and Article Lists

---

*Stopword Lists* displays stopwords that the system removes from index entries and search strings. For example, the title *The Farmer in the dell* would supply only two words for the title keyword index: *FARMER* and *DELL* because the words *IN* and *THE* are defined as stopwords.

## Accessing Stopword Lists

To access the STOPWORD LISTS screen, enter the screen identifier DSTOP from any Online Catalogue menu, or select DSTOP at the *Online Catalogue Master Menu*. The default English-language system lists are shown.

```
                                STOPWORD LISTS                                04 JUN 93    16:41:30

The following words are ignored in word searches:

Subject           : AN AND AS IN THE THIS TO

Title             : AN AND AS IN THE THIS TO

Author           : AN AND AS IN THE THIS TO

Series           : AN AND AS IN THE THIS TO

All-of-the-above : AN AND AS IN THE THIS TO

Press <ENTER> to exit.
```

The system also removes stopwords from your keyword search strings. For example, the following title keyword search:

```
TITLE WORD(S): DELL FARMER IN
```

is processed as a search for *FARMER* and *DELL*.

## Leading Article Lists

*Leading Article Lists* displays leading articles that the system removes from index entries and search strings. For example, the title *The Farmer in the dell* would be filed as *FARMER IN THE DELL* because *THE* is defined as a leading article.

To access the LEADING ARTICLE LISTS screen, enter the screen identifier DART at any *Online Catalogue* menu, or select DART from the *Online Catalogue Master Menu*. The default English-language system lists are shown.

```

HH:MM                LEADING ARTICLE LISTS                DD MMM YY

The following words are ignored at the beginning of headings:

Subject              : A AN THE UN UNE LE LA

Title                : A AN THE UN UNE LE LA

Author               : A AN THE UN UNE LE LA

Series               : A AN THE UN UNE LE LA

All-of-the-above    : A AN THE UN UNE LE LA

Ignore Leading      : 0  Articles, Even If non-filing count is zero. (1=Yes ,0=No
)
Press <ENTER> to exit.

```

**Non-Filing Count** If a heading comes from a MARC field with a non-filing count indicator, the system ignores the specified number of characters when filing and does not apply the leading article lists. For example, the title taken from the field:

```
245 04$aThe Farmer in the dell
```

would be filed as *FARMER IN THE DELL* because the non-filing count is 4.

**Ignoring Leading Articles** In Cataloguing, you can choose to ignore leading articles. In releases prior to 6.8, even if the nonfiling count was zero, the system would strip leading articles. With Release 6.8, you can set the system to ignore leading articles even if the nonfiling count is zero. This is consistent with USMARC rules.

**Browse Search** The system also ignores leading articles in your browse search strings. For example, the following title browse search:

TITLE: THE FARMER IN THE DELL

is processed as a search for *FARMER IN THE DELL*.

# 12

## Patron Display

---

The Online Catalogue can be set up to allow patrons to see their own circulation information:

- holds
- blocks/fines
- items checked out.

To display your own circulation information on the PATRON INQUIRY screen, enter the screen identifier PAT on any ONLINE CATALOGUE MENU, or select PAT on the ONLINE SEARCH MASTER MENU (OPAC).

For security, the initial screen requires you to enter your barcode number.

```
04 JUN 19YY          Geac ADVANCE Library System (##)          MASTER AU
 16:42                Your Library Name
                        P A T R O N      I N Q U I R Y
```

```
Please enter your library card barcode number or <ENTER> :
```

Depending on how the Online Catalogue has been set up by the library, the system might then require one or more additional forms of identification:

- Please enter your password: #####
- Please enter your Personal ID: #####

- Please enter your Phone number: #####
- Please enter the first 3 letters of your Surname: ###

The system then displays the PATRON INQUIRY screen.

Alternatively, <ENTER> to exit.

If there are any “full” type blocks on the patron (as defined in the Circulation’s Transaction Codes table), then the system does not allow access to the function.

## Patron Record Inquiry

The PATRON RECORD INQUIRY screen is similar to Circulation's PATRON REGISTRATION screen.

```

PATRON RECORD INQUIRY

Patron Barcode.: 20000004446689                Last Update: 09/10/98
Old Barcode.....: 20000004446688,-102962       Last Trans.: 07/27/98
1. Name (Last, F M): Patron, Mary              Registered : 06/18/98
2. Address.....: 456 Northrup Ave
                Markham, Ontario
3. Zip/Postal Code.: MARKHAM, ONT L3R 9T8
4. Phone Number(s): 905-555-1212
5. Address 2.....:

6. Zip/Postal Code.:                          14. Password...: *****
7. Personal ID.....: 274 29 7611              15. Home Inst.: AU-ACADEMIC LIBRARY STA
8. ID Type.....: SSN                          16. Home Subl.:
9. Patron Code.....: STF-Staff                17. Housebound (Y/N) ? : N
10. Expiration Date.: 31 DEC 1999
11. Comments.....:

12. Rte. Recipient...: N
13. Rte. Location...:
Options:
List holds   Blocks display   Item list   Password change   ? help   Exit

```

Each of the first three options, which access the additional screens described, are offered only if relevant, and only if permitted by the Patron Inquiry Options setup table.

### Blocks Display

The PATRON BLOCKS screen, accessed with the *Blocks display* option, is like the identically named screen in Circulation. This screen lists blocks and charges.

```
02:22pm                PATRON BLOCKS                10 SEP 98

Enter Patron name or barcode : 20000004446689 Patron, Mary

#.#          PATRON TRANSACTIONS          AMT.  CNT   DATE
1          *** Item Waiting from Hold ***
  1      Comparative politics                07-27-98
-----
2          *** Damaged Book ***
  1                                Total Due :    1.50    09-10-98
-----

** LAST SCREEN **
Options:
Forward   Backward   Exit   ? help
```

The standard blocks and charges are:

- administrative holds: too much debt, too many overdue, and so forth.
- lost books (charge)
- items claimed returned
- mail returned
- expired card
- overdue items
- family block
- delinquent (charge)
- messages
- items waiting on hold
- late return fines (charge)
- damaged book (charge)
- lost card
- production charge (charge)
- registration (charge)



- These blocks are defined in the Transaction Codes (CTC) Circulation setup table, and the administrative hold limits are defined in the Patron Group Codes (CPGC) and Patron Type (CPC) tables.

## Items Checked Out

The CIRCULATION CHECKOUT - ITEMS CHECKED OUT screen, accessed with the *Item list* option, is like the identically named screen in Circulation. The screen lists all the items blocked out to the patron.

```
02:24pm                CIRCULATION CHECKOUT                10 SEP 98

Enter Patron name or barcode : 20000004446689 Patron, Mary

ITEMS CHECKED OUT by Patron, Mary                1 of 1 displayed
Num  Call number          Notices  Title                Date due
-----
1)  CAM1 F189.B19 N42 1984a      Party competition and Black po *DUE*  24 AUG 98
      0 Goldberg, Robert                21:00

Options:
? help  # line  Renew line(s)#  Renew all  Backward  Forward  Exit
```

## Password Change

Patrons may change their passwords by selecting the *Password change* option on the PATRON RECORD INQUIRY screen.

```
PATRON RECORD INQUIRY

Patron Barcode.: 20000004446689                Last Update: 09/10/98
Old Barcode.....: 20000004446688,-102962       Last Trans.: 07/27/98
1. Name (Last, F M): Patron, Mary              Registered : 06/18/98
2. Address.....: 456 Northrup Ave
                Markham, Ontario
3. Zip/Postal Code.: MARKHAM, ONT L3R 9T8
4. Phone Number(s): 905-555-1212
5. Address 2.....:

6. Zip/Postal Code.:                          14. Password...: *****
7. Personal ID.....: 274 29 7611              15. Home Inst.: AU-ACADEMIC LIBRARY STA
8. ID Type.....: SSN                          16. Home Subl.:
9. Patron Code.....: STF-Staff                17. Housebound (Y/N) ? : N
10. Expiration Date.: 31 DEC 1999
11. Comments.....:

12. Rte. Recipient...: N
13. Rte. Location...:
    Please enter your OLD password : *****
    Please re-enter your NEW password : *****
```

The patron is prompted for the old password first. If the password is correct, the patron is prompted for the new password. The new password must be entered a second time before the system accepts the change.

# 13

## Online Search Setup

---

This chapter describes the setup tables that are used to customize how OPAC functions in your library.

OPAC setup tables are listed on the ONLINE SEARCH SETUP screen in the sequence in which they should be maintained.

In addition to basic setup, management activities include:

- determining the indexes that will be searched
- defining the screen layout of search screens
- designating the bibliographic print format
- specifying port setup
- determining the text for prompts and help windows
- defining the databases that can be accessed from OPAC
- linking library defined material types to MARC Material Codes
- specifying search synonyms.

## Accessing Setup

To access Online Search Setup, type OSUP on a master menu prompt, or:

1. Select the Online Catalogue from the MASTER MENU.
2. The ONLINE CATALOGUE MASTER MENU appears.
3. Select Online Search Setup from the menu.

```
DD MMM YYYY          Geac ADVANCE Library System (#.##)          P P P P P I I I I I I
HH:DD                Your Library Name

                        ONLINE CATALOGUE MASTER MENU

                        1. SEARCH  Search Online Catalogue
                        2. OLCM   Library Calendars Menu
                        3. DSTOP  Stopword Display
                        4. DART   Leading Article Display

                        5. PAT    Patron Display

                        6. OSUP   Online Search Setup
                        7. ORM    OPAC Reporting Menu

                        8. MM     Return to Master Menu

Enter the number of your selection and press <ENTER>
or ? followed by <ENTER> for Help :
```

## Accessing Setup Tables

The Online Search Setup allows library staff to specify aspects of the online catalogue search features. When Online Search Setup is selected from the ONLINE CATALOGUE MASTER MENU, the ONLINE SEARCH SETUP screen appears.

```
10 SEP 1998          Geac ADVANCE Library System (X.X)          DEFAULT1  AU
14:53              ADVANCE Development X.X
```

### ONLINE SEARCH SETUP

1. OI	OPAC Indexes	10. OHD	OPAC Holdings Display
2. OS	OPAC Searches	11. ORW	Related Works
3. OSC	Search Commands	12. OBOC	Bib. Output Control
4. OSSS	Search Selection Screens	13. OPC	Port Control
5. OCAL	Call Number Listing	14. OL	OPAC Limits
6. OCNL	Control Number Listing	15. OMST	Material Search Type Codes
7. OTSL	Title Summary Listing	16. OKT	OPAC Keyword Thesaurus
8. OBD	Bibliographic Displays	17. CLIST	Cataloguing List Codes
9. OPSCTL	Status Display Control		

Enter the number of your selection and press <ENTER>  
 or ? followed by <ENTER> for Help.  
 Press <ENTER> to return to previous level :

**NOTE:** Some of these control tables are dependant on other control tables being predefined. This menu is designed so that the tables are listed in the sequence in which they should be maintained.

## Setup Options

The options that can be found in the Online Search Setup code screens are:

- Help* Displays a help message for more information.
- Accept* This option appears on the sub screens and is used to accept what is displayed on the screen. NOTE: The *File* option is always used on the main screens when you are ready to file your modified records.
- Add item* This option is used for adding entries to a record or to create new records. In the OPAC setup, when you want to create a new code, the system will prompt:
- ```
Enter the code you wish to add
```
- If you want to create a field, you will have to insert it among the others. The system prompts:
- ```
Enter the field number to insert data before:
```
- This prompt will default to the number of existing fields plus one (after the last).
- For example, if you wish to insert a field between the fields numbered 4 and 5, enter 5 in response to this prompt.
- The system gives you access to a blank workform where you will enter the new field description.
- # line* Enter the line number to edit that line, or a portion of the line. For example, entering 3 at the prompt allows the user to change information in line number three.
- Line by line* Enter or edit the screen line by line.
- Output* Choosing the *Output* option sends the displayed record to an attached printer or allows you to print the screen. Or, if you have the add-on product RefLink, the bibliographic information can be downloaded or emailed to a workstation.
- Forward* This option returns you to the following screen.

<i>Backward</i>	This option allows you to go to the preceding screen.
<i>File</i>	After editing, use the <i>File</i> option to save the changes.
<i>Copy</i>	You can copy the information from another item. When you use this option, the system prompts: Enter the codes to copy from.
<i>Delete</i>	You can delete a record. By using this option the system prompts: Are you sure to delete this code?
<i>Exit</i>	The <i>Exit</i> option allows the user to leave the current screen and return to the previous one, without saving the modifications.
<i>Search Jump</i>	This option allows you to jump forward or backward in a long code list, skipping the screens in between. The option is case sensitive. You have to enter <i>R</i> instead of <i>r</i> to access the <i>R</i> 's.
Show menu	This option appears on the Search Selection Screens table (see <a href="#">Search Selection Screens</a> on page 13-19).

## OPAC Indexes

Enter OI on a menu screen or select OPAC Indexes on the ONLINE SEARCH SETUP screen to access the OPAC INDEXES screen.

The OPAC Indexes table lists all of the possible OPAC Index codes that can be searched.

Many of the OPAC Indexes are described as *user defineable*. This means that they are available for use by the library. In order to implement new OPAC indexes, the library must first modify B.INDEX, run ZIPDEX, and then update OPAC setup screens (see *OPAC Searches* on page 13-8) to use the new Index.

```
OPAC INDEX CODES

Number of records : 22
Code      Description of code
-----
1.  A      Author
2.  B      Program/Organization Name
3.  D      Target Audience
4.  E      User Defineable
5.  F      User Defineable
6.  G      User Defineable
7.  H      User Defineable
8.  I      User Defineable
9.  J      User Defineable
10. K     User Defineable
11. L     User Defineable
12. N     Note
13. O     User Defineable
14. P     Series

Options:
? help  # line  Print  Forward  Backward  Search jump  Exit
```



## OPAC INDEX CODES

: A

- ```

-----
1. Description                : Author
2. OPAC BIB Description       : (Author)
3. OPAC AUTH Description      : *Author*

```

## Options:

```
? help  # line  Line by line  Copy  Print  Exit
```

**Fields**

1. Description [text]

Library defined description of the index code.

2. *OPAC Bib  
Description* [text]

The index name as it appears on the Heading Browse screen for bibliographic searches, for example Author or Subject.

3. *OPAC AUTH  
Description* [text]

The index name as it appears on the Heading Browse screen for authority searches.

## Main Online Catalogue - Heading Browse

Browsing Headings: ALL=SMITH

| Heading                            | Number of Titles |
|------------------------------------|------------------|
| 1. Sleath, Frederick               | (Author) 1       |
| 2. Slocum, Rosalie, illustrator    | (Author) 1       |
| 3. Small business -- Management    | (Subject) 1      |
| 4. Small business -- United States | (Subject) 1      |
| 5. Smay, T. A., joint author       | (Author) 1       |
| 6. Smell -- Social aspects         | (Subject) 1      |

## OPAC Searches

Enter OS on a menu screen or select OPAC Searches on the ONLINE SEARCH SETUP SCREEN to access the OPAC SEARCHES screen.

The OPAC Searches are coded entries which define all the details regarding an individual type of search or index.

The Search Commands (OSC) are then linked to the index which they search.

```

                                OPAC SEARCHES

Number of records : 51
Code           Description of code
-----
1.  A          B   Author Browse
2.  A.A        B   Author Browse
3.  A.A1       B   Personal Name Browse
4.  A.A2       B   Corporate Name Browse
5.  A.A3       B   Conference Name Browse
6.  A.ALL      B   Browse All
7.  A.AS       B   Author/Subject Browse
8.  A.P        B   Series Browse
9.  A.S        B   Subject Browse
10. A.SE       B   Series Browse
11. A.T        B   Title Browse
12. A.W        W   Words
13. A1        B   Personal Name Browse
14. A2        B   Corporate Name Browse

Options:
? help  Add item # line Print Forward Backward Search jump
Exit
```

## OPAC SEARCHES

OPAC SEARCH : B.AUTHOR.A

----- ( Page 1 of 2 )

1. Search Type (W,B,K,C,RC,RM,X,L): B
  2. Description : Author Browse (auth)
  3. Stopword/article code : A
  4. 0=Bib search, 1=Auth search : 1
  5. Prompt for bottom screen : Enter Author Heading
  6. Help messages text : Author Browse\\ Enter the surname of+
  7. Index filename : A.TREE
  8. DCODES : MA,CA
  9. Label for Heading Browse & RBR : Author
  10. Search Descriptor : Browsing Authors:
- \*\* Search type 'K' (Direct key) only \*\*
11. Subroutine name :

## Options:

Forward ? help # line Line by line Copy Print Delete Exit

## Fields

### 1. Search Type

[W,B,K,C,RC,RM,X,L]

Specifies a kind of search and can be modified.

Search types are represented by these codes:

W Word (keyword)

B Browse

K Control number

C Call number

RC Reserve Book Room course

RM Reserve Book Room bibliographic information.

X Expert searches

L Cataloguing lists

### 2. Description

[Text]

Description of the type of search. NOTE: this phrase will be appended to the sentence: *You chose to search.....*, for the Review Facility.

### 3. Stopword/article code

[Character code]

This code corresponds to the stopword/article lists maintained in cataloguing. Determines which stopwords will be dropped and which leading articles will be ignored.

Use the stopword/article list as defined for:

S-Subject

T-Title

A-Author

P-Series

E-Every

4. *0=Bib search,  
1=Auth search* [0,1]  
0 =Bibliographic  
1 = Authority  
For type 'κ' searches:
- The LCCN file is an LCCN index to titles (bibliographic) and should be set to 0.
  - The ALCCN file is an LCCN index to authorities and should be set to 1.
- For word searches:
- If set to 1, the system performs a within-heading search, resulting in a Heading Summary.
  - If set to 0, ADVANCE performs a cross-heading search which displays a Title Summary screen.
  - Multi-command searches produce a Title Summary screen.
5. *Prompt for bottom screen* [Text]  
Will define what will appear on the bottom of the screen when the user chooses to search this index. For example: Enter the name of the Author.
6. *Help messages text* [Text]  
Defines a partial page of help or examples for the user when he chooses to search this index. This prompt uses standard ADVANCE window editor where you can define up to 18 lines of 78 characters of online help for the SEARCH ENTRY screen.
7. *Index filename* [Character code]  
Name of the field containing the index.  
For example:  
WORDS  
A.TREE  
CALLNO  
Nothing

ISNO/LCCN/ . . .

CLISTS

### 8. DCODES

Represents the type of index that will be searched. Each DCODE can consist of a letter only, A-Z excluding M, C, X and Z (reserved for special purposes), special characters \ [ ] > ! # \$ % ( ) ~ or a letter with a number from 0-9.

Typically, ADVANCE uses the following letters and numbers. Other codes may be defined by the library using the OPAC Indexes (OI).

M=Authority

C=See references

T=Title

A=Author

S=Subject

P=Series

N=Notes

1=Personal Name

2=Corporate Name

3=Meeting Name

4=Uniform Title

5=Topical

Each DCODE represents an “OR condition”. Multiple codes in one entry represent an “AND condition”.

There are two search types: B (Browse search) and w (Word search).

**B Search Type** In a ‘B’ (browse) search type you can use one to three codes:

- up to one code of: M, C
- up to one code of: T, A, S, P, N (or others defined in OPAC Indexes (OI)).
- up to one code of: 1, 2, 3, 4, 5 (or others defined in OPAC Indexes (OI)).

If you use more than one code, the system ANDs them. Examples: A1 means search personal name authors; M means all authorities; CA2 means corporate name author cross references.

If you use a comma between sets of codes, the system ORs them. For example, A1 , A2 means search both personal name authors and corporate name authors.

**W Search Type** In a 'w' (word) search type, you can use one of the codes defined in OPAC Indexes (OI).

If you use a comma between codes, the system ORs them. For example, T, P would search all title and series title entries.

**9. Label for Heading Browse**

[Text]

This text will appear above the column of headings on the Heading Browse or Heading Summary Listings screen for 'B' or 'W' type browse searches.

**10. Search Descriptor**

[Text]

This text is used as the label preceding the search command on OPAC screens.

**11. Subroutine**

[Character Code]

Subroutine to call for search string preparation, only used for type 'K' searches.

Currently, the only two indexes requiring search string preparation are:

| <b>INDEX</b> | <b>SUBROUTINE</b> |
|--------------|-------------------|
| LCCN         | OPAC.LCCN.CONVERT |
| OCLC         | OPAC.OCLC.CONVERT |

## Sample Screens

Some sample screens have been chosen to illustrate the impact of the set up on the search screens for your library.

Following are two search screens corresponding to the sample Search Index definition for A (author browse). The elements controlled by the definition are underlined in the screens.

The standard search screen displays:

- *Search Descriptor* (e.g. Your Author:).

The heading browse search screen displays:

- *Search Descriptor* (e.g. Your Author:)
- *Label for Heading Browse* (e.g. Author).

```
Online Catalogue - Heading Browse
Your Author: A=BROWN

  Author                                     Number of Titles
1. Broutman, Lawrence J., joint author      1
2. Brouwer, Walther                          1
3. Browder, Earl, 1891-1973                 1
4. Browder, Leon W.                         1
5. Brower, Kenneth, 1944-                  1
6. Browman, David L                         1
>>>
7. Brown, A. G.                             1
8. Brown, Abbie Farwell, d. 1927           1
9. Brown, Alan Gordon John, 1931-          2
10. Brown, Alfred John, 1893-              1
11. Brown and Caldwell                      1
12. Brown, Anthony William Aldridge, 1911- joint author 1
13. Brown, Antoinette B., joint author     1

...Continued...
Options:  Enter lines (e.g. 1 or 1,2 or 1,2,4 or 1-4 or 1,3-4 etc.)
# line(s) Forward Backward Prior screen Search jump
Modify Search Review search OPAC parms New search
Reset Output # ? help
```



The SEARCH ENTRY screen displays:

- *Help messages text* (e.g. Author Search and the following lines)
- *Prompt for bottom screen* (e.g. Enter the name of the Author:).

```
Online Catalogue - Search Entry Screen
Author Search
  Enter the name of the AUTHOR, last name first.

Examples:
  Shakespeare
  SMITH MARY

Enter the name of the Author:
```

## Search Commands

The Search Commands are the codes used in later tables and by OPAC users to identify the desired search.

This table defines the available command codes and the index which is to be searched when the command code is used. You can access the OPAC SEARCH COMMANDS screen either by entering OSC on a menu screen or by selecting Search Commands on the ONLINE SEARCH SETUP screen.

| OPAC SEARCH COMMANDS   |                     |       |  |
|------------------------|---------------------|-------|--|
| Number of records : 46 |                     |       |  |
| Code                   | Description of code |       |  |
| -----                  |                     |       |  |
| 1. A                   | A                   | A.A   |  |
| 2. A1                  | A1                  | A.A1  |  |
| 3. A2                  | A2                  | A.A2  |  |
| 4. A3                  | A3                  | A.A3  |  |
| 5. AI                  | AI                  |       |  |
| 6. ALL                 | ALL                 | A.ALL |  |
| 7. ANY                 | ANY                 |       |  |
| 8. ASW                 | ASW                 |       |  |
| 9. AT                  | AT                  |       |  |
| 10. AUTHOR             | A                   |       |  |
| 11. AW                 | AW                  | AW    |  |
| 12. C                  | C                   |       |  |
| 13. CALL               | CALL                |       |  |
| 14. CD                 | CD                  |       |  |

Options:  
? help   Add item   # line   Print   Forward   Backward   Search jump  
Exit

You can create as many commands as you want.

You can choose to display one of the codes and to see with which existing search command it is linked.

OPAC SEARCH COMMANDS

SEARCH COMMAND : LCCN

- 
1. Bibliographic Search           : LCCN = K
  2. Authority Search             : ALCCN = K

Options:

? help   # line   Line by line   Copy   Print   Delete   Exit

## Fields

1. Bibliographic Search Index [Character code]  
This field defines the index which will be searched when the search command is used from all places in the main database except authority cataloguing.  
If you leave this field blank it can not be used for bibliographic searches in the main database.
  2. Authority Search Index [Character code]  
This field defines the index which will be searched when the search command is used from authority cataloguing in the main database.  
If you leave this field blank it cannot be used for authority searches.
- Additional Fields
- If the library has implemented additional databases, using the optional, add-on Citation Database product or Community Information Module, there will be additional bibliographic and authority search fields on this screen, one of each for each additional database.

## Search Selection Screens

The ADVANCE OPAC Module allows the library to define any number of Search Selection Screens. Individual workstations and/or users, can be assigned different screens (see *OPAC Port Control* on page 13-100).

