ADVANCE

Utilities Management Guide

(Release 6.82)

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Introduction

Purpose

The *Utilities Management Guide* instructs the library system administrators on how to define system-wide characteristics of the Geac ADVANCE Library System. These include port definitions, menus, options, and User IDs.

Contents

Chapter 2 of this guide provides a brief overview of the Utilities Function, and includes a function/menu map.

Chapter 3 covers the main Utilities functions in detail.

Chapter 4 describes control of the background processors.

Chapter 5 describes how to edit the online help screens.

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

Appendix B is a general ADVANCE glossary.

Appendix C describes transaction logging operations and recovery procedures.

Appendix D provides instructions for starting and stopping the ADVANCE server.

Appendix E discusses how the ADVANCE server is installed. (NOTE: installation of the server is performed by Geac.)

Appendix F describes the report writer permissions.

Other Documentation

Consult the module-specific guides for related information: how to set up and customize the module, and how to use module software such as the background processing jobs, reports, and loaders.

- *Acquisitions Management Guide*

- *Cataloguing Management Guide*

- *Circulation Management Guide*

- *Online Catalogue Guide*

- *Serials Management 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: "`ORDA`", "`Y`", "`REG`", "`Item on temporary hold by staff`".

2. The names of screen fields and options, and cross-references to section or manual titles, are in **italics**. Examples: "*UNIT COST*", "*Exit*", "see *Handling Subscriptions*".

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 behavior 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.

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Overview

Many of the system admistrator's tasks may be performed within ADVANCE, in the Utilities Function:

- user interface customization

- general code definition

- report production and definition

- message definition and control

- background processor control

- physical and logical port definition

- security.

This chapter also provides a function/menu map for the Utilities Function.

For general instructions on accessing screens and editing fields throughout ADVANCE, see *Using ADVANCE* on page A-1.

ADVANCE Core Module

The ADVANCE Core Module consists of the ADVANCE *MASTER MENU* (MM) and the Utilities Function (UTIL). The other modules (Cataloguing, Circulation, Online Catalogue, Acquisitions, and Serials) may be considered optional, sub-modules within the ADVANCE Core Module.

Utilities

User Interface Customization

The following general features of the ADVANCE user interface may be customized from the Utilities Function. (The screen identifiers are referenced in parenthesis.)

- **menu** definitions: title, list of functions and sub-menus (sequence, position, and text), and prompt (see the EMENU function)

- new **screen identifiers** (sometimes called keywords) for modified or new menus (EKF)

- the **option line format** in each module and port: either option bar mode or option command mode (OLC)

- the **option** commands, names, and help text (UCSO)

In addition, **help screens** may be defined (Help Screen Editor).

General Codes

The following miscellaneous system definition is controlled from the Utilities Function:

- patron and item **barcode formats** for each institution (BCE)

- **zip and postal codes** with their associated addresses, for patron records (ZIP)

- **qualifier codes** for controlling the scope of holds and Online Catalogue searches (QUAL).

Reports

In Utilities Function, you can produce summary reports on reports, and use the Report Writer to define or produce reports for all the modules.

Messages

Greeting messages for the ADVANCE login screen may be defined and marked for random display, specific user display, or specific date display.

Background Processors

The ADVANCE background processors for the Circulation, Cataloguing, Acquisitions, and Serials Modules are activated and de-activated from the Utilities Function (UBPM). These processors execute scheduled processing jobs such as Circulation notice production and Acquisitions purchase order generation, and execute ongoing processing such as Cataloguing bibliographic indexing.

Ports

The definition of logical and physical ports includes features such as the terminal type, the printers to which output will be sent, identification of the port as a dialin port, and dedication of the port for Online Catalogue use (PORTS).

User IDs may be mapped to specific logical ports for each module (ULOG).

Language Control

For multilingual libraries, Geac provides a Language Codes table and a set of tools to help manage the language files for system text (LMENU). These are listed in the *Menu and Function Map* but are not otherwise described in this manual.

CAUTION Do not use these translation tools without consultation with Geac.

Security

ADVANCE security control is provided in the following ways. (The screen identifier for the security-defining functions are given in parentheses.)

- a user requires a **User ID** (sometimes called an Identification Code or Access Code) and a **password** in order to log on to ADVANCE (EACC)

- a user's **privilege level** in a module determines which menus and functions (screen identifiers) he or she has access to in that module (EACC)

- the **access level** of a screen identifier determines whether a user at any particular privilege level has access to the identifier's corresponding menu or function (EKF)

- a user's **screen identifier suppression** setting in a module determines whether he or she is restricted to selecting from menus in that module: that is, whether screen identifiers may be entered to directly access unlisted functions and menus (EACC)

- a user's **permissions**, possibly restricted by password and by Library Code, Qualifier Code, or fund number pattern, determine which detailed functions and activities he or she may perform on which records. (This extended security control is currently implemented only in the Acquisitions and Online Catalogue Modules.) (EACC and SECUR)

- a user's **default menu** in the ADVANCE Core Module, and the contents of that menu, determine which modules the user has access to (EACC and EMENU)

- a **menu** definition determines which functions and sub-menus a user sees listed (EMENU)

- the **hide option** setting for an option determines whether users see the option listed at the bottom of screens (UCSO)

Additional security control is provided within the individual modules. For example, you can specify which forms of identification are required in order for a patron to access his or her circulation information in the Online Catalogue, and you can determine which selectors may select items to be ordered on which funds in Acquisitions,

Transaction Logging

The optional Transaction Logging module provides up-to-the-minute protection from data loss by writing all database updates to a separate journal (disk) drive.

Accessing the Menus and Functions

The Utilities menus and functions can be accessed directly by entering their screen identifiers on any Utilities menu (or on the ADVANCE *MASTER MENU*), or indirectly by going through two or more menus. For example, the *SYSTEM UTILITY MENU* screen identifier is USUM.

Screen identifiers are indexed at the back of this guide, and are included in the list of menus and functions in the following section.

Whether you must go through two or more menus to reach the function you want depends on whether or not the port setup and individual access control levels on your system hide the highest level, ADVANCE *MASTER MENU*. The library may also have rearranged the menus and the functions available on them.

Utilities Main Menu

The *UTILITY MENU* (screen identifier UTIL) provides access to all Utilities menus and functions.

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


                          UTILITY MENU

                  1. USUM     Systems Utility Menu

                  2. USRM     System Reporting Menu

                  3. UTLM     Import/Export Menu

                  4. UBPM     Background Processor Menu

                  5. LMENU    Language Menu

                  6. AODB     Available OPAC Databases

                  7. TLCTRL   Transaction Logging Control


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

Menu and Function Map

Following is a list of the menus and functions you may encounter in using the Utilities Function. The user-availability, location, and titles of some of these items might have been modified by the library.

Items in *italics* are covered in the *Cataloguing Management Guide,* the *Circulation Management Guide,* the *Online Catalogue Guide,* or the *Reports Guide*. Items in **bold** are menus.

MM   **ADVANCE Master Menu**

  UTIL   **Utility Menu**

    USUM   **System Utility Menu**
              EMENU   Enter Menu
              PMENU   Print Menu
              USMO   Standard Menu Options
              EKF   Enter Keywords
              PKF   Print Keywords
              EACC   Enter Access Codes
              PACC   Print Access Codes
              ULOG   Add Port to Access Codes

      SECUR   **Advance Security Menu**
                GPERM   General Permissions Setup
                MPERM   Module Permissions Setup
                UBACC   User Group Access Code Setup
                PSSWD   Password Setup

              SPC   Server Port Control
              PORT   Port Definitions
              BCE   Barcode Control Entry
              ZIP   Zip/Postal Code Entry
              UGME   Greeting Message Entry
              UGMC   Greeting Message Control
              UCPW   Change Password
              UCSO   Update Option Prompts
              OLC   Option Line Choice

      QUAL   **Qualifier Maintenance Menu**
                MQUAL   Qualifier Code Maintenance
                PQUAL   Post Qualifiers to Database

```
            MSG        Application Messages
```
USRM ***System Reports Menu*** (See the *Reports Guide)*
    CCR   *System Reports*
    RW   *Report Writer*
    URCM   *Report Codes Menu*
        RGC   *Report Group Codes*
        RM   *Reporting Modules*
        RT   *Reporting Types*
        RO   *Reporting Operators*
        RST   *Reporting Sort Types*
        RPO   *Reporting Print Options*
        RWF   *Reporting Files*
    RPC   *Report Prompt Codes*

UTLM ***Import/Export Menu***
    UBIM   ***Bibliographic Importing Menu*** *(See the Cataloguing Management Guide)*
        UBII   *Import Standard MARC*
        UJCIM *Journal Citation Importing Menu*
            UABII *Import ABI*
            UIACI *Import IAC*
            UWILI *Import Wilson*
        UCIMI *CIM Import Standard MARC*
        UBIX   *Index Standard MARC*
        UBIS   *Stop MARC Indexing*
    UAIM   ***Authority Importing Menu*** *(See the Cataloguing Management Guide)*
        UAII   *Import Standard MARC*
        UAIX   *Index MARC Records*
        UAIS   *Stop MARC Indexing*
    UAEM   ***MARC Exporting Menu*** *(See the Cataloguing Management Guide)*
        UAES   *Exporting Selection Codes*
        UABE   *Authority & Bibliographic Exporting*
    UPIM   ***Patron Importing Menu*** *(See the Circulation Management Guide)*
        UPIR   *Import Patron Records*
        UIPR   *Index Patron Records*

UBPM **Background Processor Menu**
```
            PCIR       Circulation Processor
            PCP        Cataloguing Processor
            CPC        Cataloguing Processor Control
            PACQ       Acquisitions Processor
            PSER       Serials Control Processor
```

LMENU **Language Menu**

      UTTA   Set Tape Type and Attach Tape
      ULST   Save Language Files to Tape
      ULLF   Load Language Files from Tape
      ULDC   Display English Language Changes
      ULIF   Integrate Foreign Language Files
      CL   Change Language
      ULAC   Add/Modify Language Code

AODB *Available OPAC Databases*

TLCTRL Transaction Logging Control

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System Utilities

The SYSTEM UTILITY MENU provides access to functions which enable you to:

- define and print library-specific **menus** (EMENU, PMENU)

- list the **"standard" screen identifiers** (keywords) available from all menus (USMO)

- define and print **screen identifiers** (keywords), and assign an access level to the screen identifier (EKF, PKF)

- define and print **User IDs** (access codes), and assign a password to each user and, for each module, specify the user's access level, default menu, permission to use non-displayed screen identifiers, and so on (EACC, PACC)

- assign a **logical port** to each User ID for each module (ULOG)

- define User Group **security permissions** for detailed tasks and functions, and permission passwords if required (SECUR, GPERM, MPERM, UBACC, PSSWD)

- define each **port**. and specify the terminal type, printers used for output, default Institution Code, and so on (PORT)

- define **barcode** formats for each institution (BCE)

- define **zip and postal codes** (ZIP)

- define **greeting messages**, and specify when and for whom the messages will be shown (UGME, UGMC)

- change your own **password** (UCPW)

- define **option codes** (USCO)

- list the modules and ports in which the **option bar** is used, and specify Online Catalogue time-outs (OLC)

- define the **Qualifier Codes** for Online Catalogue searches and Circulation holds filling, and have the codes assigned to the pieces and copy sets in the database (QUAL, MQUAL, PQUAL).

Access   To access the SYSTEM UTILITY MENU, select it from the UTLITY MENU, or enter USUM on any Utilities menu (or on the ADVANCE MASTER MENU).

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

                          SYSTEMS UTILITY MENU

     1. EMENU   Enter Menu                 11. PORT    Port Definitions
     2. PMENU   Print Menu                 12. BCE     Barcode Control Entry

     3. USMO    Standard Menu Options      13. ZIP     Zip/Postal Code Entry
                                           14. UGME    Greeting Message Entry
     4. EKF     Enter Keywords
     5. PKF     Print Keywords             15. UGMC    Greeting Message Control

     6. EACC    Enter Access Codes         16. UCPW    Change Password
     7. PACC    Print Access Codes         17. UCSO    Update Option Prompts
     8. ULOG    Add Ports to Access Codes  18. OLC     Option Line Choice

     9. SECUR   Advance Security Menu       19. QUAL   Qualifier Maintenance
    10. SPC     Server Port Control         20. MSG    Application Messages

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

The functions are described in this chapter, in menu sequence.

Menus (EMENU)

Use the Enter Menu function to add or update the ADVANCE menus. You may, for example, create a special, simplified menu for the Circulation front desk staff.

Access the function from the SYSTEM UTILITY MENU, or by entering EMENU on any Utilities menu (or on the ADVANCE MASTER MENU).

Specifying the Menu

```
                    UPDATE MENU FILE                        MASTER

    Enter Menu Item Key :
```

To add or update a menu, enter the menu name and <ENTER>. Alternatively, to leave the function, <ENTER> without specifying a menu.

Existing Menu

Name   To see a list of existing menu names, either use the Print Menu function to print the menus, or log out of ADVANCE and LIST the MF file at the Terminal Control Language (TCL) level.

System   When you specify a menu, such as DEV.ACQ.MASTER, the system
Response   displays the main UPDATE MENU FILE screen. From this screen you can edit, delete, print, and preview the specified menu.

New Menu

Name   Menu names can be 1-40 characters long, and cannot include blanks. (Use periods in place of blanks.)

Geac suggests you add your library name to the end of the menu name to distinguish library-specific menus from Geac-provided ones. For example, name a menu ACQ.MASTER.RECEIVERS_MYLIB (where MYLIB represents your library's National Union Catalogue code).

System Response	When you enter a new name, the system prompts:

```
This is a new record. Do you want to continue? (Y/N)
```

If you answer Y and <ENTER>, to create the new menu, the system first displays the UPDATE MENU FILE screen. Use this screen to create, print, and review the specified menu.

If you answer N or do not answer, the system returns to the *Enter Menu Item Key* prompt.

Update Menu File

If you selected an existing menu to update, the system displays the UPDATE MENU FILE screen that allows you to select your next activity.

```
              UPDATE MENU FILE                              MASTER

   MENU ITEM : DEV.ACQ.MASTER

   1. HEADING: ACQUISITIONS MAIN MENU
   2. PROMPT :

   3.    COL  ROW  KEYWORD   DESCRIPTION                     ADDONS

          5    7   ORDM      Ordering Menu
          5    9   RECM      Receiving Menu
          5   11   INVM      Invoicing Menu
          5   13   ARM       Reports Menu
          5   15   VENM      Vendor Maintenance Menu
         43    7   FUNM      Fund Management Menu
         43    9   CODM      Code Table Menu
         43   11   CTLM      Control Table Menu
         43   13   ARCM      Archive Access Menu             ACQARC
         22   17   MM        Return to Master Menu

   Options:
    # line   Line by line   Delete   Show menu   File   Print   ? help   Exit
```

Fields

1. HEADING   [0-50 characters, including imbedded blanks]

Screen title. For consistency with Geac provided menus, use uppercase letters. The system automatically centers your text.

2. PROMPT [0-50 characters, including imbedded blanks]

Enter the prompt that will display at the bottom of the menu. The system automatically centers your text.

If this field is left blank, the system uses the standard menu prompt:

```
Enter the number of your selection and press <ENTER>
```

or, ? followed by <ENTER> for Help.

```
Press <ENTER> to return to previous level:
```

3. [Details]

COL [0-79]

Column position for the menu option. Typical values are: 23 for options in a single-column menu, or 5 and 43 for options in a two-column menu.

ROW [5-18]

Column position for the menu option. Typical values are: 5, 7, 9, and so on for options in a double-spaced menu. (Rows 0-4 should be left for the menu heading, and rows 19-23 should be left for menu prompts.)

KEYWORD [1-8+ characters]

Screen identifier (keyword) of the function that accesses the menu option.

DESCRIPTION [1-39+ characters]

Description of the menu option.

ADDONS [1-10+ characters]

Used by Geac development staff to specify that a screen identifier (keyword) is part of one or more add-on products. At installation/upgrade time, the specific screen identifier becomes part of the installed menu only if one or more of the specified add-on products is installed. The format of this field is:

• Commas are used to specify OR conditions.

• Semi-colons are used to specify AND conditions.

For example, the value `ACQ,SER;CIRC` means that the site must have either acquisitions or serials installed along with the circulation module.

Options

Select *Delete* to delete the menu from the system. Select *File* or *Exit* to return to the `Enter Menu Item Key` prompt.

Show Menu   Previews the menu by displaying it on screen.

Print   Previews the menu by sending the image to the printer.

 # line
Line by line   Select *# line* or *Line by line* to edit the menu. When field 3 is edited (which represents the contents of the menu) a new option line appears and each line of the menu is numbered.

```
              UPDATE MENU FILE                              MASTER

   MENU ITEM : DEV.ACQ.MASTER

   1. HEADING: ACQUISITIONS MAIN MENU
   2. PROMPT :

   3.    COL  ROW  KEYWORD   DESCRIPTION                     ADDONS

      1.   5    7  ORDM      Ordering Menu
      2.   5    9  RECM      Receiving Menu
      3.   5   11  INVM      Invoicing Menu
      4.   5   13  ARM       Reports Menu
      5.   5   15  VENM      Vendor Maintenance Menu
      6.  43    7  FUNM      Fund Management Menu
      7.  43    9  CODM      Code Table Menu
      8.  43   11  CTLM      Control Table Menu
      9.  43   13  ARCM      Archive Access Menu             ACQARC
     10.  22   17  MM        Return to Master Menu

   Options:
    Forward   Backward   # line   Line by line   Delete #   Add #   Show menu
    Accept    Print    ? help    Exit
```

Menu Table Options

Add #   Adds a new line item before the specified line. To add to the beginning of the list, choose *Add # 1*; to add to the end of the list, choose *Add # n* where n is one greater than the last line number.

Delete   Removes the specified item from the menu table.

Accept   Temporarily saves the changes made to the Menu Table and returns you to the UPDATE MENU FILE screen. Use *File* to permanently save your changes to the menu.

Menu Printing **(PMENU)**

Use the `Print Menu` function to print the ADVANCE menus.

Access the function from the SYSTEM UTILITY MENU, or by entering PMENU on any Utilities menu (or on the ADVANCE MASTER MENU).

```
                    MENU PRINT ROUTINE
                    ==================


  Do you wish to print all menus or just one? (A, D, S, E) :

        (A)ll menus associated with a master menu.

        (D)ump all menus  (No particular order).

        (S)ingle menu to the printer.

        (E)xit this process.
```

Options

A   Prints a menu and all sub-menus. The system prompts:
```
Print Documentation? Y/N
Output with numbered border? Y/N
ENTER MODULE
Enter keyword of beginning menu.
```

D   Prints all menus associated with a module, even the ones that do not appear as an option on another menu. The system prompts:
```
Print Documentation? Y/N
Output with numbered border? Y/N
ENTER MODULE.
```

S   Prints one menu. The system prompts:
```
Print Documentation? Y/N
Output with numbered border? Y/N
ENTER MODULE
Enter keyword for menu.
```

E   Exits the `Print Menu` function.

Prompts

Print Documentation?

Answer Y to have the report include menu names, screen identifiers, access levels, and so on for the menus and all the menu options.

Output with numbered border?

Answer Y to have the report include column and row numbers around each menu.

ENTER MODULE

Enter the module name. The valid names are:

ACQ   Acquisitions Module
CAT   Cataloguing Module
CIRC   Circulation Module
OPAC   Online Catalogue Module
SER   Serials Module
blank ADVANCE Core Module (includes Utilities Function).

Enter keyword of beginning menu

Enter the screen identifier of a menu. For example, enter AUTIL for the ACQUISITIONS UTILITIES MENU and its sub-menus. For all the menus in a module, in menu option sequence, enter the module's main menu:

ACQ.MM   ACQUISITIONS MAIN MENU
CAT.MM   CATALOGUING MAIN MENU
CIRC.MM   CIRCULATION MASTER MENU
OPAC.MM   ONLINE CATALOGUE MASTER MENU
SER.MM   SERIALS CONTROL MAIN MENU
ALOHA.MM ADVANCE MASTER MENU.

Enter keyword for menu

Enter the screen identifier of a specific menu. For example, enter AUTIL for the ACQUISITIONS UTILITIES MENU alone.

Standard Menu Options (Screen Identifiers) `(USMO)`

Use the `Standard Menu Options` function to view or change the list of universal screen identifiers.

Access the function from the SYSTEM UTILITY MENU, or by entering `USMO` on any Utilities menu (or on the ADVANCE MASTER MENU).

```
                    UNIVERSAL KEYWORDS


     TABLE CODE : STANDARD.OPTIONS
     ----------------------------------------------------------------------
  1. Options    : OFF,ON,UCPW



            These options will be available from any menu.
            Even if DIRECT KEYWORD access is not possible.


 Options:
  ? help   # line   Line by line   Print   Exit
```

Users at sufficiently high access levels may enter any of these screen identifiers on any ADVANCE menu, even if they are not listed on the menu and the user cannot use unlisted screen identifiers. However, screen identifiers can only be used in the module(s) for which they have been defined.

Standard screen identifiers include:

OFF   Logs the user completely out of ADVANCE, down to the UNIX logon prompt. (Dialled-in users may be disconnected.)

ON   Logs the user out of ADVANCE, back to the ADVANCE Logon Screen.

UCPW   Accesses the `Change Password` function.

Screen Identifiers (Keywords) **(EKF)**

Use the `Enter Keywords` function to add or update the screen identifiers for menus or functions.

If, for example, you create a special, simplified, menu for the Circulation front desk staff, you will need to define a screen identifier for the menu. This enables staff to access the menu directly, and allows you to define the menu as an option on a higher level menu.

Access the function from the SYSTEM UTILITY MENU, or by entering EKF on any Utilities menu (or on the ADVANCE MASTER MENU).

Specifying the Module

```
                    UPDATE  ** KF **  FILE              {ADV}


   Module Name :
```

To add or update screen identifiers, enter the module name and <ENTER>.

The valid names are:

   ACQ   Acquisitions Module
   CAT   Cataloguing Module
   CIRC   Circulation Module
   OPAC   Online Catalogue Module
   SER   Serials Module
   ADV   ADVANCE Core Module (includes Utilities Function).

Multiple Modules   The screen identifier may be used only within the module you specify. If you want staff to be able to use an identifier in more than one module, you must define the identifier multiple times, once in each of those modules.

Specifying the Screen Identifier

```
                        UPDATE  ** KF.ACQ **  FILE              {ADV}


    Enter Code :
```

The system displays the name of the module you selected (e.g. ACQ) in the screen title, and prompts for the screen identifier.

To add or change the definition of a screen identifier, enter the screen identifier and <ENTER>. Alternatively, to leave the function, <ENTER> without specifying an identifier.

Screen Identifier   Screen identifiers are 2 to 8 characters long, and cannot include blanks. Special screen identifiers are used for the main menu in each module: for example, the screen identifier for the ACQUISITIONS MAIN MENU is ACQ.MM rather than just ACQ.

To see a list of existing screen identifiers, either use the Print Keyword function to print them, or log out of ADVANCE and LIST the KF file at the Terminal Control Language (TCL) level.

New Screen   If you enter a new screen identifier, the system prompts:
Identifier
`This is a new record. Do you want to continue? (Y/N)`

Answer Y to create the new identifier, or N to leave the function.

Screen Identifier Definition Screen

Once you have specified a module and screen identifier, the system displays a screen for defining the identifier.

```
                       UPDATE  ** KF.ACQ **  FILE            {ADV}


  Enter Code : ACQ.MM


  1. Keyword Type   : M
  2. Verb/Data/Code : MF
  3. Identification : DEV.ACQ.MASTER
  4. Access Name    :
  5. Pass in Data   :
  6. Access Level   :


   Options:
    # line   Delete   Delete #   File   Print   Exit   ? help
```

Select *File*, *Exit*, or *Delete* to leave the Enter Keyword function and return to the menu from which you accessed the function: *File* saves your changes, *Exit* does not save your changes, and *Delete* deletes the screen identifier from the system.

