



Staff User's Guide – Search

Version 24

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Document released: July 3, 2022

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1 Search Function Overview

This chapter includes the following sections:

- Search Functions
- Indexes
- Functional/Overview Mode
- Full Screen Mode

1.1 Search Functions

You can use the Search function to:

- **Search the databases** for bibliographic and authority records.
- View **holdings information** about an item, such as the call number of each copy (for example, branch and shelf number).
- View **circulation information** such as how long the item may be on loan and whether the item is currently on loan.

There are two types of searches available in the Search function:

- **Browse** - You can browse an alphabetical list of headings, such as titles, authors and subjects.
- **Find** - You can search the database for keywords. The system searches Word Indexes (such as Words in Title, Words in Subject) for records containing the keywords entered by the patron (In the Web OPAC, this function is called "Search"). To go directly to a specific record, enter the item's unique identifier, such as its ISBN or barcode number.

1.2 Indexes

The system librarian can define the indexes available to the patron in the Search function. There are three kinds of indexes:

- **Headings Indexes** - Headings are whole phrases from the bibliographic record, such as author, title, subject and so on. An entire field or specific subfields may be used for a Headings Index. Headings Indexes are used by the Browse function.
- **Word Indexes** are lists of words taken from specific fields of the bibliographic record. Examples of word indexes include:
 - words from authors (tags 100, 110...)
 - words from titles (tags 240, 241, 242, 243, 245...)
 - words from subjects (tags 600, 650)

- words anywhere in the record

Word Indexes are used for the Find function.

- **Direct Indexes** can be used in either Browse or Find. Examples of Direct Indexes include:
 - system numbers
 - ISBN/ISSN
 - call numbers
 - inventory numbers

1.3 Functional/Overview Mode

In the left pane you can choose either Functional or Overview mode. The Functional mode allows you to search the database, view records, create sets, and so on, as described in sections 2-7 below.

The Overview mode displays the Overview Tree, which shows all the records in the system that are related to a specific bibliographic record. For example, it displays the bibliographic record, the holdings record, the administrative record, and the items, subscriptions, orders and loans attached to the selected item record.

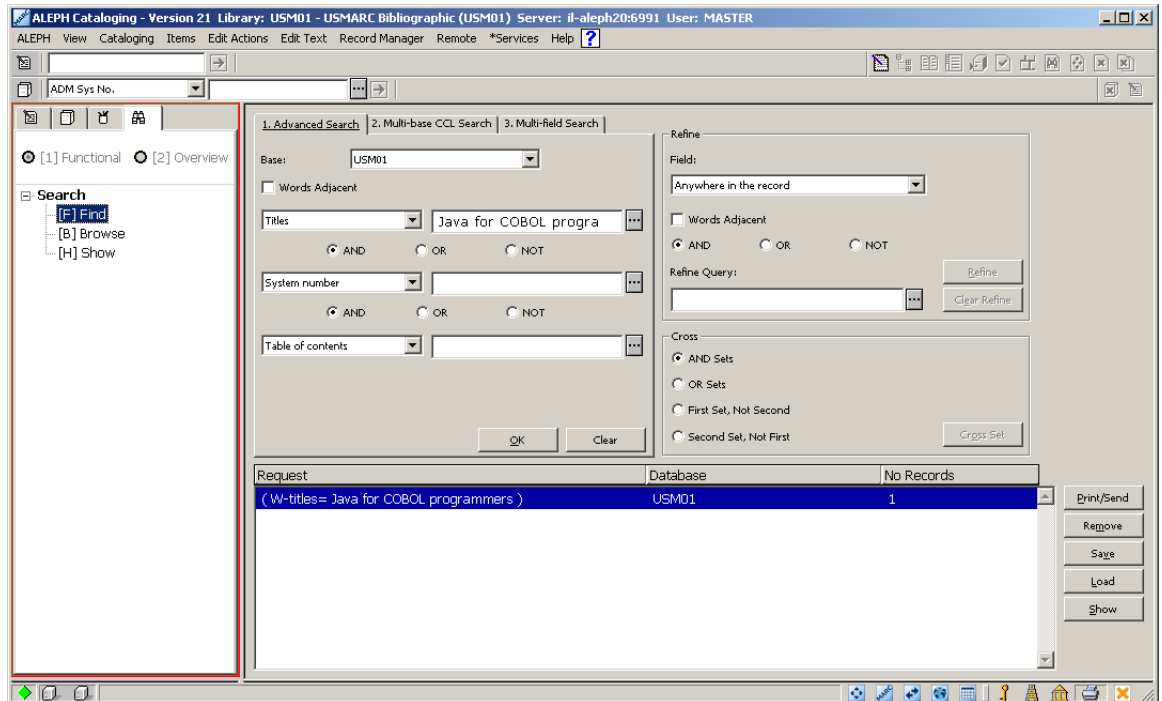
When a record is displayed in Overview mode, the right pane has buttons for transferring the record to one of the GUI functions (Cataloging, Items, Circulation, ILL, Serials Control, Ordering, Search).