Enter OSSS on a menu screen or select Search Selection Screens on the ONLINE SEARCH SETUP screen to access the SEARCH SELECTION SCREEN DEFINITION. You will be presented with the codes used in your library.

```

SEARCH SELECTION SCREEN DEFINITION                                MASTER

Number of records : 3
Code      Description of Code
-----
1.  DETAIL  Search Selection Detail Screen
2.  PUBLIC  Search Selection Detail Screen
3.  SIMPLE  Search Selection Simple Screen

Options:
# line  Add item  Forward  Backward  ? help  Exit

```

Choosing one existing code sends you to the SEARCH SELECTION SCREEN FIELD DEFINITION BROWSE where the display labels and their position on the screen are presented. From this screen you can copy, delete or file the record.

```
SEARCH SELECTION SCREEN FIELD DEFINITION BROWSE          MASTER

SCREEN CODE :      DETAIL

1. DESCRIPTION      : Search Selection Detail Screen

2. DEFAULT DATABASE : MAIN - Main Online Catalogue
3. RESERVED AREA

FIELD  COLUMN  ROW  DISPLAY LABEL

4.     10      0  Wel c o m e   t o   t h e   O n l i n e   C a t
5.      1      2  LOOK FOR THE FIRST WORD IN THE:
6.     45      2  LOOK FOR ANY WORD IN THE:
7.      4      3  Subject
8.     48      3  Subject
9.      4      4  Title

Options:
File # line  Add item  Show menu  Forward  Backward  Copy  Delete
? help  Exit
```

## Fields

- |                     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|---------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. DESCRIPTION      | [text]<br><br>Library defined explanation of <i>SCREEN CODE</i> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 2. DEFAULT DATABASE | [null or library defined code]<br><br>This field will not appear if your library does not subscribe to additional databases.<br><br>If your library has implemented additional databases such as ABI or IAC which use the optional Citation Database product or Community Information Module, you may specify a default database. Enter ?? to obtain a list of databases.<br><br><i>Null</i> When you navigate through the library's defined hierarchy of search selection screens and arrive at the screen being defined by this table, the database will not be changed. Any subsequent expert searches will act upon the last database which was searched. You may want to leave this field blank if your screen(s) are generic and do not contain text which indicates that you are in a specific database.<br><br><i>Library Defined Code</i> When you navigate through the library's defined hierarchy of search selection screens and arrive at the screen being defined by this table, the database will be changed to the database specified in this field. You may want to use this field if your screen(s) contain text which indicates that you are in a specific database. |
| 3. RESERVED AREA    | This selection accesses the SEARCH SELECTION SCREEN - RESERVED AREA. (See <i>Reserved Area</i> on page 13-23.)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| Display Fields      | The bottom area of the screen is a summary listing of the fields which are defined in the SEARCH SELECTION SCREEN FIELD DEFINITION.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |

## Options

- |                  |                                                                                                                                                                                                                                                           |
|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>Show menu</i> | Simulates what will be presented during the search.<br><br>You can use this display to test the highlighting/cursoring and so on.<br><br>After exiting from the Show menu, the system returns you to the SEARCH SELECTION FIELD DEFINITION BROWSE screen. |
|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

*File* The system validates that none of the defined fields or reserved areas overlap.

If overlap is detected, an error message describing the problem will be displayed and the user will not be able to file the screen.



## Reserved Area

Selecting *RESERVED AREA* from the SEARCH SELECTION SCREEN FIELD DEFINITION BROWSE will access the SEARCH SELECTION SCREEN - RESERVED AREA.

```

SEARCH SELECTION SCREEN RESERVED AREA                                MASTER

SCREEN CODE :      DETAIL

COMMAND PROMPT
1. COLUMN POSITION :    1
2. ROW POSITION   :   19
3. FIELD LENGTH  :   78

HELP MESSAGE
4. COLUMN POSITION :    1
5. ROW POSITION   :   20
6. FIELD LENGTH  :   78

PARAMETERS CHANGED MESSAGE
7. COLUMN POSITION :    8
8. ROW POSITION   :    9
9. TEXT          : Parameters Changed

Options:
# line  Accept  Exit   ? Help

```

This screen is divided into three groups with similar fields. Each of the groups defines the position and size of a reserved area on the Search Selection Screen.

In each of the groups:

- **COMMAND PROMPT:** defines the column, row and length of the entry area for search commands.
- **HELP MESSAGE:** defines the column, row and length of the help line for currently selected field.
- **PARAMETERS CHANGED MESSAGE:** defines the column, row and the text of the message which is to appear when the user has overridden the default search parameters.

**Fields**

1. COLUMN POSITION [0-79]

2. ROW POSITION [0-23]

3. FIELD LENGTH [Number]

The total of column position and field length should not exceed 80.

4-8 COLUMN POSITION, ROW POSITION AND FIELD LENGTH  
Same description as above.

9. TEXT [Text]

The message which is to appear when the user has overridden the default search parameters.

## Search Selection Screen Field Definitions

Upon selecting an existing or adding a new field to the SEARCH SELECTION FIELD DEFINITION BROWSE screen, the SEARCH SELECTION SCREEN FIELD DEFINITIONS will appear.

This screen is used to define the details of any one segment of text to appear on the defined search selection screen.

```

SEARCH SELECTION SCREEN FIELD DEFINITIONS          MASTER

SCREEN CODE : DETAIL                               FIELD NUMBER : 6

1. Column : 4
2. Row   : 3
3. Display Label :
   Subject
4. Highlight for Display Label ( 0=No highlight , OR 1-18 ) :

5. Type ( 0=text , 1=menu , 2=command , 3=subroutine ) : 2
6. Help text ( only if type = 1 , 2 or 3 ) :
   Enter the Subject
7. Database Code ( only if type = 2 ): MAIN          Command Code: S
8. OPAC Screen ( only if type = 1 ) :
9. Subroutine to call :
Options:
  Accept  Line by line  # line  Show menu  Delete  ? help  Exit

```

Again, you can use the *Show Menu* option to display the result of your set up.

### Fields

- |                  |                                                      |
|------------------|------------------------------------------------------|
| 1. <i>Column</i> | [0-79]<br>Defines the column position for the label. |
| 2. <i>Row</i>    | [0-23]<br>Defines the row position for the label.    |

### 3. *Display label* [Text]

This is the text which will appear in the designated position.

### 4. Highlight for Display Label [0,1,...,18]

This value defines the appearance of the display label. You can choose between 18 different types of highlighting. A value of 0 indicates that the label is not to be highlighted.

The available types of highlights are displayed when you access the field. Note that the appearance of a particular highlight is dependant on the terminal type. For example, specify 7 to have the display label highlighted the same way that column headers are (e.g. reverse video, colour, intensity).

```
4. Highlight for Display Label ( 0=No highlight , OR 1-18 ) :
  1= Screen Header   2= Library Name   3= Attention       4= Screen Name
  5= Display Label   6= Field Label   7= Column Header  8= Message
  9= Option Prompt  10= Option Char  11= Option Desc  12= Error Message
 13= Input          14= Normal Text  15= Menu Field   16= Menu Code
 17= Menu Option   18= Window Border
```

- 1 = Screen header on top line of screens.
- 2 = Library name on second top line of screens.
- 3 = Attention message.
- 4 = Screen name, usually on top or third line of screens.
- 5 = Label for a field users cannot change.
- 6 = Label for a field users can change
- 7 = Column heading.
- 8 = General message.
- 9 = The "Options:" prompt.
- 10 = Characters displayed in the option line.
- 11 = Descriptions displayed beside "Options:" and in the options list.
- 12 = Error messages.
- 13 = Prompt window input area.
- 14 = Normal text.
- 15 = Menu item description and number.
- 16 = Menu screen identifier.
- 17 = Menu prompt for selecting an item.
- 18 = Border around window editor (e.g. help window editor).

5. *Type* [0,1,2,3]  
Type of the fields:
- 0 This is an explanatory note to be placed on this screen.
  - 1 This is a selectable menu option and will involve another search selection screen.
  - 2 This is a selectable search option and will involve a search command.
  - 3 This is a selectable option which will call a subroutine.
6. *Help text* [Text]  
This text will appear in the reserved area for help messages, whenever the OPAC user is currently positioned on the option (used for types '1', '2', '3').
7. *Database Code* [Character code]  
For type '2' only.  
Specify the database to be searched. Enter `MAIN` for the main database, or another database code if the library has implemented additional databases (such as ABI, IAC, or CIM) with the optional, add-on Citation Database product or the Community Information Module.
- Command Code* [Character code]  
For type '2' only.  
Code from the Search Commands table. This defines which search is to be executed when the OPAC user selects this option.
8. *OPAC screen* [Character code]  
For type '1' only.  
Table prompt from the Search Selection screens. Defines the other search selection screen which is to be invoked when the OPAC user selects this option.  
  
NOTE: when you define an option which invokes another search selection screen, you should also define options on the other screen which

will return to this screen. Otherwise, the OPAC user will not be able to get back to the original screen.

9. *Subroutine to call*

[Character code]

For type '3' only.

Defines the ADVANCE subroutine which is to be called when the user selects this option.

This facility is for adding options which call on subroutines for special options within the system.

Example: you can call `OP.DISPLAY.PATRON` if you wish to provide access to the patron inquiry function from the defined search selection screen.

Any subroutine called should meet the following criteria:

- It should have no parameters.
- If it issues any prompts, it must have a code for handling the OPAC time-out feature.

Example:

In order to set up a bilingual OPAC workstation with the ability to quickly switch the language between English and French, follow these steps:

1. Create two subroutines: one will change the current language to French and the other to English.
2. To the French version of the screen, add a type '3' field "Speak English" which calls the appropriate subroutine from step 1.
3. To the English version of the screen, add a type '3' field "Parlez-vous en francais" which calls the subroutine which changes the language to French.

## Call Number Listing

The set up of new functions is done through similar series of screens where the libraries can tailor the display of the Online Catalogue, for their own needs: Call Number Listing, Control Number Listing, Title Summary Listing, Bibliographic Display screens, Pieces summary and Related works.

The Call Number Listing, Control Number Listing and Title Summary screens maintenances are very similar.

The purpose of the CALL NUMBER LISTING SCREEN DEFINITION screen is to allow the user to define the presentation of the searched results for call number searches.

When maintaining this table, the system first displays a list of all related types of OPAC Searches.

NOTE: You can not add or delete items from this table. You may only define the screens for existing type 'C' search indexes.

From this list, the user will select the index for which he/she wishes to modify screen definition.

The Call Number Listing table is accessed by entering OCALL on a menu screen or by selecting Call Number Listing on the ONLINE SEARCH SETUP screen. The CALL NUMBER LISTING SCREEN DEFINITION appears.

```

                                CALL NUMBER LISTING SCREEN DEFINITION                                MASTER
Number of records : 4
Code      Description of Code
-----
1. C      CALL NUMBER

Options:
# line  Forward  Backward  ? Help  Exit

```

The user is then presented the screen CALL NO LISTING SCREEN FIELD DEFINITION BROWSE

```
CALL NO LISTING SCREEN FIELD DEFINITION BROWSE      MASTER

CODE :      C

1. CALL NUMBER WIDTH      : 20
2. CALL NUMBER HEADING   : Call Number

FIELD  WIDTH  HEADING
3.     50     Title

Options:      Enter specified line number
File # line  Add item Forward Backward Copy ? help Exit
```



## Fields

1. *CALL NUMBER WIDTH* [Numeric 1-74]

This field defines the width for the first column which will display the call number.

2. *CALL NUMBER HEADING* [Text]

This field defines the heading for the first column.

*FIELD; WIDTH; HEADING* [Numeric; Text]

This is a summary of the additional columns which have been defined for the screen. Each line represents one additional column.

You can add new columns to the screen using the *Add item* option or access an existing column with the *#line* option. In either case the CALL NO LISTING SCREEN SUBFIELD BROWSE screen will appear.

This screen defines the size, heading and contents for the column.

```

                                CALL NO LISTING SCREEN SUBFIELD BROWSE                                MASTER
                                CODE :      C
                                FIELD :      3

1. FIELD WIDTH      : 50
2. FIELD HEADING   : Title

SUBFIELD   TYPE      VALUE
  3.         0         4

Options:   Enter specified line number
Accept # line Line by line Add item Forward Backward Delete
? help Exit

```

## Fields

1. FIELD WIDTH [Number]

Defines the width of the column.

NOTE: In the resultant screen displayed in OPAC, each column will be displayed with only one space between them. Also the first 6 positions of the available screen space are reserved for the display of the sequential number on the browse list. The total width of all columns defined should not exceed 74 (80-6) including the space between the columns.

2. FIELD HEADING [Text]

Defines the heading for the column.

SUBFIELD, TYPE,  
VALUE

This is a summary of the data elements which have been defined for the column. Each line represents one additional data element.

You can add new data elements to the column using the Add item option or access an existing data element with the #line option. In either case the CALL NO LISTING SCREEN SUBFIELD DEFINITIONS screen will appear.

```
CALL NUMBER LISTING SUBFIELD DEFINITIONS          MASTER

CODE      : C
FIELD     : 3 - Title
SUBFIELD  : 3

1. Field type           : 0
2. Field value         : 4
3. Subfields           :
4. Indicator 1 match   :
5. Indicator 2 match   :
6. Indicator 3 match   :
7. Indicator 4 match   :
8. Indicator 5 match   :
9. Indicator 6 match   :
10. Indicator 7 match  :
11. Indicator 8 match  :
12. Indicator 9 match  :

Options:
Accept  Line by line  # line  Delete  ? Help  Exit
```

## Fields

### 1. *Field type*

[0,1,2]

- 0 The data element to be included in the screen is defined in terms of an attribute within the B.MASTER file which contains a list of Authority Heading Keys.
- 1 The data element to be included in the screen is defined in terms of an attribute within the B.MASTER file which contains data to be displayed.
- 2 The data element to be included in the screen is defined in terms of a MARC definition.

NOTE: The entire screen could be defined using only MARC definitions but because of the design of the existing ADVANCE database, extracting the data using the MARC definition is the slowest method and therefore the user should use type '0' or '1' where possible, in order to maximize OPAC performance.

MARC definitions should only be used where the desired data element has not already been pre-extracted/processed by the Cataloguing Module or when you wish to put additional restrictions on the indicator values and MARC subfields to be displayed.

### 2. *Field value*

[Number]

The contents of this field depend on the *Field type*.

- If *Field type* is 0 Attribute number which contains the list of authority keys. The values meaningful in this case are:
  - 4 = title headings
  - 5 = author headings
  - 6 = subject headings
  - 7 = series headings
- If *Field type* is 1 Attribute number which contains the desired data in the B.MASTER file. Consult the B.MASTER data dictionary for the possible values.
- If *Field type* is 2 MARC tag which is to be extracted.

NOTE: The following fields are only applicable if *Field type* is 2.

3. *Subfields*

[Alphanumeric]

List of MARC subfields which are to be displayed for the tag. If left blank, then all the subfields present in the data will be displayed.

Please consult your MARC manuals for possible tag/subfield combinations.

This list of subfields is entered without any punctuation between the individual values. For example if you wish to display the a,b,c and d subfields for a given tag, enter: 'abcd'.

4-20. *Indicator 1 match  
to Indicator 9 match*

[Number]

List of possible indicator values for positions 1 through 9. The data for the tag will only be displayed if its indicator in the respective position matches one of the possible values in the list.

As with *Subfields*, this list is entered as a string of characters. If left blank, then all possible values for the indicator position will be accepted.

If you wish to display tags with specific indicator values and one of those values is a blank, use  $\text{\textcircled{B}}$  to denote the allowed value of blank.

**Result**

This is the result of the previous set up.

## Online Catalogue - Call Number Listing

Browsing Call Numbers: C=QA23

| Call Number       | Title                                                                               |
|-------------------|-------------------------------------------------------------------------------------|
| 1. QA21 .C3       | Vorlesungen uber geshichte der mathematik                                           |
| 2. QA21 .H58      | Geschichte der Mathematik                                                           |
| 3. QA21 .H58 1957 | The history of mathematics                                                          |
| 4. QA21 .K525     | Mathematics, the loss of certainty                                                  |
| 5. QA22 .R4       | Das exakte Denken der Griechen; Beitrage zur Deutung von Euklid, Plato, Aristoteles |

>>>

|                        |                                                                     |
|------------------------|---------------------------------------------------------------------|
| 6. QA26 .K5313         | Development of mathematics in the 19th century                      |
| 7. QA27.I4 B2          | Mathematical research in India : (A brief review)                   |
| 8. QA27.P67 K7813 1980 | A half century of Polish mathematics : remembrances and reflections |

...Continued..., 0 titles selected

Options:    Select lines (e.g. 1 or 1,2 or 1,2,4 or 1-4 or 1,3-4 etc.)  
# line(s) Select   Proceed   Forward   Backward   Prior screen  
Search jump   Review search   OPAC parms   New search   Reset   Output  
? help

### Another Example

You can define other parameters for the display of the Catalogue.

```
CALL NO LISTING SCREEN FIELD DEFINITION BROWSE          MASTER

CODE :    CALL

1. CALL NUMBER WIDTH   : 25
2. CALL NUMBER HEADING : *Call Number*

FIELD  WIDTH   HEADING
3.     35      ** Title / Author **
4.     6       *Year*
```

Options: Enter specified line number  
File # line Add item Forward Backward Copy ? help Exit

```
CALL NO LISTING SCREEN SUBFIELD BROWSE          MASTER

CODE :    CALL
FIELD :    4

1. FIELD WIDTH   : 6
2. FIELD HEADING : *Year*
```

| SUBFIELD | TYPE | VALUE |
|----------|------|-------|
| 3.       | 2    | 260   |

Options: Enter specified line number  
Accept # line Line by line Add item Forward Backward Delete  
? help Exit

In this second example the listing will appear with the call number, the title and the year.

```

                                QA DB - Call Number Listing
CALL=QA23

    *Call Number*                ** Title / Author **                *Year*
1. QA21 .K525                    Mathematics, the loss of certainty/ 1980.

                                Kline, Morris, 1908-
2. QA22 .R4                      Das exakte Denken der Griechen;    [1949]
                                Beitrage zur Deutung von Euklid,
                                Plato, Aristoteles .
                                Reidemeister, Kurt, 1893-

>>>
3. QA26 .K5313                  Development of mathematics in the   c1979.
                                19th century/
                                Klein, Felix, 1849-1925
4. QA27.I4 B2                   Mathematical research in India : (A 1947.
                                brief review) /
                                Banerji, A C

...Continued..., 0 titles selected
Options:  Select lines (e.g. 1 or 1,2 or 1,2,4 or 1-4 or 1,3-4 etc.)
# line(s) Select  Proceed  Forward  Backward  Prior screen
Search jump  Review search  OPAC parms  New search  Reset  Output
? help

```

## Control Number Listing

The purpose of the CONTROL NUMBER LISTING SCREEN DEFINITION is to allow the user to define the presentation of the searched results for control number searches.

This table maintenance is very similar to the Call Number listing. For detailed explanation see *Call Number Listing* on page 13-29.

For your convenience, four screens are presented; within this maintenance; note the small number of differences between them.

To access the CONTROL NUMBER LISTING SCREEN DEFINITION enter OCNL anywhere on a master menu or select Control Number Listing on the ONLINE SEARCH SETUP screen.

```
                                CONTROL NUMBER LISTING SCREEN DEFINITION                                MASTER

Number of records : 8
Code      Description of Code
-----
1. AI     ISBN/ISSN
2. CD     CODEN
3. CN     CONTROL NUMBER
4. I      ISBN/ISSN
5. L      LCCN
6. LCN    LCN
7. MP     MUSIC PUBLISHER NO.
8. O      OCLC

Options:
# line  Forward  Backward  ? Help  Exit
```

This CONTROL NUMBER LISTING SCREEN DEFINITION screen differs from the Call Number Listing only in this screen lists the OPAC Searches which are type 'k'.



```
CONTROL NO LISTING SCREEN FIELD DEFINITION BROWSE      MASTER

CODE :      CN

1. CONTROL NUMBER WIDTH   : 12
2. CONTROL NUMBER HEADING : CONTROL NUMBER

FIELD  WIDTH  HEADING
3.    40     Title
4.    20     Author

Options:
File # line  Add item  Forward  Backward  Copy  ? help  Exit
```

```
CONTROL NO LISTING SCREEN SUBFIELD BROWSE      MASTER

CODE :      CN
FIELD :      3

1. FIELD WIDTH   : 50
2. FIELD HEADING : Title

SUBFIELD  TYPE  VALUE
3.        0    4

Options:
Accept # line  Line by line  Add item  Forward  Backward  Delete
? help  Exit
```

The only difference between the preceding two screens and the ones for Call Number Listing is the name of some prompt labels.

```
                CONTROL NUMBER LISTING SUBFIELD DEFINITIONS          MASTER

      CODE      : CN
      FIELD     : 3 - Title
      SUBFIELD   : 3

1. Field type      : 0
2. Field value    : 4
3. Subfields      :
4. Indicator 1 match :
5. Indicator 2 match :
6. Indicator 3 match :
7. Indicator 4 match :
8. Indicator 5 match :
9. Indicator 6 match :
10. Indicator 7 match :
11. Indicator 8 match :
12. Indicator 9 match :

Options:
Accept  Line by line  # line  Delete  ? help  Exit
```

The only difference between this screen and the corresponding Call Number Listing screen is:

- The field type for Call Number allows type '0' or '1' or '2'.
- Since Control listing can be for bibliographic or authority indexes, only type '1' and '2' are valid when maintaining a table for an authority control number listing.

## Title Summary Listing

The display of the title summary list screens is set up on the TITLE SUMMARY LISTING SCREEN DEFINITION and the connected screens.

You will define there the labels to display on the Title Summary Lists screens.

Access the TITLE SUMMARY LISTING SCREEN DEFINITION by entering OTSL on a master menu or by selecting Title Summary Listing on the ONLINE SEARCH SETUP screen.

### Multiple Databases

If the library has any citation databases or the Community Information Module installed (using the optional, add-on Citation Database product or the Community Information Module), the OPAC TITLE SUMMARY SCREENS screen will be shown first. This screen lists the database codes for the main online catalogue, the citation databases, and the Community Information database. Select a database.

The following sample screens are for the main online catalogue.

```

                                TITLE SUMMARY LISTING SCREEN DEFINITION                                MASTER

CODES record : OPAC.TITLE.SUMMARY.MAIN

FIELD  WIDTH  HEADING
  1.    60    Author/Title
  2.     4     Year

Options:
File  # line  Add item  Forward  Backward  Copy  ? Help  Exit

```

In this example, the two columns, Author/Title and Year, will appear on the Title Summary List screens.

You can choose one field to access the TITLE SUMMARY LISTING SCREEN SUBFIELD BROWSE.

```
TITLE SUMMARY LISTING SCREEN SUBFIELD BROWSE          MASTER

CODE : OPAC.TITLE.SUMMARY.MAIN
FIELD : 1

1. FIELD WIDTH : 60
2. FIELD HEADING : Author/Title

SUBFIELD  TYPE  VALUE
3.         0    5
4.         2    245

Options:
Accept # line  Line by line  Add item  Forward  Backward  Delete
? help  Exit
```

The only differences between this screen and the one for the Call Number Listing are that there is no list of indexes (which means it is a global definition) and it is not assumed that the first column is used for the search string.

You can edit the data by choosing one subfield to reach the TITLE SUMMARY LISTING SUBFIELD DEFINITIONS.

```

                                TITLE SUMMARY LISTING SUBFIELD DEFINITIONS          MASTER

      CODE   : OPAC.TITLE.SUMMARY.MAIN
      FIELD  : 3   - Author/Title
      SUBFIELD : 4

1. Field type      : 2
2. Field value    : 245   - TITLE STATEMENT
3. Subfields      : abc
4. Indicator 1 match :
5. Indicator 2 match :
6. Indicator 3 match :
7. Indicator 4 match :
8. Indicator 5 match :
9. Indicator 6 match :
10. Indicator 7 match :
11. Indicator 8 match :
12. Indicator 9 match :

Options:
Accept  Line by line  # line  Delete  ? Help  Exit
```

For more detail on the screen fields see the [Call Number Listing](#) on page 13-29.