Select *Delete #* and specify a field number to clear the contents of that field.

Fields

1. Keyword Type   [M, V, R, or S]

Indicates the type of function called by the screen identifier.

M   The identifier calls a menu. Use this value for the library-specific menus you add.

V   The identifier calls a non-menu function: a verb or subroutine (such as the Acquisitions Ordering Function).

R   GEAC-ASSIGNED ONLY. (The identifier calls a report.)

S	GEAC-ASSIGNED ONLY. (The identifier calls a screen handler.)

2. Verb/Data/Code

[file name]

If the identifier calls a menu, enter MF.

If the identifier calls a non-menu function, enter the name of the verb or subroutine.

3. Identification

[menu name or non-menu function type]

Identifies the menu or kind of verb:

- to have the screen identifier call a menu, enter the menu name (2-40 characters)

- to have the screen identifier call a non-menu function, enter CP for a Geac subroutine, or IV for a local subroutine or a PICK verb.

4. Access Name

Leave blank: not currently used.

5. Pass in Data

[0-50 characters]

Some non-menu functions can accept data specified in this field. Ask Geac Support for assistance.

For example, you might add a new library calendar named NCAL (in the Circulation Calendar table, CLCM), and then add NCAL as a V type screen identifier to the Online Catalogue's Library Calendar Menu (screen identifier OLCM; menu name OPAC.CALENDAR). To have the new calendar displayed when users select NCAL on the menu, you must specify NCAL in the *Pass in Data* field of the definition of the NCAL screen identifier.

6. Access Level

[0-99]

Minimum privilege level required by a user in order to use the screen identifier (and therefore access the menu or function controlled by the screen identifier). 99 provides the very highest security, and 0 or blank the lowest —all users can use the screen identifier (as long as they can access the module itself and can either access a menu which offers the identifier or can enter identifiers directly from any menu in the module).

Screen Identifier Printing (PKF)

Use the Print Keywords function to print the screen identifiers.

Access the function from the SYSTEM UTILITY MENU, or by entering PKF on any Utilities menu (or on the ADVANCE MASTER MENU).

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

                                 PRINT KEYWORDS

 Enter module name or <ENTER> to exit :
```

To print the screen identifiers, enter the module name and <ENTER>. Alternatively, to leave the function, <ENTER> without specifying a module.

The valid names are:

    ACQ   Acquisitions Module
    CAT   Cataloguing Module
    CIRC   Circulation Module
    OPAC   Online Catalogue Module
    SER   Serials Module
    ADV   ADVANCE Core Module (includes Utilities Function).

User IDs (Access Codes) `(EACC)`

Use the `Enter Access Codes` function to add or update the User IDs for ADVANCE users. User IDs control access to ADVANCE, the modules, menus and functions, and the Cataloguing workfiles. Some changes, such as financial transactions or bibliographic record updates, are stamped with the user's User ID. The User ID definition includes the user name and password and, for each module, the access level and default menu.

NOTE: You may instead use the `Change Password` function (UCPW) to change your own password.

Access   Access the function from the SYSTEM UTILITY MENU, or by entering EACC on any Utilities menu (or on the ADVANCE MASTER MENU).

Specifying the User

```
                        UPDATE ACCESS FILE                      MIKE

        Enter User Identification Code:
```

To add or update a User ID (access code), enter the User ID and <ENTER>. Alternatively, to leave the function, <ENTER> without specifying a User ID.

User IDs can be 1-36 characters long.

Existing User ID   If you enter an existing User ID, the system displays the UPDATE ACCESS FILE screen, for selecting an activity.

To see a list of existing User IDs, log out of ADVANCE and LIST the SAF file at the Terminal Control Language (TCL) level.

New User ID   If you enter a new User ID, the system prompts:

This is a new record. Do you want to continue? (Y/N)

If you answer Y and <ENTER>, to create the new User ID, the system displays the USER ACCESS RECORD screen.

User IDs should be short enough to remember but long enough to describe the user. They should not include blanks: use periods instead.

Upper and lower case letters are not equivalent (for example, SUPER.ADAMS is **not** equivalent to super.adams or Super.Adams). You might define generic User IDs for circulation desk staff (CIRC01, CIRC02, etc.) and personal User IDs for cataloguers (CATJB for John Brown, CATAS for Alice Solter, and so on).

Activity Selection Screen

If you selected an existing User ID to update, the system displays the UPDATE ACCESS FILE screen which allows you to select your next activity.

```
                      UPDATE ACCESS FILE                    MASTER

      Enter User Identification Code: CATMASTER    Master Cataloguer


          1.   UPDATE USER ACCESS RECORD

          2.   UPDATE MODULE ACCESS RECORD



  Options:
   # line    ? help    Exit
```

Select *Exit* to return to the Enter User Identification Code prompt.

1   Accesses the USER ACCESS RECORD screen, for changing the user's name or password, or for deleting the User ID.

2   Accesses the UPDATE MODULE ACCESS RECORD screen, for changing the user's access level, the user's default menu, and so on in a particular module.

The system prompts:
ENTER MODULE NAME

Enter a module name. The valid names are:

ACQ	Acquisitions Module
CAT	Cataloguing Module
CIRC	Circulation Module
OPAC	Online Catalogue Module

```
                        SER     Serials Module
                        ADV     ADVANCE Core Module (includes Utilities Function).
```

User Access Record Screen

The USER ACCESS RECORD screen allows you to define the user's name and password.

```
                         USER ACCESS RECORD                        MASTER

        Enter User Identification Code: CAT.AB   Alice Brown, Cataloguer


     1. LAST NAME             Brown, Cataloguer
     2. FIRST NAME            Alice
     3. MIDDLE INITIAL
     4. PASSWORD              EXKA.LIBR9
     5. INSTITUTION
     6. SUBLOCATION




     Options:
      # line   Line by line   Delete   File   ? help   Exit
```

Select *File*, *Exit*, or *Delete* to leave the `Enter Access Code` function and return to the menu from which you accessed the function: *File* saves all your changes, *Exit* does not save your changes, and *Delete* deletes the User ID from the system.

Fields

1. *LAST NAME*
2. *FIRST NAME*
3. *MIDDLE INITIAL*

[0-58 characters each, including blanks and punctuation]

User's name (family name, first name, and middle initial or name) or description. The first name appears on the initial ADVANCE screen after the user has logged on, the first and last names of the user who last updated a piece are shown in the *Updated by* field on the HOLDINGS DISPLAY screen (CEH) and EDIT HOLDINGS INFORMATION (CEHI). The names may also appear in some reports.

4. PASSWORD   [2-20 characters (6-12 is recommended)]

Password for logging into ADVANCE. Define passwords that are simple enough for staff to remember but unusual enough that unauthorized people cannot guess them.

You may include punctuation but should not include blanks. Upper and lower case letters are **not** equivalent.

NOTE: You may also use the `Change Password` function (`UCPW`) to change your own password.

Module Access Record Screen

The UPDATE MODULE ACCESS RECORD screen allows you to define the User ID, the user's name, and password for all modules.

```
               UPDATE MODULE ACCESS RECORD

 MODULE  : CAT           NAME : Master Librarian

 1. PRIVILEGE LEVEL: 99               4. KNOWLEDGE     : 0
 2. MENU         : CAT.MM             5. SUPPRESS KEYWORD: 0
 3. USER GROUP CODE: DFLT

 6. PERMISSION DESCRIPTION                  PERMISSION  RESTRICT TO
                                            GRANTED     QUALIFIER
    Add MARC records                          Y
    Change MARC records                       Y
    Delete MARC records                       Y
    Merge and replace MARC records            Y
    Add holdings                              Y
    Change current information for holdings   Y
    Change owning information for holdings    Y
    Delete holdings                           Y
    Move holdings between locations           Y

 Options:
  # line   Line by line   Delete   Additional details   Keyword table   File
  ? Help   Exit
```

Select *File*, *Exit*, or *Delete* to return to the UPDATE ACCESS FILE screen for selecting an activity: *File* saves all your changes, *Exit* does not save your changes, and *Delete* deletes the module definition for the User ID.

Fields

1. PRIVILEGE LEVEL   [0-99]

User privilege level in the module. A user may use a screen identifier only if his or her privilege level is equal or higher than the access level defined for that screen identifier. 99 provides the very highest privileges, and 0 or blank the lowest. If the user does not have a particular module access record, he or she may not access that module at all.

2. KNOWLEDGE   [0 or 1]
[1 is obsolete]

blank or 0   The system will display the initial WELCOME TO THE ONLINE CATALOGUE screen when the user starts or ends a search.

3. MENU   [2-6 characters]

Specifies the screen identifier of the user's initial menu for the module. You can specify any menu in the module, but do **not** specify a non-menu function (a V type screen identifier, for a verb or subroutine).

Single-Module Access   To limit a user's access to a **single module**, enter the module name in this field for the user's ADVANCE Core Module (ADV) definition, and as usual, enter an initial module menu in the module's definition. For example, to limit a user to Acquisitions, you could enter ACQ in the *MENU* field of their ADV module definition, and ACQ.MM (or perhaps ACQ.MASTER.RECEIVERS_MYLIB) in the *MENU* field of their ACQ module definition.

4. SUPPRESS KEYWORD   [0 or 1]

1   The user will not be able to use screen identifiers (except the universal ones: see *Standard Menu Options (Screen Identifiers) (USMO)* on page 3-10), and the system will not show screen identifiers in the menus, for example:

        1. Ordering Menu

blank or 0   The user will be able to use screen identifiers, and the system will show screen identifiers in the menus, for example:

        1. ORDM Ordering Menu

5. *USER GROUP CODE*

[User Group Code, 0-8 characters]

Default set of permissions for Acquisitions tasks and functions. You can override any of the default settings for a particular user by updating the *PERMISSION DESCRIPTION* field.

To see the USER GROUP ACCESS CODE SETUP table of valid User Group Codes, enter `??` and <ENTER>.

Changing the Code

If you change the User Group Code, the system prompts:
`Update user with permissions from user group code?`

Answer `Y` to change the permissions to the standard values defined for the user group. Alternatively, answer `N` to leave the user's permissions unchanged.

6. *PERMISSION DESCRIPTION*

If you access this field, the system re-displays the bottom half of the screen, with the permissions numbered and a different set of options.

NOTE: Permissions are grouped by module and assigned a line number so that they can be accessed by the *# line* option. Do not confuse these line numbers with the system assigned Permission ID Numbers that appear in other parts of the documentation. Therefore, the line numbers shown on this screen do not correspond to the Permission ID Numbers which consist of three digits and use the format 009, 062, etc. To display Permission ID Numbers use MODULE PERMISSIONS (MPERM) on the SECURITY MENU.

```
   PERMISSION DESCRIPTION                     PERMISSION  RESTRICT TO
                                              GRANTED     LIBRARY/QUALIFIER
1. Access to Request/Order display (ORDD)         Y
2. Access to Request/Order entry (ORDA)           Y
3. Pre-search of OPAC                             Y
4. Pre-search of CAT workfile                     Y
5. Pre-search of Approval workfile                Y
6. Pre-search of Acquisitions                     Y
7. Access to Request/Order update (ORDU)          Y
8. Assign/Update vendor on requests/orders        Y
9. Assign/Update funds on requests/orders         Y

Options:
  # line   Line by line   Accept   Forward   Backward   ? help   Exit
```

Select *Accept* or *Exit* to leave the *PERMISSION DESCRIPTION* field and re-display the original options: *Accept* keeps your changes, *Exit* does not keep your changes.

For descriptions of the permissions, see the *User Permissions* appendix in the *relevant manual*.

... PERMISSION GRANTED

[Y, N, or P]

Specifies the user's level of permission for a function or task.

Y   The user has permission for the function or task, perhaps qualified by special restrictions. Additional permissions may be required: for example, you cannot authorize a request for ordering (permission 004) unless you can add or update an order/request (permissions 002 and 003).

N   The user does not have permission for the function or task.

P   The user must enter a library-specified password to have permission. With the correct password, this is equivalent to Y; without the correct password, this is equivalent to N. This password is not the same as the User ID password (see *Security Menu* on page 3-35).

The P level is useful at libraries in which people share terminals and a single User ID is defined for an area of work (such as ordering). The high-security tasks (such as authorizing an order) 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.

... RESTRICT TO LIBRARY/ QUALIFIER

[Library Code (1-6 characters), Qualifier Code (1-6 characters), or blank]

Some functions and tasks allow you to restrict the user's access to a particular set of records.

NOTE: To specify the fund number patterns for fund restrictions, select the *Additional Details* option.

Library Code   If you can specify a Library Code for the function or task, and do specify one, then the user will only be permitted to access records (such as

order/requests, invoices, funds, and vendors) that have that particular
Library Code assigned.

Qualifier Code   If you can specify a Qualifier Code for the function or task, and do
specify one, then the user will only be permitted to access catalogue
records that have that particular Qualifier Code assigned.

Additional Details Screen

Some functions and tasks allow you to restrict the user's access to a
particular set of records. To view or specify the fund number patterns for
fund restrictions, select the *Additional Details* option. The system
displays the UPDATE MODULE ACCESS RECORD - ADDITIONAL
DETAILS screen.

```
           UPDATE MODULE ACCESS RECORD - ADDITIONAL DETAILS        MASTER

     Module: ACQ
     User code: CAT.AB

     FUND PATTERN FOR MATCHING
 1.        -    -    -
 2.        -    -    -
 3.        -    -    -
 4.        -    -    -
 5.        -    -    -
 6.        -    -    -
 7.        -    -    -
 8.        -    -    -
 9.        -    -    -
10.        -    -    -


Options:
 # line   Line by line   Add item   Accept   Delete line   Forward
 Backward   ? help   Exit
```

Select *Accept* or *Exit* to return to the main UPDATE MODULE ACCESS
RECORD screen: *Accept* keeps your changes, *Exit* does not keep your
changes.

The default values are supplied from the User Group Code assigned to
the User ID. You may override the default values for this User ID.

If no fund patterns are defined, no fund pattern restriction is applied to
the user.

You can define one or more parts of a fund pattern. Examples:

```
MAIN**-SCI**-AV*****
LAW***-*****-MAP****
******-*****-AV*****
```

Cataloguing Tag Definition Table

To view or specify the Tag Definition Tables, select the *Additional Details* option. The system displays the UPDATE MODULE ACCESS RECORD - ADDITIONAL DETAILS screen.

The Tag Definition Table allows libraries to specify which MARC format, fields and subfields can be edited, added, or deleted. A separate table is used for each action.

Select:

A   Specifies which MARC format and tags can be added.

C   Specifies which MARC format and tags can be edited.

D   Specifies which MARC format and tags can be deleted.

E   Allows you to exit the ADDITIONAL DETAILS screen.

```
          UPDATE MODULE ACCESS RECORD - ADDITIONAL DETAILS        MASTER

    Module: CAT
    User code: MASTER
    Tag Definition Table For Adding Tags

    Tag        Format        Subfield                      Allow
    ---------  --------------  ----------------------------  ---------
1.  1**        BK                                            Y
2.  24*        BK                                            Y
3.
4.
5.
6.
7.
8.
9.
10.


Options:
 # line   Line by line   Add #   Accept   Delete line #   ? Help   Exit
```

Tag	[USMARC field]

Enter a specific tag number or a tag pattern, for example 1** to edit any 1XX tag. An empty list implies no restrictions. If there is a duplication of tag definitions in the table, the first occurrence is used for validation. For example, if 100 and 1** are both defined in the table, then 100 should be placed before 1** in order to specifically define tag 100. If the 1** was listed first, validation would occur against the first 1** tag encountered, not necessarily the 100 tag.

Use tag 0 to represent the leader.

Format   [USMARC format code]

List of MARC format codes separated by commas. Null implies the restriction is valid for **all** formats.

Subfield   [USMARC subfield]

List of subfields separated by commas. Null implies the restriction is valid for **all** subfields.

Allow   [Y or N]

Y   Default. Allows you to edit only the subfields defined in the previous column.

N   Allows you to edit all subfields except those defined in the previous column. If subfields are not defined, then N implies that you are allowed to edit all subfields.

Keyword Table

The *Keyword table* option is available for all modules.

Use this table to:

• limit access to specific keywords when the User Privilege Level does not provide sufficient access control

• add password control to keywords.

```
           USER GROUP ACCESS CODE SETUP - KEYWORD ACCESS TABLE       MASTER

     Module: CAT
     User Group code: DFLT

     Keyword       Permission Granted
     --------      ------------------
  1. AMC                  N
  2. ASM                  P
  3.
  4.
  5.
  6.
  7.
  8.
  9.
 10.



 Options:
  # line   Line by line   Add #   Accept   Delete line #   ? help   Exit
```

Use the *# line* option to access an existing line. Use the *Add #* option to add a new Keyword.

Keyword   [Valid Keyword or blank]

Enter a keyword or ?? to browse a list or enter a space to exit.

Permission Granted   [P (Password controlled) or N (Not permitted)]

Enter P or N.

Use the Password Setup (PSSWD) to link a password to a keyword.

Summary List of Permissions

Module	Perm No.	Permission	Restrict to Qualifier
ADV	**Includes Keywood Access Table**		
ADV	073	Runs reports from specific report group.	Report Group Codes
ADV	074	Edit reports from specific report group.	Report Group Codes
CAT	**Includes Additional Details Tag Definition Table for Changing Tags and Keyword Access Table**		
CAT	075	Add MARC records	**A** - Authority, or **B** - Bibliographic
CAT	068	Change MARC records	**A** - Authority, or **B** - Bibliographic
CAT	077	Delete MARC records	**A** - Authority, or **B** - Bibliographic
CAT	077	Merge and replace MARC records	**A** - Authority, or **B** - Bibliographic
CAT	078	Add holdings	Sublocation Codes
CAT	069	Change current information for holdings	Sublocation Codes
CAT	106	Change owning information for holdings	Sublocation Codes
CAT	079	Delete holdings	Sublocation Codes
CAT	070	Move holdings between locations	Sublocation Codes
CAT	080	Move holdings records between bibliographic records	Sublocation Codes
CAT	107	Change Call numbers	
CIRC	**Includes Keywood Access Table**		
CIRC	081	Change Checkout date and time	
CIRC	082	Change due date and time	

Module	Perm No.	Permission	Restrict to Qualifier
CIRC	083	Override administrative hold on patron	
CIRC	084	Override max items checked/time limit	
CIRC	085	Override max items in possession limit	
CIRC	086	Override patron group loan period	
CIRC	087	Override maximum renewal limit	
CIRC	088	Change Checkin date and time	
CIRC	089	Suspend/Resume charging fine at Checkin	
CIRC	090	Waive overdue fines during Checkin	
CIRC	091	Remove traces for missing items	
CIRC	092	Cancel holds	
CIRC	093	Change hold scope	Qualifier Codes
CIRC	094	Allow copy specific hold	
CIRC	095	Change hold priority level	
CIRC	096	View patron records	Sublocation Codes
CIRC	097	Change patron records	Sublocation Codes
CIRC	098	Add patron records	Sublocation Codes
CIRC	099	Delete patron records	Sublocation Codes
CIRC	100	Add patron blocks	Patron Block Codes
CIRC	101	Delete patron blocks	Patron Block Codes
CIRC	102	Process payment transactions	
CIRC	103	Waive fines in Accounts Receivable	
CIRC	104	Open and Close cash registers	
CIRC	105	Access to RBR processing	
ACQ	**Includes Additional Details Fund Pattern for matching and Keyword Access Table**		

Module	Perm No.	Permission	Restrict to Qualifier
ACQ	001	Access to Request/Order display (ORDD)	Library Codes
ACQ	002	Access to Request/Order entry (ORDA)	Library Codes
ACQ	008	Pre-search of OPAC	
ACQ	009	Pre-search of CAT workfile	
ACQ	010	Pre-search of Approval workfile	
ACQ	011	Pre-search of Acquisitions	Library Codes
ACQ	061	Link Copy Sets in Catalogue to New Order	
ACQ	003	Access to Request/Order update (ORDU)	Library Codes
ACQ	007	Assign/Update vendor on requests/orders	
ACQ	006	Assign/Update funds on requests/orders	
ACQ	060	Creation of new vendor from ordering	
ACQ	004	Authorize requests for ordering	Library Codes
ACQ	005	Cut orders	Library Codes
ACQ	048	Update of 'on order' items	Library Codes
ACQ	051	Access to Receiving Display (RECD)	Library Codes
ACQ	050	Access to Receiving Entry/Update (RECU)	Library Codes
ACQ	049	Receiving/Returning gifts	Library Codes
ACQ	012	Receiving/Returning (all items)	Library Codes
ACQ	052	Invoice at time of receipt	Library Codes
ACQ	013	Claiming	Library Codes
ACQ	014	Vendor and Order reports	Library Codes
ACQ	015	Addition of child records	Library Codes
ACQ	016	Access to Invoice display (INVD)	Library Codes
ACQ	017	Invoice entry	Library Codes

Module	Perm No.	Permission	Restrict to Qualifier
ACQ	018	Access to Invoice Update (INVU)	Library Codes
ACQ	019	Invoice claiming	Library Codes
ACQ	020	Invoice validation	Library Codes
ACQ	021	Invoice authorization	Library Codes
ACQ	022	Access to Voucher display (VCHD)	Library Codes
ACQ	023	Voucher entry	Library Codes
ACQ	024	Access to Voucher update (VCHU)	Library Codes
ACQ	025	Access to Fund display (FUND)	Library Codes
ACQ	026	Fund entry	Library Codes
ACQ	027	Access to Fund update (FUNU)	Library Codes
ACQ	053	Fund mapping	Library Codes
ACQ	028	Access to Journal display (JRND)	Library Codes
ACQ	029	Journal entry	Library Codes
ACQ	030	Access to Journal update (JRNU)	Library Codes
ACQ	031	Access to Vendor display (VEND)	Library Codes
ACQ	032	Vendor entry	Library Codes
ACQ	033	Access to Vendor update (VENU)	Library Codes
ACQ	034	PO Format setup	
ACQ	035	BISAC Confirmation setup	
ACQ	054	Update fiscal profile control records	Library Codes
ACQ	036	Fund structure setup	
ACQ	037	Fund Period setup	
ACQ	038	Year end code setup	
ACQ	039	Own User defaults setup	

Module	Perm No.	Permission	Restrict to Qualifier
ACQ	040	ALL User defaults setup	
ACQ	041	Approval loading	
ACQ	042	Bisac Processing	
ACQ	043	Invoice loading	
ACQ	044	Subscription Review	
ACQ	045	Subscription Batch Renewal	
ACQ	046	Acquisitions Calendar Processing	
ACQ	047	Year end Processing	
ACQ	062	Audit Archive/Purge Processing	
ACQ	063	Time Period Archive Processing	
ACQ	064	Access to Archived Request/Order Display	Library Codes
ACQ	065	Access to Archived Invoice Display	Library Codes
ACQ	066	Access to Archived Voucher Display	Library Codes
ACQ	067	Allow 'Edit Holdings' function from ACQ	
ACQ	071	See financial data in vendor records	Library Codes
SER	**Includes Keywood Access Table**		
SER	072	Edit publication patterns	
SER	108	Check in serials	SHIPTO Codes
OPAC	**Includes Keywood Access Table**		
OPAC	057	Exit Search Selection Screen	
OPAC	058	Override Truncated Limits	
OPAC	059	Override maximum number of items for OPAC printing	

User ID Printing (PACC)

Use the `Print Access Codes` function to print a User ID's access information for every module: privilege level, knowledge, default menu, and keyword suppression.

NOTE: To see a list of User IDs, log out of ADVANCE and `LIST` the `SAF` file at the Terminal Control Language (TCL) level.

Access the function from the SYSTEM UTILITY MENU, or by entering `PACC` on any Utilities menu (or on the ADVANCE MASTER MENU).