1.4 Full Screen Mode

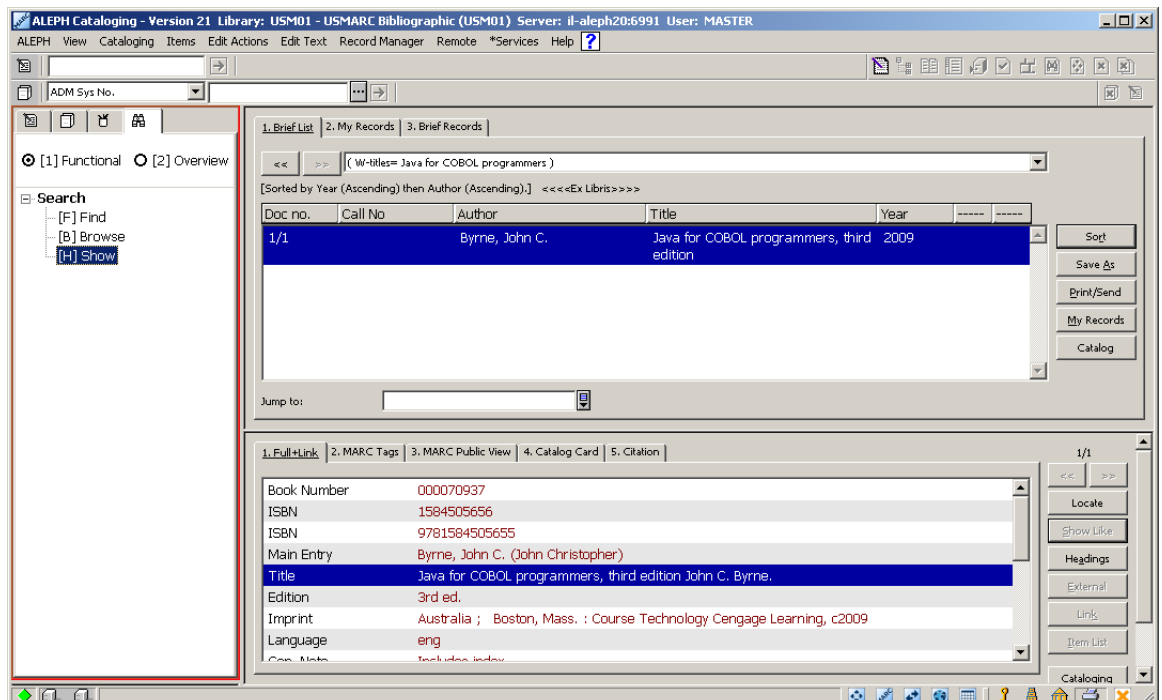
The Full Screen option enables you to enlarge a window containing a selected record.


To use the Full Screen option:

1. Enter a Find or a Browse query.
2. Highlight the record set retrieved by the query:



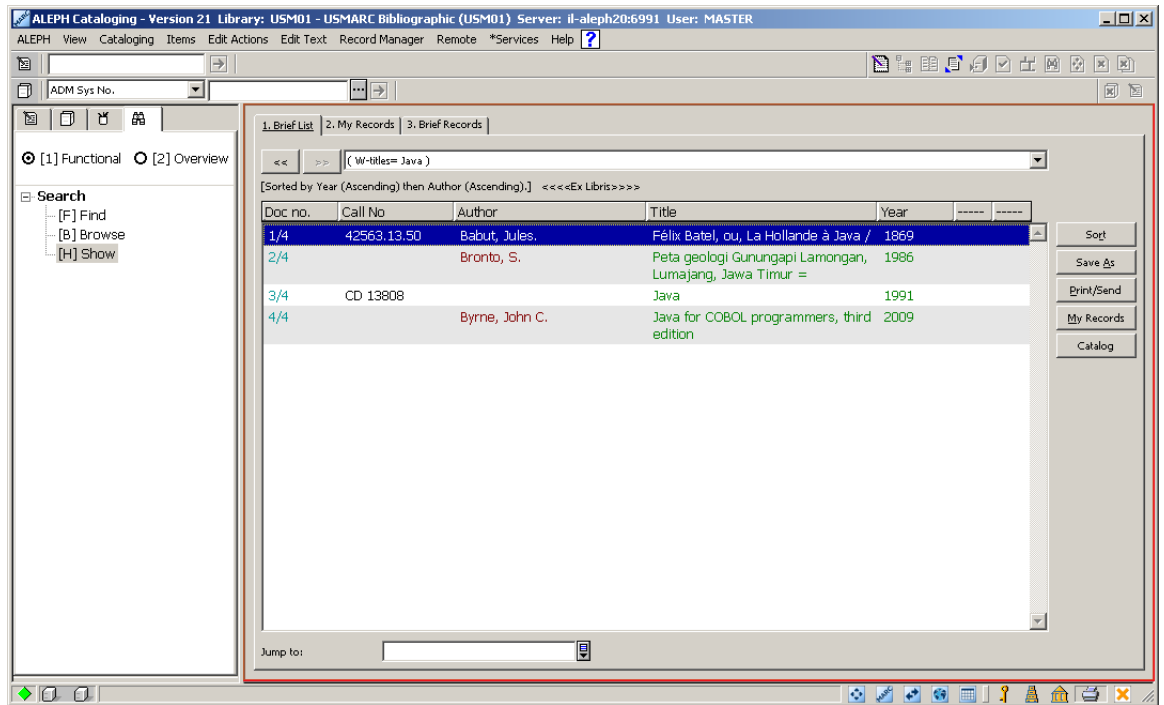
3. Click **Show**. This displays a record list in the upper pane and a Full view in the lower pane:



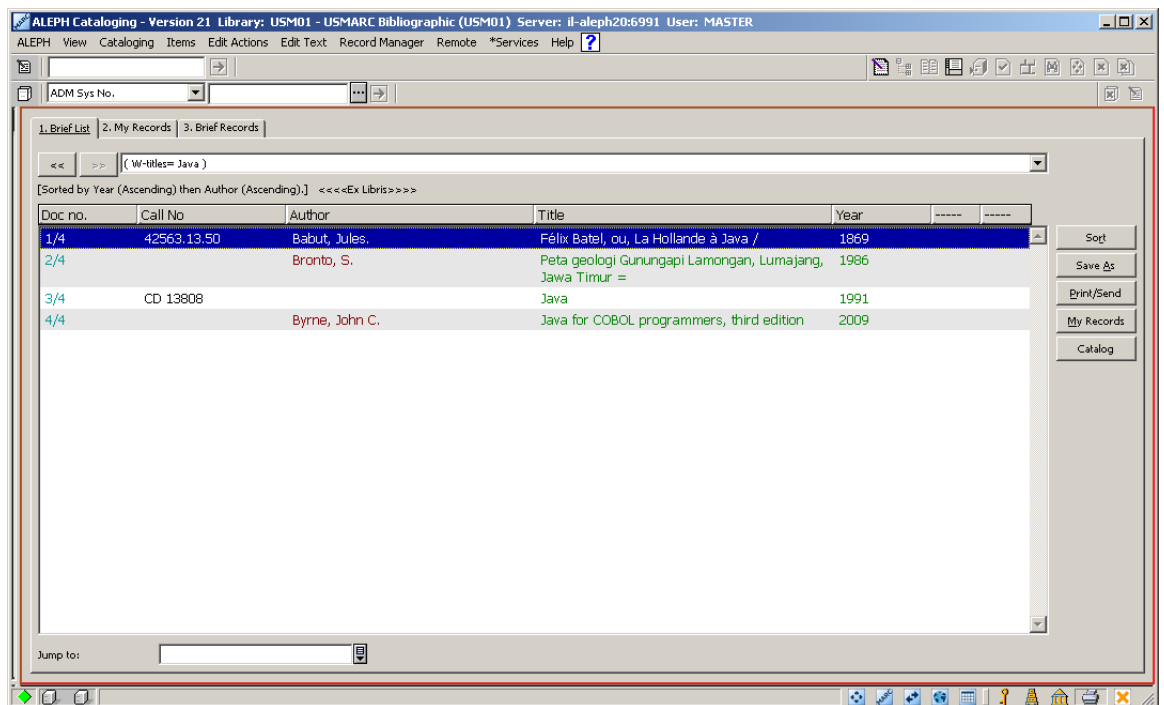
4. To view a record in Full Screen mode, click in the upper or the lower pane, select the Full Screen option from the View menu or click the  Full Screen icon on the upper right of the screen. When you select this option, the lower pane is not displayed and the screen takes up the