## Results

This is the result of the previous set up.

```
Online Catalogue - Title Summary
Your Search: AW=TWAIN

Author/Title                                     Year
1. Twain, Mark, 1835-1910                       1935
   The adventures of Tom Sawyer.
2. Twain, Mark, 1835-1910                       1899
   Pudd'nhead Wilson and Those extraordinary twins , by Mark
   Twain [i.e. S. L. Clemens]
3. Twain, Mark, 1835-1910                       1984
   The innocents abroad ; Roughing it/ Mark Twain
4. Twain, Mark, 1835-1910                       1938
   Mark Twain's letter to William Bowen, Buffalo, February
   sixth, 1870. Prefatory note by Clara Clemens Gabrilowitsch;
   foreword by Albert W. Gunnison.
5. Twain, Mark, 1835-1910                       1985
   Adventures of Huckleberry Finn/ illustrated by Barry Moser ;
   foreword by Henry Nash Smith.

15 titles in list,
Options:
# line(s)  Forward  Prior screen  Sort  All  Modify search
Review search  OPAC parms  New search  Reset  Output #  ? help
```

Example

Here, the author, title and year will be displayed in three different columns. The width for each column is defined in the set up.

```

                                TITLE SUMMARY LISTING SCREEN DEFINITION
                                MASTER

CODES record : OPAC.TITLE.SUMMARY.MAIN

FIELD  WIDTH  HEADING
  1.    20    Author
  2.    40    Title
  3.     5    Year

Options:
File   # line  Add item  Forward  Backward  ? help  Exit

```

```

                                Online Catalogue - Title Summary
Your Search: S=HISTORY

  Author..... Title..... Year
1. Saint-Real, M.   Conjuraton des Espagnoles contre la   1829
   l'abbe de (Cesar republicue de Venise, precedee de sept
   Vichard), 1639-1692 discours sur l'histoire, et suivie de la
                        Conjuraton des Gracques , par
                        Saint-Real.
2. Gooch, G. P. (George History and historians in the nineteenth 1959
   Peabody), 1873-1968 century. With a new introd. by the
                        author .
3. Vance, John A., Samuel Johnson and the sense of history/ 1984
   1947- John A. Vance.
4. LaCapra, Dominick, History and criticism/ Dominick LaCapra. 1985
   1939-

12 titles in list
Options:
# line(s) Forward Prior screen Sort All Modify Review search
OPAC parms New search Reset Output # ? help

```

## Bibliographic Displays

From this table you can define the content of the item display screens for both the brief and full display options within OPAC, and for each combination of module and database.

Screen definitions are both module and database specific. Each definition is comprised of three parts: the module, the display type, and the database code; each part is separated by a hyphen (-). The module can be one of: ACQ, CAT, CIRC, SER, or OPAC. The type of display can be: DETAILED (used for the full display option within OPAC) or SIMPLE (used for the brief display option within OPAC). The database code must be one of the databases defined in the AODB code table.

When a searched item is displayed, the system will attempt to use the definition for the specific module from which the user is searching, the type of display being used, and the database being searched.

If the appropriate definition does not exist, the system will display an error message.

The BIBLIOGRAPHIC DISPLAY SCREEN DEFINITION is accessed either by entering OBD on a menu screen or by selecting *Bibliographic Displays* on the ONLINE SEARCH SETUP screen.

A list of modules and their screen definitions appears.



```
BIBLIOGRAPHIC DISPLAY SCREEN DEFINITION                                MASTER

Number of records : 10
Code
-----
1. ACQ-DETAILED-MAIN
2. ACQ-SIMPLE-MAIN
3. CAT-DETAILED-MAIN
4. CAT-SIMPLE-MAIN
5. CIRC-DETAILED-MAIN
6. CIRC-SIMPLE-MAIN
7. OPAC-DETAILED-MAIN
8. OPAC-SIMPLE-MAIN
9. SER-DETAILED-MAIN
10. SER-SIMPLE-MAIN

Options:
# line  Add item  Forward  Backward  ?-Help  Exit
```

Use the *# line* option to access an existing screen or to add another.

Either option will take you to the screen titled BIBLIOGRAPHIC DISPLAY SCREEN FIELD BROWSE, the first of two screens used to maintain these screen definitions.

In this example the bibliographic display code chosen is OPAC-DETAILED-MAIN. The data is displayed on two screens.

```

                                BIBLIOGRAPHIC DISPLAY SCREEN FIELD BROWSE                                MASTER

BIBLIOGRAPHIC DISPLAY CODE :   OPAC-DETAILED-MAIN
1. LABEL LENGTH : 15
2. SUPPRESS IF NO DATA (1=YES) : 1

FIELD  LINE LABEL                                DATA TO DISPLAY                                RESTRICTIONS
3.   AUTHOR                                     .5
4.   TITLE                                     *245
5.   VARIANT TITLE                             *246
6.   FORMER TITLE                              *247abf
7.   PRIOR TITLE                               *780at
8.   NEW TITLE                                 *785at
9.   SUBJECT                                   .6
10.  SERIES                                   .7,"; ,16
11.  LANGUAGE                                  15
12.  MEDIA                                     8
13.  EDITION                                  14

Options:
File  # line  Add item  Forward  Backward  Copy  Delete  ?-Help
Exit

```

```

                                BIBLIOGRAPHIC DISPLAY SCREEN FIELD BROWSE                                MASTER

BIBLIOGRAPHIC DISPLAY CODE :   OPAC-DETAILED-MAIN
1. LABEL LENGTH : 15
2. SUPPRESS IF NO DATA (1=YES) : 1

FIELD  LINE LABEL                                DATA TO DISPLAY                                RESTRICTIONS
14.  SCALE, ETC.                               *255
15.  PUBLISHER                                 *260a,10
16.  PRODUCTION                               *261
17.  IMPRINT                                  *262
18.  PUB. DATE                                *260c
19.  DESCRIPTION                              13
20.  FIRST ISSUED                             *362
21.  NOTES                                    *500
22.  BIBLIOGRAPHY                             *504
23.  CONTENTS                                 *505a
24.  CITATIONS                                *510

Options:
File  # line  Add item  Forward  Backward  Copy  Delete  ?-Help
Exit

```

1. LABEL LENGTH [Numeric]  
This value designates the width of area on the far left of the resulting display screen which will be used to display the labels.
2. SUPPRESS IF NO DATA [0,1]  
Use 0 (no) or 1 (yes). This flag defines whether empty or non-existing fields should be displayed.  
If set to 0, empty fields will be displayed.  
If this flag is set to 1, the empty fields will not be displayed.
- FIELD; LINE LABEL;  
DATA TO DISPLAY;  
RESTRICTIONS [Numeric; text]  
Summary display of the fields which have been previously defined for the screen.  
Use the *Add item, # line* option in order to add or edit an existing field.  
Either option will take you to the screen titled: BIBLIOGRAPHIC DISPLAY SCREEN FIELD DEFINITIONS.

```

                                BIBLIOGRAPHIC DISPLAY SCREEN FIELD DEFINITIONS   MASTER
FIELD NUMBER : 3      BIBLIOGRAPHIC DISPLAY CODE : OPAC-DETAILED-MAIN

1. Line Label : AUTHOR
2. Data to Display : *100abdn
3. Prefix for CODES lookup :
4. Characters to Drop :
5. Display ALL Tag Occurrences (1=yes) :
6. Display ALL Subfld occurrences (1=yes) :
7. Print Subflds on 1 line (1=yes) :
8. Fixed Subfld :
9. Fixed Tag/Subfld Position :
10. Indicator 1 Match :
11. Indicator 2 Match :
12. Indicator 3 Match :
13. Indicator 4 Match :
14. Indicator 5 Match :
15. Indicator 6 Match :
16. Indicator 7 Match :
17. Indicator 8 Match :
18. Indicator 9 Match :
Options:
Accept  Line by line  # line  Delete  ? help  Exit
19. Maximum Lines :
20. Repeat Delimiter: ;
21. Format codes :
22. Material codes:

```

From this screen, all the information regarding a single displayed field is defined.

## Fields

- |                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|-----------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. <i>Line label</i>              | [Text]<br><br>Defines the label which is to appear to the left of the field. If this field is left empty, the last non-null value for the previous fields will be used.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 2. Data to display                | [Character code]<br><br>.nn indicates that the field is to be extracted from the list of authority keys contained in attribute nn of the B.MASTER record.<br><br>nn indicates that the field is to be extracted from attribute nn of the bibliographic record.<br><br>*nnnxxx indicates that the field is to be extracted from the MARC record for tag nnn. Optionally, you can specify the list of subfields which are to be displayed (xxx). For example, *245abc would extract the 245 tag, subfields a, b and c. If no subfields are listed, then all subfields for the data element will be displayed. Add the suffix UK (such as *245UK or *245abcUK) if you want UKMARC ISBD display punctuation used. |
| 3. Prefix for CODES lookup        | [Text]<br><br>If the data element extracted from the bibliographic record contains a code from a table and you wish to display the description as opposed to the code, enter the prefix used in the CODES file for that table. For example Language code would use "LANG-".                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 4. Characters to Drop             | [String of characters]<br><br>If the extracted data contains unwanted characters, use this field to remove them. Any characters entered here will be removed from the extracted data prior to display.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 5. Display ALL Tag Occurrences    | [0,1]<br><br>0 (no) will cause only the first occurrence to be displayed.<br><br>1 (yes) will cause all occurrences of the MARC tag or extracted attribute to be displayed.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 6. Display ALL Subfld occurrences | [0,1]<br><br>Only pertinent when the Data to Display is a MARC field.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |

- 1 (yes) means display all occurrences of the defined subfields.
7. Print Subflds on 1 Line [0,1]  
If 0 (no), the displayed subfields will be presented on their own line.  
1 (yes) means display subfields concatenated together with a space between each, all on one line. Note that if you specify tags with a UK suffix in the *Data to display* field, 1 (yes) means display **tags** concatenated together with a **semi-colon and space** between each, all on one line.
8. Fixed Subfld [0,1]  
A value of 1 (yes) indicates that this is a fixed MARC field or subfield.
9. Fixed Tag/Subfld Position [Number]  
The starting column for the fixed MARC field or subfield.
10. Indicator 1 match to 18. Indicator 9 match [Number]  
List of possible indicator values for positions 1 through 9. The data for the tag will only be displayed if it's indicator in the respective position matches one of the possible values in the list.  
As with Subfields, this list is entered as a string of characters. If left blank, then all possible values for the indicator position will be accepted.  
If you wish to display tags with specific indicator values and one of those values is a blank, use B to denote the allowed value of blank.
19. Maximum Lines [Number]  
Maximum number of lines to be displayed. 0 or empty means display all lines.  
This field is particularly useful in citation database displays: for example, 3 lines of Abstract on the SIMPLE display but the entire Abstract on the DETAILED display.
20. Repeat Delimiter [Character]  
Character to separate repeated fields in displays. Leave the field blank to have repeated fields displayed on separate lines.

21. Format codes [list of valid MARC Format Codes separated by commas]
- The field is displayed to OPAC users only for those records with a MARC format that matches one of these Format Codes.
- Blank Leave blank if this field should display for all records regardless of format code.
22. Material codes [list of valid Material Codes separated by commas]
- The field is displayed to OPAC users only for those records with a Material Code that matches one of these Material Codes.
- Blank Leave blank if this field should be displayed regardless of the Material Code.
- NOTE: You can restrict display to a specific Format Code or Material Code but not to both.

## Status Display Control

This table allows you to determine when the default status of a piece is displayed in the Online Catalogue.

Select `Status Display Control` on the `ONLINE SEARCH SETUP` menu or enter `OPSCCTL` elsewhere on a menu screen to access the `OPAC STATUS CONTROL` screen.

```

OPAC STATUS CONTROL

OPAC STATUS CONTROL CODE : OPAC.STATUS.CONTROL
-----
1. Only use the default TEXT if ALL the subfields are empty      : 1

Options:
?-Help  # line  Line by line  Print  Exit

```

### Field

1. Only use the default TEXT if ALL the subfields are empty [0,1]

The library can define piece both status and field information (such as call number suffix, which could have a value such as “On Reserve Shelves”) to be displayed in a summary column for pieces. If a piece has an actual status, ADVANCE displays both the field information (if any) and the status. If a piece does not have an actual status, ADVANCE displays the field information (if any) and, depending on how this parameter is set, might display the default status, such as “In Library” or “Not Available”.

0 (no) will cause both the default status and the field information (if any) to be displayed.

1 (yes) will cause the default status to be displayed only if the piece has no field information. ADVANCE will display the field information alone if field information is available.



# OPAC Holdings Display

The basis for ADVANCE holdings information is the USMARC Format for Holdings Data, Update No.2, July 1994.

ADVANCE supports level 1, 2, 4 and 5 holdings. All levels of holdings screen layouts are site definable.

## Holdings Level

|         |                                                                                                                                                                                                                                                    |
|---------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Level 1 | Displays location information, not specific copy information. Indicates that there are holdings at a specific Institution, Sublocation, and/or Collection but does not indicate how many copies. No circulation status is available at this level. |
| Level 2 | Used to display copies of single-parts. Provides all location information including copy number and circulation status. Electronic copies of single-part titles are also displayed at this level.                                                  |
| Level 3 | Not used.                                                                                                                                                                                                                                          |
| Level 4 | Displays location information and summary holdings statements for every copy of a multipart or serial held by the library. Electronic copies of multipart and serial titles are also displayed at this level                                       |
| Level 5 | Displays detailed information about a specific copy of a multipart or serial title including the location of the copy. Each issue or volume (contained within the copy) whether barcoded or not can be displayed at this level.                    |

## Holdings Display Factors

The following factors influence the level of holdings that displays:

- Number of copies of the title
- Type of material (single-part, multipart, serials)
- The site-defined threshold.

|                  |                                                                                                                                  |
|------------------|----------------------------------------------------------------------------------------------------------------------------------|
| Number of copies | Count of the number of titles distributed throughout the library at the specified institution, sublocation, or collection level. |
|------------------|----------------------------------------------------------------------------------------------------------------------------------|

|                  |                                                                                                                                                       |
|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|
| Type of Material | The type of bibliographic item as identified by code (Type of record) in Leader position /06.                                                         |
| Single-part      | Leader/06, code x.                                                                                                                                    |
| Multipart        | Leader/06, code v.                                                                                                                                    |
| Serial           | Leader/06, code y.                                                                                                                                    |
| Threshold        | Institution, sublocation, and collection threshold levels are defined in the Holdings Threshold Table on the OPAC HOLDINGS DISPLAY DEFINITION screen. |

## Access

You can access the OPAC HOLDINGS DISPLAY DEFINITION screen by entering the screen identifier OHD on a menu screen or by selecting OPAC HOLDINGS DISPLAY on the ONLINE SEARCH SETUP screen.

```
DD MMM YYYY          Geac ADVANCE Library System (#.##)          DEFAULT1 AU
HH:MM                Your Library Name
```

```
OPAC HOLDINGS DISPLAY DEFINITION
```

1. OPAC Display Level One
2. OPAC Display Level Two
3. OPAC Display Level Four
4. OPAC Display Level Five

5. Citation Database Displays
6. Holdings Threshold Table
7. Pieces descriptions
8. No Holdings heading message

```
Enter selection or <ENTER> to exit :
```

## Defining Holdings Displays - Overview

The BRIEF and FULL OPAC search screens that display to patrons consist of two parts. The upper portion of the screen displays brief bibliographic information which is specified on the Bibliographic Displays (OBD) table. The lower half of the OPAC display screen is reserved for holdings information.

The OPAC HOLDINGS DISPLAY DEFINITION table allows you to specify how holdings information displays. From these screens you can:

- specify the format of the display screen
- edit the field labels
- change the content of the field by identifying a source code that links the required information to a list of available codes

```
DD MMM YYYY          Geac ADVANCE Library System (##.##)          P P P P P I I I I I I
HH:MM                Your Library Name
```

### OPAC HOLDINGS DISPLAY DEFINITION

1. OPAC Display Level One
2. OPAC Display Level Two
3. OPAC Display Level Four
4. OPAC Display Level Five
  
5. Citation Database Displays
6. Holdings Threshold Table
7. Pieces descriptions

Enter selection or <ENTER> to exit :

Up to three screens are used to define the appearance and content of the each Display Level:

- OPAC HOLDINGS DISPLAY. Lists the currently defined fields. Allows you to edit the current definition or add a new field.

- OPAC DISPLAY LEVEL SCREEN SUBFIELD BROWSE. Allows you to edit the position of the fields which changes the appearance of the display, or the content of the headings which changes the labels of the columns. Provides access to the SUBFIELD SOURCE field from which you can change the content of the field.
- OPAC DISPLAY LEVEL SUBFIELD DEFINITION. Appears when the *SUBFIELD SOURCE* field, or the *Add item* option is selected from the previous screen. Allows you to change, or select a new source code which changes the content of the field. (Source codes are defined by Geac.)

## General Definition

Select definitions 1 through 34 on the OPAC HOLDINGS DISPLAY DEFINITION to edit the screen content and layout. Any of these choices display the OPAC HOLDINGS DISPLAY screen.

The columns on this screen define the headings and their position on the level display screens. In this example, the OPAC Level One contain one field and displays the heading HELD AT THE FOLLOWING LOCATIONS, CHOOSE ONE FOR MORE DETAIL.

```
OPAC HOLDINGS DISPLAY                                MASTER

CF record : OPAC.DISPLAY.DEFINITION
*** OPAC DISPLAY LEVEL ONE ***

HEADING MESSAGE : HELD AT THE FOLLOWING LOCATIONS, CHOOSE ONE FOR MORE DETAIL

FIELD BASELINE COLUMN WIDTH LINES HEADING          DEFAULT TEXT
1.      1          7      70      0

Options:
File # line  Heading  Add item  ? Help  Exit
```

### Display Field

**CF Record**                      The name of the Control File (CF) record that contains the specification ADVANCE uses internally to display the online catalogue screens.

### Options

**Heading**                      [text - 150 characters maximum]  
Enter the message that displays for this level item.

## Editing the Screen Content or Layout

Use the *# line* or *Add item* option to access the definition of an existing column or add a new field to the display. The OPAC HOLDINGS DISPLAY SUBFIELD BROWSE screen appears.

```

                                OPAC HOLDINGS DISPLAY SUBFIELD BROWSE
  MASTER
CODE :   OPAC.DISPLAY.DEFINITION
FIELD :   1

1. FIELD BASELINE:      1
2. FIELD COLUMN :      7
3. FIELD WIDTH  :     70
4. FIELD LINES  :      0
5. FIELD HEADING1:
6. FIELD HEADING2:
7. FIELD DEFAULT :
  SUBFIELD SOURCE
  8. INST      - Institution Code
  9.  SUBL     - Sublocation Code
 10. COLL     - Collection Code
                                PREFIX  SUFFIX
                                @        @

Options:
Accept # line  Line by line  Add item  Delete  ? help  Exit

```

### Edit Fields

The OPAC HOLDINGS DISPLAY SUBFIELD BROWSE screen displays when the *# line* or *Add item* option is selected.

- |                   |           |                                                                                                                              |
|-------------------|-----------|------------------------------------------------------------------------------------------------------------------------------|
| 1. FIELD BASELINE | [Numeric] | Specifies the position by line number where the first field displays. One represents the line immediately below the Heading. |
| 2. FIELD COLUMN   | [Numeric] | Defines the starting column position of the field.                                                                           |
| 3. FIELD WIDTH    | [Numeric] | Defines the width of the field.                                                                                              |

4. FIELD LINES [Numeric]  
Represents the maximum number of lines that display. Zero indicates no maximum.
5. FIELD HEADING1 [text - 55 characters]  
Enter the first line of text (column heading) that appears above the column. (In the example screen, no heading is used.)
6. FIELD HEADING2 [text - 55 characters]  
Enter the second line of text (column heading) that appears below *FIELD HEADING1*.
7. FIELD DEFAULT [text]  
Enter the default text that will appear in the column, if no other text is entered.

### Subfield Definitions

8. INST  
9. SUBL  
10. COLL
- If you select one of the subfields (8-10 in this example), or the *Add item* option from the OPAC HOLDINGS DISPLAY SUBFIELD BROWSE screen, the OPAC HOLDINGS DISPLAY SUBFIELD DEFINITIONS screen appears.

```
OPAC HOLDINGS DISPLAY SUBFIELD DEFINITIONS          MASTER
CODE : OPAC.DISPLAY.DEFINITION
FIELD : 1 -
SUBFIELD : 11
1. SOURCE :
2. PREFIX :
3. SUFFIX :
```

Enter the OPAC Display Level One attribute code.



1. SOURCE Enter the source codes that define this subfield. Type ?? to see a browse list of available source codes.
2. PREFIX Enter the text that appears at the beginning of the display element. Use the symbol @ to indicate a blank space.
3. SUFFIX Enter the text that appears at the end of the display element. Use the symbol @ to indicate a blank space.

## OPAC Display Level One

Level 1 holdings show that a location has holdings but does not specify exactly what is held (Single-part).

If the number of location copies is greater than the site-defined threshold the system displays Level 1 holdings information at the institution, sublocation or collection level depending on which threshold was exceeded.

### Example Display

```
Online Catalogue - BRIEF DISPLAY (1 of 1 titles)

Author(s)      :Howard, Sidney Coe, 1891-1939
                Bridges, Herb, 1928-
                Boodman, Terry C.
                Mitchell, Margaret, 1900-1949. Gone with the wind
Title          :Gone with the wind, the screenplay
Year          :c1989.
Subject       :United States -- History -- Civil War, 1861-1865 -- Drama
Language      :English

HELD AT THE FOLLOWING LOCATIONS, CHOOSE ONE FOR MORE DETAIL
1.  ADVLIB Central GENERAL
2.  ADVLIB Central MRR
3.  ADVLIB Central NLS/BPH

3 item(s) in list.
Options:
# item  Prior screen  Extend search  Limit list  Full display  Output
MARC  Holds  ILL request  Order display  Review search  OPAC parms
New search  Reset  ? Help
```

### Access

To specify how Level 1 holdings display select *OPAC Display Level One* from the *OPAC DISPLAY DEFINITION* screen. The *OPAC HOLDINGS DISPLAY DEFINITION SCREEN* appears.

```

                                OPAC HOLDINGS DISPLAY SCREEN                                MASTER

CF record : OPAC.DISPLAY.DEFINITION
*** OPAC DISPLAY LEVEL ONE ***

HEADING MESSAGE : 1. Title is held in the following locations, choose one for
more detail.

FIELD BASELINE COLUMN WIDTH LINES HEADING                                DEFAULT TEXT
1.      1          7      70      0

```

Options:

```
File # line  Heading  Add item  ? help  Exit
```

```

                                OPAC HOLDINGS DISPLAY SUBFIELD BROWSE                                MASTER

CODE : OPAC.DISPLAY.DEFINITION
FIELD : 1

1. FIELD BASELINE: 1
2. FIELD COLUMN : 7
3. FIELD WIDTH : 70
4. FIELD LINES : 0
5. FIELD HEADING1:
6. FIELD HEADING2:
7. FIELD DEFAULT :
SUBFIELD SOURCE                                PREFIX SUFFIX
8. INST - Institution Code
9.  SUBL - Sublocation Code @
10. COLL - Collection Code @

Options:
Accept # line  Line by line  Add item  Delete  ? help  Exit

```

## Subfield Definitions

```
                                OPAC HOLDINGS DISPLAY SUBFIELD DEFINITIONS                                MASTER

CODE      : OPAC.DISPLAY.DEFINITION
FIELD     : 1 -
SUBFIELD  : 11

1. SOURCE      :
2. PREFIX     :
3. SUFFIX     :
```

Enter the OPAC Display Level One attribute code.

### Source Codes

| Source Code | Description of Information Displayed |
|-------------|--------------------------------------|
| COLL        | Collection Code                      |
| INST        | Institution Code                     |
| SUBL        | Sublocation Code                     |

## OPAC Display Level Two

When the number of location copies is less than the site-defined threshold and the title is a non-numbered publication (that is a single-part), the system displays Level 2 holdings information that includes piece designations.

