

No Coding Required

Catalog Customizations Made From the Staff Client

Kathy Lussier, Coordinator

Massachusetts Library Network Cooperative

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**Many Settings
Available to
Adjust OPAC
Look and
Behavior**



Adjusting the Library Selector

Default Display

Consortium

- System(s) (listed alphabetically)
- Branch(es) (listed alphabetically)



When you have single-branch systems, there is a lot of redundancy.

Make the System Invisible

Server Admin -> Organizational Units

By default, if you make the system invisible in the OPAC, the child branches will be invisible too.

Main Settings Hours of Operation Addresses

Organization Unit Name Douglas Public Library Translate ▾

Organization Unit Policy Code SYS3

Main Email Address

Main Phone Number

Organization Unit Type System ▾

Parent Organization Unit CONS ▾

OPAC Visible

Save Delete

New Child

Name	opac.org_unit.non_inherited_visibility
Label	Org Units Do Not Inherit Visib
Enabled	<input checked="" type="checkbox"/>
Value	
Cancel	Save

Enable the 'Org Units Do Not Inherit Visibility' Global Flag

Server Admin -> Global Flags

Before



After



More Extensive Changes to Library Selector

Aside from visibility, what can you do if you don't like the default sort order of the library selector?

Maybe you added an extra level to your hierarchy for policy reasons, but don't want that level to display in the catalog

Consortium

~~Region 1~~

- Hemlock Library System

- Hemlock Library

- Juniper Library System

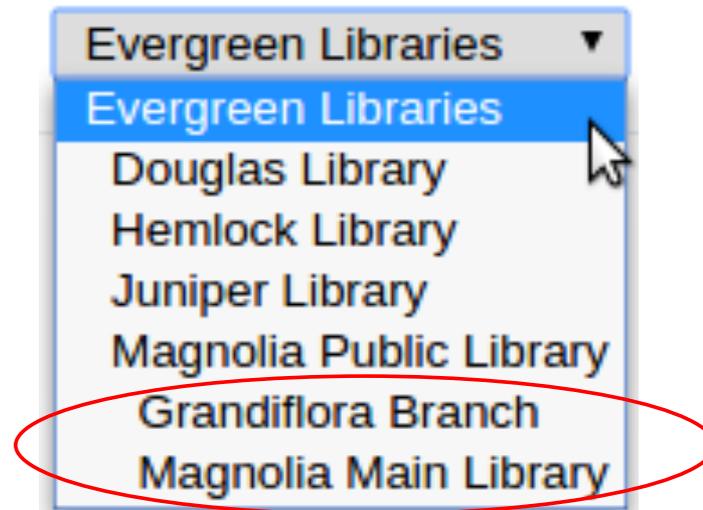
- Juniper Library

~~Region 2~~

- Douglas Library System

- Douglas Library

Or maybe alphabetical isn't always the best representation of how libraries should be listed.



Custom Org Unit Trees to the Rescue

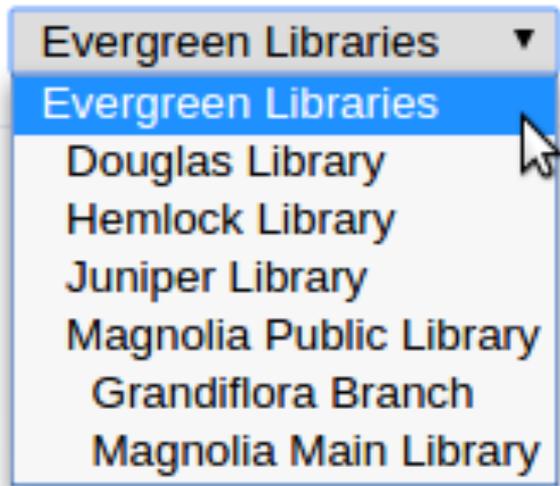
Org Unit Custom Tree

- To add new nodes to the custom tree, drag them from the full tree on the left
- Changes to custom org trees may require web server (apache) reload before taking effect