upper

pane:



5. If you select this option once more, the navigation pane is not shown and the record takes up the whole screen:



- To turn off the Full Screen mode and switch to the previous view, select again the Full Screen option from the View menu or click the



Full Screen icon on the upper right of the screen.

2 Find Function

This chapter includes the following sections:

- Advanced Search
- Multi-base CCL Search
- Multi-field Search
- Word Search for CJK

The Find function enables you to search the database using keywords, unique identifiers and heading phrases. The system searches Word Indexes (such as Words in Title, Words in Subject) for records containing the keywords entered by the user; Direct Indexes for unique identifiers (such as ISSN, barcode, and so on); and Headings Indexes for heading phrases.

To use the Find Function, choose the Find node.

2.1 Advanced Search

When you activate the Advanced Search, the pane below is displayed:

Choose the field to be searched (that is, the Index to be searched) and type the retrieval text.

Selecting the Words Adjacent option instructs the system that the words in the search

string must be in the same field and must appear next to each other in the record.

When entering keywords, you can use truncation, masking and logical operators, as explained below.

2.1.1 Truncation

Type a portion of a word and add the ? character or the * character at the beginning (or end) to indicate that you want all words that begin (or end) with that portion of the word. Truncation can be used in the middle and at the beginning or end, but not both in the beginning and at the end.

For example:

chloro?

retrieves all records that have words beginning with *chloro* in an indexed field.

?benzene

retrieves all records that have words ending with *benzene* in an indexed field.

2.1.2 Masking

In masking, special characters are used as placeholders and enable the system to retrieve words having variant spellings or matches that contain portions of words.

? or * is a placeholder for any number of characters.

For example:

ps?ic

retrieves all records that have words beginning with *ps* and ending with *ic* in an indexed field, such as *psychic* and *psychotic*.

is a placeholder for one or no character.

For example:

colo#r

retrieves both *color* and *colour* in an indexed field.

! is a placeholder for one character.

wom!n

retrieves both *woman* and *women* in an indexed field.

2.1.3 Logical (Boolean) Operators

A search may be narrowed or broadened by using the logical (Boolean) operators **AND**, **OR**, **NOT**.

For example:

peasant and labo?r

retrieves all records that have *peasant* and *labor* or *labour*.

peasant or serf

retrieves all records that have either *peasant* or *serf*.

lord not serf

retrieves all records that have the word *lord* but do not also include the word *serf*.

You can also use the following signs for the Boolean operators *and*, *or*, *not*. If no operator is present, then *and* is assumed.

- AND = + (plus sign)
- AND = & (ampersand)
- OR = | (pipe sign)
- NOT = ~ (tilde)

For example:

peasant & labo?r

peasant + labo?r

peasant | serf

lord ~ serf

The following:

peasant and labor

retrieves only records that contain both these words: *peasant*, *labor*.

For example: **The history of peasant labor.**

To search for words that are also used as Boolean operators, use quotation marks around the Boolean operator.

For example:

peasant "and" labor

retrieves only records that contain all these words: *peasant*, *labor*, and.