```
          P R I N T    A C C E S S    R E P O R T



    Enter identification code :
```

Enter a User ID and <ENTER> to print information. Alternatively, <ENTER> with the field left blank to exit the function.

The system then asks if you are sure:
`Send report on this person's access records to printer?`
Answer `Y` to print the information, or `N` to return to the first prompt without printing or displaying the information.

Port Assignment to User IDs (`ULOG`)

Use the `Add Port to Access Codes` function to assign a logical port to each User ID for each module. An environment is defined for each port on the PORT table: the institution, sublocation, printer type, and so on (see *Ports (PORT)* on page 3-55).

For libraries at which physical port assignment is handled by a terminal server, this user-to-logical-port mapping ensures that a user is always given the same port-defined environment, no matter which physical port he or she is connected to.

If the library has some terminals hardwired to physical ports and a user signs on to one of those terminals, the system uses that physical port's defined environment rather than the environment defined for the user's logical port.

Libraries which do not use networking software, and which have all terminals hardwired to particular physical ports, do not need to use this table.

Access the function from the SYSTEM UTILITY MENU, or by entering `ULOG` on any Utilities menu (or on the ADVANCE MASTER MENU).

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

             UPDATE USER IDS WITH LOGICAL PORTS


             User ID :
```

Enter a User ID and <ENTER>. Alternatively, <ENTER> with the field left blank to exit the function.

NOTE: To see a list of User IDs, log out of ADVANCE and `LIST` the `SAF` file at the Terminal Control Language (TCL) level.

Port Assignments   After you identify a user, the system displays the current port assign-
                          ments, and leaves the cursor on the first port assignment.

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

           UPDATE USER IDS WITH LOGICAL PORTS


           User ID : MASTER


           User / Module       Logical port
           MASTER*ACQ          ACQ3
           MASTER*ADV          ADV
           MASTER*CIRC         CIRC3
           MASTER*CAT          CAT2
           MASTER*SER          SER3
           MASTER*OPAC         OPAC
```

The screen lists the modules which have been defined for the User ID in
the Enter Access Codes function (EACC).

For each module, either enter a logical Port Code from the PORT table
(1-13 characters), or just <ENTER> to accept the current code. If you
leave a port assignment field blank, the system will map the user to the
DEFAULT port.

When you proceed past the bottom field, the system returns to the User
ID prompt.

Permissions Security (SECUR)

ADVANCE provides extended security control by supplying a set of **permissions for detailed functions and activities**. These permissions may include further possible restrictions:

- by password

- by one or more qualifier types, such as Library Code, Sublocation Code, MARC database, and so forth.

To view or update permissions security in general, for **User Groups** and **passwords**, use the functions available on the ADVANCE SECURITY MENU.

NOTE: To view or update an **individual user**'s permissions, use the Enter Access Codes function (EACC). (See *User IDs (Access Codes) (EACC)* on page 3-16.)

Access   Access the menu from the SYSTEM UTILITY MENU, or by entering SECUR on any Utilities menu (or on the ADVANCE MASTER MENU).

Security Menu

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

                         ADVANCE SECURITY MENU

            1. GPERM   General Permissions setup

            2. MPERM   Module Permissions setup

            3. UGACC   User Group Access code setup

            4. PSSWD   Password setup


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

Options

GPERM   Accesses the ADVANCE GENERAL PERMISSIONS SETUP function, for changing the permission descriptions.

MPERM   Accesses the ADVANCE MODULE PERMISSIONS SETUP function, for viewing the permission available in a module.

UGACC   Accesses the USER GROUP ACCESS CODE SETUP table, for defining User Groups for a module.

PSSWD   Accesses the PASSWORD PERMISSION SETUP function, for defining the permission passwords.

General Permissions (`GPERM`)

Use the ADVANCE GENERAL PERMISSIONS SETUP function to change the description of permissions, or to view a complete list of permissions for all modules.

Access the function from the ADVANCE SECURITY MENU, or by entering GPERM on any Utilities menu (or on the ADVANCE MASTER MENU).

```
              ADVANCE GENERAL PERMISSIONS SETUP                MASTER

     DESCRIPTION                                TYPE  HELP MESSAGE
  1. Access to Request/Order display (ORDD)      0    Allow user access to req+
  2. Access to Request/Order entry (ORDA)        0    Allow user access to req+
  3. Access to Request/Order update (ORDU)       0    Allow user access to req+
  4. Authorize requests for ordering             0    Allow user to authorize +
  5. Cut orders                                  0    Allow user to assign 'CU+
  6. Assign/Update funds on requests/orders      2    Allow user to assign/upd+
  7. Assign/Update vendor on requests/orders     2    Allow user to assign/upd+
  8. Pre-search of OPAC                          1    Allow pre-search of OPAC+
  9. Pre-search of CAT workfile                  2    Allow pre-search of CAT +
 10. Pre-search of Approval workfile             2    Allow pre-search of Appr+
 11. Pre-search of Acquisitions                  0    Allow pre-search of ACQ +
 12. Receiving/Returning (all items)             0    Allow user to receive/re+
 13. Claiming                                    0    Allow user to claim item+
 14. Vendor and Order reports                    0    Allow user to update ven+
 15. Addition of child records                   0    Allow user to add child +


Options:
 Line by line   # line   File   Forward   Backward   ? help   Exit
```

Select *File* or *Exit* to leave the function and to return to the menu from which you accessed the function: *File* saves your changes, *Exit* does not save your changes.

Fields

The library may not add or delete permissions.

DESCRIPTION   [1-40 characters]

Brief description of the permission, for display on all permission lists.

TYPE   [GEAC-ASSIGNED ONLY: You may not change this field.]

0   The permission may be restricted to records assigned a particular LIBRARY Code.

1   The permission may be restricted to records assigned a particular Qualifier Code.

2   Qualifiers are not used with this type of permission.

3   The permission may be restricted to records assigned a particular Institution Code.

4   The permission may be restricted to records assigned a particular Sublocation Code.

5   The permission may be restricted to records assigned a particular Report Group.

6   The permission may be restricted to records assigned a particular MARC database.

7   The permission may be restricted to records assigned a particular Qualifier Code for holds processing.

8   The permission may be restricted to records assigned a particular Patron Block Code.

9   The permission may be restricted to records assigned a particular SHIPTO Code.

HELP MESSAGE   [1-24+ characters]

Additional brief description of the permission, for display here and on the following screens: ADVANCE MODULE PERMISSIONS SETUP (MPERM), USER GROUP ACCESS CODE SETUP (UGACC), PASSWORD PERMISSION SETUP (PSSWD), and ENTER ACCESS CODES (EACC).

Module Permissions (**MPERM**)

Use the ADVANCE MODULE PERMISSIONS SETUP function to view a list of permissions for a module.

Access the function from the ADVANCE SECURITY MENU, or by entering MPERM on any Utilities menu (or on the ADVANCE MASTER MENU).

```
                    ADVANCE MODULE PERMISSIONS SETUP                MASTER

        Enter a MODULE id :
```

Enter the module name:

- ACQ for the Acquisitions Module
- ADV for the Utilities Module
- CAT for the Cataloguing Module
- CIRC for the Circulation Module
- OPAC for the Online Catalogue Module
- SER for the Serials Control Module

and <ENTER>, or <ENTER> with the field left blank to leave the function.

```
                ADVANCE MODULE PERMISSIONS SETUP                    MASTER

     MODULE: ACQ

       ID   DESCRIPTION                            HELP MESSAGE
    1. 001  Access to Request/Order display (ORDD) Allow user access to requ+
    2. 002  Access to Request/Order entry (ORDA)   Allow user access to requ+
    3. 008  Pre-search of OPAC                     Allow pre-search of OPAC +
    4. 009  Pre-search of CAT workfile             Allow pre-search of CAT w+
    5. 010  Pre-search of Approval workfile        Allow pre-search of Appro+
    6. 011  Pre-search of Acquisitions             Allow pre-search of ACQ i+
    7. 003  Access to Request/Order update (ORDU)  Allow user access to requ+
    8. 007  Assign/Update vendor on requests/orders Allow user to assign/upda+
    9. 006  Assign/Update funds on requests/orders Allow user to assign/upda+
   10. 004  Authorize requests for ordering        Allow user to authorize r+
   11. 005  Cut orders                             Allow user to assign 'CUT+
   12. 048  Update of 'on order' items             Allow user to update item+
   13. 051  Access to Receiving Display (RECD)     Allow access to RECD
  Options:
    Forward   Backward   ? help   Exit
```

User Group Codes (UGACC)

Use the USER GROUP ACCESS CODE SETUP function to define the User
Group Codes for a module. These codes enable you to conveniently
assign a full set of default permission values to a User ID in the Enter
Access Codes function (EACC).

Access the function from the ADVANCE SECURITY MENU, or by
entering UGACC on any Utilities menu (or on the ADVANCE MASTER
MENU).

```
                USER GROUP ACCESS CODE SETUP                 MASTER

     Enter module:
```

Enter the module name and <ENTER>, or <ENTER> with the field left
blank to leave the function.

```
                 USER GROUP ACCESS CODE SETUP                MASTER

     Module: ACQ
     Number of records: 6
     Code      Description of Code
     --------  --------------------------------------------------
 1. DFLT      Default ACQ code for Release 6.9 Install
 2. MGT       Management permissions group
 3. ORDER1    GROUP FOR ORDER AU CLERKS
 4. ORDER2    ORDER2 clerks for PUB - ORD3 and ORD4
 5. ORDER3    Order clerks for Geac library !!!
 6. TEST      change the description


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

Select *Add item* to add a new User Group Code. The system prompts:

```
Enter the code you wish to add:
```

Enter the name of the new code (1-8 characters), or <ENTER> without
specifying a code to return to the option line.

Detail Screen

```
                    USER GROUP ACCESS CODE SETUP                 MASTER

    Module: ACQ
    User Group code: DFLT
 1. CODE DESCRIPTION: DFLT
 2. PERMISSION DESCRIPTION                        PERMISSION  RESTRICT TO
                                                  GRANTED     QUALIFIER
    Access to Request/Order display (ORDD)            N
    Access to Request/Order entry (ORDA)              N
    Pre-search of OPAC                                N
    Pre-search of CAT workfile                        N
    Pre-search of Approval workfile                   N
    Pre-search of Acquisitions                        N
    Link Copy Sets in Catalogue to New Order          N
    Access to Request/Order update (ORDU)             N
    Assign/Update vendor on requests/orders           N
    Assign/Update funds on requests/orders            N
    Creation of new vendor from ordering              N

Options:
 # line   Line by line   Additional details   Keyword table   File   ? help
 Exit
```

Select *File* or *Exit* to leave the function and return to the menu from which you accessed the function: *File* saves your changes, *Exit* does not save your changes.

File   When you *File* the User Group Code, the system prompts:
Update users with the new permissions?

Answer Y to update the permissions in all User ID records which are assigned to this User Group. The group's standard settings will overwrite any user-specific changes that might have been made in particular User ID records.

Alternatively, answer N to file the User Group Code without changing the permissions of existing users. In effect, this creates two sets of users: any new users who are assigned this User Group Code will have the current set of permissions; users who have the prior definition of this User Group Code will have older, different permissions.

Additional Details   This option only appears when the Cataloguing or Acquisitions modules are selected. See *Additional Details Screen* on page 3-23.

1. *CODE DESCRIPTION*	[1-40 characters]

Brief description of the User Group Code.

2. *PERMISSION DESCRIPTION*	If you access this field, the system re-displays the screen, with the permissions numbered and a different set of options.

```
                    USER GROUP ACCESS CODE SETUP                  MASTER

    Module: ACQ
    User Group code: DFLT
 1. CODE DESCRIPTION: DFLT
 2. PERMISSION DESCRIPTION                        PERMISSION  RESTRICT TO
                                                  GRANTED     QUALIFIER

    Access to Request/Order display (ORDD)           N
    Access to Request/Order entry (ORDA)             N
    Pre-search of OPAC                               N
    Pre-search of CAT workfile                       N
    Pre-search of Approval workfile                  N
    Pre-search of Acquisitions                       N
    Link Copy Sets in Catalogue to New Order         N
    Access to Request/Order update (ORDU)            N
    Assign/Update vendor on requests/orders          N
    Assign/Update funds on requests/orders           N
    Creation of new vendor from ordering             N

Options:
 # line   Line by line   Additional details   Keyword table   File   ? help
 Exit
```

Select *Accept* or *Exit* to leave the *PERMISSION DESCRIPTION* field and re-display the original options: *Accept* keeps your changes, *Exit* to does not keep your changes.

For detailed descriptions of the permissions, see the *User Permissions* appendix in the corresponding user's guide or management guide.

... *PERMISSION GRANTED*	[Y, N, or P]

Specifies the user groups's level of permission for a function or task.

Y The user has permission for the function or task, perhaps qualified by special restrictions. Additional permissions may be required: for example, you cannot authorize a request for ordering (Authorize request for ordering - permission 004) unless you can add or update an order/

request (Access to Request/Order entry [ORDA] permission 002 and Access to Request/Order update [ORDU] permission 003).

N   The user does not have permission for the function or task.

P   The user must enter a library-specified password to have permission. With the correct password, this is equivalent to Y; without the correct password, this is equivalent to N. This password is not the same as the User ID password (see *User IDs (Access Codes) (EACC)* on page 3-16).

The P level is useful at libraries in which people share terminals and a single User ID is defined for an area of work (such as ordering). The high-security tasks (such as authorizing an order) 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.

... RESTRICT TO QUALIFIER

Some functions and tasks allow you to restrict the user's access to a particular set of records or specific activities. If you enter Y or P, the system prompts you for a qualifier in the RESTRICT TO QUALIFIER field. Enter ?? to browse a list of qualifiers that can be used for the permission.

NOTE: Qualifier type 2 for permissions specified in General Permissions Setup (GPERM) indicates that no qualifier is used for that permission.

Library Code

List of Library Codes separated by commas. Qualifier type 0 for permissions specified in General Permissions Setup (GPERM).

Restricts access to records (such as order/requests, invoices, funds, and vendors) that have a specified Library Code.

OPAC Qualifier

List of Qualifier Codes separated by commas. Qualifier type 1 for permissions specified in General Permissions Setup (GPERM).

Restricts access to pre-search of the Online Catalogue. A pre-search allows a search of the bibliographic database from acquisitions.

Institution Code

List of Institution Codes separated by commas. Qualifier type 3 for permissions specified in General Permissions Setup (GPERM).

Restricts access to circulation functions by Institution Code. If the Institution Code specified has Sublocations defined for it, then any activity that can be performed at the institution level can also be performed at any of the sublocations. Not implemented for any of the current permissions.

Sublocation Code
List of Sublocation Codes separated by commas. Qualifier type 4 for permissions specified in General Permissions Setup (GPERM).

Restricts access to circulation functions by Sublocation Code. If a library consists of a single institution that has no sublocations, then the Institution Code will be used.

Report Group
List of Report Group Codes separated by commas. Qualifier type 5 for permissions specified in General Permissions Setup (GPERM).

Restricts the reports that can be run to the groups specified.

MARC Database
Specifies A (Authority database) or B (Bibliographic database) separated by a comma. Qualifier type 6 for permissions specified in General Permissions Setup (GPERM).

Restricts access to the specified database.

Holds Processing
List of Holds Processing Codes separated by a commas. Qualifier type 7 for permissions specified in General Permissions Setup (GPERM).

The use of holds processing codes is specified in OPAC QUALIFIER CODES (MQUAL).

Restricts access to the hold scope. These codes include a system wide hold scope.

Patron Block Code
List of Patron Block Codes separated by commas. Qualifier type 8 for permissions specified in General Permissions Setup (GPERM).

Specifies which patron block codes can be added or deleted manually.

SHIPTO Code
List of SHIPTO codes separated by commas. Qualifier type 9 for permissions specified in General Permissions Setup (GPERM).

Restricts access to serials checkin.

Additional Details Screen

Some functions and tasks allow you to restrict the user's access to certain activities in Cataloguing or Acquisitions.

Acquisitions Fund Pattern Screen

To view or specify the fund number patterns for fund restrictions, select the *Additional Details* option. The system displays the UPDATE MODULE ACCESS RECORD - ADDITIONAL DETAILS screen.

```
           USER GROUP ACCESS CODE SETUP - ADDITIONAL DETAILS         MASTER

      Module: ACQ
      User Group code: DFLT

      FUND PATTERN FOR MATCHING
  1.        -    -    -
  2.        -    -    -
  3.        -    -    -
  4.        -    -    -
  5.        -    -    -
  6.        -    -    -
  7.        -    -    -
  8.        -    -    -
  9.        -    -    -
 10.        -    -    -


 Options:
  # line   Line by line   Add item   Accept   Delete line   Forward
  Backward   ? help   Exit
```

Select *Accept* or *Exit* to return to the main USER GROUP ACCESS CODE SETUP screen: *Accept* keeps your changes, *Exit* does not keep your changes.

If no fund patterns are defined, no fund pattern restriction is applied to the user.

You can define one or more parts of a fund pattern. Examples:

```
  MAIN**-SCI**-AV*****
  LAW***-*****-MAP****
  ******-*****-AV*****
```

Cataloguing
Tag Definition Table

To view or specify the Tag Definition Tables, select the *Additional Details* option. The system displays the UPDATE MODULE ACCESS RECORD - ADDITIONAL DETAILS screen

The Tag Definition Table allows libraries to specify which MARC formats, fields and subfields can be edited, added, or deleted. A separate table is used for each action.

Select:

A   Specifies which MARC format and tags can be added.

C   Specifies which MARC format and tags can be edited.

D   Specifies which MARC format and tags can be deleted.

E   Allows you to exit the ADDITIONAL DETAILS screen.

```
          USER GROUP ACCESS CODE SETUP – ADDITIONAL DETAILS        MASTER

     Module: CAT
     User Group code: DFLT
     Tag Definition Table For Changing Tags

     Tag        Format        Subfield                      Allow
     --------- -------------- ---------------------------- ---------
 1. 1**        BK                                          Y
 2. 24*        BK                                          Y
 3.
 4.
 5.
 6.
 7.
 8.
 9.
10.


Options:
 # line   Line by line   Add #   Accept   Delete line #   ? help   Exit
```

Tag	[USMARC field]

Enter a specific tag number or a tag pattern, for example 1** to edit any 1XX tag. An empty list implies no restrictions. If there is a duplication of tag definitions in the table, the first occurrence is used for validation. For example, if 100 and 1** are both defined in the table, then 100 should be placed before 1** in order to specifically define tag 100. If the 1** was listed first, validation would occur against the first 1** tag encountered, not necessarily the 100 tag.

Use tag 0 to represent the leader.

Format	[USMARC format code]

List of MARC format codes separated by commas. Null implies the restriction is valid for **all** formats.

Subfield	[USMARC subfield]

List of subfields separated by commas. Null implies the restriction is valid for **all** subfields.

Allow	[Y or N]

Y Default. Allows you to edit only the subfields defined in the previous column.

N Allows you to edit all subfields except those defined in the previous column. If subfields are not defined, then N implies that you are allowed to edit all subfields.

Keyword Table

The *Keyword table* option is available for all modules.

The Keyword Access Table provides the library with another level of security in addition to the user Privilege Level. This table allows you to override the privilege level defined in Enter Access Codes (EACC) and therefore block the user's access to a the keyword.

Use this table to:

• limit access to specific keywords when the User Privilege Level does not provide sufficient access control

• add password control to keywords.

You should not use this table to replace the Privilege Level defined in Enter Access Codes (EACC).

```
          USER GROUP ACCESS CODE SETUP - KEYWORD ACCESS TABLE      MASTER

     Module: CAT
     User Group code: DFLT

     Keyword      Permission Granted
     --------     ------------------
 1.  AMC               N
 2.  ASM               P
 3.
 4.
 5.
 6.
 7.
 8.
 9.
10.



 Options:
  # line   Line by line   Add #   Accept   Delete line #   ? help   Exit
```

Use the *# line* option to access an existing line. Use the *Add #* option to add a new Keyword.

Keyword   [Valid Keyword or blank]

Enter a keyword or ?? to browse a list or enter a space to exit.

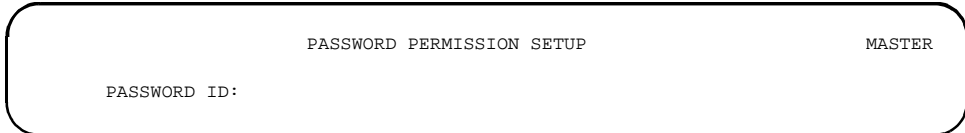*Permission Granted*   [P (Password controlled) or N (Not permitted)]

Enter P or N.

Use the Password Setup (PSSWD) to link a password to a keyword.

Passwords (`PSSWD`)

Use the PASSWORD PERMISSION SETUP function to define permission passwords.

Access the function from the ADVANCE SECURITY MENU, or by entering PSSWD on any Utilities menu (or on the ADVANCE MASTER MENU).

```
                    PASSWORD PERMISSION SETUP                    MASTER

        PASSWORD ID:
```

Enter the name of a new or existing password (1-10 characters; upper and lower case letters are equivalent), or <ENTER> without specifying a password to leave the function.

Existing
Password

To see a list of existing permission passwords, log out of ADVANCE and LIST the SAF file at the Terminal Control Language (TCL) level.

New Password

If you enter a new password, the system prompts:

This PASSWORD is not found. Do you wish to add?(Y/N)

Answer Y to add one, or N to return to the PASSWORD ID prompt.

```
                    PASSWORD PERMISSION SETUP                    MASTER

      PASSWORD ID: SESSAMY                      Created by: MASTER
                                                Edited by : MASTER
                                                Edit date : 01-22-97


      PERMISSION DESCRIPTION                    PERMISSION
                                                GRANTED
  1. Access to Request/Order display (ORDD)         Y
  2. Access to Request/Order entry (ORDA)           Y
  3. Access to Request/Order update (ORDU)          Y
  4. Authorize requests for ordering               Y
  5. Cut orders                                     Y
  6. Assign/Update funds on requests/orders         Y
  7. Assign/Update vendor on requests/orders        Y
  8. Pre-search of OPAC                             Y
  9. Pre-search of CAT workfile                     Y
 10. Pre-search of Approval workfile                Y
 11. Pre-search of Acquisitions                     Y

Options:
 # line   Line by line   File   Forward   Backward   Keyword table   ? help
 Exit
```

Select *File* or *Exit* to return to the initial PASSWORD PERMISSION SETUP screen: *Accept* saves your changes, *Exit* does not save your changes.

The library may not delete permission passwords, but can deactivate them by setting all their permissions to N.

PERMISSION GRANTED

[Y or N]

Specifies the password's level of permission for a function or task.

Y   The password allows the user access to the function or task.

N   The password does not allow the user access to the function or task.

Keyword Table Option

The *Keyword table* option links the Password ID you entered to the keywords specified in the KEYWORD ACCESS TABLE by module.

NOTE: Ensure that users have the necessary permissions that will allow them to access the keywords protected by password control. For example, if the keyword AMC (Authority Cataloguing Menu) is

password protected, users will require permission to add or change
MARC records in the authority database.

1. Select the *Keyword table* option. The PASSWORD PERMISSION
   SETUP - KEYWORD ACCESS TABLE appears.

```
         PASSWORD PERMISSION SETUP - KEYWORD ACCESS TABLE        MASTER


   Enter module:  CAT
```

2. The system prompts you for a module. Enter a module and
   <ENTER>. The PASSWORD PERMISSION SETUP - KEYWORD
   ACCESS TABLE re-displays.

```
         PASSWORD PERMISSION SETUP - KEYWORD ACCESS TABLE        MASTER


   Module: CAT

   Keyword
   --------
1. AMC
2.
3.
4.
5.
6.
7.
8.
9.
10.

Options:
 # line   Line by line   Add #   Accept   Delete line #   ? help   Exit
```

3. Enter the Keywords for the screens you have specified as password
   controlled. Select *Accept* and <ENTER>.

Server Port Control(`SPC`)

Defines the minimum security requirements needed by the ADVANCE server to respond to a request from the client. This table also determines whether the server accepts requests to:

- place or cancel holds

- renew checked out items.

```
                       SERVER PORT CONTROL

    SERVER PORT CONTROL CODE : z3950
    ------------------------------------------------------------------
    Description                                        : z3950 port
 2. Security measures on patron inquiry function       : 14
    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)
 3. Allow patrons to renew checked out items (0=No,1=Yes)    : 1
 4. Allow patrons to place holds (0=No,1=Yes)               :
 5. Allow patrons to cancel holds (0=No,1=Yes)              :




 Options:
  ? Help   # line   Line by line   Copy   Print   Exit
```

Fields

In any of these fields, no response (blank or null) is the same as 0.