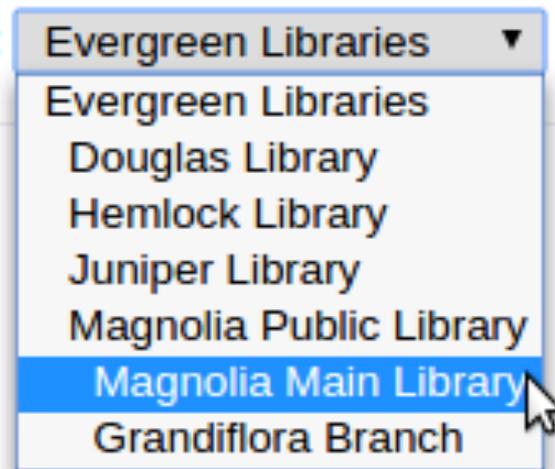
The screenshot displays two side-by-side tree views. The left view, titled 'Full Org Unit Tree', shows a hierarchical structure with nodes: CONS (expanded), DOU (expanded), DOU-BR, HEM (expanded), BR2, HEM-BR, SL1, JUN (expanded), JUN-BR, MAG (expanded), MAG-GR, MAG-BR, and BM1. The right view, titled 'Custom Unit Tree: OPAC', shows a similar structure but with a dropdown menu open over the 'MAG-BR' node. The dropdown menu contains a green arrow icon and a '+' sign, and a 'MAG-BR' node is being dragged into it. The right view also includes buttons for 'Expand / Collapse', 'Delete Selected', 'Activate Tree', and 'Apply Changes'.

Available from Server Admin ->
Custom Org Unit Trees

Before



After



Org Unit Hiding Depth

- Available in Local Admin -> Library Settings Editor
- Allows libraries to adjust the selector so that users can only search within specific libraries/systems.
- You need to set a depth at which libraries should be visible in the selector. Using a typical hierarchy, the depths are:
 - 0 is entire consortium
 - 1 is the system
 - 2 is the branch
 - 3 is any sublibrary/bookmobile below the branch.
- Works with the `physical_loc` variable

The Library Setting

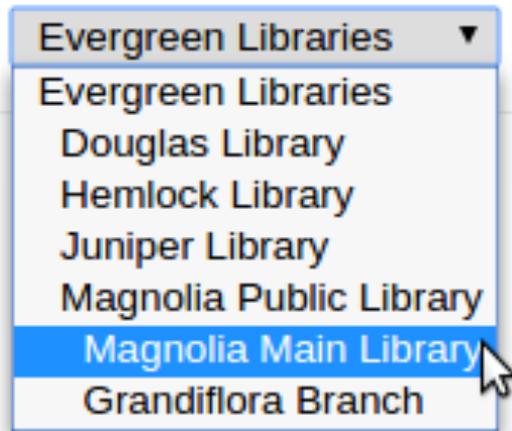
Org Unit Hiding Depth

This will hide certain org units in the public OPAC if the Physical Location (url param "physical_loc") for the OPAC inherits this setting. This setting specifies an org unit depth, that together with the OPAC Physical Location determines which section of the Org Hierarchy should be visible in the OPAC. For example, a stock Evergreen installation will have a 3-tier hierarchy (Consortium/System/Branch), where System has a depth of 1 and Branch has a depth of 2. If this setting contains a depth of 1 in such an installation, then every library in the System in which the Physical Location belongs will be visible, and everything else will be hidden. A depth of 0 will effectively make every org visible. The embedded OPAC in the staff client ignores this setting.

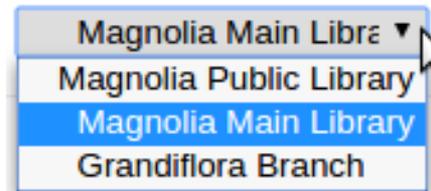
Context

Value

Before



After



When Adjusting Your Selector

- Restart apache after configuring to see your changes
- Public vs. staff
 - Libraries that are not visible to the public will continue to display in the staff catalog and other staff dropdown menus.
 - The custom org tree will display in both the public and staff catalog. It will not display in other staff client dropdown menus.
- The custom org tree will not affect the library sort order on search results or record summary pages.

Adding Scopes / Collections to the Selector

Copy Location Groups allow you to group together copy locations into a single search location that can be added to your library selector.

The screenshot displays the 'Copy Location Groups' interface for the 'HEM' library. A modal window is open for editing the 'Juvenile Collection' group. The modal contains the following fields:

Display Above Orgs	<input type="checkbox"/>
Is OPAC Visible?	<input checked="" type="checkbox"/>
Name	Juvenile Collection
<input type="button" value="Cancel"/> <input type="button" value="Save"/>	

The main interface shows a list of 'Group Entries' and a list of 'Copy Locations' that can be added to the group.