### Example Display

| Online Catalogue - BRIEF DISPLAY |                                                                                                                                  |              |                    | (1 of 1 titles) |
|----------------------------------|----------------------------------------------------------------------------------------------------------------------------------|--------------|--------------------|-----------------|
| Author(s)                        | :Howard, Sidney Coe, 1891-1939<br>Bridges, Herb, 1928-<br>Boodman, Terry C.<br>Mitchell, Margaret, 1900-1949. Gone with the wind |              |                    |                 |
| Title                            | :Gone with the wind, the screenplay                                                                                              |              |                    |                 |
| Year                             | :c1989.                                                                                                                          |              |                    |                 |
| Subject                          | :United States -- History -- Civil War, 1861-1865 -- Drama                                                                       |              |                    |                 |
| Language                         | :English                                                                                                                         |              |                    |                 |
| CURRENT LOCATION & COPIES HELD:  |                                                                                                                                  |              |                    |                 |
|                                  | Location                                                                                                                         | Collection   | Call Number/Copy # | Status / Due    |
|                                  | -----                                                                                                                            | -----        | -----              | -----           |
| 1.                               | ADVLIB Central                                                                                                                   | GENERAL      | c.1                | On Order        |
| 2.                               | ADVLIB Central                                                                                                                   | GENERAL      | c.2                | On Order        |
| 3.                               | ADVLIB Central                                                                                                                   | GENERAL      | c.3                | On Order        |
| 4.                               | ADVLIB Central                                                                                                                   | GENERAL      | c.4                | On Order        |
| 5.                               | ADVLIB Central                                                                                                                   | GENERAL      | c.5                | On Order        |
| 10 item(s) in limited list.      |                                                                                                                                  |              |                    |                 |
| Options:                         |                                                                                                                                  |              |                    |                 |
| # item                           | Forward                                                                                                                          | Prior screen | Extend search      | Full display    |
| Limit list                       | Output                                                                                                                           | MARC         | Holdings           | ILL request     |
| Review search                    | OPAC parms                                                                                                                       | New search   | Reset              | ? Help          |

### Access

Select *OPAC Display Level Two* from the *OPAC DISPLAY DEFINITION* screen. The *OPAC HOLDINGS DISPLAY DEFINITION SCREEN* appears.

```

                OPAC HOLDINGS DISPLAY                                MASTER

CF record : OPAC.DISPLAY.DEFINITION
*** OPAC DISPLAY LEVEL TWO ***

HEADING MESSAGE : CURRENT LOCATION & COPIES HELD:

FIELD BASELINE COLUMN WIDTH LINES HEADING                DEFAULT TEXT
1.    1         7    19    1 Location                    no location
-----
2.    1         27   15    1 Collection                  -----
3.    1         42   20    0 Call Number/Copy #          *Not yet ava
-----
4.    1         65   15    0 Status / Due                In library
-----
5.    2          7    70    0 Access:

Options:
File  # line  Heading  Add item  Forward  ? Help  Exit

```

```

                OPAC HOLDINGS DISPLAY SUBFIELD BROWSE            MASTER

CODE : OPAC.DISPLAY.DEFINITION
FIELD : 3

1. FIELD BASELINE: 1
2. FIELD COLUMN : 42
3. FIELD WIDTH : 20
4. FIELD LINES : 0
5. FIELD HEADING1: Call Number/Copy #
6. FIELD HEADING2: -----
7. FIELD DEFAULT : *Not yet available*
SUBFIELD SOURCE                PREFIX  SUFFIX
8. CNPRE - Call number prefix  @
9. CALLNO - Call number        @
10. COPYNO - Copy number       c.

Options:
Accept # line Line by line Add item Delete ? Help Exit

```

## Subfield Definitions

| OPAC HOLDINGS DISPLAY SUBFIELD DEFINITIONS       |   | MASTER                  |
|--------------------------------------------------|---|-------------------------|
| CODE                                             | : | OPAC.DISPLAY.DEFINITION |
| FIELD                                            | : | 1 -                     |
| SUBFIELD                                         | : | 11                      |
| 1. SOURCE                                        | : |                         |
| 2. PREFIX                                        | : |                         |
| 3. SUFFIX                                        | : |                         |
| Enter the OPAC Display Level One attribute code. |   |                         |

## Source Codes

| Source Code | Description of Information Displayed  |
|-------------|---------------------------------------|
| BARCODE     | Barcode                               |
| BOUND       | Bound label                           |
| CALLNO      | Call number                           |
| CALLNO.O    | Call number (Owning)                  |
| CCODE       | Circulation Code                      |
| CCODE.O     | Circulation Code (Owning)             |
| CNCLASS     | Call number - Classification          |
| CNCLASS.O   | Call number - Classification (Owning) |
| CNCUTTER    | Call number - Cutter                  |
| CNCUTTER.O  | Call number - Cutter (Owning)         |
| CNPRE       | Call number prefix                    |
| CNPRE.O     | Call number prefix (Owning)           |
| CNSCN       | Call number - Shelving Control Number |

|           |                                                                                                                                                                                                                            |
|-----------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| CNSCN.O   | Call number - Shelving Control Number (Owning)                                                                                                                                                                             |
| CNSS      | Call number - Shelving scheme                                                                                                                                                                                              |
| CNSUF     | Call number suffix                                                                                                                                                                                                         |
| CNSUF.O   | Call number suffix (Owning)                                                                                                                                                                                                |
| COLL      | Collection Code                                                                                                                                                                                                            |
| COLL.O    | Collection Code (Owning)                                                                                                                                                                                                   |
| COPYNO    | Copy number                                                                                                                                                                                                                |
| DUEDATE   | Due date                                                                                                                                                                                                                   |
| DUETIME   | Due time                                                                                                                                                                                                                   |
| EACOMP    | Electronic access - Compression information<br>Provides information about how the file was compressed and specifically how to decompress the file.<br>This information is retrieved from the USMARC field 856, subfield c. |
| EACONTACT | Electronic access - Contact for assistance<br>Provides the contact name for assistance.<br>This information is stored in the USMARC field 856, subfield m.                                                                 |
| EAENAME   | Electronic access - Electronic file name<br>Specifies the name of the electronic file as it appears in the directory indicated in the directory path.<br>This information is stored in the USMARC field 856, subfield f.   |
| EAFSIZE   | Electronic access - File size<br>Specifies the size of the file as stored under the filename specified in EAENAME.<br>This information is stored in the USMARC field 856, subfield s.                                      |
| EAHOST    | Electronic access - Host name<br>Specifies the fully qualified domain (host name) of the electronic location.<br>This information is stored in the USMARC field 856, subfield a.                                           |
| EAHOSTLOC | Electronic access - Full name of location<br>Specifies the full name of the host location, including the geographical location as indicated in EAHOST.<br>This information is stored in the USMARC field 856, subfield n.  |
| EAIP      | Electronic access - IP address<br>Specifies the Internet Protocol (IP) address, i.e., the numeric address associated with the host.<br>This information is stored in the USMARC field 856, subfield b.                     |



|            |                                                                                                                                                                                                                                             |
|------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| EAMATERIAL | Electronic access - Materials specified<br>Specifies the part of the bibliographic item to which it applies.<br>This information is stored in the USMARC field 856, subfield 3.                                                             |
| EAMETHOD   | Electronic access method<br>Specifies the access methods that can be used, such as Email, FTP, Remote login.<br>This information is stored in the USMARC field 856, subfield 2.                                                             |
| EANPUBNOTE | Electronic access - Nonpublic notes<br>Contains the nonpublic note pertaining to the electronic location or item.<br>This information is stored in the USMARC field 856, subfield x.                                                        |
| EAOS       | Electronic access - Operating system<br>Specifies the operating system for the host named in EAHOST.<br>This information is stored in the USMARC field 856, subfield o.                                                                     |
| EAPATH     | Electronic access - Directory path<br>Specifies the path with the directory names where the file is stored.<br>This information is stored in the USMARC field 856, subfield o.                                                              |
| EAPUBNOTE  | Electronic access - Public notes<br>Contains the nonpublic note pertaining to the electronic location or item.<br>This information is stored in the USMARC field 856, subfield z.                                                           |
| EAURL      | Electronic access - Uniform Resource Locator<br>Contains the Uniform Resource Locator, which provides the standard syntax for locating an object using the existing Internet protocols.<br>Field 856 creates a URL from separate subfields. |
| HOLDS      | Number of holds                                                                                                                                                                                                                             |
| INST       | Institution Code                                                                                                                                                                                                                            |
| INST.O     | Institution Code (Owning)                                                                                                                                                                                                                   |
| NONPUBNOTE | Nonpublic notes                                                                                                                                                                                                                             |
| PUBNOTE    | Public notes                                                                                                                                                                                                                                |
| STAT       | Current status                                                                                                                                                                                                                              |
| SUBL       | Sublocation Code                                                                                                                                                                                                                            |
| SUBL.O     | Sublocation Code (Owning)                                                                                                                                                                                                                   |

NOTE: Source codes that have a .O extension indicate that the code refers to the owning location.

## Level Four Holdings

When the number of location copies is less than the site-defined threshold and the title is a numbered publication – either a multipart or a serial, the system displays a Level 4 holdings statement. This display includes a summary holdings statement for every copy of a multipart or serial held.

### Example Display

```
Online Catalogue - BRIEF DISPLAY          (1 of 1 titles)

Author(s)      :World Clean Air Congress (9th : 1992 : Montréal, Québec)
                International Union of Air Pollution Prevention Associations
                Air & Waste Management Association
Title          :Waste management : papers from the 9th World Clean Air
                Congress, Towards the year 2000--critical issues in the global
                environment, Montréal, Québec, Canada, August 30-September 4,
                1992
Year           :1992.
Subject        :Refuse and refuse disposal -- Congresses
                Air quality management -- Congresses
Series         :Critical issues in the global environment; v. 1
Language       :English

LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
  1.  ADVLIB Central GENERAL c.1
      Set: v.1-v.10
  2.  ADVLIB Central GENERAL c.2
2 item(s) in list.
Options:
# item  Forward  Prior screen  Extend search  Full display
Limit list  Output  MARC  Holds  ILL request  Order display
Review search  OPAC parms  New search  Reset  ? Help
```

### Access

Select *OPAC Display Level Four* from the *OPAC HOLDING DISPLAY DEFINITION* screen. The *OPAC HOLDINGS DISPLAY* screen appears.

```

                                OPAC HOLDINGS DISPLAY                                MASTER
CF record : OPAC.DISPLAY.DEFINITION
*** OPAC DISPLAY LEVEL FOUR ***

HEADING MESSAGE : LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:

FIELD BASELINE COLUMN WIDTH LINES HEADING                                DEFAULT TEXT
1.      1          7      70      0
2.      2          7      70      0
3.      4          7      70      0 URL:
4.      5          7      70      0 Public Note:
5.      6          7      70      0 Host:

Options:
File # line  Heading  Add item  Forward  ? Help  Exit

```

```

                                OPAC HOLDINGS DISPLAY SUBFIELD BROWSE                                MASTER
CODE : OPAC.DISPLAY.DEFINITION
FIELD : 3

1. FIELD BASELINE: 3
2. FIELD COLUMN : 7
3. FIELD WIDTH : 65
4. FIELD LINES : 0
5. FIELD HEADING1: Electronic Access:
6. FIELD HEADING2:
7. FIELD DEFAULT :
SUBFIELD SOURCE                                PREFIX SUFFIX
8. EAHOST - Elect access - Host name @
9. EAIP - Elect access - IP address @
10. EAURL - Elect access - Uniform Resource+ URL: @
11. EAPUBNOTE - Elect access - Public notes Notes:

Options:
Accept # line Line by line Add item Delete ? help Exit

```

## Subfield Definitions

```

                                OPAC HOLDINGS DISPLAY SUBFIELD DEFINITIONS                                MASTER

CODE      : OPAC.DISPLAY.DEFINITION
FIELD     : 3  - Electronic Access:
SUBFIELD  : 8

1. SOURCE : EAHOST      - Elect access - Host name
2. PREFIX :
3. SUFFIX : @

Options:
Accept  Line by line  # line  Delete  ? help  Exit
    
```

### Source Codes

| Source Code | Description of Information Displayed                                                                                                                                                                                       |
|-------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| CALLNO      | Call number                                                                                                                                                                                                                |
| CNCLASS     | Call number - Classification                                                                                                                                                                                               |
| CNCUTTER    | Call number - Cutter                                                                                                                                                                                                       |
| CNPRE       | Call number prefix                                                                                                                                                                                                         |
| CNSCN       | Call number - Shelving Control Number                                                                                                                                                                                      |
| CNSS        | Call number - Shelving scheme                                                                                                                                                                                              |
| CNSUF       | Call number suffix                                                                                                                                                                                                         |
| COLL        | Collection Code                                                                                                                                                                                                            |
| COPYNO      | Copy number                                                                                                                                                                                                                |
| EACOMP      | Electronic access - Compression information<br>Provides information about how the file was compressed and specifically how to decompress the file.<br>This information is retrieved from the USMARC field 856, subfield c. |

|            |                                                                                                                                                                                                                           |
|------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| EACONTACT  | Electronic access - Contact for assistance<br>Provides the contact name for assistance.<br>This information is stored in the USMARC field 856, subfield m.                                                                |
| EAENAME    | Electronic access - Electronic file name<br>Specifies the name of the electronic file as it appears in the directory indicated in the directory path.<br>This information is stored in the USMARC field 856, subfield f.  |
| EAFSIZE    | Electronic access - File size<br>Specifies the size of the file as stored under the filename specified in EAENAME.<br>This information is stored in the USMARC field 856, subfield s.                                     |
| EAHOST     | Electronic access - Host name<br>Specifies the fully qualified domain (host name) of the electronic location.<br>This information is stored in the USMARC field 856, subfield a.                                          |
| EAHOSTLOC  | Electronic access - Full name of location<br>Specifies the full name of the host location, including the geographical location as indicated in EAHOST.<br>This information is stored in the USMARC field 856, subfield n. |
| EAIP       | Electronic access - IP address<br>Specifies the Internet Protocol (IP) address, i.e., the numeric address associated with the host.<br>This information is stored in the USMARC field 856, subfield b.                    |
| EAMATERIAL | Electronic access - Materials specified<br>Specifies the part of the bibliographic item to which it applies.<br>This information is stored in the USMARC field 856, subfield 3.                                           |
| EAMETHOD   | Electronic access method<br>Specifies the access methods that can be used, such as Email, FTP, Remote login.<br>This information is stored in the USMARC field 856, subfield 2.                                           |
| EANPUBNOTE | Electronic access - Nonpublic notes<br>Contains the nonpublic note pertaining to the electronic location or item.<br>This information is stored in the USMARC field 856, subfield x.                                      |
| EAOS       | Electronic access - Operating system<br>Specifies the operating system for the host named in EAHOST.<br>This information is stored in the USMARC field 856, subfield o.                                                   |
| EAPATH     | Electronic access - Directory path<br>Specifies the path with the directory names where the file is stored.<br>This information is stored in the USMARC field 856, subfield o.                                            |
| HSTMT      | Summary holdings statement                                                                                                                                                                                                |

|      |                  |
|------|------------------|
| INST | Institution Code |
| SUBL | Sublocation Code |

## Level Five Holdings

A Level 5 holdings statement is displayed for one copy of a numbered publication – either a multipart or serial. This level provides detailed information about a specific copy of a multipart or serial.

### Example Display

| Online Catalogue - BRIEF DISPLAY |                                                                                                           | (1 of 1 titles) |
|----------------------------------|-----------------------------------------------------------------------------------------------------------|-----------------|
| Author(s)                        | :Massachusetts. Laws, etc.<br>West Publishing Company                                                     |                 |
| Title                            | :Massachusetts general laws annotated, under arrangement of the<br>official General laws of Massachusetts |                 |
| Year                             | :[1958-                                                                                                   |                 |
| Subject                          | :Law -- Massachusetts                                                                                     |                 |
| Language                         | :English                                                                                                  |                 |
| Location :                       | AL CENTRAL GENERAL                                                                                        |                 |
| Issue Number                     |                                                                                                           | Status          |
| -----                            |                                                                                                           | -----           |
| 1. No.9(1997:AUG)                |                                                                                                           | Exp issue       |
| 2. No.5(1997:JAN)-No.8(1997:AUG) |                                                                                                           | Received        |
| 2 item(s) in list.               |                                                                                                           |                 |
| Options:                         |                                                                                                           |                 |
| # item                           | Prior screen                                                                                              | Extend search   |
| MARC                             | Hold                                                                                                      | ILL request     |
| New search                       | Reset                                                                                                     | ? Help          |
|                                  | Limit list                                                                                                | Full display    |
|                                  | Order display                                                                                             | Review search   |
|                                  | OPAC parms                                                                                                |                 |

```
OPAC HOLDINGS DISPLAY                                MASTER

CF record : OPAC.DISPLAY.DEFINITION
*** OPAC DISPLAY LEVEL FIVE ***

ORDER OF DISPLAY:
Serial holdings display in ascending order? : 0
Multipart holdings display in ascending order?: 1

FIELD BASELINE COLUMN WIDTH LINES HEADING          DEFAULT TEXT
1.    1         7     50    4 Issue Number          -----
2.    1        60     20    1 Status                -----

Options:
File # line Order Add item ? Help Exit
```

Order Option

[0, 1]

- 0 Displays serial holdings in descending order.
- 1 Displays serial holdings in ascending order.
- 0 Displays multipart holdings in descending order.
- 1 Displays multipart holdings in ascending order.



```

                OPAC HOLDINGS DISPLAY SUBFIELD BROWSE                MASTER
    CODE :      OPAC.DISPLAY.DEFINITION
    FIELD :      2

    1. FIELD BASELINE:      1
    2. FIELD COLUMN  :      60
    3. FIELD WIDTH   :      20
    4. FIELD LINES   :      1
    5. FIELD HEADING1:      Status
    6. FIELD HEADING2:      -----
    7. FIELD DEFAULT :
      SUBFIELD SOURCE                                PREFIX   SUFFIX
    8.   :

Options:
Accept  # line  Line by line  Add item  Delete  ? Help  Exit

```

**Subfield Definitions**

```

                OPAC HOLDINGS DISPLAY SUBFIELD DEFINITIONS            MASTER
    CODE :      OPAC.DISPLAY.DEFINITION
    FIELD :      2 - Status
    SUBFIELD :      8

    1. SOURCE      :
    2. PREFIX      :
    3. SUFFIX      :

Options:
Accept  Line by line  # line  Delete  ? Help  Exit

```

**Source Codes**

| Source Code | Description of Information Displayed |
|-------------|--------------------------------------|
| BARCODE     | Barcode                              |
| BOUND       | Bound label                          |

|            |                                                                                                                                                                                                                                                                                                                                                                                                           |
|------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| CALLNO.O   | Call Number (Owning)                                                                                                                                                                                                                                                                                                                                                                                      |
| CCODE      | Circulation Code                                                                                                                                                                                                                                                                                                                                                                                          |
| CCODE.O    | Circulation Code (Owning)                                                                                                                                                                                                                                                                                                                                                                                 |
| CNCLASS.O  | Call number - Classification (Owning)                                                                                                                                                                                                                                                                                                                                                                     |
| CNCUTTER.O | Call number - Cutter (Owning)                                                                                                                                                                                                                                                                                                                                                                             |
| CNPRE.O    | Call number prefix (Owning)                                                                                                                                                                                                                                                                                                                                                                               |
| CNSCN.O    | Call number - Shelving Control Number (Owning)                                                                                                                                                                                                                                                                                                                                                            |
| CNSUF.O    | Call number suffix (Owning)                                                                                                                                                                                                                                                                                                                                                                               |
| COLL.O     | Collection Code (Owning)                                                                                                                                                                                                                                                                                                                                                                                  |
| DUEDATE    | Due date                                                                                                                                                                                                                                                                                                                                                                                                  |
| DUETIME    | Due time                                                                                                                                                                                                                                                                                                                                                                                                  |
| ENUMCHRON  | Enumeration and Chronology levels<br>This should be the essential element for the level 5 serial and multipart holdings display. It contains the part information of the copy you select from level 4. It displays enumeration of that copy, i.e., vol.1, vol. 2 and its chronology such as yr. 1996. The display includes the information for each Type of Holding, namely issue, supplement, and index. |
| HOLDS      | Number of holds                                                                                                                                                                                                                                                                                                                                                                                           |
| INST.O     | Institution Code (Owning)                                                                                                                                                                                                                                                                                                                                                                                 |
| NONPUBNOTE | Nonpublic notes                                                                                                                                                                                                                                                                                                                                                                                           |
| PUBNOTE    | Public notes                                                                                                                                                                                                                                                                                                                                                                                              |
| STAT       | Current status                                                                                                                                                                                                                                                                                                                                                                                            |
| SUBL.O     | Sublocation Code (Owning)                                                                                                                                                                                                                                                                                                                                                                                 |
| TITLE      | Title of supplement/index                                                                                                                                                                                                                                                                                                                                                                                 |

## Citation Database Displays

From this screen you can specify the message that appears when the source title for a citation is found, or is not located in the citation database.

```

                                OPAC HOLDINGS DISPLAY                                MASTER

CF record : OPAC.DISPLAY.DEFINITION
*** CITATION RECORD DISPLAY ***

1. Holding message for items not found in Main Database :
   The library does not hold any copies of this periodical.

2. Holding message for items found in Main Database :
   The library holds the following copies of this periodical :

Options:
File # line ? help Exit

```

### Display Fields

CF record: The name of the Control File (CF) record that contains the specifications ADVANCE uses internally to display the online catalogue screens.

### Edit Fields

1. Holding message for items not found in Main Database [text]  
Enter the message that you want to display when a title is not located in the database.
2. Holding message for items found in Main Database [text]  
Enter the message that you want to display when a title is located in the database. This message precedes the holdings list for the title found.

## Holdings Thresholds Definitions

### *When to Use Thresholds*

The Holdings Thresholds Definition table was intended for use by large union catalogues. Use these definitions if you have huge numbers of the same title. With thresholds the system displays a summary of institutions, sublocations and collections where the copies are held and asks the patron to choose one for more detail. Without thresholds the patron may page through hundreds of copies of detailed information to reach the copy they desire.

### Not Setting Thresholds

If no thresholds are set, ADVANCE displays the level of holdings that provides the most detail for the title. For all but the largest libraries or consortia, this is the best solution.

In general this means that if the title is a single-part, a level 2 holdings display is generated; for serial or multipart titles a level 4 holdings display is displayed.

### Default Values

The default value for each threshold level is <null>. (To enter null, type # and <ENTER>.)

### Access

Select **Holding Threshold Definition** on the **ONLINE SEARCH SETUP** menu. The **HOLDINGS THRESHOLD TABLE** appears.

```
                                HOLDINGS THRESHOLD TABLE

OPAC HOLDINGS THRESHOLD : HOLDINGS.THRESHOLDS
-----
1. Institution level threshold           : 1000
2. Sublocation level threshold          : 500
3. Collection level threshold           : 250

Options:
? help  # line  Line by line  Print  Exit
```

**How the System Determines the Level of Display**

Threshold limits provide ADVANCE with a way of determining which level of holdings information to display. ADVANCE looks at both the number of copies of the title (that is the number of location copy records) and the number of Institutions, Sublocations, and Collections when it makes an assessment of the records.

The system tests the thresholds in sequence, beginning with the Institution level, then Sublocation, and Collection. In addition, the system checks that the number of institutions, sublocations and collections is more than one.

If the number of location copy records is greater than the institution level threshold and there is more than one institution then an institution level OPAC display is generated. If the number of locations is greater than the sublocation level threshold and there is more than one sublocation, then a sublocation level display is generated. If the number of locations is greater than the collection level threshold and the number of collections is greater than one, then a collection level display is generated. If the number of locations does not exceed any of these threshold levels, then if the title is a single-part a level 2 holdings display is generated, otherwise a level 4 holdings display is generated (serial or multipart).

| <b>Holdings Display Level if Threshold Exceeded</b> | <b>Holdings Display Level if Threshold is not Reached</b> | <b>Type of Holding</b> |
|-----------------------------------------------------|-----------------------------------------------------------|------------------------|
| Level 1                                             | Level 2                                                   | Single-part            |
| Level 1                                             | Level 4                                                   | Multipart              |
| Level 1                                             | Level 4                                                   | Serial                 |

*OPAC Suppression Turned On*

Copies of a title that are held at institutions, sublocations, or collections that have the OPAC suppression flag turned on are excluded from the calculation. This choice is controlled from the Institution Codes (CHIC), Sublocation/Building Codes (CHSC), and Collection Codes (CHCC) tables on the Holding Setup Menu (CHSM) in Cataloguing.

*Determining Potential Threshold Limits*

If you decide to use threshold definitions, you may want to test potential threshold values by determining how many copies of specific titles exist in your library. You can accomplish this by using this statement or a similar one at TCL:

```
LIST B.MASTER WITH NLOCS GT 100 NLOCS TITLE
```

This statement instructs the operating environment to list all the B.MASTER records with the number of locations greater than 100 and then display the B.MASTER record number (Local Control Number); the number of locations; and the title of the item. An example of possible results follows.

```
IST B.MASTER WITH NLOCS GT 100 NLOCS TITLE HH:MM:SS DD MMM YYYY PAGE 1
B.MASTER.. #locns TITLE.....

10015141      102 Light gymnastics : a guide to
              systematic instruction in ph
              ysical training for use in sc
              hools, gymnasia, etc.
10025443      254 The petrology of the sediment
              ary rocks
10025721      102 The new country: a social history
              of the American frontier,
              1776-1890
10025843      234 An analysis of national forest
              range problems in northeastern
              California

4 records listed.
6.9>
```

Adjust the number 100 up or down as appropriate for your library. You should then test the threshold limits for these titles. Depending on the number of institutions, adjust the number 100 up or down as appropriate for your library. You should then test the threshold limits for these titles. Depending on the number of institutions, sublocations and collections in your library you might want to adjust the default thresholds.

**Edit Fields**

- 1. Institution level threshold [1-9999]  
Enter a number in the range 1-9999.
  
- 2. Sublocation level threshold [1-9999]  
Enter a number in the range 1-9999.

3. Collection level  
threshold

[1-9999]

Enter a number in the range 1-9999.