Description System provided text. (Cannot be edited.) The system uses the name that was assigned when the port was created from the PORT DEFINITIONS (PORT) table on the System Utility Menu.

2. Security measures on patron inquiry function [0,1,2,3,4]

Sets the minimum level of security that must be met before the server responds to a client request. (The client can establish additional security requirements.)

0   At the minimum level, the server accepts the patron's barcode. The client can send additional data, such as a password or personal ID, and this data will be validated. The additional data is not required. If the additional data cannot not be validated the request is refused.

1,2,3,4   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). Any specified element is mandatory, for example if 1 (password) is specified, then the server must receive and be able to validate the patron's barcode and password. If the client sends additional information, such as the first three letters of the surname, then the server validates the barcode, password and the first three letters of the surname. If any of the information including additional information cannot be validated, then the clients request is refused.

All data used in security measures are defined in the patron record in 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.

3. Allow patrons to renew checked out items		[0,1]
	0	Patrons are not allowed to renew checked out items.
	1	Authorizes patrons to renew checked out items.
4. Allow patrons to place holds		[0,1]
	0	Patrons are not allowed to place holds.
	1	Patrons are allowed to place holds.
5. Allow patrons to cancel holds		[0,1]
	0	Patrons are not allowed to cancel holds.
	1	Patrons are allowed to cancel holds.

Ports (PORT)

Use the Port Definitions function to define the institution, sublocation, printer type, and so on for each port.

Logical Ports

Use the Add Port to Access Codes function (ULOG) to assign a logical port to each User ID for each module. For libraries at which physical port assignment is handled by a terminal server, this user-to-logical-port mapping ensures that a user is always given the same port-defined environment, no matter which physical port he or she is connected to.

Other Port Tables

Special definitions of the Port Codes may be set up in the Circulation, Cataloguing, and Online Catalogue Modules to control such conditions as: which items may be checked out at the port, whether or not insert notes are printed for items checked in at the port, a default pickup location for holds placed at the port, and whether Online Catalogue users may change the default Qualifier Code at the port.

- CHECKOUT PORT CONTROL (CPCC) in Circulation

- CHECKIN PORT CONTROL (CIPC) in Circulation

- REGISTER PORT CONTROL (CPRP) in Circulation

- HOLDS PORT CONTROL (CPH) in Circulation

- HOLDINGS PORT CONTROL (CEHD) in Circulation and Cataloguing

- OPAC PORT CONTROL (OPC) in the Online Catalogue.

Port Codes may be **added** in these other tables, but can be **deleted** only from the Utilities table. Whenever you add a port, be careful to update its definitions in all relevant tables.

Access

Access the function from the SYSTEM UTILITY MENU, or by entering PORT on any Utilities menu (or on the ADVANCE MASTER MENU).

Initial Screen

```
                         PORT

     Number of records : 64
     Code            Description of code
     -------------   -------------------------------------------------
  1. 000             System Console
  2. 001             Line 1 - system printer
  3. 002             Line 2
  4. 003             Line 3
  5. 004             Line 4
  6. 005             Line 5
  7. 006             Line 6
  8. 007             Line 7
  9. 008             Line 8
 10. 009             Line 9
 11. 010             Line 10
 12. CAM1            CIRC PORT 1
 13. CAM2            CIRC PORT 2
 14. CAM3            CIRC PORT 3

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

Select *Add item* to add a new Port Code, or *# line* to access an existing one.

New Port Code If you select *Add item*, the system prompts:
Enter the name of the port you wish to add

Enter a Port Code, 1-13 characters long. (The code can actually be up to 20 characters long but only the first 13 characters will be displayed in the code list.)

UNIX Logon Name To provide automatic access to ADVANCE, use the user's UNIX logon name as the Port Code. (Be careful to use upper and lower case letters as appropriate.) This feature is particularly useful for dedicated Online Catalogue or staff terminals. When the user logs onto the UNIX system, the system will automatically log them directly into ADVANCE, skipping the ADVANCE Logon Screen. It is also necessary to define the user's *Identification Code* and *Password* and the terminal's *Terminal type* in the PORT table.

NOTE: Because the ADVANCE Logon Screen is skipped in this situation, the user will not see the greeting message that would have been displayed there. Consider using the *Execute at Logon* field to provide a message for these users.

Detail Screen

```
                              PORT

     PORT CODE : CAM1
     -------------------------------------------------------------------
  1. Description               : CIRC PORT 1
  2. Comment                   :
  3. Current Institution       : PUB = Public Library
  4. Current Sublocation       : BRA1 = Public Lib Main Branch
  5. Current Collection        :
  6. Dialup modem  (1 = Yes)   :
  7. Terminal type             :
  8. Execute at Logon          :
  9. System Printers           : 0
 10. Standard Printer Settings :
      Page width, page length, top margin, bottom margin, mode, options
 11. Auxiliary Printer (1 = Yes:
 12. Auxiliary Printer type    :
 13. Function key type         :
 14. Identification Code       :
 15. Password                  :
Options:
  ? help   # line   Line by line   Copy   Print   Delete   Exit   File
```

Select *File*, *Exit*, or *Delete* to return to the initial screen: *File* saves your changes, *Exit* does not save your changes, and *Delete* deletes the port.

1. Description   [any]

Brief description of the Port Code, for display on the initial screen.

2. Comment   [any]

Additional description of the port. This text is only shown here.

3. Current Institution   [Institution Code, 0-6 characters]

Identifies the port's institution (highest level of holdings), for statistics and for the sorting of pieces on the Online Catalogue's holdings displays.

NOTE: Pieces held at the location specified in the *Current Institution*, *Current Sublocation*, and *Current Collection* fields will be shown first in the holdings displays — the more fields you specify, the more precise the location definition will be, and the fewer pieces will be selected for the top of the display list.

To see Cataloguing's INSTITUTION CODES table, enter ?? and <ENTER>.

4. Current Sublocation   [Sublocation Code, 0-6 characters]

Identifies the port's building or other unit within the institution, for statistics and for the sorting of pieces on the Online Catalogue's holdings displays.

To see Cataloguing's SUBLOCATION CODES table, enter ?? and <ENTER>.

5. Current Collection   [Collection Code, 0-6 characters]

Identifies the port's collection within the sublocation, for statistics and for the sorting of pieces on the Online Catalogue's holdings displays.

To see Cataloguing's COLLECTION CODES table, enter ?? and <ENTER>.

6. Dialup modem   [0 or 1]

1   The system will display the ADVANCE Terminal Selection Screen before the logon screen.

blank or 0   The system will skip the Terminal Selection Screen, and will typically display the ADVANCE Logon Screen as the first ADVANCE screen. The terminal type specified in field 7 will be automatically selected.

7. Terminal type   [0-13 characters]
[This field has an effect only if field 6 is answered 0.]

Specifies the default terminal type (e.g. `WY85.VT100N`) for dial-in terminals (for proper terminal emulation). To see a list of valid types, log out of ADVANCE and `LIST` the `SCF` file at the Terminal Control Language (TCL) level: the types are shown in the form `VID.`*type*.

8. Execute at Logon

[0-44 characters]

Specifies a PICK verb to be executed when a user logs on. For example, you could have a message displayed to a direct access port (which skips the ADVANCE Logon Screen). Ask Geac Support staff for assistance.

9. System Printers

[1-255 digits]

Specifies which system printer will receive the output generated from print requests from the port.

To see a list of system printer numbers, log out of ADVANCE and at the Terminal Control Language (TCL) level type `SPOOL –LIST` . (Printers and printer numbers are defined by Geac or the library system administrator using the `SETPTR` command down at the TCL level.)

Leave this field blank if you do not want output sent to a system printer.

10. Standard Printer Settings

[0-44 characters]

Print settings, for the system printer or other output destination.

Enter a comma between subfields. Default settings will be used for any trailing elements you do not assign.

Example: `80,60,3,3,1,FORM CARBON,LNUM`

... Page Width

[0-3 digits, " , "]

Line length. Default is 132 characters.

... Page Length

[0-3 digits, " , "]

Number of lines per page. Default is 60 lines in a PI/open system, 66 lines in a uniVerse system.

... Top Margin

[0-3 digits, " , "]

Number of blank lines at the top of the page. Default is 3 lines.

... Bottom Margin	[0-3 digits, " , "]
	Number of blank lines at the bottom of the page. Default is 3 lines.
... Mode	[1-5, " , "]
	Output destination type. Default is 1, output is sent to the line printer spooler. Other values specify the destinations such as a hold file or tape device. See your PI/open or uniVerse operating system help documentation for the SETPTR command.
... Options	[zero, one, or more options, separated by " , "]
	Available options include the number of copies, line numbering, form control, and banners. See your PI/open or uniVerse operating system help documentation for the SETPTR command.
11. Auxiliary Printer	[0 or 1]
1	The terminal has a printer connected to its auxiliary port. Local printing, such as inserts, receipts, spine labels, and Online Catalogue screens, will be sent to the auxiliary printer.
blank or 0	The terminal does not have a printer connected to its auxiliary port. Local printing, such as inserts, receipts, and Online Catalogue screens, will be sent to the system printer.
12. Auxiliary Printer type	[0-42 characters] [This field has an effect only if field 11 is answered 1.]
	Specifies the type of auxiliary printer. To see a list of valid types, log out of ADVANCE and LIST the SCF file at the Terminal Control Language (TCL) level: the types are shown in the form PTR.*type*.
13. Function key type	Leave blank: not currently implemented.
14. Identification Code	[User ID, 0-36 characters]
	The system will automatically log on the port with this User ID. Consider using this feature at dedicated Online Catalogue ports.

15. Password   [2-20 characters]

The system will automatically supply this user password when logging on the port (see field 14). Consider using this feature at dedicated Online Catalogue ports.

Barcodes (BCE)

Use the `Barcode Control Entry` function to define item and patron barcode formats for each institution.

Access the function from the SYSTEM UTILITY MENU, or by entering BCE on any Utilities menu (or on the ADVANCE MASTER MENU).

```
                    BARCODE CONTROL RECORD EDIT



    Enter Institution Code :
```

Enter an Institution Code and <ENTER>. Alternatively, <ENTER> with the field left blank to exit the function.

To see Cataloguing's INSTITUTION CODES table, enter ?? and <ENTER>.

Initial Screen

```
                     BARCODE CONTROL RECORD EDIT


   Enter Institution Code : PUB


     1. Item
     2. Patrons
     3. DYNA STOCK Item


 Options:
  ? help   # line   New   Backward   Forward   Exit
```

Select *New* to add a new barcode control record, or *# line* to access an existing one.

Types of Barcodes
Each institution typically has two barcode formats defined: one for patrons and one for items (pieces).

Additional formats may be defined for demonstration barcode numbers.

The library might also define barcode formats to cover patrons from other universities or public library systems who have borrowing privileges at the library.

The system **rejects** barcode numbers that are scanned or typed in if they do not match any of the formats defined for the institution. If a barcode number matches more than one format, the system uses the first format in the list.

Temporary
Barcode
Numbers

Temporary numbers can be system-assigned to new patrons (e.g. -000174) or new items (e.g. N1002355) when staff do not have or want to use physical barcode labels. ("N" prefaces temporary item barcode numbers, and "-" prefaces temporary patron barcode numbers).

Detail Screen

```
                    BARCODE CONTROL RECORD EDIT


   Enter Institution Code : PUB


     1. Barcode Description.....................: Patron
     2. Pattern Match...........................: '2'13N
     3. Barcode Type (1=patron,0=book)..........: 1
     4. Institution Code........................: 9999
     5. Institution Code Position...............: 1
     6. Beginning Barcode Position..............: 1
     7. Barcode Length..........................: 13
     8. Check Digit (1=yes).....................: 1
     9. Check Digit Position....................: 14
    10. Display Format..........................:
    11. Subroutine Name.........................:



 Options:
  ? help   # line   Line by line   Delete   File   Exit
```

Select *File*, *Exit*, or *Delete* to return to the initial screen: *File* saves your changes, *Exit* does not save your changes, and *Delete* deletes the barcode control record.

1. Barcode Description	[1-28 characters]
	Brief description of the Barcode Control Code, for display on the initial screen.
2. Pattern Match	[any]
	Pattern of characters on the barcode. Example pattern definitions (in PICK BASIC):

- `14N` means 14 digits
- `4A10N` means 4 alphabetic characters and 10 digits (used for items only)
- `'3'12N` means a 3 followed by 12 digits.

If necessary, ask Geac Support for assistance.

3. Barcode Type	[`0` or `1`]
`1`	Format used for patrons.
blank or `0`	Format used for items (pieces).
4. Institution Code	[any]

Specifies a code in the barcode that identifies owning institution of an item or home institution of a patron (typically stored in positions 2-5 of the barcode). Leave this field blank if the barcode does not include such data.

This code corresponds to, but is not necessarily the same as, the barcode format's Institution Code defined by the library in ADVANCE. For example, 1234 in the barcode number could correspond to the CENTRL Institution Code.

5. Institution Code Position	[0-2 digits] [This field has an effect only if field 4 has a code defined.]
	Specifies the starting position of the barcode institution code defined in field 4.

6. *Beginning Barcode Position*	[0-2 digits]
	Specifies the starting position of the barcode number to be considered by the system when doing check digit verification.

7. *Barcode Length*	[0-2 digits]
	Specifies the number of characters in the barcode number, including the institution code (if any) but not including the check digit (if any).

8. *Check Digit* [0 or 1]

1	The barcode includes a check digit.
blank or 0	The barcode does not include a check digit.

9. *Check Digit Position* [0-2 digits]
[This field has an effect only if field 8 is answered 1.]

Specifies the position of check digit in the barcode.

10. *Display Format* [number signs and spaces]

Screen display format for the barcode.

Example: if the format is defined as
```
  # #### #########
```
then the 14-character barcode 12345678901234 would be displayed as
```
  1 2345 678901234.
```

Leave this field blank to have the barcode displayed as is, without added spaces, on the Circulation checkin and checkout screens and the Circulation reports.

11. *Subroutine Name* [any]
[This field has an effect only if field 8 is answered 1.]

Name of the subroutine used for check-digit calculations. Leave this field blank (for the standard modulus-10 routine) or enter the name of a custom routine supplied by Geac.

Zip and Postal Codes (`ZIP`)

Use the `Zip/Postal Code Entry` function to define default address information (city, state or province, and country) for zip and postal codes. The system supplies the information in a patron record when Circulation staff assign the Zip/Postal Code.

Although Zip/Postal Codes can be added from Circulation (in the *Zip/Postal Code* fields on the PATRON REGISTRATION screen), the codes can be updated or deleted only in the Utilities function.

Updates
Updating a code retroactively changes the address information in existing patron records, but the new information will be used wherever staff assign or re-assign the code.

Deletions
Deleting a code retroactively removes the address information from existing patron records, but does not remove the code itself from the patron records.

Access
Access the function from the SYSTEM UTILITY MENU, or by entering `ZIP` on any Utilities menu (or on the ADVANCE MASTER MENU).

```
HH:MM     CITY - STATE/PROVINCE - ZIP/POSTAL CODE EDIT        DD MMM YYYY


        Zip/Postal Code    :

        1.  City           :

        2.  State/Province  :

        3.  Country        :
```

Enter a Zip/Postal Code and <ENTER>. Alternatively, <ENTER> with the field left blank to exit the function.

Zip/Postal Codes can be 1-50 characters long. Upper and lower case letters are not equivalent, and spaces are not ignored. For example, `L3R4T5` and `l3r 4t5` are different codes than `L3R 4T5`.

To see a list of existing Zip/Postal Codes, log out of ADVANCE and `LIST` the `ZIP` file at the Terminal Control Language (TCL) level.

Detail Screen

After you enter a Zip/Postal Code, the system displays the current values and an option line.

```
 HH:MM    CITY - STATE/PROVINCE - ZIP/POSTAL CODE EDIT        DD MMM YYYY


         Zip/Postal Code    : L3R 4T5

         1.  City           : MARKHAM

         2.  State/Province  : ONTARIO

         3.  Country        : CANADA


 Options:
  # line   Delete   File   Exit   ? help
```

Select *File*, *Exit*, or *Delete* to return to Zip/Postal Code prompt: *File* saves your changes, *Exit* does not save your changes, and *Delete* deletes the Zip/Postal Code.

Enter up to 40 characters each in the *City*, *State/Province*, and *Country* fields. You may leave one or more of the fields empty.

Greeting Message Definition (`UGME`)

Use the `Greeting Message Entry` function to define special or random greeting messages that will be displayed on the ADVANCE Logon Screen.

NOTE: The `Greeting Message Control` function (UGMC) determines when and to whom the special messages are displayed.

Access the function from the SYSTEM UTILITY MENU, or by entering UGME on any Utilities menu (or on the ADVANCE MASTER MENU).

```
                        GREETING MESSAGE ENTRY




    Options:
     ? help    Special greeting    Random greeting    Exit
```

Select *Special greeting* to access the standard, date- or user-controllable greetings. Select *Random greeting* to access the randomly displayed greetings.

Selection Screen

Special greetings are accessed and updated or deleted on the GREETING MESSAGE UPDATE screen. Random greetings are handled on the identical SPECIAL MESSAGE UPDATE screen.

```
                        SPECIAL MESSAGE UPDATE

   Enter Greeting (#) or (N)ew :                            Total = 6

        -------------------------------------------------------------------
```

Enter an existing greeting number, or enter N to add a new greeting. Alternatively, <ENTER> with the field left empty to leave the function.

The *Total* field indicates the number of defined greetings.

To see a list of existing greeting messages, log out of ADVANCE and
LIST the GREETING file at the Terminal Control Language (TCL) level.

Definition Screen

```
                      SPECIAL MESSAGE UPDATE

 Enter Greeting (#) or (N)ew  :4                           Total = 6
     -------------------------------------------------------------------
    1> Ontario Legislative Library,
    2> Welcome to Geac ADVANCE demo!
    3> Welcome to Geac ADVANCE demo!
    4> Welcome to Geac ADVANCE demo!
    5> Welcome to Geac ADVANCE demo!

 Options:
  ? help   File   Delete   Forward   Backward   Exit   # line   Add #
  Delete #   Change #   Join line #
```

Define up to 8 lines of message text, of up to 71 characters per line.

Message
Number

When a message is displayed on the login screen, the system displays
the message number in curly brackets above the message. **Random
greetings** are numbered 1-1999. For **special greetings**, the system adds
2000 to the greeting number (e.g. greeting 11 is displayed as {2011}). If
you delete a message, subsequent messages are not renumbered.

Options

Select *File*, *Exit*, or *Delete* to leave the function and return to the menu
from which you accessed the function: *File* saves your changes, *Exit*
does not save your changes, and *Delete* deletes the message.

 # line

Accesses the line you specify.

Add #

Adds one or more lines below the line number you specify. (Specify 0 to
add lines to the very top of the message.)

Delete #

Deletes the line you specify.

Change #

Replaces text on the line you specify. For example, 3/Monday/Sunday
changes the text Monday to Sunday on line 3.

Join line #

Moves text from the following line up to the end of the line you specify.

Greeting Message Control (`UGMC`)

Use the `Greeting Message Control` function to determine when and to whom greeting messages are displayed on the ADVANCE login screen.

NOTE: The `Greeting Message Entry` function (`UGME`) defines the content of the messages.

Access the function from the SYSTEM UTILITY MENU, or by entering `UGMC` on any Utilities menu (or on the ADVANCE MASTER MENU).

```
                         GREETING

      Number of records : 6
      Code          Description of code
      ----------    ----------------------------------------------------
  1. (MASTER)      Master Message (Displays Always)
  2. 06/04/93      LIBRARY CLOSING EARLY
  3. KAY           Identification Code Activated Message
  4. CIRC3         CIRC DESK 3
  5. MUL2          Identification Code Activated Message
  6. MUL3          Identification Code Activated Message


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

To add a Greeting Control Code, select *Add item*. The system prompts:
`Enter the code you wish to add`

Types of Codes   There are three types of codes you may add:

(MASTER)

You may define one master greeting. The system displays the master greeting in preference to date or user greetings.

MM/DD/YY

You may define one date greeting per date. Be careful to include the leading zeros: for example, `06/04/93` is proper but `6/4/93` is not. The system displays the date greeting on the date specified unless superseded by a master greeting.

USERID

You may define one user greeting per User ID (access code). The system displays the user greeting to the user specified unless superseded by a master or date greeting.

Detail Screen

```
                            GREETING

      GREETING CODE : (MASTER)
      --------------------------------------------------------------------
   1. Greeting description      : LIBRARY CLOSING EARLY
   2. Display greeting (1 = Yes) :
   3. Special greeting number    :


   Options:
    ? help   # line   Line by line   Copy   Print   Delete   Exit   File
```

Select *File*, *Exit*, or *Delete* to return to the initial screen: *File* saves your changes, *Exit* does not save your changes, and *Delete* deletes the greeting.

Fields

1. Greeting description   [Any]

Brief description of the Greeting Control Code, for display on the initial screen's code list.

2. Display greeting   [0 or 1]

1   Display the greeting.

blank or 0   Do not display the greeting.

3. Special greeting number   [1-4 digits]

Specifies which greeting message to display. When specifying a special greeting message, add 2000 to the message number. For example, enter 2011 rather than 11 to specify special message 11 — entering 11 would specify random message 11.

Password Changes (`UCPW`)

Use the `Change Password` function to change your own password. (In the `Enter Access Codes` function, you can change any user's password.)

Access the function from the SYSTEM UTILITY MENU, or by entering `UCPW` on any Utilities menu (or on the ADVANCE MASTER MENU).

```
Changing password for MASTER:

Password must be at least two (2) characters long.

Enter old password:
```

Enter your current password and <ENTER>. Alternatively, <ENTER> with the field left blank to exit the function.

New Password   The system then prompts for your new password:
`Enter new password:`

Enter a new password for logging into ADVANCE. Define a password that is simple enough for you to remember but unusual enough that unauthorized people cannot guess it (e.g. EXKA.LIBR9).

The password may be 2-20 characters long (6-12 is recommended), and should not include blanks. Upper and lower case letters are **not** equivalent: EXKA.LIBR9 is not equivalent to Exka.Libr9.

The system then prompts:
`Retype new password:`

Re-enter the new password, to ensure you have not mistyped it. If you enter it the same, the system says:
`Password changed`
`Press <Enter> to exit.`

<ENTER> to leave the function.

Option Line Codes (UCSO)

Use the Update Option Prompts function to update the Option Line Codes which define the option commands and control the display of options.

Access the function from the SYSTEM UTILITY MENU, or by entering UCSO on any Utilities menu (or on the ADVANCE MASTER MENU).

Initial Screen

This screen lists the Geac-provided, numeric codes. The library cannot add or delete options.

```
                    OPTION LINE CODES

     Number of records : 316
     Code    Description of code
     ------  ----------------------------------------------------------
 1. 1       ?          ? help              Get more information
 2. 2       B          Backward            Move backward
 3. 3       F          Forward             Move forward
 4. 4       FI         File                Save the record or modifi
 5. 5       E          Exit                Exit  without saving modi
 6. 6       #          # line              Enter specified line numb
 7. 7       A          Add item            Add entries
 8. 8       R.#        Retrieve #          Retrieve specified item/p
 9. 9       D.#        Delete #            Delete specified line num
10. 10      DEL        Delete              Delete record
11. 11      L          Line by line        Enter/edit field line by
12. 12      PRT        Print               Print screen/record
13. 13      R          Retrieve            Retrieve bib record
14. 14      O          On/off toggle       On/off toggle in auto.pha

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

Detail Screen

```
                        OPTION LINE CODES

     OPTION LINE CODE : 8
     ------------------------------------------------------------------
 1. Selection Characters (Simple Mask)  : R.#
 2. Length/Number of Selection Characters : 3
 3. Option Line Description              : Retrieve #
 4. Length/Number of characters in Desc. : 10
 5. Option Priority (1=high)            : 1
 6. Long Description of entry           : Retrieve specified item/piece +
 7. Hide option flag (1=hide)           :
 8. Not lined up flag (1=NOT lined up)  :
 9. Input Mask (Detailed PICK format)   : 'R.'0N
10. Upper case masking off (1=yes)      :




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

Select *File* or *Exit* to return to the initial screen: *File* saves your changes, *Exit* does not save your changes.

