No Coding Required

Catalog Customizations Made

From the Staff Client

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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.

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

Server Admin -> Global Flags
Before

Evergreen Libraries
Douglas Public Library
Douglas Library
Hemlock Public Library
Hemlock Library
Juniper Public Library
Juniper Library
Magnolia Public Library
Grandiflora Branch
Magnolia Main Library

After

Evergreen Libraries
Douglas Library
Hemlock Library
Juniper Library
Magnolia Public Library
Grandiflora Branch
Magnolia Main Library
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

Available from Server Admin -> Custom Org Unit Trees
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.

<table>
<thead>
<tr>
<th>Context</th>
<th>MAG-BR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>1</td>
</tr>
</tbody>
</table>

[Delete Setting] [Update Setting]
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.
How Are Libraries Using Copy Location Groups?

Type the keyword you want to find. For example:
- george washington biography
- dickens great expectations
- "new england" birds

Search Tips
Consortium-wide groups at the top
Collections
<table>
<thead>
<tr>
<th>Library</th>
</tr>
</thead>
<tbody>
<tr>
<td>RSU #87 Carmel Schools</td>
</tr>
<tr>
<td>Caravel Middle School</td>
</tr>
<tr>
<td>Carmel Elementary School</td>
</tr>
<tr>
<td>Suzanne M. Smith Elementary School</td>
</tr>
<tr>
<td>Shaw Public Library System</td>
</tr>
<tr>
<td>Shaw Public Library</td>
</tr>
<tr>
<td>Simpson Memorial Library System</td>
</tr>
<tr>
<td>Simpson Memorial Library</td>
</tr>
<tr>
<td>Stewart Free Library System</td>
</tr>
<tr>
<td>Stewart Free Library</td>
</tr>
<tr>
<td>Tott Library</td>
</tr>
<tr>
<td>Thompson Free Library System</td>
</tr>
<tr>
<td>Thompson Free Library</td>
</tr>
<tr>
<td>Front Room</td>
</tr>
<tr>
<td>Basement</td>
</tr>
<tr>
<td>Thordike Library, College of the Atlantic - System</td>
</tr>
<tr>
<td>Thordike Library, College of the Atlantic</td>
</tr>
<tr>
<td>Wilton Free Public Library System</td>
</tr>
<tr>
<td>Wilton Free Public Library</td>
</tr>
</tbody>
</table>

**Cake Pans**
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

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>9</td>
<td>Don't look for more than this number of records with holdings when displaying browse headings with visible record counts.</td>
<td>True</td>
</tr>
<tr>
<td>10</td>
<td>When enabled, Located URIs will provide visibility behavior identical to copies.</td>
<td>False</td>
</tr>
<tr>
<td>11</td>
<td>OPAC Format Icons Attribute</td>
<td>True</td>
</tr>
<tr>
<td>12</td>
<td>OPAC Metarecord Hold Formats Attribute</td>
<td>True</td>
</tr>
<tr>
<td>13</td>
<td>OPAC Format Selector Attribute</td>
<td>True</td>
</tr>
<tr>
<td>14</td>
<td>Search: maximum number of facet values to retrieve for each facet</td>
<td>True</td>
</tr>
</tbody>
</table>

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]