Group Entries:

- HEM-CLOSED Easy Reader
- HEM Juvenile Non-Fiction
- HEM Young Adult Fiction
- HEM-BR Young Adult Fiction
- HEM-CLOSED Young Adult Fiction
- HEM Children's Fiction

Copy Locations:

- HEM Special Collections
- HEM-CLOSED Audio/Video
- HEM-CLOSED Biography
- HEM-CLOSED Display
- HEM-CLOSED Genealogy
- HEM-CLOSED Magazines
- HEM-CLOSED Music
- HEM-CLOSED New Arrivals
- HEM-CLOSED Reserves
- HEM-CLOSED Theses
- HEM-BR Audio/Video
- HEM-BR Biography
- HEM-BR Display
- HEM-BR Easy Reader
- HEM-BR New Arrivals
- HEM-BR Newspapers
- HEM-BR Periodicals
- HEM-BR Reference
- HEM-BR Reserves

How Are Libraries Using Copy Location Groups?

The screenshot shows a library search interface. At the top, there is a search bar with a dropdown menu set to "NOBLE (All Libraries)" and a "Search" button. Below the search bar, there is a prompt: "Type the keyword you want to find. For ex" followed by a list of example keywords: "george washington biography", "dickens great expectations", and "new england" birds. Below the list is a link for "Search Tips".

The dropdown menu is open, showing a list of copy location groups. The groups are: Stoneham Children's, Stoneham Adult, Stoneham Teen, Swampscott, Swampscott Children's, Swampscott Adult, Swampscott Teen, Wakefield, Wakefield Children's, Wakefield Adult, Wakefield Teen, Winthrop, Winthrop Children's, Winthrop Adult (highlighted), Winthrop Teen, Children's Collections, Teen Collections, Adult Collections, Public Libraries, and Academic Libraries.

At the bottom of the page, there is a footer with the text: "NOBLE Web | NOBLE OverDrive | NOBLE Digital Heritage", "Powered by Evergreen", and "Copyright © 2006-2016 Georgia Public Library Service, and others". A "Help" link is also visible on the right side of the footer.

Theses

[Advanced Search](#) [Browse the Catalog](#)

Type: Keyword **Format:** All Formats **Library:** 4th year theses an **Search**

- Collège Boréal - Sudbury
- Collège Boréal - Timmins
- Collège Boréal - Toronto
- Collège Boréal - Témiskaming
- Laurentian University
- Huntington University Library
- Instructional Media Centre
- J.N. Desmarais Library
- 4th year theses and essays**
- Graduate theses and essays
- Laboratoire de didactiques, E.S.E.



The logo for Laurentian University, featuring a stylized tree and sun emblem on the left, and the text 'Laurentian University' and 'Université Laurentienne' on the right.

Collections

Keyword Format: All Formats Library: Homer Library Search



Homer Public Li

- Homer Library
- Homer Public Library
 - All Adult
 - All Children
 - All Teen
 - Alaskana
 - Audiobooks
 - Battle Books
 - Biography
 - Children - Picture Books
 - Fiction**
 - Magazines & Newspapers
 - Music
 - New - Adult
 - New - Children
 - Nonfiction
 - Read 15 in '16
 - Russian
 - Videos

[Purchase](#) | [Interlibrary Loans](#) | [Questions?](#) | [HPL Website](#)

and others

Cake Pans

Keyword Format: All Formats Library: **Cake Pans**



Main
Lib

- RSU #87 Carmel Schools
- Caravel Middle School
- Carmel Elementary School
- Suzanne M. Smith Elementary School
- Shaw Public Library System
- Shaw Public Library
- Simpson Memorial Library System
- Simpson Memorial Library
- Stewart Free Library System
- Stewart Free Library
- Test Library
- Thompson Free Library System
- Thompson Free Library
- Front Room
- Basement
- Thorndike Library, College of the Atlantic - System
- Thorndike Library, College of the Atlantic
- Wilton Free Public Library System
- Wilton Free Public Library
- Cake Pans**

and others

Electronic Resources

Refresher

There are two ways to expose electronic resources to the public in the catalog

- Using a Transcendent Bib Source for the bib record.
 - Record will appear in all catalog searches, even if limited to copy locations
- Located URIs
 - The owning library/system/consortium is entered in subfield 9 of the 856 field, and the record will only appear if the search is scoped appropriately.

Default Located URI Behavior

- Electronic resources are retrieved if the user is scoped to the owning org unit or a child of that org unit.
- Electronic resources will also be retrieved if the user is logged in and has a preferred library that is the owning org unit or a child of that org unit.

Example



- If the Magnolia Public Library System owns the electronic resource and the user is not logged in, the record will be retrieved if the search is scoped to the Magnolia system, the Magnolia Main Library or the Grandiflora branch.
- If the user is logged in with a preferred library of Magnolia, it will also appear when scoped to the consortium.
- But if the user is from Magnolia, is not logged in, and is searching the entire consortium, they'll never know they could have access to that resource.