Option Lines

The way options are presented at the bottom of screens in a modules depends on whether or not the "option bar" feature is activated from the Option Line Control table (OLC).

Option Bar Mode

In this mode, the option line will look something like the following, with one of the options highlighted and a brief help text for it is shown on the first line.

```
Options:    Get more information
 Check in   Holdings   Claims   Order detail   Forward   Backward
 Prior screen   ? help   Exit
```

Users may highlight an option by using the arrow keys or entering the first letter of the option (capitalized by convention).

Option Command Mode

In this mode, the option line will look something like the following, with a 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
```

Users may select an option by entering the command.

Fields

1. Selection Characters   [any]

Short description of the option, for option command mode. The text is displayed in highlighted text. By convention:

- state the option **command** (generally 1 to 3 uppercase characters)

- if an option **parameter** is required for using the prompt, indicate what is required: for example, R.# instructs the user to enter R to select the option (retrieving an item) and then enter an item number to specify which item

- if the option **parameter is optional**, surround its description by curly brackets: for example, D.{Subf}, for deleting a subfield.

CAUTION: Do not define duplicate values, even temporarily. For example, to change the File command from FI to F, first change the Forward command from F to something else, such as FW.

CAUTION: If you change the question mark value to something else for the help option, you will not be able to change it back in this function. Instead, you must log out of ADVANCE and edit the item in the OPTION file at the Terminal Control Language (TCL) level.

CAUTION: Do not change the contents of this field if it contain only #. For example, do not change # to R.#.

2. Length/Number of Selection Characters   [1-2 digits]

Length of the short option description defined in field 1.

3. Option Line Description   [any]

Longer description of the option. In option command mode, this text is displayed, after an automatically supplied equals sign, to the right of the short option description. In option bar mode, only this text is displayed, and the initial character (capitalized, by convention) indicates the character that users may enter to select the option. If two or more

characters are required, each of the required characters is capitalized (by convention).

4. Length/Number of characters in Desc.

[1-2 digits]

Length of the longer option description defined in field 3.

5. Option Priority

Leave blank: not currently implemented.

6. Long Description of entry

[0-53 characters]

Help text for the option, for option bar mode only. This text displays on the Options: line.

7. Hide option flag

[0 or 1]

1   The system will not display the option, but users who know it may nevertheless select it. This provides a low level of security.

blank or 0   The system will display the option.

8. Not lined up flag

[0 or 1]
[This option has an effect only if field 7 is answered blank or 0 and options are displayed in option command mode.]

1   Display the option three spaces from the next option. This packs the options closer together and may reduce the number of option lines required on screens.

blank or 0   Line up the option below the one shown on the previous line. Displaying options in columns this way improves the appearance and readability of the options.

9. Input Mask

[any]

Specifies how the system is to interpret the option command and parameters. Numeric options are denoted by a period in the pattern (i.e., 'R.'0N). You will not need to change the Geac-supplied values unless you changed the value in field 1.

10. Upper case masking off

Leave blank: not currently implemented. (Users may enter the option commands in either upper or lower case: the system considers `fi` equivalent to `FI`.)

Option Line Control (`OLC`)

Use the `Option Line Control` function to determine the option line mode for each module and port.

Access the function from the SYSTEM UTILITY MENU, or by entering `OLC` on any Utilities menu (or on the ADVANCE MASTER MENU).

NOTE: The option descriptions and commands are defined in the Option Line Codes table (`UCSO`).

```
                        OPTION LINE CONTROL


     OPTION LINE CONTROL CODE : OPTION.CHOICE
     ---------------------------------------------------------------------
  1. Modules to get Option bar              : ADV,CAT,CIRC,OPAC,ACQ,SER
        (ADV,CAT,CIRC,OPAC,ACQ,SER)
  2. Ports to get Option bar                : 003,005,008,009,020,019
        (3 digits with leading zeroes)



 Options:
  ? help   # line   Line by line   Print   Exit   File
```

Fields

1. Modules to get Option bar

[zero, one, or more module names (separated by commas)]

The modules in which the option line will be displayed in option bar mode, no matter which port is being used. In the other, unlisted modules, the option line will be displayed in option command mode unless overridden at a particular port by field 2.

The module names are:

    ACQ   Acquisitions Module
    CAT   Cataloguing Module
    CIRC   Circulation Module
    OPAC   Online Catalogue Module
    SER   Serials Module
    ADV   ADVANCE Core Module (includes Utilities Function).

Option Bar Mode   In this mode, the option line will look something like the following, with one of the options highlighted and a brief help text for it is shown on the first line.

```
Options:      Get more information
 Check in    Holdings    Claims    Order detail    Forward    Backward
 Prior screen    ? help    Exit
```

Users may highlight an option by using the arrow keys or entering the first letter of the option (capitalized by convention). (For further details, see *Using ADVANCE* on page A-1 .)

Option Command Mode   In this mode, the option line will look something line the following, with a 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
```

Users may select an option by entering the command. (For further details, see *Using ADVANCE* on page A-1.)

2. Ports to get Option bar   [zero, one, or more Port Codes (separated by commas)]

The ports at which the option line will be displayed in option bar mode, even though the module is not specified in field 1.

Qualifier Maintenance (`QUAL`)

The QUALIFIER MAINTENANCE MENU provides access to the functions which define and process the Qualifier Codes.

Access — Access the menu from the SYSTEM UTILITY MENU, or by entering QUAL on any Utilities menu (or on the ADVANCE MASTER MENU).

Qualifier Maintenance Menu

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

                         QUALIFIER MAINTENANCE MENU


                   1. MQUAL   Qualifier Code Maintenance

                   2. PQUAL   Post Qualifiers to Database


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

Options

MQUAL — Accesses the OPAC QUALIFIER CODES table, for defining the Qualifier Codes.

PQUAL — Accesses the POST CHANGES TO QUALIFIER TABLE function, for retroactively updating the ADVANCE database with your latest set of the Qualifier Codes.

Qualifier Codes (`MQUAL`)

NOTE: If you change or add Qualifier Codes (in CQUAL or MQUAL), you must run Qualifier Code Posting (PQUAL) from the QUALIFIER MAINTENANCE MENU in Utilities to update the system. This process may take several hours to complete. Execute this process only when all users are logged off.

The Qualifier Codes define broad locations for items (monographic pieces and serial copy sets) to facilitate the scope of Online Catalogue searches and Circulation holds.

Access the table from the QUALIFIER MAINTENANCE MENU, or by entering MQUAL on any Utilities menu (or on the ADVANCE MASTER MENU).

```
                    OPAC QUALIFIER CODES


    Number of records : 15
    Code                 Description of code
    -------------------  -------------------------------------------
  1. A/V                 A/V ITEMS
  2. A/VBR1              A/V ITEMS IN MAIN BRANCH
  3. ALL                 ALL ITEMS
  4. BRA1                MAIN BRANCH
  5. BRA2                NORTH BRANCH
  6. BRA3                EAST BRANCH
  7. BRA123              ALL BRANCHES
  8. RARE                RARE BOOKK ITEMS (CALL NO PREFIX)



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

Select *Add item* to add a new Qualifier Code. The system prompts:

Enter the code you wish to add:

Enter the name of the new code (1-6 characters), or <ENTER> without specifying a code to return to the option line.

Detail Screen

```
                        OPAC QUALIFIER CODES


    QUALIFIER CODE : CAM123
    -------------------------------------------------------------------
 1. Description                        : ALL BRANCES
 2. Institutions                       :
 3. Sublocations                       : BRA1,BRA2,BRA3
 4. Collections                        :
 5. Callno Prefixes                    :
 6. Classifications                    :
 7. Use qualifier for Holds Processing? : 1
    (1=Yes, 0=No)
 8. Next Wider scope for Holds Processing: ALL = ALL ITEMS



Options:
 ? help   # line   Line by line   Copy   Print   Delete   Exit   File
```

Select *File*, *Exit*, or *Delete* to return to the initial screen: *File* saves your changes, *Exit* does not save your changes, and *Delete* deletes the Qualifier Code.

Fields

1. Description

[any]

Brief description of the Qualifier Code.

2-6 HOLDINGS FIELDS

A Qualifier Code can be defined with multiple Institution Codes, multiple Sublocation Codes, and so on. An item matches the definition of a Qualifier Code if the item has any one of the defined Institution Codes AND any one of the defined Sublocation Codes AND so on.

2. Institutions

[zero, one, or more Institution Codes, 0-6 characters each]

Assigns the institution(s) (the highest level of holdings) to the qualifier's location group.

To see Cataloguing's INSTITUTION CODES table, enter ?? and <ENTER>.

3. Sublocations	[zero, one, or more Sublocation Codes, 0-6 characters each]
	Assigns the building(s) or other sub-institution unit(s) to the qualifier's location group.
	To see Cataloguing's SUBLOCATION CODES table, enter ?? and <ENTER>.
4. Collections	[zero, one, or more Collection Codes, 0-6 characters each]
	Assigns the collection(s) to the qualifier's location group.
	To see Cataloguing's COLLECTION CODES table, enter ?? and <ENTER>.
5. Callno Prefixes	[zero, one, or more Call Number Prefix Codes, 0-6 characters each]
	Assigns the call number prefix(es) to the qualifier's location group.
	To see Cataloguing's CALL NUMBER PREFIX table, enter ?? and <ENTER>.
6. Classifications	[zero, one, or more Classification Codes, 0-6 characters each]
	Assigns the call number classification group(s) to the qualifier's location group.
	To see Cataloguing's CLASSIFICATION CODES table, enter ?? and <ENTER>.
6. Use qualifier for Holds Processing	[0 or 1]
1	Enables the filling of item holds to be restricted by Qualifier Code.
blank or 0	Prevents the filling of item holds from being restricted by Qualifier Code.
7. Next Wider scope for Holds Processing	[Qualifier Code, 0-6 characters] [This field has an effect only if field 6 is answered 1.]
	If the hold cannot be filled by items in its primary Qualifier Code location group, the system will try this other Qualifier Code's location group instead.
	NOTE: This Qualifier Code does not have to be wider. That is, it does not need to include all of the first code's locations.

Qualifier Code Posting (`PQUAL`)

NOTE: If you change or add Qualifier Codes (in CQUAL or MQUAL), you must run Qualifier Code Posting (PQUAL) to update the system. This process may take several hours to complete. Execute this process only when all users are logged off.

Use the POST CHANGES TO QUALIFIER TABLE function to retroactively update the Qualifier Code assignment in monographic pieces, serial copy sets, and indexes. Depending on a piece or copy set's location information, the system may assign zero, one, or many codes to the item.

Access the table from the QUALIFIER MAINTENANCE MENU, or by entering PQUAL on any Utilities menu (or on the ADVANCE MASTER MENU).

```
DD MMM YYY          Geac ADVANCE Library System (#.##)          DEFAULT  AL
   HH:MM                        ADVANCE Library

                     POST CHANGES TO QUALIFIER TABLE

    This function posts the changes in the Qualifier table:

    1.   Generate the compiled qualifier reverse tables.
    2.   Generate the compiled qualifier evaluation tables.

    3.   Re-evaluate the qualification bit strings for all records in
         - LOCCPY
         - B.MASTER
         - A.MASTER


      WARNING --- This process may take hours !!!

    Do you want to proceed (Y/N) :
```

Answer Y to update the database using the latest Qualifier Code definitions, or N to leave the function without updating the database.

Application Messages (MSG)

Application Messages defines the messages that will be displayed by
ADVANCE to the terminal and/or printer. Application messages may
display on the terminal only, on the printer only, or on both the terminal
and printer.

Access the table from the SYSTEM UTILITY MENU, or by entering MSG
on any Utilities menu (or on the ADVANCE MASTER MENU).

```
                        MESSAGES

      Number of records : 45
      Code         Description of code
      -----------  --------------------------------------------------
  29. SCM38        Self CheckIn - Item claimed returned
  30. SCM39        Self CheckIn - Item marked as lost
  31. SCM4         Self Checkout - Item Status prevents checkout
  32. SCM40        Self CheckIn - Item part of revolving collection
  33. SCM41        Self CheckIn - Returned to wrong location
  34. SCM42        Self CheckIn - Item missing
  35. SCM43        Self CheckIn - Item marked as 'on search'
  36. SCM44        Self CheckIn - Item on hold or booked
  37. SCM45        Self CheckIn - Item relocated here
  38. SCM46        Self CheckIn - Item to be routed elsewhere
  39. SCM47        Self CheckIn - Item req'd for RBR
  40. SCM48        Self CheckIn - Item has pending actions
  41. SCM5         Self Checkout - Item Action prevents checkout
  42. SCM6         Self Checkout - No Loan Rules

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

NOTE: Although *Add item* is available, you should not use this function.

To edit a message, select *# line* and enter the appropriate number. The
detail screen appears.

Detail Screen

```
                             MESSAGES

     MESSAGE CODE : SCM10
     -------------------------------------------------------------------
 1. Message Description       : Self Checkout - No Due Date
 2. Screen display line       : No Due Date
 3. Print line                :













 Options:
  ? help   # line   Line by line   Copy   Print   Delete   Exit
```

Fields

1. Message Description   [any]

Indicates the purpose or use of the message.

2. Screen display line   [any]

The text of the message that displays.

3. Print line   [any]

The text of the message that prints.

4

Background Processors

ADVANCE allows you to activate background processors on phantom (dummy) ports. These processors will automatically execute scheduled processing jobs and perform ongoing processing such as the indexing of catalogue records.

Background Processor Menu (UBPM)

The *BACKGROUND PROCESSOR MENU* provides access to the functions in which you may activate or de-activate the processors. To access the menu, select it on the *UTILITY MENU,* or enter UBPM on any Utilities menu (or on the ADVANCE *MASTER MENU*).

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

                       BACKGROUND PROCESSOR MENU


                     1. PCIR  Circulation Processor

                     2. PCP   Cataloguing Processor

                     3. CPC   Cataloguing Processor Control

                     4. PACQ  Acquisitions Processor

                     5. PSER  Serials Control Processor


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

Circulation Background Processor (`PCIR`)

The Circulation Background Processor executes processing jobs, such as hold updates and notice production, that are scheduled by the Circulation Production Codes and shown on the *CIRCULATION CALENDAR PROCESSOR* screen (`OCP`). When not busy with such processing jobs, the processor updates checkin and checkout statistics and executes time-related status/action changes. (See the *Circulation Management Guide* for descriptions of the Production Codes and processing jobs.)

When the processor is **inactive**, statistical updating is handled directly by the checkin and checkout ports, and the port response times may degrade during periods of heavy use. When the processor is **active**, these ports will improve in performance because they will just write the checkin and checkout records to a batch file for the processor to handle when it has time. However, **overall** system performance will decrease slightly when the processor is busy.

You may execute a Circulation processing job interactively when the processor is inactive, but not when the processor is active.

Access   To activate or de-activate the processor, or to examine the size of its processing backlog, access the *CIRCULATION BACKGROUND PROCESSOR* screen by selecting it on the *BATCH/BACKGROUND PROCESSOR MENU,* or by entering `PCIR` on any Utilities menu (or on the ADVANCE *MASTER MENU*).

Processor Inactive

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

                     CIRCULATION  BACKGROUND  PROCESSOR


         Processor Status      :  Inactive

         Start time            :

         Number left to process :  0


   Options:
    Redisplay   Exit   On processor
```

Processor Active

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

                     CIRCULATION  BACKGROUND  PROCESSOR


         Processor Status      :  Active (Userno 4098)

         Start time            :  05-20-93 14:53:12

         Number left to process :  375


   Options:
    Redisplay   Exit   Off processor
```

Options

Redisplay	Updates the information on the screen.
Exit	Leaves the function.
On processor	Activates the processor. (This option is not available when the processor is already active.)

NOTE: If there are any outstanding processing jobs (that is, jobs that were scheduled to start on or before the current date and time), the system displays a message warning you that they will be executed immediately, provides a list of the jobs, and asks `Do you still wish to start the processor (Y/N)`. Answer Y to continue or N to not proceed. If you do want to start the background processor without having these jobs executed immediately, you should go to the *CIRCULATION CALENDAR PROCESSOR* screen (`OCP`) and change their scheduled start times to later.

Off processor   De-activates the processor. (This option is not available when the processor is already inactive.)

CAUTION: If the processor is executing a processing job when you select this option, it will complete the processing before becoming inactive. In the meantime, the Processor Status field will show `Shutting down`. Wait for the processor to become completely inactive before you perform such activities as rebooting the system.

Fields

Processor Status   `Inactive`, `Active`, or `Shutting down` (the processor has been turned *Off* but has not yet finished its current processing job).

The *Userno*, shown when the processor is active, specifies the port number of the phantom port on which the processor is executing. If you are unable to terminate the processor through regular means, you can log out of ADVANCE and log out this port at the Terminal Control Language (TCL) level.

Start time   Date and time the processor was activated.

Number left to process   Current backlog of checkin transactions, checkout transactions, and time-related status/action changes to be processed. The number may vary from zero (at quiet times) to many thousand (at busy times, particularly if background processing jobs are being executed).

You do not need to wait for the backlog to be reduced to zero before de-activating the processor — the system saves the backlog for when the processor is next activated.

Cataloguing Background Processor (`PCP`)

The Cataloguing Background Processor indexes new and updated bibliographic and authority records when they are filed. There are no background processing jobs in Cataloguing such as there are in Circulation, Acquisitions, and Serials.

When the processor is **inactive**, indexing is handled directly by the cataloguing ports — when staff file a record, the terminal locks until the indexing is completed. When the processor is **active**, these ports will improve in performance because they will quickly write the catalogue records to a temporary batch file for the processor to index when it has time. However, **overall** system performance will decrease slightly when the processor is busy, and the new or updated versions of backlogged records are not accessible until indexed.

Loaders and Transfers

Processes which involve indexing, such as the Bibliographic Record Conversion/Indexing Process (`UBIX`) and the Acquisitions to Catalogue Transfer Job (`UPMDB`) will execute much faster if you have one or more copies of the Cataloguing Background Processor active.

Multiple Copies

You may activate more than one copy of the Cataloguing Background Processor. The more copies you activate, the smaller the backlog of un-indexed records will be, but the more overall system performance will decrease. For example, you might consider having three or four copies of the processor active when there are 10 cataloguers working.

Access

To activate or de-activate copies of the processor, or to examine the size of its processing backlog, access the *CATALOGUING BACKGROUND PROCESSOR* screen by selecting it on the *BATCH/BACKGROUND PROCESSOR MENU,* or by entering `PCP` on any Utilities menu (or on the ADVANCE *MASTER MENU*).

The following sample screen shows that two copies of the processor are active.

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

                         CATALOGUING BACKGROUND PROCESSOR


     Processor status        :  Active

     Processor id(s)         :  4098 4099

     Number left to process  :  23

     Scheduled Start Time    :



  Options:
    Redisplay   ? help   Exit   On processor   Off processor
```

Options

Redisplay	Updates the information on the screen.
Exit	Leaves the function.
On processor	Activates another copy of processor.
Off processor	De-activates all copies of the processor.

Fields

Processor Status `Inactive` or `Active`.

Processor id(s) The port numbers of the phantom ports on which copies of the processor are executing. If you are unable to terminate the processor through regular means, you can log out of ADVANCE and log out this port at the Terminal Control Language (TCL) level.

Number left to process Current backlog of bibliographic or authority records to be processed. The number may vary from zero (at quiet times) to many thousand (at busy times).

You do not need to wait for the backlog to be reduced to zero before de-activating the processor — the system saves the backlog for when the processor is next activated.

Scheduled Start Time   Not currently implemented.

Cataloguing Background Processor Report (CPC)

To determine whether or not Cataloguing Background Processor Reports will be produced automatically, access the *CATALOGUING PROCESSOR CONTROL TABLE* screen and answer 1 (yes) or 0 (no) in the *Produce Processor Reports* field.

To access the screen, select it on the *BATCH/BACKGROUND PROCESSOR MENU,* or enter CPC on any Utilities menu (or on the ADVANCE *MASTER MENU*).

For each processor, a separate report of statistics (including information such as the total number of records indexed and the number per hour) will be automatically generated and printed when you de-activate the processors.

```
               CATALOGUING PROCESSOR CONTROL TABLE


     TABLE CODE NAME : CATALOGUING.PHANTOM.CONTROL
     ----------------------------------------------------------------------
  1. Produce Processor Reports (1=Yes)          : 0



 Options:
  ? help   # line   Line by line   Print   Exit
```

NOTE: The *Print* option on this screen only prints the screen itself.

Acquisitions Background Processor (PACQ)

The Acquisitions Background Processor executes processing jobs, such as the Order Generation Job and the Acquisitions to Catalogue Transfer Job, that are scheduled by the Acquisitions Production Codes and shown on the *ACQUISITIONS CALENDAR PROCESSOR* screen (ACP). (See the *Acquisitions Management Guide* for descriptions of the Production Codes and processing jobs.)

NOTE: Overall system performance will decrease slightly when the processor is busy.

You may execute an Acquisitions processing job interactively when the processor is inactive, but not when the processor is active.

Access To activate or de-activate the processor, access the *ACQUISITIONS BACKGROUND PROCESSOR* screen by selecting it on the *BATCH/ BACKGROUND PROCESSOR MENU,* or by entering PACQ on any Utilities menu (or on the ADVANCE *MASTER MENU*).

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

                     ACQUISITIONS   BACKGROUND   PROCESSOR


          Processor Status      :  Inactive

          Start time            :



  Options:
   Redisplay   ? help   Exit   On processor
```

Options

Redisplay Updates the information shown on the screen.

Exit Leaves the function.

On processor Activates the processor. (This option is not available when the processor is already active.)

NOTE: If there are any outstanding processing jobs (that is, jobs that were scheduled to start on or before the current date and time), the system displays a message warning you that they will be executed immediately, provides a list of the jobs, and asks `Do you still wish to start the processor (Y/N)`. Answer Y to continue or N to not proceed. If you do want to start the background processor without having these jobs executed immediately, you should go to the *ACQUISITIONS CALENDAR PROCESSOR* screen (`ACP`) and change their scheduled start times to later.

Off processor   De-activates the processor. (This option is not available when the processor is already inactive.)

CAUTION: If the processor is executing a processing job when you select this option, it will complete the processing before becoming inactive. In the meantime, the Processor Status field will show `Shutting down`. Wait for the processor to become completely inactive before you perform such activities as rebooting the system.

Fields

Processor Status   `Inactive`, `Active`, or `Shutting down` (the processor has been turned *Off* but has not yet finished its current processing job).

The *Userno*, shown when the processor is active, specifies the port number of the phantom port on which the processor is executing. If you are unable to terminate the processor through regular means, you can log out of ADVANCE and log out this port at the Terminal Control Language (TCL) level.

Start time   Date and time the processor was activated.

Serials Background Processor (`PSER`)

The Serials Background Processor executes processing jobs, such as the claim generation job and the summary holdings build job, that are scheduled by the Serials Production Codes and shown on the *SERIALS CONTROL CALENDAR PROCESSOR* screen (`SCP`). (See the *Serials Management Guide* for descriptions of the Production Codes and processing jobs.)

NOTE: Overall system performance will decrease slightly when the processor is busy.

You may execute a Serials processing job interactively when the processor is inactive, but not when the processor is active.

Access   To activate or de-activate the processor, access the *SERIALS BACKGROUND PROCESSOR* screen by selecting it on the *BATCH/ BACKGROUND PROCESSOR MENU,* or by entering `PSER` on any Utilities menu (or on the ADVANCE *MASTER MENU*).