E-book
Description: 1 online resource (854 pages) : illustrations
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 chapter 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.
<table>
<thead>
<tr>
<th>#</th>
<th>SVF Attribute</th>
<th>Code</th>
<th>Value</th>
<th>Description</th>
<th>OPAC Visible</th>
<th>Search Label</th>
<th>Is Simple Selector</th>
<th>Concept URI</th>
<th>Composite Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Search Formats</td>
<td>blu-ray</td>
<td>Blu-ray</td>
<td></td>
<td>True</td>
<td>Blu-ray</td>
<td>False</td>
<td>Manage</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Search Formats</td>
<td>book</td>
<td>All Books</td>
<td></td>
<td>True</td>
<td>All Books</td>
<td>False</td>
<td>Manage</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Search Formats</td>
<td>braille</td>
<td>Braille</td>
<td></td>
<td>True</td>
<td>Braille</td>
<td>False</td>
<td>Manage</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Search Formats</td>
<td>casaudbook</td>
<td>Cassette audiobook</td>
<td></td>
<td>True</td>
<td>Cassette audiobook</td>
<td>False</td>
<td>Manage</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Search Formats</td>
<td>casmusic</td>
<td>Audio cassette music recording</td>
<td></td>
<td>True</td>
<td>Audio cassette music recording</td>
<td>False</td>
<td>Manage</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Search Formats</td>
<td>cdaudobook</td>
<td>CD Audio book</td>
<td></td>
<td>True</td>
<td>CD Audio book</td>
<td>False</td>
<td>Manage</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Search Formats</td>
<td>cmd music</td>
<td>CD Music recording</td>
<td></td>
<td>True</td>
<td>CD Music recording</td>
<td>False</td>
<td>Manage</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Search Formats</td>
<td>dvd</td>
<td>DVD</td>
<td></td>
<td>True</td>
<td>DVD</td>
<td>False</td>
<td>Manage</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Search Formats</td>
<td>eaudio</td>
<td>E-audio</td>
<td></td>
<td>True</td>
<td>E-audio</td>
<td>False</td>
<td>Manage</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Search Formats</td>
<td>ebook</td>
<td>E-book</td>
<td></td>
<td>True</td>
<td>E-book</td>
<td>False</td>
<td>Manage</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Search Formats</td>
<td>electronic</td>
<td>Electronic</td>
<td></td>
<td>False</td>
<td>Electronic</td>
<td>False</td>
<td>Manage</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Search Formats</td>
<td>equip</td>
<td>Equipment, games, toys</td>
<td></td>
<td>True</td>
<td>Equipment, games, toys</td>
<td>False</td>
<td>Manage</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Search Formats</td>
<td>evideo</td>
<td>E-video</td>
<td></td>
<td>True</td>
<td>E-video</td>
<td>False</td>
<td>Manage</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Search Formats</td>
<td>kit</td>
<td>Kit</td>
<td></td>
<td>True</td>
<td>Kit</td>
<td>False</td>
<td>Manage</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Search Formats</td>
<td>lpbook</td>
<td>Large Print Book</td>
<td></td>
<td>True</td>
<td>Large Print Book</td>
<td>False</td>
<td>Manage</td>
<td></td>
</tr>
</tbody>
</table>
Record Attribute: Search Formats
Coded Value: cdmusic / CD Music recording

Composite Data Expression

Musical sound recording AND 1.4 m. per second

Composite Data Tree

AND

- 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

AND

- OR

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

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

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

- OR

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

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

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

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

<table>
<thead>
<tr>
<th>#</th>
<th>Label</th>
<th>Enabled</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>OPAC Format Icons Attribute</td>
<td>True</td>
<td>icon_format</td>
</tr>
<tr>
<td>2</td>
<td>OPAC Format Selector Attribute</td>
<td>True</td>
<td>search_format</td>
</tr>
<tr>
<td>3</td>
<td>OPAC Metarecord Hold Formats Attribute</td>
<td>True</td>
<td>mr_hold_format</td>
</tr>
</tbody>
</table>

Server Admin -> Global Flags
Adding Icon Images

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

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</tr>
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<tbody>
<tr>
<td>1</td>
<td>OPAC Format Icons</td>
<td>blu-ray</td>
<td>Blu-ray</td>
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<tr>
<td>2</td>
<td>OPAC Format Icons</td>
<td>book</td>
<td>Book</td>
</tr>
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<td>3</td>
<td>OPAC Format Icons</td>
<td>braille</td>
<td>Braille</td>
</tr>
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<td>4</td>
<td>OPAC Format Icons</td>
<td>casaudiobook</td>
<td>Cassette audiobook</td>
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<td>5</td>
<td>OPAC Format Icons</td>
<td>casmusic</td>
<td>Audiocassette music recording</td>
</tr>
<tr>
<td>6</td>
<td>OPAC Format Icons</td>
<td>cdaudiobook</td>
<td>CD Audiobook</td>
</tr>
</tbody>
</table>

• 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.
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
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 Titles starting with the hunger games in Evergreen Libraries

  -- Back  Next --

  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?