There's a Global Flag for that

9	Don't look for more than this number of records with holdings when displaying browse headings with visible record counts.	True	100
10	When enabled, Located URIs will provide visibility behavior identical to copies.	False	
11	OPAC Format Icons Attribute	True	icon_format
12	OPAC Metarecord Hold Formats Attribute	True	mr_hold_format
13	OPAC Format Selector Attribute	True	search_format
14	Search: maximum number of facet values to retrieve for each facet	True	1000

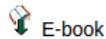
Available from Server Admin -> Global Flags

Enable the Flag

- Patrons searching the entire consortium will retrieve all electronic records.
- They will not retrieve the record if scoped to a library that does not own record or is not a child or parent of the record's owner.
- The record will list all potential URLs.

List of URLs

Nursing procedures / Elizabeth Jacqueline Mills, editor. [electronic resource]



ISBN: 9781469881010 (e-book)

Description: 1 online resource (854 pages) : illustrations

Edition: Fourth edition.

Publisher: Philadelphia, Pennsylvania : Lippincott Williams & Wilkins, 2004.

Copyright: ©2004

Electronic resources

Most resources are available to all onsite at owning library unless resident access is indicated.

- [Access for Bunker Hill Community College via ebrary](#)
- [Access for Merrimack College via ebrary](#)
- [Access for North Shore Community College via ebrary](#)
- [Access for Northern Essex Community College via ebrary](#)
- [Access for Phillips Academy via ebrary](#)

Content descriptions

Bibliography, etc. Note: Includes bibliographical references at the end of each chapters and index.

Restrictions on Access Note: Access limited to residents of owning communities and students of owning institutions.

Source of Description Note: Description based on print version record.

Customizing Search Filters, Icons, and Metarecord formats

- Server Admin -> MARC Coded Value Maps
- Mix and match item types, item forms, bib levels to create the exact formats you need.
- Work with your catalogers on this project.

Coded Value Maps

Coded Value Maps

Record Attribute Type:

[Back](#) [Next](#) [Filter](#)

<input checked="" type="checkbox"/>	#	SVF Attri	Descri
		S/L	
		TMat	
		Type	
		Videorecording format	
		File	
		Freq	
		Regl	
		Title	
		Author	
		Sound recording format	
		OPAC Format Icons	
		Metarecord Hold Formats	
		Search Formats	
		Content Type	
		Media Type	
		Carrier Type	
		AccM	
		Comp	
		CrTp	
		EntW	
		Cont	
		FMus	
		LTxt	
		Orig	

Go Back Reload Go Forward

Debug Print Page

Coded Value Maps

Coded Value Maps

New Map Delete Selected Clone Selected

Record Attribute Type: Search Formats

[Back](#) [Next](#) [Filter](#)

✓	#	SVF Attribute	Code	Value	Description	OPAC Visible	Search Label	Is Simple Selector	Concept URI	Composite Definition
<input type="checkbox"/>	1	Search Formats	blu-ray	Blu-ray		True	Blu-ray	False		Manage
<input type="checkbox"/>	2	Search Formats	book	All Books		True	All Books	False		Manage
<input type="checkbox"/>	3	Search Formats	braille	Braille		True	Braille	False		Manage
<input type="checkbox"/>	4	Search Formats	casaudiobook	Cassette audiobook		True	Cassette audiobook	False		Manage
<input type="checkbox"/>	5	Search Formats	casmusic	Audiocassette music recording		True	Audiocassette music recording	False		Manage
<input type="checkbox"/>	6	Search Formats	cdaudiobook	CD Audiobook		True	CD Audiobook	False		Manage
<input type="checkbox"/>	7	Search Formats	cdmusic	CD Music recording		True	CD Music recording	False		Manage
<input type="checkbox"/>	8	Search Formats	dvd	DVD		True	DVD	False		Manage
<input type="checkbox"/>	9	Search Formats	eaudio	E-audio		True	E-audio	False		Manage
<input type="checkbox"/>	10	Search Formats	ebook	E-book		True	E-book	False		Manage
<input type="checkbox"/>	11	Search Formats	electronic	Electronic		False	Electronic	False		Manage
<input type="checkbox"/>	12	Search Formats	equip	Equipment, games, toys		True	Equipment, games, toys	False		Manage
<input type="checkbox"/>	13	Search Formats	evideo	E-video		True	E-video	False		Manage
<input type="checkbox"/>	14	Search Formats	kit	Kit		True	Kit	False		Manage
<input type="checkbox"/>	15	Search Formats	lpbook	Large Print Book		True	Large Print Book	False		Manage