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

                       SERIALS   BACKGROUND   PROCESSOR


          Processor Status      :   Inactive

          Start time            :




   Options:
    Redisplay   ? help   Exit   On processor
```

Options

Redisplay   Updates the information shown on the screen.

Exit   Leaves the function.

On processor   Activates the processor. (This option is not available when the processor is already active.)

NOTE: If there are any outstanding processing jobs (that is, jobs that were scheduled to start on or before the current date and time), the system displays a message warning you that they will be executed immediately, provides a list of the jobs, and asks `Do you still wish to start the processor (Y/N)`. Answer Y to continue or N to not proceed. If you do want to start the background processor without having these jobs executed immediately, you should go to the *SERIALS CALENDAR PROCESSOR* screen (`SCP`) and change their scheduled start times to later.

Off processor De-activates the processor. (This option is not available when the processor is already inactive.)

CAUTION: If the processor is executing a processing job when you select this option, it will complete the processing before becoming inactive. In the meantime, the Processor Status field will show `Shutting down`. Wait for the processor to become completely inactive before you perform such activities as rebooting the system.

Fields

Processor Status `Inactive`, `Active`, or `Shutting down` (the processor has been turned *Off* but has not yet finished its current processing job).

The *Userno*, shown when the processor is active, specifies the port number of the phantom port on which the processor is executing. If you are unable to terminate the processor through regular means, you can log out of ADVANCE and log out this port at the Terminal Control Language (TCL) level.

Start time Date and time the processor was activated.

5

Help Screen Editor

Help screens are provided throughout ADVANCE. There are two ways you can create or edit the text on an ADVANCE help screen:

- use the Help Screen Editor within ADVANCE

- log out of ADVANCE and use the system editor at the Terminal Control Language (TCL) level: that is, directly edit the screen's help record in the system's HF file.

This chapter describes the first of these methods: the Help Screen Editor.

Access   To access the Help Screen Editor:

1. Access the ADVANCE screen whose help screen you wish to add or update.

2. Select the *? help* option to go to the help screen.

   - If the help screen is already **defined**, the system displays the help screen. Enter the library password (such as UPDATE) at the help screen's input prompt.

   - If the help screen is **not defined**, the system prompts:
     ```
     Online help not available...
     ```
     Enter the library password (such as UPDATE) at this prompt.

   NOTE: The library password is defined on line 4 of the HELPER record in the KF file.

CAUTION   If the you edit the Geac-provided help screen records, you should keep backups and follow special naming conventions. See *Naming Conventions* on page 5-10.

Sample Help Screen

Consider the two-page screen for the Online Catalogue's Brief Display.

```
-------------------------------------------------------------------------------
|          The following options are available :                              |
|                                                                             |
| (F)orward      Go forward in the display (to see the pieces infor-          |
|                mation).                                                      |
| (B)ackward     Go backward in the display (won't be shown if this           |
|                is the first page).                                          |
| (P)rior        Return to the previous screen.                              |
| (E)xtend       Extend your search with the same author/title/subject/       |
|                series/shelf location.                                       |
| (PRT)print     Print the bibliographic record on your screen.              |
| (N)ew search   Start a new search.                                         |
| (?)help        Get help message for the screen.                            |
| (S)earch copy  Limit display of pieces to those with a certain string.     |
|                                                                             |
| Press <ENTER> to continue for more options.  _                             |
|                                                                             |
|                                                                             |
|                                                                             |
|                                                                             |
 -------------------------------------------------------------------------------
```

```
-------------------------------------------------------------------------------
|          The following options MAY ALSO be available :                      |
|                                                                             |
| (M)arc         Display bibliographic record in MARC format.                |
| (#)line        See information about a specific piece (you may have         |
|                to go forward to see the pieces and get this option).        |
| (H)olds        List holds on title (hold queue).                           |
| (H)old Title   Display list of holds, allowing you to place a hold         |
|                and list library locations for pickup.                      |
| (FD)Full display Show a more detailed display of the record.               |
| (SN)See next   See next record in the list of records selected.            |
| (SP)See previous See previous record in the list of records selected.      |
| (OD)Order display See acquisitions orders for bibliographic item.          |
|                                                                             |
|                                                                             |
|                                                                             |
|                                                                             |
|                                                                             |
|                                                                             |
| Press <ENTER> to return to previous screen.  _                             |
 -------------------------------------------------------------------------------
```

When you access the Help Screen Editor from **any** page of the help
screen, the system displays the initial HELP SCREEN EDITOR screen.

```
 HELP SCREEN EDITOR     Name : PIECES.DISPLAY.SUMMARY.
  ---------------------------------------------------------------------
  | .* PLEASE REMEMBER TO CHANGE SISTER HELP SCREEN 'OPAC.DISPLAY.OPTIONS' |
  | .LEFT MARGIN 0 .*RIGHT MARGIN 0 .*TOP MARGIN 0 .LINE LENGTH 22       |
  |         The following options are available :                       |
  |                                                                     |
  | (F)orward     Go forward in the display (to see the pieces infor-   |
  |               mation.                                               |
  | (B)ackward    Go backward in the display (won't be shown if this    |
  |               is the first page).                                   |
  | (P)rior       Return to the previous screen.                        |
  | (E)xtend      Extend your search with the same author/title/subject/ |
  |               series/shelf location.                                |
  | (PRT)print    Print the bibliographic record on your screen.        |
  | (N)ew search  Start a new search.                                   |
  | (?)help       Get help message for the screen.                      |
  | (S)earch copy Limit display of pieces to those with a certain string. |
  |                                                                     |
   ---------------------------------------------------------------------

 Options:
  ? help   Edit   Copy   New   Print   Delete   File   Exit
```

This screen shows the beginning of the text in the help screen record. (In
this example, the record is named PIECES.DISPLAY.SUMMARY.)

? help   Displays help for the Help Screen Editor.

Edit   Places the help screen record in edit mode.

Copy   Copies another help screen record over top of this record. The system
prompts for the name of this other record.

New   Creates a new help screen record, or enables you to edit another existing
record. The system prompts for the name of this new/other record, and
then asks whether or not you want the current record saved (generally
answer Y).

The *New* option is a convenient way to add or access and edit a help
screen that is called from the current record by a .*CHAIN or .*READ
command.

Print Prints the help screen record (as it was last filed).

Delete Deletes the help screen record.

File Saves the changes made to the help screen record and returns to the help screen.

Exit Discards any changes made to the help screen record and returns to the help screen.

Editing a Help Screen Record

When you select the *Edit* option, the system displays the help screen record in a text **window** similar to the one shown below. You can proceed in this text window to display and work on the rest of the help record.

```
HELP SCREEN EDITOR     Name : PIECES.DISPLAY.SUMMARY.
  ----------------------------------------------------------------------
 | .* PLEASE REMEMBER TO CHANGE SISTER HELP SCREEN 'OPAC.DISPLAY.OPTIONS' |
 | .LEFT MARGIN 0 .*RIGHT MARGIN 0 .*TOP MARGIN 0 .LINE LENGTH 22        |
 |         The following options are available :                         |
 |                                                                        |
 | (F)orward      Go forward in the display (to see the pieces infor-    |
 |                mation.                                                 |
 | (B)ackward     Go backward in the display (won't be shown if this     |
 |                is the first page).                                     |
 | (P)rior        Return to the previous screen.                         |
 | (E)xtend       Extend your search with the same author/title/subject/ |
 |                series/shelf location.                                 |
 | (PRT)print     Print the bibliographic record on your screen.         |
 | (N)ew search   Start a new search.                                    |
 | (?)help        Get help message for the screen.                       |
 | (S)earch copy  Limit display of pieces to those with a certain string.|
 |                                                                        |
 | Press <ENTER> to continue for more options.                           |
 | .*INPUT 1,47,1                                                         |
 | .BP                                                                    |
  ----------------------------------------------------------------------
```

Use the window editing commands when editing the record (see *Using ADVANCE* on page A-1).

Display Differences

The windowed record does not exactly match the help screen that will be displayed by the system:

• The record has some "." formatting commands to define page breaks, the size and position of the help screen, and input fields.

• The window display is three characters narrower than a full width help screen.

Formatting Commands

The "." formatting commands can be used in the help records to define such elements as page breaks, the size and position of the help screen, and input fields.

Screen position and size

The help screen can either completely fill the terminal display (21 lines high by 74 characters wide), or just cover a portion of it.

.LEFT MARGIN *n*
Left margin of the help screen, where *n* is 0-70 character-spaces from the **left** edge of the terminal display.

.*RIGHT MARGIN *n*
Right margin of the help screen, where *n* is 5-70 character-spaces from the **right** edge of the terminal display.

.*TOP MARGIN *n*
Top margin of the help screen, where *n* is 0-22 lines down from the top of the terminal display.

.LINE LENGTH *n*
Height of the help screen plus 1, where *n* is 1-22 lines.

Examples   **.*TOP MARGIN 0 .LINE LENGTH 22**
gives the maximum 21-line screen, filling the display;

.*TOP MARGIN 5 .LINE LENGTH 17
gives a 16-line screen starting 4 lines down from the top of the display;

.*TOP MARGIN 0 .LINE LENGTH 17
gives a 16-line screen starting at the top of the display.

CAUTION   An input field cannot be placed on the very bottom line of the screen. The line underneath the input field is usually left blank and must be counted in the LINE LENGTH total. In the help screen record, the line below the input field text is typically used for the INPUT command.

Input field

Each help screen must have a user input field. This typically requires the user to <ENTER> to continue to the next page or exit from the help screen, but might require the user to enter a menu option to go to another help screen.

.*INPUT *n1,n2,n3,n4,n5,n6;n7,n8;n7,n8;...*
   Input field definition, where:

- *n1* determines whether the cursor is placed on the previous line (1) or on a new line (0).

- *n2* is the cursor position (1-74 character-spaces from the left edge of the help screen frame).

- *n3* is the display length of the input field. (The default is 20 but a more typical value is 1.)

- *n4* is the maximum input length of the input field. (The default is 100.)

- *n5* is the input value used if the user presses the ENTER key without entering one. (The default is a null value which will typi-cally cause an "exit"; see *Examples*.)

- *n6* determines whether the input field is highlighted (1), or not (0). (The default is 1.)

- *n7* is an input value, and *n8* is the command to execute when the user enters that input value. The command can be either of the following:

   .*CHAIN *recordname*
      Go to the help record called *recordname*.

   .*EXIT
      Display the next page of the help screen record or, if there is no more, return to the screen from which help was requested.

Other commands

Some of the following commands may also be useful.

.*READ *recordname*

Merge the help record called *recordname* into this help record for showing on the help screen. This command could be useful for displaying a single help record from several help screens, or for displaying a library-specific help record (see the following section).

.BP

Begin a new page. The help screen can be two or more pages long and require the user to <ENTER> to continue from one page to the next.

.* *comment*

Comment line.

.NO HILITE

Do not surround the help screen by a highlighted frame, and do not highlight the input field. (This command is rarely used.)

Examples

Example 1
```
Press <ENTER> to continue.
.*INPUT 1,28,1
```

The 1-character input field is 28 character-spaces from the help screen's left frame, on the Press <ENTER>... line.

<ENTER> displays the next page of the help screen record or, if there are no more pages, returns to the screen from which help was requested.

Example 2
```
Enter the number of your selection and press <ENTER>
or just press <ENTER> to exit:
.*INPUT 1,32,2;1,.*CHAIN HELP.AA;2,.*CHAIN HELP.BB;,
```

The 2-character input field is 32 character-spaces from the help screen's left frame, on the Enter the number... line.

This help screen offers a menu of help topics. If the user enters 1, the system goes to the HELP.AA help record. If the user enters 2, the system goes to the HELP.BB help record. If the user <ENTER> without entering a value, the system displays the next page of the help screen record or, if there are no more pages, returns to the screen from which help was requested.

Example 3
```
Enter the number of your selection and press <ENTER>
or just press <ENTER> to exit:
.*INPUT 1,32,2;1,.*CHAIN HELP.AA;2,.*CHAIN HELP.BB
```

This example is almost the same as Example 2, but omits ";," from the end of the INPUT statement. Because of this, the system will not do anything if the user <ENTER> without entering a value.

Example 4
```
Enter the number of your selection and press <ENTER>
or just press <ENTER> to continue:
.*INPUT 1,36,2,,1;1,.*CHAIN HELP.AA;2,.*CHAIN HELP.BB;3,EXIT
```

This example is almost the same as Example 2, but the default entry value is 1 and the command for entry value 3 is EXIT. If the user either enters 1 or <ENTER> without entering a value, the system goes to the HELP.AA help record. If the user enters 2, the system goes to the HELP.BB help record. If the user enters 3, the system displays the next page of the help screen record or, if there are no more pages, returns to the screen from which help was requested.

Naming Conventions

If the library edits help screen record(s) for a help screen, prefix the library-specific records with "`L.`" and, if you want to retain the original files, make backup copies of the Geac-provided records prefixed by "`G.`". This way, during an ADVANCE release upgrade, the installation software can overwrite the appropriate records and leave the others alone:

- If the library has not made any changes to a help screen, the corresponding help files will all be unprefixed files, and the upgrade will overwrite those files.

- If the library has made changes to a help screen, the upgrade will overwrite only the unprefixed files and leave the "`L.`" files unaltered.

Example Consider, for example, the Geac-provided record `MENU.HELP`, which defines the Online Catalogue MASTER MENU's help screen. The library would back up this record to "`G.MENU.HELP`", create a library-specific version called "`L.MENU.HELP`", and change the `MENU.HELP` record so that it read in the library-specific version. The following steps describe this process:

1. Access the Online Catalogue MASTER MENU help screen.

2. Enter the library password to access the Help Screen Editor for the `MENU.HELP` record.

3. Create a backup:

   a. Select the *New* option and specify `G.MENU.HELP` to create the record.

   b. Select the *Copy* option and specify `MENU.HELP`, then *File* the record.

4. Create a library version:

   a. Select the *New* option and specify `L.MENU.HELP` to create the record.

   b. Select the *Copy* option and specify `MENU.HELP`, *Edit* the record as desired, and then *File* it.

5. Change the original `MENU.HELP` record so that it reads in the library version:

   a. *Delete* the record (this also exits you from the record).

    b. Recreate the record by selecting the *? help* option and then entering the library password at the `Online help not avail-able...` prompt.

    c. *Edit* the recreated record, adding comments and a `.*READ` statement as shown on the next page, then *File* it.

  6. Check that the help screen works properly.

```
HELP SCREEN EDITOR     Name : MENU.HELP
  --------------------------------------------------------------------------
  | .* THE GEAC VERSION BACKUP HAS A "G." PREFIX                            |
  | .* THE LIBRARY VERSION HAS AN "L." PREFIX                               |
  | .*READ L.MENU.HELP                                                      |
  |                                                                        |
  |                                                                        |
  |                                                                        |
  |                                                                        |
  |                                                                        |
  |                                                                        |
  |                                                                        |
  |                                                                        |
  |                                                                        |
  |                                                                        |
  |                                                                        |
  |                                                                        |
  |                                                                        |
  |                                                                        |
  |                                                                        |
  --------------------------------------------------------------------------
Options:
 ? help    Edit    Copy    New    Print    Delete    File    Exit
```

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.CURSOR file.

Enter	Description
<ENTER>	To leave the current field as is and **proceed**, 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 **down to the option line**, 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 **go back** 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 **clear** 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 **help** on the field, type a single question mark at the beginning of the field and <ENTER>.
??	At fields which take a setup code as the value, you can have the system display the **list of valid codes**. Type two question marks at the beginning of the field and <ENTER>.
	For example, typing ?? in the *CHRONOLOGY CODE* 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.
<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 Overtype modes.

Enter	Description
<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 **edit window**. 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..

Enter	Description
<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

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 *bibliographic utility* (*OCLC*, *WLN*, *RLIN*, or *UTLAS*) 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	A way of handling and standardizing bibliographic information using "see" and "see also" references.
	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".
	"See also references" are generally used in subject searches. A user who looked under the subject of "Home" might find "see also Family".
	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.
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.

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.

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 *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 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 *barcodes*, *ISBN*s, and so on.
checkin	1) In the Circulation module, the process of checking returned items in at the circulation desk. Also known as *discharge*.
	2) In the Acquisition and Serials modules, *checkin* 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 *charge* 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 *barcode* 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 *bibliographic item, physical volume*, *piece*, and *copy set*.
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 *call number* 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 *checkin*. 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 *disks*.

diskette
: Also "floppy disk". Similar to *disk*, typically used with microcomputers.

DOS
: Disk Operating System, for a microcomputer.

download
: The data flow from the host computer system **down** 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 *authoritative form*.

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 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 - *variable length* and *fixed length*. Some people use the word "tag" to refer to a MARC field.

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.

field separator	A control character used at the end of each *variable field* to separate it from the next.
file	A collection of related records treated as a unit.
	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.
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 *offset*s).
fixed-length field element	Part of a MARC *fixed-length field* whose length and contents are pre-defined. For example, the language code (character positions 35 to 37) in Tag 008.
fixed-length subfield	A *subfield* 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	In ADVANCE, "function" refers to each of the possible actions available in the main menus.
	For example, in the Circulation module, "function" refers to an operation available in the online menus: e.g. checkout.
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.

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 *bibliographic item*, *physical volume*, *copy*, or barcoded *piece*.

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

	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 biblio-graphic item. Normally the author but sometimes the title.

MARC field	A *fixed-length* or *variable-length field* 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 *serial*.

N

non-filing	Words or characters that do not affect sorting. For example, **The Joy of Cooking** 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, **The Joy of Cooking**,

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 *purchase order*.
OS	Short form for *operating system*.
OSI	Stands for "Open System Interconnect." An international standard developed by *ISO* 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 *access level*.
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.

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 *piece*.

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 *access level*.

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 *operating system* or an *application* program. Prompts appear on the CRT screen, and require a response from the computer operator.

publication pattern   A serial's *enumeration* pattern, *chronology* 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 *boot*.

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 *compile* of a program.

recon   Retrospective conversion of bibliographic records into machine-readable format. This process typically occurs when a library purchases a

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.

              The term "reserve" is sometimes used by public libraries to mean *hold*.

reserve book "RBR" is a function within the Circulation module designed to handle
room   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 "wanding". 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.

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 *sign on*.
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 *variable-length field*, such as subfield b.
subfield code	The one-character code which identifies a MARC subfield: for example, the "a" in "‡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 *"see"* and *"see also" references* 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 *tag*.
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 *prompt* 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.

C

Transaction Logging

The ADVANCE transaction logging module provides up-to-the-minute protection from data loss by writing all database updates to a separate (journal) disk drive. This allows you to recover transactions from any form of system failure except one in which both the journal drive and the data drive have been corrupted.

This appendix describes:

- transaction logging modes

- transaction logging control

- transaction logging operation

- recovery procedures.

Transaction Logging Modes

Transaction logging provides four modes of operation:

Disabled mode

Database updates are not logged. If a system failure occurs while in this mode, the database may need to be restored from the last backup. If this is required, all updates since that backup would be lost.

Normal mode

All database updates are written to the journal drive without further intervention.

Nowrites mode

All updating to the database is disabled. Database inquiries are allowed. This mode is useful for performing backups while allowing OPAC access. Users may print from OPAC; however, reports will not be generated from the Report Writer.

Recovery mode

While in recovery mode, users will not be allowed to log into ADVANCE. All access to ADVANCE will be restricted until the recovery procedure is complete.

Transaction Logging Control (`TLCTRL`)

Access Transaction Logging by selecting it on the UTILITY MENU, or by entering the screen identifier TLCTRL on any Utilities menu (or on the ADVANCE MASTER MENU).

Use Transaction Logging Control to edit the transaction log control record. From this screen, you can:

• enable or disable transaction logging

• enable or disable the Nowrites mode. When this mode is enabled, you will be allowed to specify the message which will be displayed when a user attempts to update the database.

• determine when and by whom Transaction Logging Control was last edited

NOTE: Any changes made to the transaction log control record will become effective only after all outstanding transactions are completed. That is, if you are editing Transaction Logging Control while a transaction is being updated, the editing changes will not take effect until the transaction update is completed.

```
                   TRANSACTION LOGGING CONTROL


   Control record : TRANSACTION.LOG.CONTROL
   -----------------------------------------------------------
1. Transaction Logging (1=YES / 0=NO): 1
2. NO WRITES (1=YES / 0=NO  )        : 0
3. If NO WRITES, message shown       : No writes allowed!
   Last Edit Date                    : 06-03-94
   Last Edit Time                    : 12:05
   Last Edit User                    : geac








Options:
 Line by line   # line   File   ? help   Exit
```

Use the *# line* option to select a line to edit or use the *Line by line* option to edit each line sequentially.

Select *File* or *Exit* to return to the UTILITY MENU: *File* saves all your changes, *Exit* does not save your changes.

Restart ADVANCE

Enabling or disabling transaction logging requires you to *File* your changes and ensure all users log off ADVANCE. The TRANSACTION.LOG.CONTROL file is read from the ADVANCE Control File when ADVANCE is started.

Fields

Transaction Logging

[0 or 1]

1   Enables transaction logging. After transaction logging is enabled, all users must exit and re-enter ADVANCE in order to activate transaction logging.

0   Disables transaction logging. After transaction logging is disabled, all users must exit and re-enter ADVANCE in order to de-activate transaction logging. Recovery from system failure is not possible with this set to 0.

NO WRITES

[0 or 1]

1   Sets transaction logging to the Nowrites mode. Prohibits updating the database files while transaction logging is activated but allows queries to the database. NOTE: Search statistics will not be captured while this mode is active.

0   Permits updates to the database.

If NO WRITES,
   message shown

[0-78 characters]

Enter the message that will be displayed when a user attempts to update the database while the Nowrites mode is enabled. Examples of messages you might use are:

```
This function not available at this time. Please try later.

This function not available due to backup. Please try later.
```

Last Edit Date, Time, User	Provided by the system. These values are determined when you leave this screen by using the *File* option.
Last Edit Date	Date when Transaction Logging Control screen was last edited.
Last Edit Time	Time when Transaction Logging Control screen was last edited.
Last Edit User	Identifies who last edited Transaction Logging Control.

Transaction Logging Operation

The transaction logger is managed from three UNIX scripts and one program:

- **onlogger** — starts the logger
- **offloger** — stops the logger
- **clearlogs** — clears the log files
- **advtlc** — controls the logger

How to Start the Logger

To start the logger, at UNIX execute `onlogger` [*pathname*] where *pathname* is the path of the operations directory (ADV directory).

The *onlogger* script is located in the directory called *logger*. This directory resides in the same directory as the operations directory (ADV directory).

The *onlogger* script activates the ADVANCE transaction logger.

How to Stop the Logger

To stop the logger, at UNIX execute `offlogger` [*pathname*] where *pathname* is the path of the operations directory (ADV directory).

The *offlogger* script is located in the directory called *logger*. This directory resides in the same directory as the operations directory (ADV directory).

The *offlogger* script de-activates the ADVANCE transaction logger.

How to Clear the Log Files

To clear the log files, at UNIX execute `clearlogs` [*pathname*] where *pathname* is the path of the operations directory (ADV directory).

The *clearlogs* script is located in the directory called *logger*. This directory resides in the same directory as the operations directory (ADV directory).

The *clearlogs* script clears the information that has been written by the ADVANCE transaction logger.

This script is normally executed after the successful completion of a backup.

Using advtlc to Control the Logger

Multiple Accounts   If you have more than one account running transaction logging the system prompts you for an account when advtlc starts.

1. At the UNIX prompt, type:

   ```
   $ advtlc
   ```

2. The system displays all the accounts that have transaction logging.