## Threshold Settings Examples

These examples illustrate how threshold limits influence the results obtained from an OPAC search. The title *Gone With The Wind, The Screenplay* is held at the following locations:

| <b>Institution</b> | <b>Sublocation</b> | <b>Collection</b> | <b>Number of Location Copies (Items)</b> |
|--------------------|--------------------|-------------------|------------------------------------------|
| ADVLIB             | CENTRAL            | GENERAL           | 35                                       |
| ADVLIB             | CENTRAL            | MRR               | 2                                        |
| ADVLIB             | CENTRAL            | NLS/BPH           | 12                                       |
| ADVLIB             | Landover           | LOAN              | 30                                       |
| <b>Total</b>       |                    |                   | <b>79</b>                                |



## Example 1

```

                                HOLDINGS THRESHOLD TABLE

                                OPAC HOLDINGS THRESHOLD : HOLDINGS.THRESHOLDS
                                -----
                                1. Institution level threshold           : 999
                                2. Sublocation level threshold           : 75
                                3. Collection level threshold             : 70

Options:
? Help  # line  Line by line  Print  Exit

```

These settings result in a Level 1 OPAC display at the sublocation level. At this level, the number of sublocation (79) and collection (79) location copies is greater than the specified limits 75 and 70. Because the threshold limit did not exceed the Institution level the system displays the search results for sublocation level which means only the Institution and Sublocation display. You must select a line number to display more information.

```

                                Online Catalogue - BRIEF DISPLAY           (1 of 1 titles)
Local Control # :10004627
LCCN            :89011713 //r94
AUTHOR         :Howard, Sidney Coe, 1891-1939
TITLE          :Gone with the wind, the screenplay
Pub/Size       :Delta, 24 cm.

HELD AT THE FOLLOWING LOCATIONS, CHOOSE ONE FOR MORE DETAIL
1.  ADVLIB Central
2.  ADVLIB Landover

2 item(s) in list.
Options:
# item  Prior screen  Holdings edit  Extend search  Full display
Limit list  Output  MARC  Order display  Review search  OPAC parms
New search  Reset  ? Help

```

**Example 2**

```
                                HOLDINGS THRESHOLD TABLE

                                OPAC HOLDINGS THRESHOLD : HOLDINGS.THRESHOLDS
                                -----
1. Institution level threshold      : 999
2. Sublocation level threshold     : 80
3. Collection level threshold       : 70

Options:
? Help  # line  Line by line  Print  Exit
```

These settings produce a Level 1 OPAC display at the collection level. At this level, the number of sublocation location copies (79) is less than 80. The sublocation level limit was not reached, so the system displays the OPAC results at the Collection level.

```
                                Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10004627
LCCN            :89011713 //r94
AUTHOR         :Howard, Sidney Coe, 1891-1939
TITLE          :Gone with the wind, the screenplay
Pub/Size       :Delta, 24 cm.

HELD AT THE FOLLOWING LOCATIONS, CHOOSE ONE FOR MORE DETAIL
1.  ADVLIB Central GENERAL
2.  ADVLIB Central MRR
3.  ADVLIB Central NLS/BPH
4.  ADVLIB Landover LOAN

4 item(s) in list.
Options:
# item  Prior screen  Holdings edit  Extend search  Full display
Limit list  Output  MARC  Order display  Review search  OPAC parms
New search  Reset  ? Help
```

## Example 3

```

                                HOLDINGS THRESHOLD TABLE

                                OPAC HOLDINGS THRESHOLD : HOLDINGS.THRESHOLDS
                                -----
1. Institution level threshold      : 999
2. Sublocation level threshold     : 99
3. Collection level threshold      : 99

Options:
? Help  # line  Line by line  Print  Exit

```

These settings produce a Level 2 OPAC display for a single-part monograph. At this level, the number of location copies (79) is less than any of the threshold limits; therefore, the system displays the greatest amount of detail.

```

                                Online Catalogue - BRIEF DISPLAY                (1 of 1 titles)

Author(s)      :Howard, Sidney Coe, 1891-1939
                :Bridges, Herb, 1928-
                :Boodman, Terry C.
                :Mitchell, Margaret, 1900-1949. Gone with the wind
Title          :Gone with the wind, the screenplay
Year          :c1989.
Subject       :United States -- History -- Civil War, 1861-1865 -- Drama
Language      :English

CURRENT LOCATION & COPIES HELD:
  Location      Collection      Call Number/Copy #      Status / Due
  -----
1.  ADVLIB Central  GENERAL      c.1                      On Order
2.  ADVLIB Central  GENERAL      c.2                      On Order
3.  ADVLIB Central  GENERAL      c.3                      On Order
4.  ADVLIB Central  GENERAL      c.4                      On Order
5.  ADVLIB Central  GENERAL      c.5                      On Order
10 item(s) in limited list.
Options:
# item  Forward  Prior screen  Extend search  Full display
Limit list  Output  MARC  Holds  ILL request  Order display
Review search  OPAC parms  New search  Reset  ? Help

```

Summary - Threshold Examples

| <b>Example 1</b> | Thresholds | Number of Location Copies |                                           | Display                                                      |
|------------------|------------|---------------------------|-------------------------------------------|--------------------------------------------------------------|
| Institution      | 999        | 79                        | Less than institution level threshold.    | Institution and Sublocations levels only.                    |
| Sublocation      | 75         | 79                        | Greater than sublocation level threshold. |                                                              |
| Collection       | 70         | 79                        | Greater than collection level threshold.  |                                                              |
| <b>Example 2</b> |            |                           |                                           |                                                              |
| Institution      | 999        | 79                        | Less than institution level threshold.    | Displays the Institution, Sublocation and Collection levels. |
| Sublocation      | 80         | 79                        | Less than sublocation level threshold.    |                                                              |
| Collection       | 70         | 79                        | Greater than collection level threshold.  |                                                              |
| <b>Example 3</b> |            |                           |                                           |                                                              |
| Institution      | 999        | 79                        | Less than institution level threshold.    | No threshold is exceeded. Displays the greatest detail.      |
| Sublocation      | 99         | 79                        | Less than sublocation level threshold.    |                                                              |
| Collection       | 99         | 79                        | Less than collection level threshold      |                                                              |

## Pieces Descriptions

From this screen you can specify the message that appears under the status column for a Level 2 or Level 5 item. This message also appears in the *Status* field on the Pieces Detail screen.

Note that sublocation-specific override default statuses can be defined on the Sublocation Codes table (CHSC) in Cataloguing.

```

                                OPAC HOLDINGS DISPLAY                                MASTER

CF record : OPAC.DISPLAY.DEFINITION
***  PIECES DESCRIPTIONS  ***

1. Piece description for barcoded items with no status :
   In Library

2. Piece description for non-barcoded items with no status :
   Not Available

Options:
File   # line   ? help   Exit

```

### Display Fields

**CF record:** The name of the Control File (CF) record that contains the specifications ADVANCE uses internally to display the online catalogue screens.

### Edit Fields

- |                                                            |                                                                                           |
|------------------------------------------------------------|-------------------------------------------------------------------------------------------|
| 1. Piece description for barcoded items with no status     | [text]<br>Enter the message that you want to display when a title is a barcoded item.     |
| 2. Piece description for non-barcoded items with no status | [text]<br>Enter the message that you want to display when a title is a non-barcoded item. |

## No Holdings Heading Message

Allows you to specify the message that displays to the OPAC user when there are no holdings of the title.

```
NO HOLDINGS MESSAGE TABLE

OPAC NO HOLDINGS : NO.HOLDINGS.MESSAGE
-----
1. OPAC message when there are no holdings: The library does not hold any+

Options:
? help  # line  Line by line  Print  Exit
```

### Edit Fields

1. OPAC message when there are no holdings

[text — 150 characters maximum]

Enter the message that you want to display when a title is located in the database but there are no holdings attached to the title. To enter a long message, use ESC P to open a window and ESC E to close the window.

---

## Related Works

When you use the *Extend Search* option from the item display screen, the RELATED WORKS SCREEN DEFINITION is displayed. This screen shows the headings under which the item has been catalogued and allows you to extend your search by selecting one of the headings. The OPAC module will then proceed to a title summary for all items catalogued under the selected heading. This maintenance function allows you to define the catalogued headings which are to appear on the RELATED WORKS SCREEN DEFINITION. The definition consists of a list of MARC tags, display criteria and the label under which the heading is to appear.

The set up for this display screen is achieved by accessing the Related Works function on the ONLINE SEARCH SET UP screen or by entering ORW on a menu screen.

### Multiple Databases

If the library has any citation databases or the Community Information Module installed (using the optional, add-on Citation Database product or the Community Information Module), the OPAC RELATED WORKS SCREENS screen will be shown first. This screen lists the database codes for the main online catalogue, the citation databases, and the Community Information databases. Select a database.

The following sample screens are for the main online catalogue.

```
                                RELATED WORKS SCREEN DEFINITION                                MASTER

CODES record : OPAC.RELATED.MAIN

FIELD   TAG      LABEL
-----  -
1.     245      Title :
2.     240
3.     100      Author:
4.     110
5.     700
6.     710
7.     650      Subject
8.     600
9.     651
10.    CALL     Call number

Options:
File   # line   Add item   Forward   Backward   Copy    ? help   Exit
```

```
                                RELATED WORKS SCREEN FIELD DEFINITIONS                                MASTER

CODES record : OPAC.RELATED.MAIN
FIELD NUMBER : 1

1. Tag           : 245      - TITLE STATEMENT
2. Label         : Title :
3. Subfields     :
4. Indicator 1 match :
5. Indicator 2 match :
6. Indicator 3 match :
7. Indicator 4 match :
8. Indicator 5 match :
9. Indicator 6 match :
10. Indicator 7 match :
11. Indicator 8 match :
12. Indicator 9 match :
13. Search Command : T
    DECODE used    : T

Options:
Accept  Line by line  # line  Delete  ? help  Exit
```



---

## Fields

1. *Tag* [MARC tag or 'CALL']
- This field defines the MARC tag for the heading which is to be included on the related works screen. A special value of CALL is allowed in order to designate that the list of call numbers for the item are to be displayed. Any MARC tag used in this definition must have been defined as a heading in the Cataloguing module and be indexed in A.TREE.
2. *Label* [Text]
- The label under which the designated heading which is to be included on the related works screen.
3. *Subfields*
- This field is for future use. At this time any entry in this area is ignored.
4. *Indicator 1 Match*  
12. *Indicator 9 Match* [Number]
- List of possible indicator values for positions 1 through 9. The data for the tag will only be displayed if it's indicator in the respective position matches one of the possible values in the list.
- The list is entered as a string of allowed characters. If left blank, then all possible values for the indicator position will be accepted.
- If you wish to display tags with specific indicator values and one of those values is a blank, use B to denote the allowed value of blank.
13. *Search Command* [Search Command Code]
- Displays the search command specified by this field.

## Bibliographic Output Control

This table defines the list of all available print formats offered by the library.

Select `Bib. Output Control` on the `ONLINE SEARCH SETUP` screen or enter `OBOC` on any menu screen. The `OPAC BIBLIOGRAPHY PRINT` screen appears.

If a printer is attached to the system, bibliographic information can be printed.

```
OPAC BIBLIOGRAPHY PRINT

Number of records : 4
Code      Description of code
-----
1. 1      Summary Display
2. 2      Formal Bibliography
3. 3      Complete Record (Notes + Call#)
4. 4      To workstation / Email

Options:
? help   Add item # line Print Forward Backward Search jump
Exit
```

These printing choices provide the information:

- **Summary Display**  
provides titles and call numbers.
- **Formal Bibliography**  
prints the author's name, title, publisher and other information. It does not print the call number.
- **Complete Record**  
prints the same information as the formal bibliography but also includes the call number, notes and description.

- To workstation/Email

Requires the RefLink add-on product. Allows you to download or email bibliographies in Pro-Cite comma-delimited format.

Selecting the *#line* option allows some aspects of printing administration to be edited. The screen illustrates which parameters can be changed.

```
OPAC BIBLIOGRAPHY PRINT

OPAC BIB PRINT CODE : 4
-----
1. Output format description           : To workstation / Email
2. Charge fees for output. 1=yes, 0=no : 0
3. Max # items to be output at a time : 99
4. Check printing at 'nn' items       :
5. Minimum charge (e.g. 0.05)         :
6. Cost per item printed (e.g. 0.05)  :
7. Smallest fee unit (e.g. 0.05)      :
8. Output Format (0=Print,1=RefLink))  : 1

Options:
? help # line Line by line Copy Print Delete Exit
```

## Fields

1. Output format description [Text]  
Edit the name of this printout from this line.
  
2. Charge fee for output [0,1]  
Enter:  
0 if no fee is being charged.  
1 to charge a fee for printing. The cost of the printing is displayed as a message on screen to the patron. Before the printing starts, the patron is given the opportunity to discontinue the process. When the bibliographies are printed the printing fee appears at the top of the first page.  
NOTE: this is a display only feature, rather than an accounting feature. The charges are not saved as an invoice that can be re-printed at another time.
  
3. Max # items to be output at a time [Numeric]  
Enter the number of items that you want to output. Printing at certain times may affect the efficiency of the system.
  
4. Check printing at 'nn' items [Numeric]  
If you want to ensure that the printer is functioning properly, enter the number of items that should be printed before the printer pauses.
  
5. *Minimum charge* [Numeric]  
Enter the minimum amount that will be charged for a printout. The cost of the printing is displayed as a message on screen to the patron. Before the printing starts, the patron is given the opportunity to discontinue the process.
  
6. *Cost per item printed* [Numeric]  
Enter the cost per printout for each item. The cost of the printing is displayed as a message on screen to the patron. Before the printing starts, the patron is given the opportunity to discontinue the process.
  
7. *Smallest \$\$ unit* [Numeric]

Enter the smallest monetary unit that the system should use for calculating the charges and that will be displayed to the OPAC patron.

*8. Output Format*

[0, 1]

Enter:

0 to print to a printer.

1 to download or email bibliographies to a workstation. Requires the add-on product RefLink.

## OPAC Port Control

This table allows you to define special features for each port. A port may correspond to one or more terminals (hardwired or logical ports). Some ports can be dedicated to the Online Catalogue. The basic definition of ports can be found on the PORT table (PORT) in the Utilities Function (See *Utilities Management Guide*).

The OPAC Port Control consists of five screens:

Port Control Default

Sorting Control

Bibliographic Display

Listing Screen

Patron Inquiry Control

Select `Port Control` on the `ONLINE SEARCH SETUP` screen or enter `OPC` on any menu screen.

The `OPAC PORT CONTROL` screen lists the different port codes that could be modified.

```

                                OPAC PORT CONTROL

OPAC PORT CONTROL CODE : DEFAULT
------( Page 1 of 5 )
Description                      : Default Port

2. Standard OPAC Screen          : DETAIL = Search Selection D+
3. Default Language              :
4. OPAC Qualifier                :
5. User can Change OPAC Qualifier (1 = Yes) : 0
6. Statistical Group             :
7. Allow Output Format           : 1,2,3
8. Boolean Search Time Out      : 30
9. Input Time Out               :
10. Truncated Term Threshold    : 20

Options:
Forward  ?-Help  # line  Line by line  Print  Exit  File

```

## Fields

### 2. Standard OPAC Screen

[Character code]

Enter ?? to list the table OSSS. This prompt defines the SEARCH SELECTION SCREEN which is to first appear when the OPAC Search Function is invoked.

### 3. Default Language

[Character code]

Enter ?? to list the table ULAC (Utilities Menu). This prompt defines the default language for the OPAC workstation. This is useful when setting up a mixture of OPAC workstations in a multi-lingual environment. Some workstations can be set up to use English by default and others may use French. The library can then also provide the capability to temporarily change the language at any given workstation.

### 4. OPAC Qualifier

[Character code]

The qualifiers are codes narrowing down the items displayed for a search. For example the medical sublocation in the library can decide to only display the documents on that particular subject.

Enter ?? in this field to list the OPAC qualifier codes also used in Circulation.

This field defines the qualifier which is to be used by default for the OPAC workstation.

5. User can change  
OPAC qualifier

[0,1]

Governs whether the OPAC user can temporarily change this parameter through the OPAC PARAMETERS screen.

0 for not allowed

1 for allowed

6. Statistical group

[Alphanumeric]

OPAC search statistics are tracked by ADVANCE. If you wish the searches performed on the workstation to be tracked, this field should be non-null. The contents of this field will be used as the port ID under which the statistics are tracked. If you wish to track the statistics separately, you should enter a unique ID into this field (for example the port ID).

If you wish to summarize the statistics for a group of workstations which may have different port control records, then enter some common value into this field of each of the port records in question.

7. Allow Output Format

[Character code]

Enter ?? in this field to display the coded table OBOC. This field defines the available output formats for the OPAC workstation from the table of all available formats. To download or email bibliographies you must have the ReLink add-on product installed for this port.

The codes entered at this field determine the choices that appear on the OUTPUT A BIBLIOGRAPHY screen when the *Output* option is used.

8. Boolean Search  
Time Out

[Numeric]

# of seconds, 0 = no limit

When this field is non-zero, the system will 'time out' whenever a boolean search takes more than the defined number of seconds. When the Boolean Search times out, the system will issue the message:



Your search has timed out. Select an option from below.

### 9. Input time out

[Numeric]

# of seconds, 0 = no limit

If you ceased keyboard entry for more than the defined time period, the system will perform an automatic reset. This clears any existing search, returns to the default Search Selection screen and resets all OPAC parameters to their default states.

**CAUTION:** This function does not provide any warning to the user and therefore if used, should be set so that the amount of time would guarantee that the user must have walked away and is no longer using the workstation.

### 10. Truncated Term Threshold

[Numeric]

# of words, 0 = no limit

This option defines the maximum number of words which you can retrieve into a search, via the word truncation facility. If the number of words found by a truncation is greater than the defined limit, the search will be interrupted and you will be prompted for the appropriate action. (Edit, Browse Words, Omit Term).

All these fields can be modified with the *# line* or *Line by line* options. Use *Forward* to access the second screen of the Port Control table.

## Sorting control

This section of the Port Control table determines whether full sorting is automatic or optional for the user, the maximum number of headings or titles to be fully sorted, and the length of time the system will spend sorting headings or titles before asking the user whether or not to continue.

If sorting is set to *optional*, the headings retrieved by a keyword search will appear in LCN order. You will be able to use the *Sort* option.

If sorting is set to *automatic*, the system always sorts headings on their full text and does not offer the *Sort* option.

```

                                OPAC PORT CONTROL

OPAC PORT CONTROL CODE : DEFAULT
------( Page 2 of 5 )
SORTING CONTROL OF HEADING SUMMARY LIST
1. Sorting (0=Optional,1=Automatic)      : 0
2. Maximum number allowed to be sorted  : 0
   (0 = no maximum)
3. Number of seconds after which user will : 30
   be prompted to continue or quit the sort
   (0 = no interrupt)

SORTING CONTROL OF TITLE SUMMARY LIST
4. Sorting (0=Optional,1=Automatic)      : 0
5. Maximum number allowed to be sorted  : 0
   (0 = no maximum)
6. Number of seconds after which user will : 30
   be prompted to continue or quit the sort
   (0 = no interrupt)

Options:   Enter specified line number
Forward   Backward   ?-help   # line   Line by line   Print   Exit   File

```

Use the *# line* option to change any of the sorting specifications. To save the editing changes, use the *File* option.

Increasing the number of headings or titles that are sorted will have an impact on overall system response times, as sorting consumes both CPU and disk input/output resources.

## Fields

### *SORTING CONTROL OF HEADING SUMMARY LIST*

This section of the control table deals with the sorting of headings in the HEADING SUMMARY LIST screen (which is shown for single-index keyword searches when the search terms match more than one heading).

#### 1. *Sorting*

[0,1]

If sorting is set to *optional*, the items in the title summary listing will first appear in LCN order.

If sorting is set to *automatic*, the system automatically sorts the items in the sequences:

1. Author (then title, then descending year)
2. Title (then author, then descending year)
3. Descending year (then author, then title)

#### 2. Maximum number allowed to be sorted

[Numeric]

This number represents the upper limit of the number of headings to be sorted on their full text. If the number of headings in the list exceeds the maximum number, the system does not fully sort the headings and instead presents a message telling the user that the number of headings exceeds the sorting limit. If 0 is entered there will be no maximum.

#### 3. Number of seconds after which user....

[Numeric]

This field sets the time limit on how long ADVANCE will continue to sort a list before a message appears asking the user whether or not to continue. If 0 is entered there is no interrupt.

### *SORTING CONTROL OF TITLE SUMMARY LIST*

This section of the control table deals with the sorting of items (citations/titles/bibliographic records) in the TITLE SUMMARY LIST screen (which is shown for browse or keyword searches when the selected/matched heading has more than one item).

#### 1. *Sorting*

[0,1]

When sorting is set to *optional*, items are shown unsorted.

When sorting is set to *automatic*, the system automatically sorts the items — by author (then title, then ascending year of publication).

In both cases, the system offers the *Sort* option for sorting items by author (then title, then ascending year) or title (then author, then ascending year) or descending year.

2. Maximum number  
allowed to be sorted

[Numeric]

This number represents the upper limit of the number of items to be sorted. If the number of items in the list exceeds the maximum number, the system does not sort the items and instead presents a message telling the user that the number of items exceeds the sorting limit. If 0 is entered there will be no maximum.

3. Number of seconds  
after which user.....

[Numeric]

This field sets the time limit on how long ADVANCE will continue to sort a list before a message appears asking the user whether or not to continue. If 0 is entered there is no interrupt.

You can use the *Forward* option to reach the third page of the Port Control table.

## Bibliographic Display

This section of parameters governs the format and/or options available from the DETAILED DISPLAY screen.

- Option to select brief or full detailed displays
- Option to display MARC record
- Option to display Holdings screen
- Option to see Order screen

```

                                OPAC PORT CONTROL

OPAC PORT CONTROL CODE : DEFAULT
------( Page 3 of 5 )
< BIBLIOGRAPHIC DISPLAY >

1. Standard Display Format                : 1
   (1 = Brief Display, 2 = Full Display, 3 = Marc Display)
2. User can Change Display Format (1 = Yes) : 1

3. Allow OPAC users option to see MARC   : 1
   (0 = No, 1 = Yes)
4. Allow OPAC users option to see Full Display : 1
   (0 = No, 1 = Yes)
5. Allow OPAC users option to see Brief Display : 1
   (0 = No, 1 = Yes)
6. Allow OPAC users option to see HOLDINGS display : 1
   (0 = No, 1 = Yes)
7. Allow OPAC users option to see ORDER display : 1
   (0 = No, 1 = Yes)
Options:      Enter specified line number
Forward      Backward  ?-Help  # line  Line by line  Print  Exit  File

```

### Fields

1. Standard display format [1,2,3]

This field defines the type of display:

1 allows the user to see brief bibliographic information only; the standard definition of brief information is: author, title, subject, series, and language.

2 allows the user to see full bibliographic information only; the standard definition of full information includes: author, title, variant title, former

title, new title, subject, series, language, media, edition, scale, publisher, and so on. The DETAILED DISPLAY screens also show piece information such as status and location, regardless of how the library answers this control question.

If 3 is entered, the user will be presented with MARC bibliographic information.

2. User can change display format [0,1]  
If set to 1, the OPAC user will be able to temporarily modify the default display format from the OPAC PARAMETERS screen.
3. Allow OPAC users option to see MARC [0,1]  
If set to 1, the MARC display option will be made available to the user in the item display screen.
4. Allow OPAC users option to see Full Display [0,1]  
If set to 1, the *Full Display* option will be made available to the user in the DETAILED DISPLAY screen.
5. Allow OPAC users to see Brief Display [0,1]  
If set to 1, the *Brief Display* option will be made available to the user in the DETAILED DISPLAY screen.
6. Allow OPAC users to see HOLDINGS display [0,1]  
If set to 1, the *# item* option will be made available to the user on the DETAILED DISPLAY screen so that they can go to the Holdings Display screen.
7. Allow OPAC users to see ORDER display [0,1]  
If set to 1, the user will be able to see the orders from OPAC.  
Use the *Forward* option to reach the fourth screen of the Port Control table.

## Listings Screen

These parameters govern the functions of OPAC screens which display listings.

```

                                OPAC PORT CONTROL

OPAC PORT CONTROL CODE : DEFAULT
------( Page 4 of 5 )
< LISTINGS SCREEN >

1. Auto Select and View (1 = Yes)           : 1
2. User can Change Auto Select and View (1 = Yes) : 0
3. No. of Display Lines for Items on Browse List : 0
   (0 = Display All Lines, # = Display # Lines)
4. User can Change No. of Display Lines (1 = Yes) : 0
5. Minimum Titles to List                   : 2
   (The default is 2)
   (The number of titles at which a Detailed Display
    should be shown as opposed to a browse list)
6. Browse - Proceed directly to Detail Display : 1
   for unique string match (0 = No, 1 = Yes)
7. Direct Key - Proceed directly to Detail Display : 0
   for exact string match (0 = No, 1 = Yes)

Options:
Forward  Backward  ?-Help  # line  Line by line  Print  Exit  File

```

### Fields

#### 1. Auto Select and View [0,1]

All listing screens allow you to browse a list of results and then to select items from that list and to perform some action upon them. The method by which you make these selections is determined by this parameter.