Record Attribute: Search Formats

Coded Value: cdmusic / CD Music recording

[↩ Return To Coded Value Maps](#)

Composite Data Expression

Musical sound recording AND 1.4 m. per second

Composite Data Tree

[New Tree](#)

[Delete Tree](#)

[Save Changes](#)

AND

[Delete](#)

[Add Child](#)

- Type (item_type) => Musical sound recording (j)

[Delete](#)

- Sound recording format (sr_format) => 1.4 m. per second (f)

[Delete](#)

Composite Data Expression

(Language material OR Manuscript language material) AND Large print AND (Monographic component part OR Collection OR Subunit OR Monograph/Item)

Composite Data Tree

New Tree

Delete Tree

Save Changes

AND

[Delete](#)

[Add Child](#)

- OR

[Delete](#)

[Add Child](#)

- - Type (item_type) => Language material (a)

[Delete](#)

- - Type (item_type) => Manuscript language material (t)

[Delete](#)

- Form (item_form) => Large print (d)

[Delete](#)

- OR

[Delete](#)

[Add Child](#)

- - BLvl (bib_level) => Monographic component part (a)

[Delete](#)

- - BLvl (bib_level) => Collection (c)

[Delete](#)

- - BLvl (bib_level) => Subunit (d)

[Delete](#)

- - BLvl (bib_level) => Monograph/Item (m)

[Delete](#)

**Sys admin needs to
perform Record Attribute
Reingest after Coded Value
Map definitions are created**

Use Global Flags to Change Coded Value Map that Should Be Used

Global Flags

[Back](#) [Next](#) [Filter](#)

#	▲ Label	Enabled	Value
1	OPAC Format Icons Attribute	True	icon_format
2	OPAC Format Selector Attribute	True	search_format
3	OPAC Metarecord Hold Formats Attribute	True	mr_hold_format

Server Admin -> Global Flags

Adding Icon Images

- A .png image where the file name matches the value in the CVM code field:

✓	#	SVF Attribute	Code	Value	Descri
<input type="checkbox"/>	1	OPAC Format Icons	blu-ray	Blu-ray	
<input type="checkbox"/>	2	OPAC Format Icons	book	Book	
<input type="checkbox"/>	3	OPAC Format Icons	braille	Braille	
<input type="checkbox"/>	4	OPAC Format Icons	casaudiobook	Cassette audiobook	
<input type="checkbox"/>	5	OPAC Format Icons	casmusic	Audiocassette music recording	
<input type="checkbox"/>	6	OPAC Format Icons	cdaudiobook	CD Audiobook	

- Add the image files to:
openils/var/web/images/format_icons/icon_format

Let patrons know what they previously checked out

- Local Admin -> Library Settings Editor: Tag Circulated Items in Results
- When logged-in patrons search, catalog will let them know if they have previously checked out a title.
- If the user does not track their circ history, anonymization of circ transactions will clear out this data.

Search: Type: Keyword Format: All Formats Library: Example Consortium Search

Another Search Advanced Search Sort by Sort by Relevance Show More Details Limit to Available Items Group Formats and

Search Results Results 1 - 1 of about 1 (page 1 of 1) Preferred library: **Example Branch 1?**

Personal Author	
Rowling, J. K.	(1)
Topic Subject	
Hogwarts School of Witchcraft and Wizardry	(1)

1.



[Harry Potter and the goblet of fire](#)

[Rowling, J. K.](#)

 Book (2002.)

Call number: G880 210
8 of 8 copies available at Example Consortium.

I have checked this item out before

[Place Hold](#) [Add to my list](#)

Other Global Flags of Note

- Map of search classes to regular expressions to warn user about leading articles - Shows a warning if user enters a leading article (a, an, the) in browse search.

Browse for starting with in

Your browse term seems to begin with an article (a, an, the). You might get better results by omitting the article.

Did you mean [hunger games](#)?

- Search: maximum number of facet values to retrieve for each facet field - new in 2.10. Default is 1000

Other Settings from the Library Settings Editor

- Jump to details on 1 hit - Bypass the search results page if there's only 1 hit. Separate settings for public and staff.
- Org Unit is not a hold pickup library - Use if you need to remove a library from the hold pickup selector.
- Payment History Age Limit - Stop showing paid fines in My Account after a certain time period.
- Warn patrons when adding to a temporary book list

Questions?