```
$ advtlc
        0 LIVE account  /adv1/ADV
        1 TEST account  /adv2/ADV


Which account?
```

3. Select an account.

One Account   After you have selected an account, or if you only have one account with transaction logging, the following menu appears:

```
     Menu        Account: /adv2/ADV
   1. Onlogger       - Bring up the logger
   2. Shutdown       - Shutdown the logger
   3. Clearlogs      - Clear the log files
   4. Kill           - kill the logger!!
   5. Status         - Get logger status
   6. PID Status     - Get PID status from logger
   7. Dirty Shutdown - Close Dirty
   8. Dirty Clearlogs- Clear dirty logs
   9. Quit           - Quit
   Selection:
```

Onlogger	Starts the logger in the account specified only if it is not already up. (If you attempt to start the logger and it is already running, the system displays a message.)
Shutdown	Stops the logger and closes LOGGER processes. Shuts down the logger only if there are no outstanding transactions. (Under normal operations there should be no outstanding transactions.)
Clearlogs	Clears the log files under the following conditions:

1. The LOGGER processes are running.

2. There are no outstanding transactions.

Activates the No writes mode, clears the file, and resets the logger to Normal mode. Allows you to clear the files without shutting down the logger.

Kill	Contact Geac Support before using this command.
	Terminates the logger processes that are running. Use only as a last resort.
Status	Queries the logger for its status. The system displays:

```
Do Status
===================================================================
                              Logger Status: N(Logging)
                Number of LOGGERS being used: 2
Number of Transactions started and not finished: 0
                             Sequence Number: 21
                    Database Sequence Number: 21
                    Flushing Sequence Number: 21
                                         N1: 4894
                                         N2: 4895
                 Maximum Number of Log users: 100
===================================================================
```

Logger Status

N(logging)	The logger is running in Normal Mode.
F(Nowrites)	Database updates have been disabled.

`I(Recovery)`	The logger is in Recovery Mode.
Number of LOGGERS being used	Number of LOGGER UNIX processes being used to record transactions. Specified when transaction logging is set up.
Number of Transactions started and not finished	Supplied by the system.
Sequence Number	Logger's internal counter: represents the next number in sequence.
Database Sequence Number	Last sequence number written to the database. Indicates that up to this sequence number, all writes were made to the database.
Flushing Sequence Number	Sequence being written to disk. Similar to the database sequence number.
N1	Sequence number since logger came up.
N2	Sequence number returned since logger came up.
Maximum Number of Log users	Maximum number of people who can login and use the system.

PID Status	Displays the same information as the Status option, but includes the Process IDs (PID) of the poled ADVANCE sessions. PID information is written to the log_indx file. Checking PID's increases the logger's work load and delays the display of logger status.
Dirty Shutdown	Call Geac Support before using this command.
	Allows you to shutdown the logger if there are outstanding transactions. Provided as an alternative to the Kill option which terminates processes abruptly. Dirty shutdown closes processes systematically but some data loss may be expected.
Dirty Clearlogs	Call Geac Support before using this command.
	Allows you to clear the log files if there are outstanding transactions. You should not have to use this option.

Quit   Exits advtlc.

Performing Backups

Performing backups can be done using TLCTRL (see *Transaction Logging Control (TLCTRL)* on page C-3) to set *NO WRITES* (field 2) to 1 which will prevent any updates to the database, but will allow queries. Once the change has been filed, backups can proceed.

After the successful completion of the backup, use the *clearlogs* script to reset the log files back to the normal state.

Use TLCTRL (see *Transaction Logging Control (TLCTRL)* on page C-3) to set *NO WRITES* (field 2) to 0 which will permit updates to the database. Once the change has been filed, normal operations can resume.

Logbackup Script

The logbackup script (logbackup), written in PERL (Practical Extraction and Reporting Language), allows you to back up log files without shutting down the logger. It can be run manually or from a cron job (that is, as an automated backup). This script changes the logger status to the Nowrites mode, backs up the files, clears the log files, and resets the logger to the Normal mode.

At the UNIX prompt, type:

logbackup *Path_to_the_ADV_Directory*

For example, to backup the log files in the LIVE account, type:

logbackup /adv1/ADV

When this script runs, it changes the logger status to the Nowrites mode. If there are outstanding transaction, the logger sleeps for 60 seconds before proceeding. (In the Nowrites mode, the logger allows writes for outstanding transaction, but does not allow any new transaction to start.)

Example Backup

```
$ logbackup /adv1/ADV

Status:         N(Logging)

Writes Off:     1995/07/27 05:57:25    00041019

Status:         F(Nowrites)

Status:         F(Nowrites)

cd ../lpipes; /usr/local/bin/gtar -cvf /adv12/budir/
```

```
                       L806842645.tar log*

                       Backup:          log_file0

                       Backup:          log_file1

                       Backup:          log_file2

                       Backup:          log_indx

                       Clear Logs:      F(Nowrites)

                       Clear Logs:      F(Nowrites)

                       Clear Logs:      1995/07/27 05:57:44   00000001

                       Status:          N(Logging)

                       $
```

Status   Queries the logger for its current mode.

Writes Off   Changes the logger status to the nowrites mode and prints the date and
               time when this occurred. The last entry represents the number of records
               in the logfile.

Backup   Output from the backup command. In this example, gtar is used to back
               up the log files to the file/adv12/budir/L806842645.tar. The numeric
               portion between L and .tar is the number of seconds since January 1,
               1970.

Clear Logs   Indicates the files are being cleared. the last line indicates the date and
               time when the files were cleared. (In this example it took 19 seconds to
               backup the log files for a single day's transactions.)

Site Specific Code   Lines 19-32 contain site specific information, for example:

```
###########################################################################
#               Site Specific variables:
           $logbindir = "/adv1/logger";# where the log commands are found
#          ($sec,$min,$hour,$mday,$mon,$year,$wday,$yday,$isdst)=gmtime(time());
#          $Date = sprintf("%02d%02d%02d",$year, $mon+1, $mday);
           $Date = time();
           $BUfile = "L";
           $BUfile .= $Date . ".tar";
           $BackUpCommand = "cd ../lpipes; /usr/local/bin/gtar -cvf /adv12/gctmp/
            $BUfile log*";
           $AllowClearDirty = 1;              # whether or not to clear if outstanding
                                              # transaction (1=yes, 0=no)
           $SleepTime = 60;
                                       # how long to wait(secs) for any outstandings
                                       # transactions - 60 is a good number
###########################################################################
```

Conventions

#	Denotes a comment. Therefore, lines beginning with # are not executed.
$	Denotes a variable.
$logbindir	Defines the pathname to logger directory. (The script uses logcommands from the logger directory to perform some tasks.)
$BackupCommand	Defines the command(s) to backup the log files

In this example, two UNIX commands are executed:

```
cd .. /pipes
usr/local/bin/gtar -cvf /adv12/budir/$BUfile log*
```

for tape archiving use:

```
find log* -print | cpio -ocvB > /dev/TAPEdevice
```

$AllowClearDirty	Sets the flag that determines if the log files will be cleared when there are outstanding transactions.
1	Despite outstanding transactions, the backup is **done** and the fields are cleared.
0	The files are **not** backed up and **not** cleared.
$SleepTime	Specifies the number of seconds to wait for outstanding transaction to finish.

Recovery Procedure

There are two types of recovery, short and full. Short recovery is typically performed after an unexpected system shutdown in which the information on disk has not been corrupted. Full recovery is required if the information on the disk has been lost or corrupted — in this case the database must be restored from the backup tape before recovery proceeds.

Short Recovery

If, on booting, the ADVANCE transaction logger determines that logging had been interrupted before the system went down, it will issue a message to the console terminal. Users will not be able to enter ADVANCE until this situation is resolved.

To initiate short recovery:

1. Ensure that the ADVANCE logger is activated.

2. Recovery is executed from PICK. To access the recovery screen, type `TL.RECOVERY` at the TCL level.

3. The TRANSACTION LOGGING RECOVERY SYSTEM screen appears.

Full Recovery

If you suspect that your database has been corrupted, you should run a full recovery:

1. Restore your most recent database backup — do not restore the transaction log.

2. Delete the item `log_indx` from the UNIX directory `../lpipes` (where .. is the ADV directory).

3. Ensure that the ADVANCE logger is activated.

4. Recovery is executed from PICK. To access the recovery screen, type `TL.RECOVERY` at the TCL level.

5. The TRANSACTION LOGGING RECOVERY SYSTEM screen appears.

```
                       TRANSACTION LOGGING
                        RECOVERY SYSTEM

    Logger Mode                   : N(Logging)

    Log Active Since              : 1994-04-21, at 10:45:25



    Recovery Options

  1 Hard Copy Audit            : 0
  2 On Screen Audit            : 1
  3 Live Writes and Deletes    : 0


 Options:
  S = Start   ? = ? help  E = Exit    # = # line
```

The Transaction Logging Recovery System screen consists of unnumbered fields that are display-only and numbered fields that can be edited.

Options

Start	Start recovery with fields 1-3 as set.
? help	Display help.
Exit	Terminates program and returns you to the TCL level.
# line	Enter the line number that you want to change. Allows you to change the value of the numbered fields between 1 (yes) and 0 (no).

Display Only Fields

Logger Mode	Indicates the current state of the ADVANCE logger. There are four possible modes:
S(Shutdown)	If the logger is inactive, an error message is displayed in this field.
N(Logging)	The system passed log integrity tests at startup — recovery is not required.

`F(Nowrites)`	Database updates have been disabled.
`I(Recovery)`	The system failed log integrity tests at startup — recovery is required.

Log Active Since   Date and time of the earliest log entry. Should a full recovery from tape be required, the backup tape is only useful if there have been no transactions from the time of the save to the *Log Active Since* time. The backup tape can, however, be more recent than the log start.

Editable Fields

Hard Copy Audit   [0 or 1]

1   Generates a report to the default printer of each database update performed by the recovery process.

0   No report is generated.

On Screen Audit   [0 or 1]

1   The recovery process is performed in a step-by-step fashion on the terminal running the recovery process.

0   The recovery process is not displayed on the terminal.

Live Writes and Deletes   [0 or 1]

1   Performs the recovery process by making changes to the database and produces a report of the changes made.

0   Allows you to execute the recovery process but does not make changes to the database. Displays messages indicating any problems with the database and produces a report of the problems detected. Select this option to make a trial run of the database problems. Before you attempt to fix any problems encountered, call Geac support for assistance.

D

ADVANCE Server Operation

The ADVANCE server module provides access to the database for all supported client products. This appendix describes:

- Server architecture

- Server operation

- Server administration

Note: All scripts and programs assume that the current directory is the main ADV directory.

Server Architecture

The ADVANCE Server processes transactions from all supported client products. The components of the server are:

- protocol server(s)

- application server(s)

- reply server(s)

- Server Manager

Data Flow

The following diagram illustrates how a message from a client is routed through the application server and how the response is passed back to the client. In practice, multiple clients, protocol servers, application servers, and reply servers may be involved.
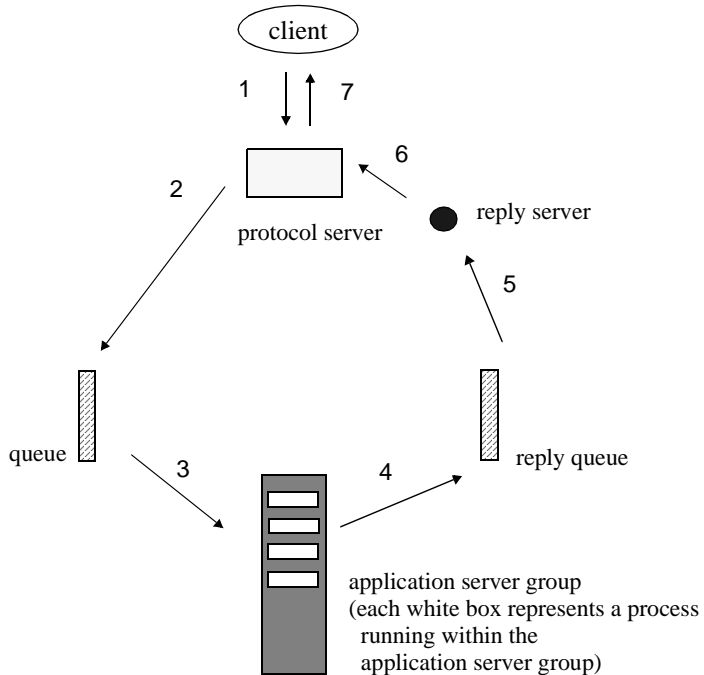
Simplified Client/Server Data Flow Diagram

Step 1   The message is received from the client, such as Self Checkout, LViS, or GeoPac. If required, the protocol server translates the message from the protocol used by the client to that used by the server. This message is identified by the process ID number of the protocol server which is used to track the message as it passes from the protocol server though the queue to the application server and eventually back to the client.

Step 2   The protocol server places the message in the message queue.

Step 3   One of the application servers within the application server group picks up the message from the queue. The application server performs the required task.

Step 4   The application server places the response onto the message queue of the reply server.

Step 5   The reply server picks up the message from the message queue.

Step 6   The reply server passes the message to the protocol server that initiated the request.

Step 7   The protocol server passes the message back to the client application. If necessary, the protocol server translates the message from the protocol used by the server to that of the client.

Components of the Server

Protocol Servers   A protocol server is the focal point for all messages between the client and the ADVANCE server. One instance of the protocol server is initiated by each connection. Because the installation of the protocol server is specific to each client, the instructions on how to install and configure each protocol server is included in a separate installation guide for each of the client products.

Application Server Group   An application server group consists of one or more application servers. An application server processes the messages on a FIFO basis. When messages arrive from the protocol servers, the requests form a single message queue. Those processes are performed in sequence against the ADVANCE account.

Multiple application server groups are used when:

- you need to access separate ADVANCE accounts that reside on the same host.

- you need to restrict the number of application servers available to specific clients. For example, you may want to provide five servers for Z39.50 clients outside the library and ten for within.

Reply Server(s)
The reply servers distribute the responses from the application server to the respective protocol server (that is, they return the response to the one that requested the transaction). The number of reply servers needed is governed solely by the volume of messages being sent back to the clients.

Server Manager
The Server Manager is the program responsible for monitoring, controlling and configuring the application server(s) and reply server(s). The srvtlc utility is run from the TCL prompt and is the user interface to the Server Manager.

Terminology

Process
Refers to an instance of a program running on the server, for example a UNIX process.

Protocol
Refers to a set of rules and conventions by which the client and the server communicate. The client-server interface uses multiple levels of protocols. Each level is responsible for a separate aspect of the message processing. TCP/IP and ASYNC are transport protocols which govern how the message is transmitted between the client and the server machines. Z39.50 is a transaction protocol which governs the content and meaning of the messages which are passed between the client and the server. ASN1 is a messaging protocol which governs the encoding of the message content.

Pipe
Refers to a special type of UNIX file which is used to pass messages between the two processes. Messages which are written to a pipe are read by other processes on a FIFO basis.

Server Operation

The ADVANCE Server supports transactions from different sources and in different formats, for example, GeoPac in Z39.50 format and 3M SelfCheck in SC (proprietary) protocol.

Choices for Running the Server

You can run the server from:

• the srvtlc utility from TCL

• a script after the system is up.

Using the srvtlc Utility

Use the srvtlc utility to initiate, change, or shutdown the ADVANCE Server.

Access

At TCL type

```
srvtlc
```

The srvtlc screen displays.

```
The Server Manager is up.   Reply servers : 2

Application server group id : 21210      Number application servers : 3
Application server group id : 21211      Number application servers : 1

              Menu
              ====
              1. Initiate the server manager
              2. Start-up server jobs
              3. Shutdown application server group
              4. Shutdown the server manager
              5. Quit

              Selection:
```

This screen displays the following information:

• the current status of the Server Manager (whether the server is up or not).

If the Server Manager is up, srvtlc also displays:

• the number of reply servers activated (2, in this example)

- a list of the application server groups and their group IDs (21210 and 21211 in this example).

- the number of application servers in each application server group (3 and 1 in this example). Note that an application server group can process several transactions concurrently if it contains several application servers. The ultimate number of application servers and reply servers required is determined by the number of transactions being processed.

- a menu which allows you to initiate and shutdown the Server Manager and to start and stop application server groups.

1. Initiate the server manager

[1-9]

Prompts you for the number of reply servers to start when the Server Manager is initiated. The number of reply servers required to maximize system throughput depends on the number of concurrently active clients. Reply servers pass the response messages from the server processes to the respective protocol servers.

The number of reply servers can be changed only by shutting down all servers and re-initiating the Server Manager. A maximum of three reply servers can be started (the system allows you to request more but only three will run — for example, 5 reply servers may be specified but only 3 will operate). Geac recommends 1 reply server for each 100 anticipated client connections. This does **not** imply that there is a limit of 300 client connections. The number of client connections is not restricted by ADVANCE.

2. Start-up server jobs

[nnnnn n] (nnnnn=application server group ID; n = number of new application servers)

Prompts you for the application server group ID and the number of new or additional application servers to start in that group.

The optimal number of application servers in an application server group depends on the following factors:

- the volume of transactions generated by the users whose transactions are processed by the particular server group

- the relative importance of processing these users' transactions as quickly as possible, in relation to those of other users.

For maintainability, Geac recommends that the application server group ID be the same as the port number that clients use to connect to the system.

[nnnnn] (nnnnn=application server group ID)

3. *Shutdown application server group*

Prompts you for the application server group ID to be shutdown. You must enter each application server group ID individually. All servers in the group will be sent a message to perform an orderly shutdown.

4. *Shutdown the server manager*

Requests the Server Manager and all reply servers to shutdown if there are no application server groups currently operational.

5. *Quit*

Exits the srvtlc utility.

Starting the Server from a Script

The ADVANCE Server can be started from a script. The script initiates the Server Manager and specifies the number of reply servers and application server group combinations to be initiated.

Example Script

Starts the Server Manager with 2 reply servers and 2 application server groups: starts group ID 21210 with 3 application servers and group ID 21211 with 1 application server:

```
cd .../ADV
nohup ../unix.lib/server/srvrman 2 21210 3 21211 1 &
```

Server Administration

Requests and replies are passed through the ADVANCE system by means of named pipes.

In the following example, two reply servers and one application server are running.

```
The Server Manager is up.  Reply servers : 2

Server group id : 21210    Number servers : 1

        Menu
        ====
     1. Initiate the server manager
     2. Start-up server jobs
     3. Shutdown server group
     4. Shutdown the server manager
     5. Quit

     Selection:
```

Pipes: Location and Naming Conventions

Pipes are located in the directory `../srv.pipes`.

The pipes used for the reply server queue are numbered sequentially using the prefix `rply` and starting at zero, for example `rply_0`, `rply_1`, etc.

The pipes used for the application server group queue are prefixed by `srvr`, for example `srvr_21210`.

Monitoring Activity

Two areas need to be monitored to determine if data flow is being constricted:

- the reply servers
- the application servers within the application server group.

To observe the data throughput, use the UNIX command `ls -l ../ srv.pipes` to determine the byte count in the named pipes.

If the number of reply servers is too low, a non-zero count will be seen in `rply_N`, and the number of reply servers should be increased. To increase the number of reply servers, all server groups and the server manager must first be shut down.

If the number of application servers in a particular application server group is too low to keep up with the volume of transactions generated for that group, a non-zero count will be seen in srvr_<group ID>. The number of application servers may be increased for any group at any time.

```
user3@quasi 12:55:06 srv.pipes 58 $ ls -l
total 0
prw-rw-rw-  1 user3    geac            0 Feb 26 12:45 ckid_11515
prw-rw-rw-  1 user3    geac            0 Feb 26 12:45 rply_0
prw-rw-rw-  1 user3    geac            0 Feb 23 17:15 rply_1
prw-rw-rw-  1 user3    geac            0 Feb 23 17:21 srvr_21210
```

NOTE: You should not use any command, such as cat, to read the contents of any of the pipes because this will remove all the data contained in the pipe.

Monitoring the Server from UNIX

When information transfer between the various parts of the server system fail, processes sometimes terminate at the application level. In this case, a message is written to the UNIX /tmp directory. These files are identified by the prefix srv, followed by the process ID number and the suffix log, for example srv.08344.log. An example file is shown below. Users should not attempt to interpret this information but should have it available for their Geac Support Representative.

```
8344: signal 13 received, dying
Send client kid 20814 failed
8344: signal 13 received, dying
Send client kid 8483 failed
~
```

Monitoring the Server from within ADVANCE

Various activities within the server are monitored and recorded in the &PH& file. To obtain a select list of items, at TCL, type:

SELECT &PH& = "SERV]"

Items are named by the prefix SERV and a system generated name, for example, SERVER.FRONT_45713_10300. To edit the items, type:

ED &PH&

An example file follows.

Typically, the display includes:

- a line number
- a directional arrow indicating which way the information was passed
- a time stamp in
- a time stamp out
- (the number of bytes)
- [a message type]

Users should not be concerned with other information that may appear in the file. This data represents debugging information of no defined format.

Message
Sources

[3]	Self-check
[5]	Z39.50
[7]	Z39.70
[0]	Client port of initialization
[C]	Client close
[—]	Server shutdown

```
0137: <-- 960221151730 960221151730 (74)
0138: --> 960221151733 960221151733 (107) [5]
0139: <-- 960221151738 960221151738 (13278)
0140: --> 960221152218 960221152218 (211) [5]
0141: <-- 960221152226 960221152227 (4909)
0142: --> 960221152333 960221152333 (193) [5]
0143: <-- 960221152340 960221152340 (5135)
0144: --> 960221152356 960221152356 (24) [C]
0145: <-- 960221152356 960221152356 (40)
0146: --> 960221152631 960221152631 (24) [C]
0147: <-- 960221152632 960221152632 (40)
0148: --> 960221152638 960221152638 (24) [C]
0149: <-- 960221152638 960221152638 (40)
0150: --> 960221153020 960221153020 (207) [5]
```

E

ADVANCE Server Installation

This appendix discusses how to:

- install the ADVANCE server

- create client login ID and home area

- create the startup script for the self-check protocol server

- create the startup script for the LViS protocol server

- create the startup script for the Z39.50 protocol server

- configure network communications for the clients

- name databases

- assign Use Attributes to the OPAC SEARCHES (OS) table.

Installation of Application Server

The ADVANCE Server supports transactions from different sources and in different formats, for example, GeoPac in Z39.50 format, 3M SelfCheck in SC (proprietary) protocol and LViS renewal.

NOTE: Server installation is performed by Geac.
Installing the server involves the following steps:

- load UNIX.LIB which loads the scripts necessary to run the server

- create the startup script

- test the server communications to ensure the server script initializes the server manager.

1. Install ADVANCE release 6.1.8 or later (required for 3M or LViS; Release 6.7.11 or later is required for Z39.50).

2. Create the pipes directory `srv.pipes` in the same directory as the main ADV directory, if it does not already exist. Ensure all users have read/write permissions to the srv.pipes directory.

    ```
    # chmod +rw srv.pipes
    ```

3. Create an F-pointer called SERVER.PIPES in your VOC if one does not already exist:

    ```
    0001: F
    0002: ../srv.pipes
    ```

4. At TCL, run the program MOVE.UNIX.LIB to copy all modules from UNIX.LIB into the associated UNIX directories. This program creates the required directories, starting with `unix.lib` which is created in the same directory as the main ADV directory.

5. From the UNIX command prompt, change directory to the server source area
    ```
    cd ../unix.lib/server
    ```
    Execute
    ```
    make -f makefile.srv [CC=cc]
    ```

    Ensure that $PATH contains the path to your **C** compiler and **make** program. The default CC is `gcc`.

6. From the UNIX command prompt,

    ```
    cd ../unix.lib/bin
    ```

To make all files executable, use

```
chmod +x *
```

Copy the appropriate server startup script (either `srvr.start.g2` or `srvr.start.uv`) to `srvr.start`.

Test Server Communications

Refer to the *Utilities Management Guide, Appendix D* for details of the ADVANCE Server Operation.

1. From TCL, run SRVTLC.

2. Initiate server manager with 1 reply server.

3. Start up a server group, for example, 210 with 2 servers.

4. Exit SRVTLC.

5. Check the `&PH& SERV*` files. Depending on the operating environment, your files may contain text similar to the following:

```
SERVER.FRONT 210 1
Building Z39.50 search tables
Processing SCOMM items
Processing OPAC.SYN items
Processing DATABASE items
Done building Z39.50 search tables
Server startup complete. USERNO=4103
Server pipe number = 210
Number reply managers = 1
```

6. From TCL, run SRVTLC again and shutdown server group 210.

7. Shutdown the server manager. The system displays the message

```
Server Manager Shutdown complete!
```

8. Select *Quit* from the SRVTLC menu.

UNIX Client Login

1. Create a new UNIX group **client**. This is not a critical step to the actual running of the protocol server, but is included for security reasons. The group name is not important, any group name that does not already exist can be used.

2. Create a new user login, for example, z3950 or sc3m, in the group **client**. In this document, it is assumed that the new user's home directory is `/home/UserName`.

3. To prevent unauthorized users from logging in as UserName, change the password to prevent logins.

    For SVR4 in sysadm, set the password to **lock**.

    For SVR3 or SVR4, use the command: passwd -l UserName

Installation of 3M or Self-Check Support

If you are installing the server to support self-check transactions, you must add a script to start the protocol server.

1. Add a new user **sc3m** to the **client** group.

2. Check that the Self-Check add-on product is installed.

3. Check that the SELF CHECKOUT CONTROL TABLE (SCCT) from the Circulation Configuration Codes table is set up. (See the *Circulation Management Guide*.)

4. Use an editor to create the **sc3m.start** script to run the 3M self-check protocol server.

    In sc3m's HOME directory, create the file sc3m.start, containing the text:

    ```
    #!/bin/sh
    cd .../ADV
    exec ../unix.lib/bin/sc3mkid 210 SC3M
    exit 0
    ```

5. Add execute permission to the file.

    ```
    chmod +x sc3m.start
    ```

NOTE: .../ADV means the full pathname to the ADV directory.

The **210** parameter is the ID of the application server group to which the Self-Check protocol server belongs.

The **SC3M** parameter is the name of the ADVANCE port record that the server uses when processing transactions for this client.

Installation of LViS Renewal Support

If you are installing the server to support LViS transactions, you must add a script to start the protocol server.

1. Add a new user **lvis** to the **client** group.

2. Check that the LViS add-on product is installed.

3. Check that the SELF CHECKOUT CONTROL TABLE (SCCT) from the Circulation Configuration Codes table is set up. (See the *Circulation Management Guide*.)

4. Use an editor to create the **lvis.start** script to run the LViS renewal protocol server.

   In LViS's HOME directory, create the file lvis.start, containing the text:

   ```
   #!/bin/sh
   cd .../ADV
   exec ../unix.lib/bin/lviskid 210 lvis
   exit 0
   ```

5. Add execute permission to the file.

   ```
   chmod +x lvis.start
   ```

NOTE: `.../ADV` means the full pathname to the ADV directory.

The **210** parameter is the ID of the application server group to which the LViS renewal protocol server belongs.

The **lvis** parameter is the name of the ADVANCE port record that the server uses when processing transactions for this client.

Installation of Z39.50 Support

If you are installing the server to support Z39.50 transactions, you must add a script to start the protocol server. (Release 6.7.11 or later required.)

1. Add a new user **z3950** to the **client** group.

2. Check that the Z39.50 add-on product is installed.

3. Assign the appropriate Bib-1 Use Attributes to the *Z39.50 - Bib Use Attr* field on the OPAC SEARCHES (OS) screen. (For more information see the section *Mapping Z39.50 Queries to ADVANCE Searches* on page E-12.)

4. Use an editor to create the **z3950.start** script to run the Z39.50 protocol server.

   In z3950's HOME directory, create the file z3950.start, containing the text:

   ```
   #!/bin/sh
   cd .../ADV
   exec ../unix.lib/server/z3950kid 210
   exit 0
   ```

5. Add execute permission to the file.

   ```
   chmod +x z3950.start
   ```

NOTE: .../ADV means the full pathname to the ADV directory.

The **210** parameter is the ID of the application server group to which the Z39.50 protocol server belongs.

Network Configuration

1. If the site is using a network to connect z39.50 or self-check clients, you need to setup the network configuration for these client connections in the files services and inetd.conf. These files are usually located in the /etc directory.

2. Use an editor to add the following entry to the /etc/services file:

   ```
   z3950          210/tcp          #Z39.50 Protocol server
   ```

   In this example and in step 3, z3950 is the **service-name** assigned to the Z39.50 Internet service. This name can be changed – it does not have to be z3950. Check that no other service has already been

defined for the chosen **service-name**. NOTE: the `netstat` command usually displays the **service-name**.

210 is the port number. This number can be changed—it does not have to be port 210. Check that no other service has already been defined for the chosen port number. NOTE: the industry standard port assigned to Z39.50 is port 210.

All characters to the right of the # sign are comments.

3. Use an editor to add the following entry to the /etc/inetd.conf file.

```
z3950 stream tcp nowait UserName  /home/UserName/z3950.start  z3950.start
```

NOTE: Substitute z3950's HOME directory for the `UserName`.

4. Make the inetd process reload the **services** and **inetd.conf** tables.

```
# ps -ef | grep inetd
# kill -HUP inetd_process_id
```

NOTE: Commands may differ among UNIX varieties. For example, on AIX, issue the single command: `refresh -s inetd`. Consult your UNIX system documentation or read the *inetd man* page.

Terminating Inactive Network Connections

When a Z39.50 client does not terminate properly from a network connection, some UNIX systems leave the protocol server process running. Eventually, these residual processes may prohibit new Z39.50 client sessions from starting. To check if a problem exists, enter:

```
# netstat | grep z3950 | wc  — number of Z39.50 network connections

# ps -ef | grep z3950kid | wc  — number of Z39.50 protocol servers

# netstat | grep z3950 | grep ESTABLISHED | wc
```

> — number of good Z39.50 network connections.
> (There will be one z3950kid for each good connection.)

If the word count for the first two lines exceeds the word count for **last line** by 50% or more, network connections may not be closing. To prevent Z39.50 protocol servers from staying up indefinitely, add a timeout.

For example, to implement a 900 second (15 minute) timeout, change the **z3950.start** script from

```
#!/bin/sh
cd .../ADV
exec ../unix.lib/server/z3950kid 210
exit 0
```

to

```
#!/bin/sh
cd .../ADV
exec ../unix.lib/server/z3950kid 210 -TOUT 900
exit 0
```

After the specified number of seconds, if no transaction has been received from the Z39.50 client, the protocol server (z3950 kid) will close the network connection and exit.

If no time out parameter is specified, or if

```
-TOUT 0
```

is specified, then z3950kid will not time out.

Database Names

Single name database searching supported.

The server always recognizes the database name **ADVANCE**. Other database names are a composite of the internal database name (such as CIM, Citations) and other information.

For sites with a simple configuration, the Database Name ADVANCE provides unqualified access to the collection of bibliographic records in the MAIN database.

If the site uses: qualifiers, community information, journal citation databases and intends to make them available through Z39.50, or if they intend to use GeoCat, the Database Name must be specified in the format described below:

X*Y[**.**a [**.**b]]

The X and Y components are

- mandatory
- case insensitive
- separated by an asterisk

Example: MAIN*BIBMAST

X Values

The **X** value is the database identifier as defined in the OPAC Databases (AODB) table on the Utility Menu (for example: MAIN, CIM, IAC, WIL, ABI). The value of X is an internal code used by ADVANCE which is displayed at the top of the Detail Screen after the # line option has been selected. It is not the code defined in the Code to Access Database field.These values are usually the same but they can be different.

Y Values

The **Y** value can be one of the following:

BIBMAST	The bibliographic records from the B.MARC file.
BIBWORK	The bibliographic records from the workfile.
AUTMAST	The authority records from the A.MARC file.

AUTWORK   The authority records from the workfile.

a Value when Y is BIBMAST or AUTMAST

When the Y value is either BIBMAST or AUTMAST, the optional a value can contain the internal number which is assigned to the ADVANCE qualifier. If present, the search will be qualified. Because qualifiers convey holdings information and the CIM, IAC, WIL and ABI databases do not include holdings information, the use of a qualifier is only meaningful when the value of X is MAIN.

The internal number for ADVANCE qualifiers is obtained from the OPAC Qualifier field on the OPAC Ports (OPC) table. It is displayed after a qualifier is selected from the browse (??) list.

If the **a** parameter is omitted, the search will be unqualified.

a Value when Y is BIBWORK or AUTWORK

When the **Y** value is either BIBWORK or AUTWORK, **a** and **b** are mandatory. **a** contains the workfile prefix. **b** contains the browse delimiter. These values are case sensitive.

The possible **a** values are described in the following table and are dependant on the value of **Y**:

Y Value	Workfile Prefix	Descriptions and Screen Identifier in ADVANCE
BIBWORK	B	Bibliographic Work Records (BWC)
	BD	Deleted Bibliographic Records (BWDR)
	BE	Bibliographic Indexing Errors (BWIE)
	BDS	Discarded Acquisitions Records (BWHR)
	BH	Bibliographic History Records (BWHR)
AUTWORK	A	Authority Work Records (AWC)
	AD	Deleted Authority Records (AWDR)
	AE	Authority Indexing Errors (AWIE)

AH	Authority History Records (AWHR)

b values

The **b** value is the browse delimiter. ADVANCE browse delimiters can be:

- any valid ADVANCE login

- system defined logins, such as MASTER, *DEL*, or ACQSYS, which are default values

- or, those defined by the cataloguing department.

Examples of complete database names

MAIN*BIBMAST	All bibliographic records from the main database.
MAIN*BIBMAST.1	The main bibliographic database, qualified by qualifier # 1.
CIM*BIBMAST	All community information records.
MAIN*AUTMAST	All authorities records from the main database.
MAIN*BIBWORK.BD.*DEL*	Deleted bibliographic records for the main database.
MAIN*BIBWORK.B.MASTER	MASTER's personal workfile of bibliographic records.

Mapping Z39.50 Queries to ADVANCE Searches

Z39.50 is an open protocol which may be used by any client application to search any compliant server database. Due to the need for disparate systems to communicate, the standard defines how a search is specified.

The means of communicating the index to search is the Z39.50 Bib-1 Use Attribute. This is simply a number which has been arbitrarily assigned to an index. For example, the Z39.50 Bib-1 Use Attribute number for the Author index is 1003.

To correlate a particular Z39.50 Bib-1 Use Attribute value to the appropriate ADVANCE index, a Use Attribute is assigned in the *Z39.50 Bib Use Attr* field on the OPAC SEARCHES (OS) screen.

```
                        OPAC SEARCHES

     OPAC SEARCH : W.ALL
     ----------------------------------------------------( Page 2 of 2 )
  1. Z39.50 - Bib Use Attr.        : 1016




 Options:
  Backward   ? help   # line   Line by line   Copy   Print   Delete   Exit
```

NOTE: If this field does not appear on your system (the second screen of the OPAC SEARCHES (OS) table) the add-on module *Z39.50* has not been installed. Contact your Geac support representative to install the module.

Guidelines for Assigning Use Attributes

To successfully process the greatest variety of Z39.50 searches, as many Z39.50 Bib-1 Use Attributes as possible should be assigned to the relevant ADVANCE search. Multiple Use Attributes can be assigned to the same OPAC search by entering them as a list separated by commas with no spaces.

Guideline 1

Z39.50 designates many Use Attributes for specific control numbers which are combined into one common index in ADVANCE, for example, ISNO contains both ISBN's and ISSN's. Therefore, you should assign Use Attributes 7 and 8 to the search table.

Guideline 2

Define a separate search in OPAC SEARCHES (OS) for each:

- bibliographic and authority search
- browse and keyword search.

This provides the ability to scan or search by phase or keyword.

When a browse search contains numeric Dcodes, you cannot define a corresponding keyword search that uses the numeric Dcodes. In this case, define the individual browse searches but only define a single keyword search for the alphabetic Dcode and assign to it the combination of all of the Use Attributes from its corresponding browse searches. See the example attribute assignments for A1, A2, A3, A, and AW.

Guideline 3

When you have a search involving multiple Dcodes, you must also have a search for each individual Dcode. See the table *Title Searches Separated from Title/Series Searches*.

NOTE: Separate search definitions are not required for the Dcodes M, C, X, and Z.

Guideline 4

When an ADVANCE index exists which is not described by any Z39.50 Bib-1 Use Attribute, two choices are possible:

- Use a defined Bib-1 Use Attribute for this index, even though the attribute name does not accurately describe this index. The benefit of using an existing attribute is that most Z39.50 clients will have this attribute available. However, this attribute assignment may be confusing to someone who does not know that this attribute has been misused in this way.

- Use an undefined Bib-1 Use Attribute for this index, such as 1501, which will not conflict with future releases of the standard. This will require the Z39.50 client to recognize your special Use Attribute. Some Z39.50 clients allow the end user to specify the Use Attribute by its name only, and not by its value. Such clients may not be able to

access this index. GeoPac and GeoCat can be configured to provide access to the additional Dcodes.

Attribute Setup Example

The following table provides an example of how Bib-1 Use Attributes might be assigned. The table displays the entries for both the OPAC SEARCHES (OS) and the OPAC SEARCH COMMANDS (OSC). Duplicate OSC codes appear because separate OS search definitions must be made for authority and bibliographic searches.

NOTE: The OS and OSC codes are shown as examples only and may not correspond to codes used at your site. However, your setup should be similar to examples shown.

Table Fields

OSC Code	Code defined on the OPAC SEARCH COMMANDS (OSC) table.
OS Code (Bibliographic Search)	Code defined as a bibliographic search on the OPAC SEARCHES (OS) table and assigned to the OSC code in the *Bibliographic Search* field on the OPAC SEARCH COMMANDS (OSC) table.
OS Code (Authority Search)	Code defined as an authority search on the OPAC SEARCHES (OS) table and assigned to the OSC code in the *Authority Search* field on the OPAC SEARCH COMMANDS (OSC) table.

The following fields appear on the OPAC SEARCHES screen.

Type of Search	A code used to represent the type of search. These codes are user defineable. In this example, B represents a browse search, W a keyword search, K a control number, and C a Call Number search.
0=Bib search 1=Auth search	Indicates whether a search is an Authority or Bibliographic search.
Index filename	Name of the file containing the index.
Dcodes	Represents the type of index that will be searched.
Subroutine name	Subroutine to call for search string preparation, only used for control number searches.

Z39.50 Bib-1 Use Attr.   The Bib-1 Use Attribute(s) assigned to this search.

Example Setup for Attribute Assignment

OSC Code	OS Code (Bibliographic Search)	OS Code (Authority Search)	Type of Search	0=Bib search 1=Auth search	Index filename	Dcodes	Subroutine name	Z39.50 Bib-1 Use Attr.
A	B.AUTHOR.B		B	0	A.TREE	A		1003 (Author)
A		B.AUTHOR.A	B	1	A.TREE	MA, CA		1003 (Author)
A1	B.AUTHOR.PERS.B		B	0	A.TREE	A1		1004 (Author-name-personal)
A1		B.AUTHOR.PERS.A	B	1	A.TREE	MA1, CA1		1004 (Author-name-personal)
A2	B.AUTHOR.CORP.B		B	0	A.TREE	A2		1005 (Author-name-corpo-rate)
A2		B.AUTHOR.CORP.A	B	1	A.TREE	MA2, CA2		1005 (Author-name-corpo-rate)
A3	B.AUTHOR.CONF.B		B	0	A.TREE	A3		1006 (Author-name-confer-ence)
A3		B.AUTHOR.CONF.A	B	1	A.TREE	MA3, CA3		1006 (Author-name-confer-ence)
ALL	B.ALL.B		B	0	A.TREE			1016 (Any)
ALL		B.ALL.A	B	1	A.TREE	M ,C		1016 (Any)
AW	W.AUTHOR.B		W	0	WORDS	A		1003, 1004, 1005, 1006
AW		W.AUTHOR.A	W	1	WORDS	A		1003, 1004, 1005, 1006
C	C.CALL.NO.B		C	0	CALLNO		OPAC.CALLNO.CONVERT	13 (Dewey classification), 16 (LC call number)
CD	K.LCCN.B		K	0	CODEN			60 (CODEN)

Example Setup for Attribute Assignment

OSC Code	OS Code (Bibliographic Search)	OS Code (Authority Search)	Type of Search	0=Bib search 1=Auth search	Index file-name	Dcodes	Subroutine name	Z39.50 Bib-1 Use Attr.
CN	K.LCCN.B		K	0	CN			12 (Local number)
CL	L.CATLIST		L	0	CLISTS			1015 Concept Reference
CN		K.LCCN.A	K	1	ACN			12 (Local number)
I	K.LCCN.B		K	0	ISNO		OPAC.ISNO .CONVERT	7 (ISBN) 8 (ISSN)
I		K.LCCN.A	K	1	AISNO		OPAC.ISNO .CONVERT	7 (ISBN) 8 (ISSN)
L	K.LCCN.B		K	0	LCCN			9 (LC card number)
L		K.LCCN.A	K	1	ALCCN			9 (LC card number)
LCN	K.LCCN.B		K	0	B.MARC		LCN	1032 (Doc-ID)
LCN		K.LCCN.A	K	1	A.MARC		LCN	1032 (Doc-ID)
MP	K.MUSIC.B		K	0	PUBNUM			51 (Number-publisher-for-music)
NW	W.NOTE.B		W	0	WORDS	N		63 (Note)
S	B.SUBJECT.B		B	0	A.TREE	S		21 (Subject heading), 27 (LC-Subject-heading)
S		B.SUBJECT.A	B	1	A.TREE	MS, CS		21 (Subject heading), 27 (LC-Subject-heading)
SE	B.SERIES.B		B	0	A.TREE	P		5 (Title-series)
SE		B.SERIES.A	B	1	A.TREE	MP, CP		5 (Title-series)
SEW	W.SERIES.B		W	0	WORDS	P		5 (Title-series)
SEW		W.SERIES.A	W	1	WORDS	P		5 (Title-series)

Example Setup for Attribute Assignment

OSC Code	OS Code (Bibliographic Search)	OS Code (Authority Search)	Type of Search	0=Bib search 1=Auth search	Index file-name	Dcodes	Subroutine name	Z39.50 Bib-1 Use Attr.
SW	W.SUBJECT.B		W	0	WORDS	S		21 (Subject heading), 27 (LC-Subject-heading)
SW		W.SUBJECT.A	W	1	WORDS	S		21 (Subject heading), 27 (LC-Subject-heading)
T	B.TITLE.B		B	0	A.TREE	T		4 (Title), 6 (Title-uniform)
T		B.TITLE.A	B	1	A.TREE	MT, CT		4 (Title), 6 (Title-uniform)
TW	W.TITLE.B		W	0	WORDS	T		4 (Title), 6 (Title-uniform)
TW		W.TITLE.A	W	1	WORDS	T		4 (Title), 6 (Title-uniform)
W	W.ALL.B		W	0	WORDS	A, S, T, P, N		1016 (Any)
W		W.ALL.A	W	1	WORDS	A, S, T, P		1016 (Any)

Because many sites include the series titles in the Title search, the examples above may not reflect your setup. If you have included series titles in your searches and you want the Use Attribute 4 (Title) to also include series titles, then you must create a separate search for the T Dcode. The table on the following page shows the expansion of title search definitions that are required (as per guideline 3) to support such a configuration.

BEFORE EXPANSION

Title Searches

OSC Code	OS Code (Bibliographic Search)	OS Code (Authority Search)	Type of Search	0=Bib search 1=Auth search	Index file-name	Dcodes	Subroutine name	Z39.50 Bib-1 Use Attr.
T	B.TITLE.B		B	0	A.TREE	T		4 (Title), 6 (Title-uniform)
T		B.TITLE.A	B	1	A.TREE	MT, CT		4 (Title), 6 (Title-uniform)
TW	W.TITLE.B		W	0	WORDS	T		4 (Title), 6 (Title-uniform)
TW		W.TITLE.A	W	1	WORDS	T		4 (Title), 6 (Title-uniform)

AFTER EXPANSION

Title Searches Separated from Title/Series Searches

OSC Code	OS Code (Bibliographic Search)	OS Code (Authority Search)	Type of Search	0=Bib search 1=Auth search	Index file-name	Dcodes	Subroutine name	Z39.50 Bib-1 Use Attr.
T	B.TITLE.B		B	0	A.TREE	T, P		4 (Title), 6 (Title-uniform)
TX	B.TITLEX.B		B	0	A.TREE	T		1501 (Place-holder for title only)
T		B.TITLE.A	B	1	A.TREE	MT, CT, MP, CP		4 (Title), 6 (Title-uniform)
TX		B.TITLEX.A	B	1	A.TREE	MT, CT		1501 (Place-holder for title only)
TW	W.TITLE.B		W	0	WORDS	T, P		4 (Title), 6 (Title-uniform)
TWX	W.TITLEX.B		W	0	WORDS	T		1501 (Place-holder for title only)
TW		W.TITLE.A	W	1	WORDS	T, P		4 (Title), 6 (Title-uniform)
TWX		W.TITLEX.A	W	1	WORDS	T		1501 (Place-holder for title only)

F

User Permissions

Introduction

In the Utilities Function, library administration staff can define user-specific permissions for many of the Report Writer functions and tasks (see the *Utilities Management Guide*). This appendix lists and briefly describes these permissions.

Levels of Permission

There are three levels of permission: Y, N, and P.

Y   The user has permission for the specified function or task, perhaps qualified by special restrictions. In addition, other permissions may be required — for example, you cannot move holdings between sublocations (permission 070) unless you change current holdings information (permission 069).

N   The user does not have permission for the specified function or task.

P   The user must enter a library-specified password to have permission. 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 (such as ordering). The high-security tasks (such as authorizing an order) 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.

Restrictions

Qualifiers or restrictions are not used with some types of permissions. Any permission designated as a type 2 on the General Permissions Setup table will not have a qualifier. Types of General Permissions are Geac assigned and cannot be changed by the library.

Report Group Codes

Allows you to restrict access to specific report groups, such as Acquisitions Fund Reports (AFUN), Cataloguing Authority (CAR), Circulation Statistics (CSR), and so forth.

You cannot access reports if you do not have permission to view them. For example, you cannot run reports containing fund information if you do not have permission to display fund information.

Library Code

Use the *Linked to Qualifier type* field on the REPORT PROMPT CODES screen to restrict access to specific libraries. Then, use ENTER ACCESS CODES (EACC) to access the USER ID that you want to restrict. Locate the permission that controls the activity you are restricting, and use the *Restrict to Qualifier* column to specify which libraries this user can access. For example, to restrict access to the Main Library for vendor information, you would assign a 0 in the *Linked to Qualifier type* field on the REPORT PROMPT CODES screen for Vendor Codes. Because Vendor Display is controlled by permission 31, use ENTER ACCESS CODES (EACC) to access the appropriate USER ID and select the *Access to Vendor Display* permission. In the *Restrict to Qualifier* column, enter the Library Code for the libraries that this user is allowed to access. This user is now restricted to running vendor reports for the libraries specified.

Permission List by Permission ID Number

Permission ID Numbers are assigned by the system. To display Permission ID Numbers grouped by module use MODULE PERMISSIONS (MPERM) on the SECURITY MENU.

073 - Allow user to run specific reports in Report Writer
074 - Allow user to edit specific reports in Report Writer

073 - Allow user to run specific reports in Report Writer

Y / P   Allows you to run any report in the Report Writer function, unless the report has been restricted by the Report Group Code.

N   You are not allowed to run the report.

Prerequisite   None.

Restriction   By Report Group Codes.

074 - Allow user to edit specific reports in Report Writer

Y / P   Allows you to edit any report in the Report Writer function, unless the report has been restricted by the Report Group Code.

N   You are not allowed to edit reports.

Prerequisite   None.

Restriction   By Report Group Codes.

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Screen Index

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General Index

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Your comments and suggestions can help us improve the ADVANCE documentation. After you have had an opportunity to use the system and its guides, we would appreciate your comments on the usefulness of this or any other ADVANCE documentation.

Please write your comments on a photocopy of these pages and, if you wish, attach additional pages.

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