If set to 0, the *#line(s) select* and *Proceed* options will appear. Use the select number option to make selections either one by one or as a list (n,n-n). The system will highlight the selected options. You can then select more items from that page or from another page that you browse forward or backward to, and when ready, choose the option you want performed on those selections (*Proceed* - Proceed to the next level of the search; *Print* - Print the list).

If set to 1, you must, in one step, make all your selections (as a list: n,n-n) and choose the option you want performed.

2. User can Change Auto Select and View [0,1]  
Determines whether or not you can temporarily change the OPAC PARAMETERS screen.
3. Number Of Display Lines..... [Numeric]  
Determines the maximum number of lines which a single item within the listing can use. If the data for a single item goes over the defined number of lines, it will be truncated and an ellipsis (...) will be displayed.  
The value 0 means that all lines should be displayed.  
NOTE: Even when this parameter has been set to 0, a single item will be limited to one page.
4. User can change Number of display lines [0,1]  
Determines where you can temporarily change the number of display lines in the OPAC PARAMETERS screen.
5. Minimum titles to list [Numeric]  
This parameter defines the minimum number of items which should be listed in the DETAILED DISPLAY.  
If the search finds less than the defined number of items, the system will automatically go to the Item Display Screen with all of the found items selected.
6. Browse - Proceed directly to Detail Display..... [0,1]  
If 0 (no) is selected, a HEADING SUMMARY LIST is displayed.  
If 1 (yes) is selected, a unique match for a browse request produces a DETAILED DISPLAY. (The request must match only one heading which starts with the request entered by the user, and that heading appears in only one index and does not have a see or see also reference). For example, if the author Charles Beard is indexed as Beard, Charles Austin, 1874-1948, then to obtain a detailed display you can enter Beard and proceed directly to the DETAILED DISPLAY screen as long as no other author's name begins with Beard (and Charles Beard does not have a see or see also reference).



7. Direct Key - Proceed  
directly to Detail  
Display

[0,1]

If 0 (no) is selected, a search request produces a browse list.

If 1 (yes) is selected, any numeric search request that leads to an exact match produces a detailed display screen.

The option *Forward* brings you to the last page of the Port Control table.

## Patron Inquiry Control

This OPAC PORT CONTROL screen defines the security and options for Patron Inquiry and patron-entered ILL requests.

Note: All fields related to Interlibrary Loan setup appear only if the ILL module is installed.

```
OPAC PORT CONTROL

OPAC PORT CONTROL CODE : DEFAULT
----- ( Page 5 of 5 )
< PATRON INQUIRY CONTROL >

1. Security measures on patron inquiry function           :
   Patron must know their barcode plus :
   (1=password,2=Personal ID,3=Phone #,4=first 3 letters of surname)
   (e.g. 1234 means patron must know all 4)
2. Allow patrons to see hold queues (0=No,1=Yes)         : 1
3. Allow patrons to see blocks, fines (0=No,1=Yes)       : 1
4. Allow patrons to see items checked out (0=No,1=Yes)   : 1
5. Allow patrons to review ILL requests (0=No,1=Yes)    : 1
6. Patrons can add ILL requests from bib display (0=No,1=Yes): 1
7. Allow patrons to renew checked out items (0=No,1=Yes) : 1

Options:
Backward  ? Help  # line  Line by line  Copy  Print  Exit
```

## Fields

- |                                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|-------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. Security measures on patron inquiry function | <p>[1,2,3,4...]</p> <p>Sets the level of security that must be met before a patron can use the Patron Inquiry [PAT] feature in OPAC. Also controls security for the OPAC ILL Request option.</p> <p>Patron must know their barcode plus: (1=password, 2=Personal ID, 3=Phone #, 4=first three letters of surname) (e.g., 1234 means patron must know all four). The sequence specified in this record determines the sequence in which the user will be prompted for the security information. For example, the sequence 41 indicates the patron will be asked for the first three letters of their surname and then their password. The patron has three chances at each prompt. Any three consecutive failures at any prompt will terminate the patron identification. It is up to the library to define the number of security measures applied to the user.</p> <p>All data used in security measures are defined in the patron record set up of Circulation. Passwords, 1 to 23 characters long, are encrypted and do not display in the online catalogue. A home institution or sublocation can be specified in the patron record.</p> <p>Note: Before allowing a patron to place, cancel, or view their hold list in the Online Catalogue, similar security setup must be done on the HOLDS CONTROL CODE (CHLDC) table.</p> |
| 2. Allow patrons to see hold queues             | <p>[0,1]</p> <p>0 will not allow the patrons to see hold queues.</p> <p>1 will authorize them to see hold queues.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 3. Allow patrons to see blocks, fines           | <p>[0,1]</p> <p>0 will not allow the display of the patrons blocks and fines.</p> <p>1 will let them see the fines</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| 4. Allow patrons to see items checked out       | <p>[0,1]</p> <p>Allows patrons to see the items checked out.</p> <p>0 will not allow the patron to see items checked out.</p> <p>1 will allow the patron to see items checked out.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |

5. Allow patrons to review ILL requests [0,1]  
Determines whether the *Review ILL* requests option is available on the Patron Inquiry screen. Allows patrons to view existing requests and add new ones.  
0 will not allow the patron to review ILL requests.  
1 will allow the patron to review ILL requests.
6. Allow patrons to use ILL request option [0,1]  
Determines whether the ILL request option is available at the OPAC Brief or Full Display screen. Allows patrons to add new request by copying the bibliographic information on the screen into the ILL request form.  
0 will not allow the patron to see the *ILL Request* option.  
1 will allow the patron to review ILL requests.
7. Allow patrons to renew checked out items [0,1]  
0 will not allow the patron to renew checked out items from the OPAC PATRON RECORD INQUIRY screen when the *Item list* option is used.  
1 allows patrons to renew checked out items from the OPAC PATRON RECORD INQUIRY screen when the *Item list* option is used. The patron may renew specific titles or renew all the items at once. The items can only be renewed if the patron passes the normal checks for renewal. The system provides messages that explain whether the item is renewed. If the item cannot be renewed or if the patron does not pass the security checks, the system prompts *Please go to the Circulation desk for help*.

## OPAC Limits

This Control Table allows you to define the text for the prompts and the help windows which are displayed, when you are editing the search limits for an OPAC search on the ONLINE CATALOGUE - MODIFY SEARCH screen. (see *Search Options and Features* on page 3-19).

Select OPAC Limits on the ONLINE SEARCH SETUP menu or enter OL elsewhere on a menu screen to access the OPAC LIMITS screen.

```

                                OPAC LIMITS

                                : OPAC.LIMITS
                                -----
1. Prompt for date              : Publication Date
2. Help for date                : help for publication date
3. Prompt for edition           : Edition
4. Help for edition             : Help for edition
5. Prompt for language          : Language
6. Help for language            : Help for languageeng,xxx,yyy\Enter s+
7. Prompt for material type     : Material Type
8. Help for material type       : Help for material type
9. Prompt for publisher         : Publisher
10. Help for publisher          : Help for publisher
11. Prompt for series volume    : Series Volume
12. Help for series volume      : Help for series volume.

Options:
?-Help # line Line by line Print Exit

```

Six limits are available with two fields for each of them: *Prompt* and *Help*.

The *Prompt* field defines the text of the prompt for the particular limit.

The *Help* field defines the help window for the particular limit. In this field, it is possible to define a help window of (78 column x 10 rows).

## OPAC Permissions

In the Utilities Module, library administration staff can define user specific permissions for some of the Online Catalogue tasks. See the *Utilities Management Guide* for further information.

### Levels of Permission

There are three levels of permission: Y, N, and P.

- Y The user has permission for the specified task.
- N The user does not have permission for the specified task.
- P The user must enter a library-specified password to have permission for the specified task. With the correct password, this is equivalent to Y; without the correct password, this is equivalent to N.

The P level is useful at libraries in which people share terminals and a single user ID is defined for an area of work. The high-security tasks can be password controlled. The people who know the password can enter the password when they need to perform the task, then afterward leave the terminal as is — they do not need to log off, log in as a higher-level user, perform the task, and afterward log back off and then on again as a lower-level general user.

## Permissions by Permission ID Number

Permission ID Numbers are assigned by the system and are three digit codes that use the format 009, 062, etc. To display Permission ID Numbers grouped by module use MODULE PERMISSIONS (MPERM) on the SECURITY MENU.

### 057 - Exit Search Selection Screen

This permission controls whether or not a user will be authorized to exit from the Search Selection Screen.

A password will be defined but it is important to note that you DO NOT have to set up a user of other modules (for example Acquisitions or Serials) to access OPAC through that application.

### 058 - Override Truncated Limits

This permission controls whether or not a user can use the hidden 'A' (all) option from the SEARCH SYNTAX ANALYSIS screen whenever the word truncation retrieves more words than the maximum defined in the OPAC Port Control table.

### 059 - Override maximum number of items for OPAC printing

This permission controls whether or not a user can request printing for more items than established for the *Max # items to be printed at a time* field in the Bibliographic Output Control table (OBOC).

## Available OPAC Databases

In the Utilities Module, a library with the optional add-on Citation Database product or Community Information Module can define the display label and a code for each citation and Community Information database. You cannot use this table to add or delete the databases themselves: this work must be done by Geac installers.

Select `Available OPAC Databases` on the `UTILITY MENU` or enter `AODB` on the `MASTER MENU` or any `Utility Module` menu. The `OPAC DATABASE CODES` screen appears.

**NOTE:** Changes to this table take effect only after logging off `ADVANCE` and back on again.

```

                                OPAC DATABASE CODES

Number of records : 5
DATABASE NAME      DESCRIPTION
-----
1.  ABI            ABI Database
2.  CIM            Community Information
3.  IAC            IAC Database
4.  MAIN           Main Online Catalogue
5.  WIL            WILSON Database

Options:
? help  # line  Print  Forward  Backward  Search jump  Exit
```

Use the *# line* option to select one of the databases.



OPAC DATABASE CODES

: ABI

- 
1. Description : ABI Database
  2. Internal Database type (1=Main, 2=Citations, 3=Community Information): 2
  3. Code to Access Database : CITABI
  4. Catalogue in non-MARC (1) or MARC (0) :
  5. Position of privileged record flag in Leader:  
Attribute # for Command table : 5

Options:

? help # line Line by line Copy Print Exit

## Fields

1. Description [Text, 26 characters maximum]  
Database description, for display in search screen titles. For example, the first part of the following title (the text before the dash):  
ABI Citation Catalogue - Heading Browse.
2. Internal Database type [1, 2]  
1 if the main online catalogue database.  
2 if a citation database  
3 if a community information database.
3. Code to Access Database [Character code]  
Reference code for the database, for assignment in other setup tables: Search Selection Screens (OSSS), Title Summary Listing (OTSL), and Related Works (ORW). You may define a reference code that is the same as or different than the OPAC Database Code (*DATABASE NAME*). For example, CITABI and ABI, respectively.
4. Catalogue in non-MARC (1) or MARC (0) [1, 0]
  - 1 Cataloguers use labelled field (description fields from CTSD, BTSD) definitions to catalogue new or update existing records in the database. This setting is useful if non-cataloguing staff are creating or maintaining the Community Information database.  
In Cataloguing, select CIM MARC Cataloguing (CCMC) to create/edit a community information record.
  - 0 Cataloguers use MARC tags to catalogue new or update existing records in this database.  
The following are samples of the cataloguing display when the Community Information database is defined to use non-MARC cataloguing (example 1) and MARC cataloguing (example 2).  
Example 1: Non-MARC Cataloguing

## BIBLIOGRAPHIC MARC CATALOGUING

Local Control # : 10004348      Transaction type : Original Entry  
Last updated    : 25 MAY 1995    Leader                    : nqn    2  
Cataloguer      : Janet Ferguson (AU)

1. General Fixed Field : 950404uuuuuueng
2. Classification numb+ : 12111
3. Personal name        : Clemente, Celia
4. Address              : 570 DuBois Rd.  
City                    : Ithaca  
State or province      : NY  
Postal code            : 14850  
Telephone number      : (607) 387-5723
5. Description note    : TRANSLATION: Will translate legal and other  
documents
6. Biographical or his+ : EDUCATION:BA, Sociology--New York University.  
MS, Social Work--Syracuse University, 1979.

## Options:

? help   # line   Leader   Copy cataloguing   Overlay workform  
Item update   Link   Unlink   Reformat   Restore   Replace   Merge   Print  
Backward   Forward   File   Exit   Toggle mode

## Example 2: MARC Cataloguing

BIBLIOGRAPHIC MARC CATALOGUING

Local Control # : 10004348      Transaction type : Original Entry  
Last updated    : 25 MAY 1995    Leader                    : nqn    2  
Cataloguer      : Janet Ferguson (AU)

008            950404uuuuuueng  
084 BB a 12111  
100 1B a Clemente, Celia  
270 BB a 570 DuBois Rd.  
          b Ithaca  
          c NY  
          e 14850  
          k (607) 387-5723  
520 BB a TRANSLATION: Will translate legal and other documents  
545 BB a EDUCATION:BA, Sociology--New York University. MS, Social  
          Work--Syracuse University, 1979.  
546 BB a Fluent in English and Spanish

Options:

? help # tag Leader Copy cataloguing Overlay workform  
Item update Link Unlink Reformat Restore Replace Merge  
Labelled display Print Backward Forward File Exit Toggle mode

5. Position of privileged record flag in Leader [numeric]

If the database has the potential to contain sensitive or privileged information, specify a position in the leader that the library can use to flag a bibliographic record as containing privileged information. The default system setup uses character position 8 for this purpose. If the library chooses a value other than 8, the CAT.LEADER.CONVERSION item in the CF file must also be changed. Geac recommends that the library choose character position 8 as the Privileged Record flag. For more information, see *Defining MARC fields* in the *Cataloguing Management Guide*.

Attribute # for Command table

Provided by the system. This field cannot be edited.

## Material Search Type Codes

Material Search Type Codes provide a method of limiting searches when you use *Change limits* from the *Modify search* option. These codes are library defined codes that are linked to and form a superset of, the MARC Material Codes.

Select Material Search Type Codes from the MARC Codes Menu or enter OMST at any OPAC Menu.

```
MATERIAL SEARCH TYPE CODES

Number of records : 4
Code  Description of code
-----
1. MAPS  Maps
2. COMPU Computer files
3. BOOK  Book & monographs
4. MUSIC Music and Sound recordings

Options:
? help  Add item  # line  Print  Forward  Backward  Search jump
Exit
```

Use the *# line* option or *Add item* option to access the definition of an existing code or to add a new code.

```
MATERIAL SEARCH TYPE CODES

MATERIAL SEARCH TYPE CODE : BOOK
-----
1. Material Desc: Book & monographs
2. Material Code: aa,ac,am

Options:
? help # line Line by line Copy Print Delete Exit
```

1. Material Desc: [text]

Enter a description of this material.

2. Material Code [one or more 2 letter character codes]

Enter the two letter MARC Material Code(s). Multiple material codes may be entered, separated by commas. (You may assign the same MARC Material Code to more than one Material Search Type Code.)

## OPAC Keyword Thesaurus

The OPAC keyword thesaurus allows you to specify synonyms for a word. When the word is used with the expansion character (>) in an OPAC search, it broadens the search to include the word and all its synonyms. For example, if you perform a search on `road>`, the search is expanded to include `road OR boulevard OR crescent OR highway OR lane OR street`.

The OPAC KEYWORD THESAURSUS screen is accessed by entering the screen identifier (OKT) on the menu screen or by selecting OPAC KEYWORD THESAURSUS on the ONLINE SEARCH SETUP screen.

```
OPAC KEYWORD THESAURSUS

1. Word          :      ROAD

2. Search also   :      BOULEVARD
   (synonym)     :      CRESCENT
                  :      HIGHWAY
                  :      LANE
                  :      STREET

3. Search also   :      RD
   (reciprocal)

Options:
# line  Line by line  File  Exit  Delete  ? help
```

## Fields

1. Word [text]  
Enter a single word only. All diacritics, punctuation, and capitalization is normalized by the system.
  
2. Search also (synonym) [text]  
Enter a single word for each entry. All diacritics, punctuation, and capitalization is normalized by the system.
  
3. Search also (reciprocal) [text]  
Enter a single word for each entry. All diacritics, punctuation, and capitalization is normalized by the system.  
  
For any word entered in this field the system automatically creates a synonym link back to the entry made in the *Word* field. This has the effect of making the words specified interchangeable. For example, the search `rd >` expands to include `road`.



## Cataloguing Lists

Cataloguing Lists allows you to create library-defined search categories, such as a Bestseller List or a New Books List. Because the bibliographic tag used to define these lists is repeatable, the same title can appear in more than one list. These selections can be added to your search screen.

```

W e l c o m e   t o   t h e   O n l i n e   C a t a l o g u e

LOOK FOR THE FIRST WORD IN THE:          LOOK FOR ANY WORD IN THE:
Subject                                   Subject
Title                                    Title
Author                                   Author
    Personal Name
    Corporate Name
    Conference Name
Series
All of the Above
Call Number

DIRECT KEY SEARCHES:                     RESERVE DOCUMENTS:
ISBN/ISSN                                Title
CODEN                                     Author
LCCN                                       Course Name
Control Number                           Course Details
LCN  Instructor
Music Publisher Number                   Patron Inquiry

Select your choice using the <SPACEBAR> or Arrow Keys, then press <ENTER>.
For HELP, type "?" then press <ENTER>.  To EXIT, type "E" then press <ENTER>.
Enter the subject

```

Cataloguing lists are created by adding 9XX tags to the bibliographic record. The following steps are required:

- Create a table in OPAC for the Cataloguing List Code.
- Define a Cataloguing List tag (9XX) in Tag & Subfield Descriptions (BTSD).
- Add the Cataloguing List tag to the appropriate format definition in Tag & Subfield Edit Checks (BTSE).
- Add the Cataloguing List tag (9XX) to the appropriate MARC records.
- Set up a search definition in OPAC Searches (OS).

- To allow the Cataloguing List to be selected from the OPAC Search Selection Screen define a search name for it on the Search Selection Screens (OSSS) table.

## Creating a Cataloguing List Code

Select Cataloguing List Codes (CLIST) from the Online Search Setup menu. The CATALOGUING LISTS screen appears.

```

                                CATALOGUING LISTS

Number of records : 1
Code                Description of code
-----
1. BESTSELLER      Best seller book list

Options:
? Help  Add item  # line  Print  Forward  Backward  Search jump
Exit

```

This table is used to define Cataloguing list codes. Only a description is associated with it.

Use the *# line* option or *Add item* option to access the definition of an existing code or to add a new code.

Code [15 characters]  
Enter a code for this record.

Description of code [text]  
Enter a description of this code.

## Defining a Cataloguing List Tag

The default tag for cataloguing lists is 958. (If necessary, another 9XX tag can be used for this purpose but this change must be done by Geac.)

Select Tag & Subfield Descriptions (BTSD) from the BIBLIOGRAPHIC SET-UP MENU to define a 9XX tag that will be used to define cataloguing lists.

```

                                TAG AND SUBFIELD VALIDATION

Tag : 958

1) Description      : Cataloguing list tag
2) Short Label     : 958
3) Reorder Subfields :
   1 = All    0 = Non-Authority Only
   null = No reordering

Valid Subfields : a,b

4) Subfield       :
   Description     :
   Short Label     :
   Privilege Level :
5) Subfield Ordering and Combinations:

6) Privilege Level for Tag: 0

Options:
? Help  # line  Del subfield  Delete  File  Exit
```

The 958 tag is repeatable, not required, and is not a fixed field. Valid indicators are blanks. There are only two valid subfields for this tag:

- \$a – Cataloguing list code. This subfield is not repeatable, required, and not a fixed field.
- \$b – Date. This subfield is repeatable, not required, and not a fixed field. The \$b Date field is not edit checked. You should enter the information in a numeric date format, such as MM/DD/YYYY, or whatever is consistent with the date format your system uses. The date entered should be the date the tag is entered.

## Validating Cataloguing List Tags

Add the Cataloguing List tags to the appropriate formats in Tags & Subfield Edit Checks (BTSE). If the edit check records are not updated the system displays the message:

Invalid Cataloguing list code

when you file or reformat a MARC record.

```

                                TAG & SUBFIELD EDIT CHECKS
MARC tag or (L)eader : 958      Cataloguing list tag
Format                : BK Book & monographs

1) Repeatable? (Y/N) : Y
2) Required?   (Y/N) : N
3) Fixed Field (Y/N) : N
4) Valid Indicators : B0123456789,B0123456789,,,,,,,,

Subfields entered :

5) Subfield      :
   Repeatable? (Y/N) :      Required? (Y/N) :      Fixed Field (Y/N) :
   Pre characters to insert :
   Post characters to insert :

Valid Subfields : a,b

Options:
? Help  # line  Line by line  Del subfield  Delete  File  Exit
```

## Creating a Search Command for Cataloguing Lists

From the OPAC Searches (OS) screen create a new search command, CL, that can be used to search the Cataloguing List. For example, when the definition is made for BESTSELLER, patrons can use the command CL=BESTSELLER to view the list.

```
OPAC SEARCHES

OPAC SEARCH : CL
-----( Page 1 of 2 )
1. Search Type (W,B,K,C,RC,RM,X,L): L
2. Description : Cataloguing Lists
3. Stopword/article code :
4. 0=Bib search, 1=Auth search : 0
5. Prompt for bottom screen : Enter Cataloguing List Code
6. Help messages text :
7. Index filename : CLISTS
8. DCODES :
9. Label for Heading Browse & RBR :
10. Search Descriptor : Browsing Cataloguing List:

** Search type 'K' (Direct key) only **
11. Subroutine name :

Options:
Forward ? Help # line Line by line Copy Print Delete Exit
```

## Adding Cataloguing Lists to the Search Screen

To make the Cataloguing List appear on the OPAC Search Selection Screen (OSSS), you must add the field to your OPAC screen definition. Set the Subroutine to call `OPAC.CATALOGUING.LIST=BESTSELLER` (BESTSELLER is the Cataloguing List Code defined in CLIST. You can use any valid code after the equal sign.

```

SEARCH SELECTION SCREEN FIELD DEFINITIONS          MASTER
SCREEN CODE : DETAIL                               FIELD NUMBER : 38
1. Column : 48
2. Row    : 8
3. Display Label :
   Bestseller List
4. Highlight for Display Label ( 0=No highlight , OR 1-18 ) : 0

5. Type ( 0=text , 1=menu , 2=command , 3=subroutine ) : 3
6. Help text ( only if type = 1 , 2 or 3 ) :
   Browse Titles from Bestseller List
7. Database Code ( only if type = 2 ) :           Command Code:
8. OPAC Screen ( only if type = 1 ) :
9. Subroutine to call : OPAC.CATALOGUING.LIST=BESTSELLER
Options:
  Accept  Line by line  # line  Show menu  Delete  ? Help  Exit

```

## OPAC Limits

This Control Table allows you to define the text for the prompts and the help windows which are displayed, when you are editing the search limits for an OPAC search on the ONLINE CATALOGUE - MODIFY SEARCH screen. (see *Search Options and Features* on page 3-19).

Select OPAC Limits on the ONLINE SEARCH SETUP menu or enter OL elsewhere on a menu screen to access the OPAC LIMITS screen.

```

                                OPAC LIMITS

                                : OPAC.LIMITS
                                -----
1. Prompt for date              : Publication Date
2. Help for date                : help for publication date
3. Prompt for edition           : Edition
4. Help for edition             : Help for edition
5. Prompt for language          : Language
6. Help for language            : Help for languageeng,xxx,yyy\Enter s+
7. Prompt for material type     : Material Type
8. Help for material type       : Help for material type
9. Prompt for publisher         : Publisher
10. Help for publisher          : Help for publisher
11. Prompt for series volume    : Series Volume
12. Help for series volume      : Help for series volume.

Options:
?-Help # line Line by line Print Exit

```

Six limits are available with two fields for each of them: *Prompt* and *Help*.

The *Prompt* field defines the text of the prompt for the particular limit.

The *Help* field defines the help window for the particular limit. In this field, it is possible to define a help window of (78 column x 10 rows).



# A

## Using ADVANCE

---

This appendix provides some general instructions on how to use ADVANCE:

- the parts of a screen
- selecting menu items
- selecting screen options
- editing in data fields
- editing in data field windows.

## The Parts of a Screen

The ADVANCE screens follow a common design, as illustrated in the following sample menu — the ADVANCE MASTER MENU.

### Menu Screens

Each menu screen typically has:

- the **software name** (Geac ADVANCE Library System) and **release number** (RRRR, e.g. 5.00), and your **library system name** (Your Library Name), at the top centre of the screen
- the **date** (DD MMM YYYY) and **time** (HH:MM), in the top left corner of the screen
- the terminal's **Port Code** (PPPPPP) and default **Institution Code** (IIIIII), in the top right corner of the screen
- a **screen title** (e.g. MASTER MENU), four lines down in the centre of the screen
- an **information display** or **work area**, in the middle of the screen
- an **options area** for entering a menu option, at the very bottom of the screen.

```
DD MMM YYYY          Geac ADVANCE Library System (RRRR)          PPPPPP  IIIIII
HH:MM
                                Your Library Name

                                MASTER MENU

1. CAT  Cataloguing          4. ACQ  Acquisitions
2. CIRC Circulation          5. SER  Serials Control
3. OPAC Online Catalogue     6. UTIL Utilities

                                7. ON    Change User
                                8. OFF  Log Off

Enter the number of your selection and press <ENTER>
or ? followed by <ENTER> for Help :
```

## Non-Menu Screens

Most non-menu screens lack the information shown in the top three lines of menu screens, and list the options across the bottom of the screen. A sample ordering screen from Acquisitions is shown below.

The operator's **User ID** (UUUUUU) is shown in the top right corner of many screens.

```

                                ORD - ORDERING DATA                                UUUUUU
PO#/LINE#: 9200000314/0001      VENDOR   : PENGUIN      ORDER DATE: 02/08/93
REQUEST #: 920123              ORDER TYPE: REGULAR   REQST DATE: 02/08/93
LIBRARY  : UL                  CONDITION : OPEN     EST DELVRY: 02/22/93
ISBN/ISSN: 0898598125         LC CARD # : 85029331 RECEIVED  :
AUTHOR   : Buss, Arnold H., 1924-
TITLE    : SOCIAL BEHAVIOR AND PERSONALITY.

STATUS   : Rush Order

1. VENDOR   : PENGUIN      6. SELECTOR : ACQ          10. UNIT COST:         46.50
2. PAY TYPE : PAY          7. TOTAL CPY: 6           11. DISCOUNT%: 15.000
3. TRANSFER : Y            8. PRIORITY : RUSH       12. TAX %      : 8.000
4. CLM CODE : DFLT        9. CURRENCY : CDN        13. ADDED CHG:         0.00
5. REQUESTOR: C. Smith    14. CONDITION: OPEN
15. VENDOR  : Please supply ASAP
    NOTE    :

Options:      Description of selected option
File # line  Line by line  Bibliographic  Allocation  Notes  Status
Conditions  Serial Publication  Vendor inquiry  Prior screen  ? Help
Exit

```

## Selecting Menu Items

The ADVANCE modules are menu-driven. Menu screens which list available sub-menus or functions are offered at the highest levels of the module. There are two ways to select a menu item.

### Menu Item Number

To select a menu item, you may enter the item's reference number on the menu and <ENTER>. For example, to select the Serials Module on the ADVANCE MAIN MENU, enter the number 5 and <ENTER>; similarly, to select the Vendor Maintenance Menu on the SERIALS CONTROL MAIN MENU, enter the number 4 and <ENTER>.

### Screen Identifiers

Each menu item also has a short alphabetic name, called a screen identifier. For example, the Publications Pattern Function, an item listed on the SERIALS CONTROL MAIN MENU, has the identifier PUBM. You can enter the identifier instead of the menu item number on this menu.

Furthermore, you do not have to be on the menu that lists the function when you enter the screen identifier — you can enter the screen identifiers on any menu in the module to go **directly** to the screen you want, skipping any intermediate menus.

## Selecting Screen Options

Many non-menu screens have a list of options at the bottom. The way these options are presented depends on whether or not the “option bar” feature is turned on for your particular ADVANCE module (e.g. Serials) or your terminal’s port. (This feature is controlled by the system administrator at a setup table — see the *Utilities Management Guide*.)

All sample screens in this guide show option lines with this feature turned on.

### Option Bar

If the “option bar” feature is turned **on**, the option line will look something like the following, with one of the options highlighted and a brief description of it shown on the first line.

```
Options:   Get more information
Check in  Holdings  Claims  Order detail  Forward  Backward
Prior screen  ? help  Exit
```

To select an option:

1. move the highlighted bar in any of three ways:
  - press an arrow key
  - press the space bar
  - type the first (capitalized) letter of the option. If more than one option begins with the same letter, type the letter a second time to proceed to the second option.
2. and then <ENTER> to execute it.

### Option Code

If the “option bar” feature is turned **off**, the option line will look something like the following, with a code (or “command”) shown to the left of each option.

```
Options:                                     <ENTER> = scroll options
C = Check in   H = Holdings   CL= Claims       O = Order detail
F = Forward   B = Backward  P = Prior screen  ? = ? help
```

To select and execute an option, enter the option’s code and <ENTER>. For example, enter CL and <ENTER> for *Claims*.

**Scrolling** If the system does not have enough room to list all options at once, you can <ENTER> to scroll forward in the list. For example, the previous sample display will change to:

```
Options:                                     <ENTER> = scroll options
F = Forward    B = Backward    P = Prior screen    ? = ? help
E = Exit
```

and then to:

```
Options:                                     <ENTER> = scroll options
E = Exit
C = Check in    H = Holdings    CL= Claims          O = Order detail
```

and then finally back to the original display.

---

## Editing in Data Fields

Many screens have fields into which you can place the cursor to add or change data. These fields are usually the numbered fields.

### Single-field Access

To access a particular field, select the *# line* option and type the field's reference number. Afterward, you can leave the field and return to the option line by <ENTER>.

### Line-by-Line, Multi-field Access

To access all the screen's fields, one after another, instead select the *Line by line* option; this places the cursor in the screen's first field. <ENTER> takes you to the next field rather than down to the option line.

When you add a **new** record, the system displays a screen with most or all of the fields left blank and automatically puts you into line-by-line entry mode.

### Commands

The commands you can use to edit text or display help within a field are described in the following table.

Use the Back Space key and type over existing text, or use the <ESC> commands, when necessary. Be careful about using **arrow keys** for this purpose because they work differently on different types of terminals.

NOTE: The library might have different commands defined for some functions, such as <ESC>OO rather than <ESC>O for the insert/over-type mode toggle. If necessary, ask your system manager or Geac Customer Support, who can check the ADV.DEFINE.CURSORS file.

| <b>Enter</b> | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|--------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ENTER>      | To leave the current field as is and <b>proceed</b> , just <ENTER>. In line-by-line mode, the system places the cursor at the next field; otherwise, it places the cursor down at the option line.                                                                                                                                                                                                                                                                                                                                                         |
| (blank)      | To leave the current field as is and send the cursor <b>down to the option line</b> , even in line-by-line mode, enter a blank at the beginning of the field and <ENTER>.                                                                                                                                                                                                                                                                                                                                                                                  |
| .            | To leave the current field as is and <b>go back</b> one field, type a period at the beginning of the field and <ENTER>. In line-by-line mode, the system places the cursor back at the preceding field; otherwise, it places the cursor down at the option line.                                                                                                                                                                                                                                                                                           |
| #            | To <b>clear</b> the current field and proceed, type a number sign at the beginning of the field and <ENTER>. In line-by-line mode, the system places the cursor at the next field; otherwise, it places the cursor down at the option line.                                                                                                                                                                                                                                                                                                                |
| ?            | For library-defined <b>help</b> on the field, type a single question mark at the beginning of the field and <ENTER>.                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| ??           | <p>At fields which take a setup code as the value, you can have the system display the <b>list of valid codes</b>. Type two question marks at the beginning of the field and &lt;ENTER&gt;.</p> <p>For example, typing ?? in the <i>CHRONOLOGY CODE</i> field of the PUBM - PUBLICATION PATTERN screen causes the system to superimpose the CHRONOLOGY CODE - (CHRN) table. If you wish, you can assign one of the listed Chronology Codes to the field by entering the code's reference number at this table before returning to the original screen.</p> |
| <ESC>A       | ErAse character under the cursor (the cursor moves to the left).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <ESC>B       | Tab Backwards within the field.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <ESC>D       | Delete character under the cursor (the cursor does not move).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <ESC>H       | Go to the beginning of the field (Home).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <ESC>I       | Insert (paste) text from your preceding deletion/capture in the field.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <ESC>L       | Go to the end of the field.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <ESC>O       | Toggle between insert and Overtyping modes.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |



| <b>Enter</b> | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                              |
|--------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ESC>P       | For some fields, the system can only show the first line of information stored in the field. (If there is more text than can be shown, the system displays a plus sign, +, at the end of the line.) If the system does not automatically display and allow you to edit this text when you access the field, use this command to open an <b>edit window</b> .<br><br>See the next section for a list of window editing commands. |
| <ESC>Q       | Delete (and capture) text to the beginning of the field.                                                                                                                                                                                                                                                                                                                                                                        |
| <ESC>R       | Restore the field (undo changes).                                                                                                                                                                                                                                                                                                                                                                                               |
| <ESC>Z       | Delete (and capture) text to the end of the field.                                                                                                                                                                                                                                                                                                                                                                              |

### <ESC> Commands

1. Press the keys one after another rather than together. To use “<ESC>E”, for example, press the Escape key, release it, and then press the “E” key.
2. Enter characters in upper or lower case, as you wish. For example, <ESC>h is equivalent to <ESC>H.

For convenience, some libraries have set up **function keys** to take the place of the commands listed in the table.

## Editing in Windows

The following table lists the commands required for editing text within a field window. A window is a temporary workspace for a field in which you may enter or edit several lines or “pages” of data and use some special editing commands. You may also use the arrow, Tab, and Back Space keys as usual.

NOTE: The library might have different commands defined for some functions, such as <ESC>OO rather than <ESC>O for the insert/over-type mode toggle..

| <b>Enter</b> | <b>Description</b>                                              |
|--------------|-----------------------------------------------------------------|
| <ESC>A       | erAse character under the cursor (the cursor moves to the left) |
| <ESC>B       | tab Backwards                                                   |
| <ESC>D       | Delete character under the cursor (the cursor does not move)    |
| <ESC>E       | Exit from the window (and save changes)                         |
| <ESC>F       | reFormat the contents of the window                             |
| <ESC>H       | go to the beginning of the line (Home)                          |
| <ESC>I       | Insert (paste) text from your preceding deletion/capture        |
| <ESC>L       | go to the end of the Line                                       |
| <ESC>M       | go to the bottoM of the window                                  |
| <ESC>O       | toggle between insert and OvertypE modes                        |
| <ESC>P       | go to the next Page; oPen a window                              |
| <ESC>Q       | delete (and capture) text to the beginning of the line          |
| <ESC>R       | Restore the line (undo changes)                                 |
| <ESC>S       | Split the line into two lines                                   |
| <ESC>T       | go to the Top of the window                                     |
| <ESC>U       | go Up to the previous page                                      |
| <ESC>Z       | delete (and capture) text to the end of the line                |

**<ESC> Commands**

1. Press the keys one after another rather than together. To use “<ESC>E”, for example, press the Escape key, release it, and then press the “E” key.
2. Enter characters in upper or lower case, as you wish. For example, <ESC>h is equivalent to <ESC>H.

For convenience, some libraries set up **function keys** to take the place of the commands listed in the table.



# B

## Glossary

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This glossary explains many of the terms you may encounter in the documentation or while performing system activities.

Words shown in *italics* are defined elsewhere in the glossary.

### A

- AACR2      Anglo-American Cataloguing Rules, version 2. These are the rules that form the “bible” of cataloguing procedure as they relate to the construction of catalogues and other lists.
- access level      A number between 0 and 99. The higher the number, the more you are allowed to do. See also *priority level*.
- access point      An entry point into a catalogue. A heading by which a bibliographic record may be retrieved.
- accession number      A number assigned by the library to an individual *bibliographic item* when it is added to the library’s collection. In ADVANCE, the accession number is usually replaced by assigning a *barcode* to the item. Barcodes themselves may constitute a form of accession number, if they are sequential.
- account      Accounts are used within the PICK system software. ADVANCE is an account in SYSPROG.
- accounts receivable      The Circulation process by which patron fines are paid, created, or assessed and other financial transactions are performed.
- Acquisitions module      The ADVANCE module used to order and keep track of the purchase of items for a library, both serials and monographs.

|                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| added entry        | An entry, other than a subject entry and additional to the main entry, under which a bibliographical entity is represented in a catalogue.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| ALA character set  | An extended 8-bit ASCII character set defined for MARC records and adopted by the American Library Association. Of the 256 characters allowed for by this code, US/MARC defines 208.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| application        | A software program or set of programs that uses the computer as a tool, as opposed to the software necessary to run the computer.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| archive tape       | Tape from a <i>bibliographic utility</i> ( <i>OCLC</i> , <i>WLN</i> , <i>RLIN</i> , or <i>UTLAS</i> ) which are released to each library and contain a copy of that library's records from the utility's database. Tapes are produced regularly.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| ASCII              | An acronym for "American Standard Code for Information Interchange". A standard 7-bit code representing up to 128 characters. The ASCII code is used in computer communications.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| attach             | To connect a job or terminal to the computer in such a way that they can communicate. Also, to define communications characteristics for a terminal.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| authoritative form | The form of a heading that has been chosen as the standard form to be used in all bibliographic records.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| authority control  | <p>A way of handling and standardizing bibliographic information using "see" and "see also" references.</p> <p>The classic example of a "see reference" is Mark Twain vs. Samuel Clemens. The library decides which of these names for the same author will be the "established" form — say, Mark Twain. If users look for "Clemens, Samuel", they will find the reference, "see Twain, Mark".</p> <p>"See also references" are generally used in subject searches. A user who looked under the subject of "Home" might find "see also Family".</p> <p>Authority control refers to the sum of the library's cataloguing decisions as to which bibliographic elements will be established form headings, rejected form headings, and related headings.</p> |
| authority file     | Records of the correct forms of names, series, or subjects used in the catalogue. The purpose of the authority file is to keep entries uniform.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| authority hot key  | The function key a user can press to browse and retrieve an authority heading for the MARC field they are cataloguing.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |

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## B

- backup** An exact copy of a primary unit that can be used in place of the primary unit in case the primary unit fails. Usually 'backup' refers to copies of ADVANCE software and the library's data files which are kept on tape. If the disk versions of these files get damaged, the files can be restored from the backup versions on tape.
- barcode** A series of printed lines and spaces representing numbers, letters, or other symbols. Barcodes are not eye readable. The format of the barcode varies from one manufacturer to another. Geac equipment can work with several barcode formats, including 'CODABAR' and Code 39.
- barcode reader** A device for reading barcode labels into a system. Generic term for 'laser scanner' or 'lightpen'.
- batch** A collection of commands and input held in an editor file. Similar to a program, but relatively simple. Batches feed instructions to the computer without requiring the presence of an operator. When you execute a batch, it usually performs several control console commands and may run several programs in a pre-assigned order.
- baud rate** Also simply "baud". A standard unit, in bits per second, used to express the data transmission capability of lines, terminals, and interface equipment.
- bibliographic item** A document or set of documents in any physical form, published, issued, or treated as an entity, and as such forming the basis for a single bibliographic description. Contrast with *physical volume* and *copy*.
- bibliographic record** In ADVANCE, the MARC format record that describes one bibliographic item. For example, if the library owns 10 copies of a three-volume edition of "War and Peace", it will describe them in one Bibliographic Record with 30 items or pieces in the Item File — 10 for each of the separate volumes.
- bibliographic utility** An online processing centre whose services are based on a machine-readable database of catalogue records. The main North American utilities are *OCLC*, *WLN*, *UTLAS*, and *RLIN*.
- binding entry** An entry in a bibliographic record to indicate that an item is physically bound with one or more other items. Used with books bound together, AV kits, etc.

- bit A binary digit. A data field that has only two possible values, 0 or 1 — that is: NO or YES; OFF or ON.
- blind heading This is an authorized heading for which no authors or subjects exist in the bibliographic database. In general, blind headings do not appear in the Online Catalogue. Note, however, that blind, non-provisional, topical subject headings do appear in the Online Catalogue. All blind headings can be searched for in the Cataloguing module.
- blind reference This is a reference to an authorized heading that does not exist in the bibliographic database. In general, blind references do not appear in the Online Catalogue. Note, however, that references to blind, non-provisional, topical subject headings do appear in the Online Catalogue.
- Boolean searching A searching technique in which search terms are presented to the system in a particular manner. These terms are operated on with Boolean logic, which means the search terms may be separated by the operators AND, OR, NOT. For example, consider the subject search: COMPUTERS AND CARS. This search would result in the retrieval of a series of items in which both COMPUTERS and CARS formed a subject term.
- boot Short for “boot strap”. The operation of loading the initial elements of the ‘operating system’ into computer memory.
- borrower Known as *patron*.
- BOT Reflective marker to identify the beginning of a tape.
- bug An error in a program or hardware function that causes the function to work incorrectly.
- byte A character of data, normally represented by 8 bits.

## C

- call number Alphanumeric code used to identify and locate a particular item on the shelves. Call numbers usually consist of a classification number and author or cutter number; they may also include an accession number. In most systems, the call number also classifies the subject material of the book. Various systems exist - common ones are *LC* and *Dewey*.
- CAN/MARC Canadian version of the MARC format.



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|                           |                                                                                                                                                                                                                                                                                                     |
|---------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| carriage return           | Indicates the use of the ENTER or RETURN key on the keyboard. Operators use this key to send data to the computer, or to respond to a prompt. Sometimes abbreviated to “<CR>”.                                                                                                                      |
| Cataloguing module        | The ADVANCE module that automates bibliographic and authority control.                                                                                                                                                                                                                              |
| cataloguing source number | Unique number assigned by the provider of the cataloguing record: e.g. OCLC, LC.                                                                                                                                                                                                                    |
| charge                    | Known as <i>checkout</i> . A function in the Circulation module: the process by which a library item is lent to a patron. To loan a book to a patron is to charge it out to the patron.                                                                                                             |
| checkdigit                | A calculated digit added to the end of a number used to validate the correctness of the sequence of digits. Used in <i>barcodes</i> , <i>ISBNs</i> , and so on.                                                                                                                                     |
| checkin                   | 1) In the Circulation module, the process of checking returned items in at the circulation desk. Also known as <i>discharge</i> .<br>2) In the Acquisition and Serials modules, <i>checkin</i> is the process of receiving an item shipped to the library, and recording the receipt on the system. |
| checkout                  | A function in the Circulation module: the process by which a library item is lent to a patron. To loan a book to a patron is to <i>charge</i> it out to the patron.                                                                                                                                 |
| chronology                | Date that identifies an issue of a serial — e.g. “June 1991”.                                                                                                                                                                                                                                       |
| Circulation module        | The ADVANCE module that automates circulation functions and transactions.                                                                                                                                                                                                                           |
| citation                  | A display of bibliographic information describing a given work.                                                                                                                                                                                                                                     |
| CODABAR                   | A 14-digit <i>barcode</i> format that ADVANCE uses.                                                                                                                                                                                                                                                 |
| COM                       | Acronym for “Computer Output on Microform”. Information is recorded on microfilm or microfiche instead of paper.                                                                                                                                                                                    |
| command                   | An order telling the system to start, stop, or continue an operation within a function. Commands are usually entered by typing a mnemonic code.                                                                                                                                                     |

|                    |                                                                                                                                                                                                             |
|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| compile            | To translate a program from a high-level source language to a machine-executable form.                                                                                                                      |
| content designator | The means of identifying data elements and/or of providing additional information about a data element. Content designators consist of tags, indicators, and subfield identifiers.                          |
| control characters | Keyboard letters, numbers, or symbols which are entered while the <CONTROL> key is held down. They are not normally printable characters.                                                                   |
| control console    | A terminal, usually in the computer room, from which the system may be controlled.                                                                                                                          |
| conversion         | The process of turning machine-readable records in one format into machine-readable records of a different format.                                                                                          |
| copy               | A single piece of a document; a duplicate; an instance of a serial issue. See also <i>bibliographic item</i> , <i>physical volume</i> , <i>piece</i> , and <i>copy set</i> .                                |
| copy number        | A number assigned by the library to a copy. The number need not be unique. Its usual purpose is to distinguish between different copies of the same title, or different copy sets of the same serial title. |
| copy set           | A duplicate run of issues of a serial; simplistically a “subscription”.                                                                                                                                     |
| copy-specific hold | A hold placed on a specific copy. A copy-specific hold may be used, for example, to capture a particular copy to be sent to the bindery. Contrast with title-level hold.                                    |
| core               | Computer memory, usually measured in megabytes: “MB”.                                                                                                                                                       |
| CRT                | Cathode Ray Tube screen of a terminal. Also known as VDU (visual display unit).                                                                                                                             |
| CSN                | Cataloguing Source Number.                                                                                                                                                                                  |
| cursor             | A small square or line on the terminal screen which tells you where the next character you type will appear.                                                                                                |
| cutter number      | Part of the <i>call number</i> used to identify the author for filing purposes.                                                                                                                             |

---

## D

|                    |                                                                                                                                                                                                                                                                                              |
|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| database           | A pool of data held in computer storage, controlled by a central authority, and available to any application capable of accessing the storage. It is designed to meet the requirements for consistent and current data by many or all of an organization's application systems.              |
| data communication | The transmission of data across geographically separated locations.                                                                                                                                                                                                                          |
| data element       | The smallest unit of information that is explicitly identified in MARC format. Within a variable field, a data element is identified by a subfield identifier. Within the record label, the directory, and a fixed-length subfield, a data element is identified by its character positions. |
| date of last use   | The date of the last transaction associated with a particular record.                                                                                                                                                                                                                        |
| Dewey              | Dewey Decimal Classification system, developed by Melvil Dewey.                                                                                                                                                                                                                              |
| diacritics         | Also "diacritic characters/marks". The marks, such as accents, which appear under or over characters, used to denote a specific sound for a given character. Sometimes used to refer to non-English alphabetic characters as well.                                                           |
| discharge          | Known as <i>checkin</i> . A function in the Circulation module: the process by which library staff record that a borrowed item has been returned by the patron.                                                                                                                              |
| disk               | Also "hard disk". A magnetic storage medium, like magnetic tape, but in the form of a platter, similar to a phonograph record.                                                                                                                                                               |
| disk drive         | A data storage device that holds, reads from, and writes to <i>disks</i> .                                                                                                                                                                                                                   |
| diskette           | Also "floppy disk". Similar to <i>disk</i> , typically used with microcomputers.                                                                                                                                                                                                             |
| DOS                | Disk Operating System, for a microcomputer.                                                                                                                                                                                                                                                  |
| download           | The data flow from the host computer system <b>down</b> to the microcomputer.                                                                                                                                                                                                                |

## E

|                  |                                                                                                                                                                                                                   |
|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| edit record      | The “edit” records are the temporary, work versions of bibliographic records, stored in the Work File. Edit records are not shown in the Online Catalogue.                                                        |
| edition          | A new edition of a work, revision. Edition information may modify some but not all of the bibliographic information for a work. According to AACR2, a new bibliographic record must be created for a new edition. |
| editor           | A program that enables the user to create, purge, retrieve and update variable-length record source files.                                                                                                        |
| editor file      | A file created using the editor.                                                                                                                                                                                  |
| enumeration      | Numbering that identifies an issue of a serial — e.g. “Vol.3 Pt.A”.                                                                                                                                               |
| EOF              | The magnetically recorded mark at the end of a file.                                                                                                                                                              |
| EOT              | The reflective marker at the end of a tape attached to the tape surface.                                                                                                                                          |
| established form | This is the form of a heading that has been chosen as the standard form that should be used in all bibliographic records. Also known as <i>authoritative form</i> .                                               |

## F

|        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|--------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| F.E.   | Stands for “Field Engineer”. Also written “FE”.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| F.E.D. | Also written “FED”. Field Engineering Division — the Geac department responsible for maintaining and repairing hardware.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| field  | <ol style="list-style-type: none"><li>1) A MARC “field” is a defined part of a MARC record used to contain only a specific category of data. For example, included in the Bibliographic Record is the Main Entry - Personal Name Field (Tag 100), the Title Statement Field (Tag 245), and the Local Call Number Field (Tag 090). There are two kinds of MARC fields - <i>variable length</i> and <i>fixed length</i>. Some people use the word “tag” to refer to a MARC field.</li><li>2) An area on the screen where you can enter data, or where the system will display information: for example, author, title. Fields often appear on the screen with a descriptive word beside them. For example, the author field usually has “AUT:” or “AUTHOR” beside it.</li></ol> |

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|                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| field separator            | A control character used at the end of each <i>variable field</i> to separate it from the next.                                                                                                                                                                                                                                                                                                                                                                           |
| file                       | <p>A collection of related records treated as a unit.</p> <p>A file is a logical structure which associates a set of items. On a PICK system, files are organized in a hierarchical structure. There are four levels of files: the System Dictionary, a users' Master Dictionary, File-level Dictionaries, and the Data Files. A PICK system can contain any number of files, which can contain any number of data items, limited only by the size of the disk drive.</p> |
| file structure             | The rules of organization that relate records within a file.                                                                                                                                                                                                                                                                                                                                                                                                              |
| fixed-length field         | Also "fixed field" and "control field". A MARC field of pre-defined length in a bibliographic record: for example, the Physical Description Field (Tag 007). Fixed-length fields are made up of one or more fixed-length data elements (sometimes called <i>offsets</i> ).                                                                                                                                                                                                |
| fixed-length field element | Part of a MARC <i>fixed-length field</i> whose length and contents are pre-defined. For example, the language code (character positions 35 to 37) in Tag 008.                                                                                                                                                                                                                                                                                                             |
| fixed-length subfield      | A <i>subfield</i> whose length is invariant, being determined for all occurrences by provisions of this format. A fixed-length subfield may be defined to contain one or more data elements. Fixed-length subfields may occur in both fixed-length fields (e.g. field 100, subfield ‡a), and variable-length fields (e.g. field 200, subfield ‡z).                                                                                                                        |
| frame                      | Disk drive storage is divided into sections called "frames". Each frame is numbered, giving the system direct access to that particular frame-id or FID. The physical size of a frame is machine-dependent, and limited only by the size of the disk drive.                                                                                                                                                                                                               |
| function                   | <p>In ADVANCE, "function" refers to each of the possible actions available in the main menus.</p> <p>For example, in the Circulation module, "function" refers to an operation available in the online menus: e.g. checkout.</p>                                                                                                                                                                                                                                          |
| fund                       | The library can define amounts of money to be encumbered, spent, referred to, and reported on through named "funds" within the Acquisitions module. The term "fund" is used to contrast with external "accounts" which are not system-maintained.                                                                                                                                                                                                                         |

## G

GFE Group Format Error. A GFE typically indicates that the data may be corrupted. Normally GFEs are caused by a sudden power failure.

## H

- hang Refers to the situation where the computer does not respond to terminal activity. Usually the result of some kind of fault, either in the software or the hardware.
- hold Sometimes called “reservation”. A facility in Circulation referring to the process by which an item not currently available is reserved for the patron. It is normally used when all copies are on loan. When the item becomes available, the library sets it aside for the requesting patron.
- holdings **Piece holdings:** the physical volumes that the library owns of a given work.  
**Copy holdings:** the issues that the library owns of a serial.  
**Summary holdings statement:** a description of the range of copy holdings.
- host The controlling or main computer in a data network.
- hot key See *authority hot key*.

## I

- imprint Publisher name, including date and place of publication.
- index A list of data arranged in some order (usually alphabetical) using a special “key” (such as author, title, etc.) which acts as an access point to the database. Indexes facilitate quick access to a large body of data.
- index entry A word, phrase, or number used to locate an item within a specific index.
- index key The term or phrase from a source record which allows you to search for that record - for example, “Twilight Zone”, or “Bowie, David”.
- indicator A special data element in a MARC variable field. Each US/MARC variable field must have two one-character indicators.

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|                   |                                                                                                                                                                                                                                                                                                                                             |
|-------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| intensity         | The brightness of the characters on the screen.                                                                                                                                                                                                                                                                                             |
| interface         | To interconnect devices or systems with different characteristics. Usually involves converting data suitable for one system into a form suitable for a second system. The term can be used as a verb or a noun. It can be applied to a cable or a connector, to a device that performs a conversion operation, or to a conceptual boundary. |
| interlibrary loan | The arrangement whereby a library system may borrow items from another library system. Either or both of the two libraries may be Geac customers. ILL patron privilege classes and material types should be defined in the Policy Tables.                                                                                                   |
| invoice           | An accounting document supplied to the library by a vendor, indicating the character, quantity, price, terms and nature of delivery of goods sold or services rendered. In the Acquisitions module, staff members will create a system record for each invoice received.                                                                    |
| I/O               | Abbreviation of “input/output”.                                                                                                                                                                                                                                                                                                             |
| ISBD              | “International Standard Bibliographic Description” — a format for describing bibliographic information.                                                                                                                                                                                                                                     |
| ISBN              | “International Standard Book Number” — an alphanumeric code (with dashes) assigned by some publishers to their works. The same work published in different countries will have different ISBNs.                                                                                                                                             |
| ISO               | Short form for “International Standards Organization”.                                                                                                                                                                                                                                                                                      |
| ISSN              | International Standard Serial Number. Similar to ISBN, except for serials.                                                                                                                                                                                                                                                                  |
| issue             | A publication unit of a serial, usually identified by unique enumeration (numbering) and chronology (cover date).                                                                                                                                                                                                                           |
| item              | Used variously, in different contexts, to mean <i>bibliographic item</i> , <i>physical volume</i> , <i>copy</i> , or barcoded <i>piece</i> .                                                                                                                                                                                                |

## J

|     |                                                                                                                                                |
|-----|------------------------------------------------------------------------------------------------------------------------------------------------|
| job | Often used as a synonym for “program”. A unit of work to be done using the computer. Often accomplished through the use of a batch or program. |
|-----|------------------------------------------------------------------------------------------------------------------------------------------------|

journal entry In the Acquisitions module, a transaction record specifying the transfer of money into or out of one or more funds.

## K

KB Short for “kilobyte” — 1024 *bytes* of memory.

keyword A word which is used as an access point to the bibliographic record. These words are taken from author, title, and subject, and individually indexed without regard to order of appearance.

## L

laser scanner Device for reading barcodes or OCR labels. See also *barcode reader*.

LC Short for “Library of Congress”. It refers to the Library of the Congress of the United States, a body with some of the characteristics of a national library. Also used to refer to the classification system used by the Library of Congress.

LCSH “Library of Congress Subject Headings”. A subject classification system for cataloguing.

LC Card Number Sometimes abbreviated to “LCCN”. “Library of Congress Control Number” — the number assigned to an item by the Library of Congress production services as a printing control number / inventory number after an item has been catalogued.

LC MARC Records Records in *US/MARC* format produced by the Library of Congress.

leader The beginning portion of a MARC record. The leader contains coded information about a record, including record type, bibliographic level, and creation date. The information is stored in a fixed-length format.

library system Also called “library”, or more often, “site”. A purchaser of ADVANCE. A library system may consist of a central library, along with its branches and departments. Alternatively, a library system may be a consortium or co-operative. A library system is composed of one or more “agencies” which share the same CPU.

lightpen The pen-like device attached by a cord to the terminal. It is used to read *barcodes* into the system for operations such as registering new patrons



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to the system, searching quickly and accurately for those already there, or entering a patron or item during a function such as CHECKIN, CHECKOUT, etc.

- line The transmission medium and equipment for carrying speech and/or data between separated locations, usually between host computer and remote terminal.
- line printer The printers used to print reports are often called “line printers”, so named because they print one line at a time. Printing speed for line printers is given in number of lines per minute: for example, “600 lpm”.
- linking The process of adding holdings information and (in particular) a barcode number for an item to the item’s bibliographic record.
- Also used in the Reserve Book Room to bring together specific courses with items.
- load To mount a tape on the tape drive and set it to the load point.
- load point The beginning of the usable portion of a tape. The load point occurs when the tape drive detects a one inch reflector on the tape (the *BOT* mark). A tape at load point may be used as soon as the drive goes online.
- local call number Known as *shelf location*.
- local copy number Known as *copy number*.
- log To record events and their time of occurrence.
- log on See *sign on*.
- log off See *sign off*.

## M

- magnetic tape Storage medium for information. Usually used in conjunction with a computer system. Typically, the magnetic tape is 1/2 inch in width, and comes in various lengths.
- main entry In a manual cataloguing system, the primary access point for a bibliographic item. Normally the author but sometimes the title.

|               |                                                                                                                                                                                                                                                                                                                                                                                                                            |
|---------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| MARC field    | A <i>fixed-length</i> or <i>variable-length field</i> in a MARC format record.                                                                                                                                                                                                                                                                                                                                             |
| MARC format   | “MAchine Readable Cataloguing” — a standardized communications format for storing and transferring bibliographic and authority cataloguing data records on magnetic tape. A MARC record is composed of a leader, a directory to the fields, fixed length fields, and variable length files. National libraries issue records for various materials in their own versions of MARC: for example, US/MARC, CAN/MARC, UK/MARC. |
| material type | A category of library materials used in the library. For example, newspapers, adult fiction paperbacks, and video cassettes could all have different material types. The library usually categorizes its materials based on its circulation policies (such as loan period) and the statistical reports desired. Every item is assigned a material type. A two-character code identified by MARC.                           |
| master record | Completed bibliographic records, stored in the main bibliographic file, or the main record for binding entry records.                                                                                                                                                                                                                                                                                                      |
| MD or M/DICT  | “Master Dictionary” — each user account on the system has a Master Dictionary associated with it. It is structurally similar to all other files on the system. Many things that a user enters at the TCL prompt are contained in the user’s Master Dictionary: verbs, procs, connectives, file-names, etc.                                                                                                                 |
| menu          | A listing of the functions available online that allows a user to choose and perform a variety of actions. The user selects the action by entering certain key(s).                                                                                                                                                                                                                                                         |
| module        | An “application” package within the ADVANCE System — examples: the Circulation module, the Cataloguing module.                                                                                                                                                                                                                                                                                                             |
| monograph     | Book; contrast with <i>serial</i> .                                                                                                                                                                                                                                                                                                                                                                                        |

## N

|                  |                                                                                                                                                                                                                         |
|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| non-filing       | Words or characters that do not affect sorting. For example, <b>The Joy of Cooking</b> is filed under “J” for “Joy”, not “T” for “The”. “The” is a non-filing word.                                                     |
| non-filing count | A specific number of characters which will be ignored for sorting purposes. Usually applied to the title of a work, and usually counted from the first character in the title. For example, <b>The Joy of Cooking</b> , |

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filed under “J” for “Joy”, would have a non-filing count of “4” (the three characters in “The” plus one space). This count is normally placed in one of the indicators of a MARC record.

normalization To improve the matching and filing of index entries, several “normalization rules” are applied automatically. For example, all letters may be converted to upper case, and some punctuation marks can be converted to blanks or stripped.

note A type of field or screen display where library staff can enter free text about a patron or item.

notice In ADVANCE, “notice” generally refers to an item printed by the library, but meant to be circulated outside the library, such as a fine notice, overdue notice, or claim notice (in Acquisitions).

## O

OCLC A bibliographic utility, formerly “Ohio College Library Center”, now “Online Computer Library Center”. Among other services, it provides a machine-readable database for cataloguing.

OCR Optical Character Recognition or Reader.

offline Opposite of *online*.

offset Another term for fixed-field data elements.

online “Online” has two meanings:

1. Connected directly to and interacting with a computer.
2. A major program used to make computer interaction easier: for example, the Circulation online.

Online Catalogue One of the ADVANCE modules, the Online Catalogue is an online query system that automates manual catalogue systems for lookup only. It allows library patrons to search the MARC records database. Patrons can examine bibliographic records, locating items through standard indexes such as subject, title, author, series, keywords, and bibliographic identification numbers.

OPAC Short for “Online Public Access Catalogue”. The ADVANCE OPAC is known as the “Online Catalogue”.

|                  |                                                                                                                                                                                                                |
|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| operating system | Often referred to as “OS”. The set of programs that control the computer and its processing.                                                                                                                   |
| operator         | The person using a terminal.                                                                                                                                                                                   |
| order            | See <i>purchase order</i> .                                                                                                                                                                                    |
| OS               | Short form for <i>operating system</i> .                                                                                                                                                                       |
| OSI              | Stands for “Open System Interconnect.” An international standard developed by <i>ISO</i> and used for communication between different types of computers. The OSI model defines 7 levels for the interconnect. |

## P

|                   |                                                                                                                                                                                                                                                                                          |
|-------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| parity            | A system of detecting errors in data transmissions and transfers. By selectively adding a single bit to bit patterns, parity causes the bit patterns to have either an odd number of bits turned On (odd parity), or an even number of bits turned On (even parity).                     |
| parity error      | Parity errors occur when the bit patterns caused by the system’s ‘parity’ setting are incorrect: for example, when the system detects a “0” but expected a “1”. Parity errors imply that one portion of the system has detected a non-recoverable failure by another part of the system. |
| password          | A code which is typed by an operator to sign on to the system or to a module. The password determines the operator’s <i>access level</i> .                                                                                                                                               |
| password security | The type of security in which staff passwords are used. The password indicates the operator’s access level which, in turn, determines the commands he or she is permitted to use.                                                                                                        |
| patron            | Refers to the individuals who use the goods and services offered by a library. Also called “borrower” and “user”.                                                                                                                                                                        |
| patron agency     | The location/library where a patron is registered.                                                                                                                                                                                                                                       |
| patron class      | Known as “patron privilege class”.                                                                                                                                                                                                                                                       |
| patron record     | The record that describes a patron. The description includes: name, barcode number, address, and other patron-related information.                                                                                                                                                       |

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|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| peripheral         | Also “peripheral device”. In a computer system, a functional unit that makes and/or receives data transfers. The term includes storage devices (such as tape drives), input devices (such as terminals), and output devices (such as printers).                                   |
| physical volume    | All that is contained in one binding, portfolio, etc., whether as originally issued or as bound after issue. A physical volume does not necessarily coincide with a bibliographic volume, which is characterized by a title page and separate pagination. See also <i>piece</i> . |
| PICK               | The operating system and database management system used by ADVANCE.                                                                                                                                                                                                              |
| piece              | A barcoded circulation unit, usually corresponding to a physical volume. Each barcoded volume of a monographic bibliographic item is a piece. In ADVANCE, piece control is handled by the Cataloguing module’s holdings function.                                                 |
| pointer            | A data element which specifies the record-number of a record in a file, or in a related file.                                                                                                                                                                                     |
| policies           | Each library has certain characteristic ways of handling the way it conducts business. These are referred to as “policies”. Circulation Setup policies include loan periods, book limits, material types, renewal limits, fine amounts, and so on.                                |
| policy parameters  | Library policies stated explicitly in the form of sets of values for the Geac-supplied tables, lists of options, and so forth.                                                                                                                                                    |
| policy tables      | The tables completed by a library during the installation process. These define the library policies, contain the decisions regarding library options, outline the structure of the system and list the various codes used by the library. Each module has its own set of tables. |
| port               | An interface that connects one or more devices (e.g., terminals, printers) to the computer. Each port has a unique number.                                                                                                                                                        |
| powerfail recovery | The computer’s ability to recover from power failures without losing data.                                                                                                                                                                                                        |
| printer            | A peripheral device used to provide hard copies of data.                                                                                                                                                                                                                          |

|                     |                                                                                                                                                                                                                                  |
|---------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| priority level      | Refers to a “security level” required to perform a function. There is a level of security associated with each command, ranging from 0 to 99 (highest = most). Synonymous with <i>access level</i> .                             |
| PROC                | PROC is short for stored procedure. PROC allows the user to pre-store a complex series of operations which can be invoked by a single command. Anything which can be done at the TCL level can be accomplished with a PROC.      |
| program             | A sequence of machine-readable instructions that a computer can execute. When a program is executed, it performs some function or operation.                                                                                     |
| project manager     | The Geac Project Manager is responsible for liaison between Geac and the individual customer.                                                                                                                                    |
| prompt              | A message from the <i>operating system</i> or an <i>application</i> program. Prompts appear on the CRT screen, and require a response from the computer operator.                                                                |
| publication pattern | A serial’s <i>enumeration</i> pattern, <i>chronology</i> pattern, and publication frequency pattern, used by the Serials module to predict issues.                                                                               |
| purchase alert      | A warning that additional copies of a title may be needed. Usually because all copies are missing or because the “hold ratio” for this item (that is, the number of holds compared to the number of active copies) is very high. |
| purchase order      | A record authorizing a vendor to deliver materials or services, usually at a set price, to the library. One or more copies of one or more items can be covered by a single purchase order (sometimes abbreviated “PO”).          |

## R

|           |                                                                                                                                          |
|-----------|------------------------------------------------------------------------------------------------------------------------------------------|
| reboot    | To perform a second or subsequent <i>boot</i> .                                                                                          |
| recall    | To require that a book on loan be returned before the expiry of the due date that was assigned when the charge was made.                 |
| recompile | To perform a second or subsequent <i>compile</i> of a program.                                                                           |
| recon     | Retrospective conversion of bibliographic records into machine-readable format. This process typically occurs when a library purchases a |

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|                   |                                                                                                                                                                                                                                                                                                                                                        |
|-------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                   | library automation system but still has some bibliographic records that were never put into machine-readable format.                                                                                                                                                                                                                                   |
| record            | To make computer processing easier, data items are brought together to form a unit called a “record”. A group of records makes up a “file”.                                                                                                                                                                                                            |
| recovery          | The process of returning a system to operable condition following a failure.                                                                                                                                                                                                                                                                           |
| reel              | A magnetic tape volume or the tape and the spool on which it is wound.                                                                                                                                                                                                                                                                                 |
| registration      | The process of recording information about individual patrons for the Circulation system, and especially of assigning barcode numbers to those patrons. Usually, “patron registration” applies to the initial entry of this information onto the system.                                                                                               |
| release           | Release refers to a particular version of a package of software: for example, Release 5.0 of ADVANCE.                                                                                                                                                                                                                                                  |
| remote            | A term applied to a device or operation that is geographically-separated from a computer but communicates with it.                                                                                                                                                                                                                                     |
| renewal           | The process whereby a borrowed item is checked out again to the same patron, effectively extending the loan period.                                                                                                                                                                                                                                    |
| report            | A result of processing in which data from various data fields is selected and presented in a particular way to provide certain pre-defined information to the user. The hard copy of this data is printed as a “report”.                                                                                                                               |
| reserve           | A “reserve collection” is also known as “short loan collection”. In academic libraries, a type of material in high demand that has short loan periods assigned to it. Reserve is often applied to required course reading materials, or to new or topical items.<br><br>The term “reserve” is sometimes used by public libraries to mean <i>hold</i> . |
| reserve book room | “RBR” is a function within the Circulation module designed to handle high-use materials in the reserve collection, often items associated with a course. It allows the user to enter instructor and course information, and links titles with the appropriate courses.                                                                                 |
| reserve recall    | An item is recalled for the Reserve Book Room.                                                                                                                                                                                                                                                                                                         |

- response time Used in connection with computer systems. The amount of time it takes for an online system to give data requested of it. It is measured as the amount of time between the point when a user presses the ENTER or RETURN key and the point when the first character of response appears on the screen.
- restore To replace something which has been removed, deleted or damaged. Restoration is part of recovery, and usually refers to the process of replacing disk files with the backup copies on tape.

## S

- scanning Also “wandering”. The act of drawing the lightpen across a barcode to read the barcode into the system.
- security level The level assigned to each function, command, and override in order to restrict its usage. Only those functions and commands having a priority level at or below the operator’s active access level may be used.
- “see also” reference A reference from an established form of a heading to one or more related headings. Also known as a "see also" cross reference.
- see reference A reference to the established form of a name from a form which should not be used as a heading. Also known as a “‘see’ cross reference”, “rejected form heading”, or “variant form heading”.
- serial A publication issued in successive parts bearing numerical or chronological designations and intended to be continued indefinitely. This includes periodicals, newspapers, annuals, etc. In ADVANCE, a serial is a *bibliographic item* (catalogued in the Cataloguing module) which may also have a *publication pattern* and *copy set* defined in the Serials module. A serial may also have *pieces* (barcoded items) assigned to it. Also see the definitions of *issue*, *copy*, and *holdings*.
- Serials module The ADVANCE module that automates serials control — primarily checkin and issue prediction.
- shelf list A catalogue of the items in a library; items are described in the same order that they are arranged on the shelves.
- shelf location Also “local call number”. The *call number* assigned to a specific copy of an item.



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|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| sign off           | Also “log off” and “logging off”. To enter the necessary information to end a session on a terminal. The console command is “OFF”. Compare to <i>sign on</i> .                                                       |
| sign on            | Also “log on”, “log in”, and “logging on”. To enter the necessary information (such as an identification number or password) to begin a session on a terminal. The console command is entry of a valid account name. |
| site               | Customer library, usually where the computer is located.                                                                                                                                                             |
| sort               | To arrange entities according to some pre-defined criteria, usually alphabetic.                                                                                                                                      |
| spine label        | Label for the spine of a book, typically with the call number.                                                                                                                                                       |
| string             | Any succession of characters. These can be numbers, letters, blanks, or other characters. The PICK system treats most data simply as a sequence of symbols or “string”.                                              |
| subfield           | In MARC format, the name for a defined part of the field in a MARC <i>variable-length field</i> , such as subfield b.                                                                                                |
| subfield code      | The one-character code which identifies a MARC subfield: for example, the “a” in “ $\ddagger$ a”.                                                                                                                    |
| subject headings   | Authorized terms that describe the contents of a book. Several may apply to a single work. One North American standard is LC Subject Headings.                                                                       |
| surcharge          | The charge automatically levied against a patron to cover certain costs, such as the cost of postage for notices, or ordering and cataloguing a replacement book.                                                    |
| syndetic structure | The logical organization of the catalogue, using “ <i>see</i> ” and “ <i>see also</i> ” <i>references</i> to interrelate the concepts represented in the catalogue.                                                  |
| SYSPROG            | System Programmer. The highest-level account within PICK.                                                                                                                                                            |
| system backup      | To copy (back up) all the files making up the system.                                                                                                                                                                |
| system manager     | The library staff member responsible for the systems staff and the computer.                                                                                                                                         |

## T

|                    |                                                                                                                                                                                                                                                                                                                                                         |
|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| tag                | The labelling mechanism used by MARC to associate data elements with their functions. Tags are composed of three digits: for example, “210” is the tag for the Abbreviated Title Field. Each different tag represents a different piece of bibliographic information: e.g., personal author, uniform title. “Tag” is sometimes used to mean MARC field. |
| tag number         | A term sometimes used to mean <i>tag</i> .                                                                                                                                                                                                                                                                                                              |
| tape               | A magnetic tape reel or cassette, or the tape on the reel or cassette.                                                                                                                                                                                                                                                                                  |
| tape backup        | The process of making a copy of data files and/or the system software. The library uses the backed-up tapes as a security precaution, in case the need for a 'restore' arises.                                                                                                                                                                          |
| tape drive         | The equipment that holds, reads from, and writes to magnetic tapes.                                                                                                                                                                                                                                                                                     |
| TCL                | “Terminal Control Language” processor. TCL is the primary interface between end-users and the computer. The state in which the computer <i>prompt</i> is displayed and is waiting for user input is commonly called being “at TCL”.                                                                                                                     |
| telecommunications | The organization and facilities that provide communications service between users in geographically separated locations. The term encompasses telephone, telegraph, radio, and satellite-based systems; unless otherwise indicated, telephone is usually assumed.                                                                                       |
| terminal           | A device used by a person to communicate with the computer.                                                                                                                                                                                                                                                                                             |
| Terminal Number    | Each terminal in a library system is assigned a unique number.                                                                                                                                                                                                                                                                                          |
| title              | The name of a work, including any alternate title, subtitle, or other associated descriptive matter preceding the author, edition, or imprint statement on the title page.                                                                                                                                                                              |
| tracing            | Any record of entries or references that have been made in connection with the cataloguing of a particular work or publication, or with establishing a particular heading. Also known as subject headings or added entries.                                                                                                                             |
| track              | A unit of data storage space on disk.                                                                                                                                                                                                                                                                                                                   |

- 
- transfer To read data in one location and write it in another location.
- transaction Any checkin, checkout, renewal, or hold.

## U

- UK/MARC The United Kingdom version of the MARC format.
- UNIX A computer *operating system* developed by Bell Laboratories.
- upload The data flow from the microcomputer **up** to the host computer system.
- UPS “Uninterruptable Power Supply” — essentially a series of batteries that conditions the power to the computer, and, with the absence of electricity, provides power to the computer for a period of time (e.g. 30 minutes.)
- user Same as *patron*.
- US/MARC The version of the MARC format used in the USA.

## V

- variable-length field Also “variable field”. A MARC field in a bibliographic record whose length is not pre-defined: for example, the Title Statement Field (Tag 245). A variable field is composed of two one-digit *indicators* and one or more *subfields*.
- vendor A dealer, wholesaler, or other organization supplying books or other materials to the library.
- volume Bibliographic element of a series. For example, **The Art of Computer Programming** has three volumes. The important point is that volumes normally share SOME bibliographic elements with each other.
- voucher A request for the complete or partial payment of one or more invoices, usually sent to the library’s financial services department.

## W

- wand Device for reading barcodes. Known as *lightpen*.
- wanding Known as *scanning*.

- WLN “Western (formerly ”Washington“) Library Network” — a bibliographic utility.
- word A unit of data storage: 8, 16, or 32 bits depending on the computer.
- work file A file where data is temporarily stored before being placed in the database. Used in the Cataloguing module.

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