For example: **The story of the peasant and his labor.**

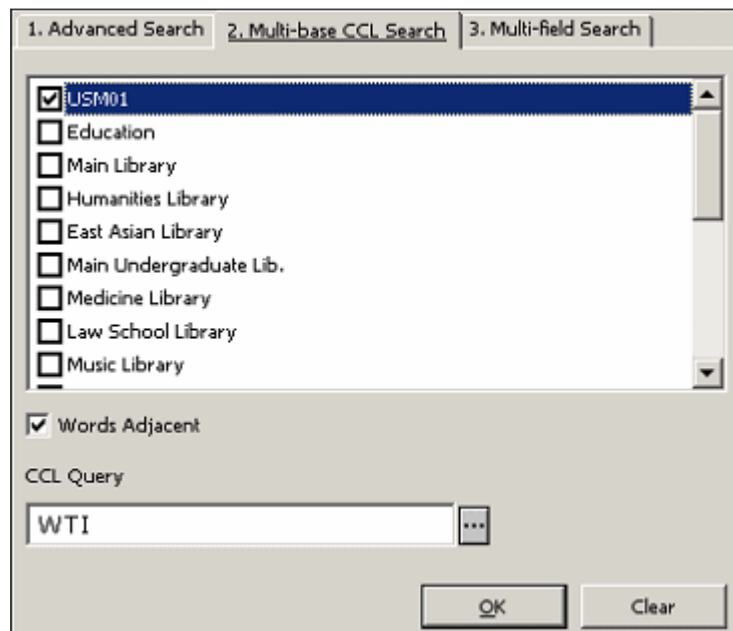
2.1.4 Parentheses

Parentheses may be used in a retrieval request. For example:

(data or edp) and (program? or system)

2.2 Multi-base CCL Search

The Multi-base CCL Search tab (shown below) lets you use Common Command Language to search for words in several different indexes at once.



You can use the Multi-base CCL Search tab to search more than one base at a time. First select the databases, and then type the keywords you are looking for.

You must specify the code of the word indexes to be searched. For example:

wti=(chem? or bio?) and *wau=jones* searches the **Words from Titles** and the **Words from Authors** indexes.

Selecting the Words Adjacent option instructs the system that the words in the search string must be in the same field and must appear next to each other in the record.

2.3 Multi-field Search

The Multi-field Search (shown below) lets you search for records using pre-set indexes. If you fill in more than one field, a Boolean *and* operation is performed:

Select the *Words Adjacent* option to indicate that the terms in the search string must be in the same field and must appear next to each other in the record.

2.4 Word Search for CJK

There are two ways in which the system searches in Chinese:

Both are dependent on adjacency.

- If the *adjacent* option is selected, the system looks for the exact string.

Example: A user enters a string of characters, *ABCD*. The system looks for the exact string, *ABCD*.

- If the *adjacent* option is not selected, the system breaks a given string into characters with the Boolean *AND* between them.

Example: A user enters a string of characters *ABCD*. The system breaks it into *A B C D* with the Boolean *AND* between the characters.

3 Browse Function

The Browse function enables you to look through an alphabetical list of phrases (such as titles, authors, subjects) from various records such as bibliographic records, authority records and so on. The Browse function can use Headings Indexes, Word Indexes, or Direct Indexes.

To use the Browse function, choose the *Browse* node.

3.1 Browse Query

When you choose the Browse node, the pane below is displayed. Choose a base, a headings index, and type the starting text of the phrase you are looking for:

The screenshot shows a web-based search interface titled "Browse". It contains the following elements:

- Base:** A dropdown menu with "USM01" selected.
- Headings List:** A dropdown menu with "Titles" selected.
- Enter Starting Text:** A text input field containing "green".
- Enter Include Text:** An empty text input field.
- Checkboxes:**
 - Include Expanded AUT Data
 - Include BIB/HOL data
 - Search keyword in headings
- Buttons:** "Go" and "Clear" buttons.

If the Include Expanded AUT Data check box is selected and the **Go** button is clicked, then additional authority information is displayed together with the heading. The Include Expanded AUT Data field determines whether or not the 260 (Complex See Reference - Subject), 664 (Complex See Reference - Name), 666 (General Explanatory Reference - Name), and 680 (Public General Note) fields from the USMARC authority record in the headings list are displayed, together with the linked bibliographic heading. Fields 300, 305, 310, 320 and 330 from the UNIMARC authority record in the headings list are displayed too.

When the **Include BIB/HOL Data** option is selected, the browse list changes, as follows:

- The columns change to include (1) the heading, (2) title and main entry from the bibliographic record, and (3) holdings (location) information from the HOL record (instead of columns that display the number of related records, a reference indicator, the heading, linked authority information, and base counts)
- The headings are no longer displayed once only; rather, the same heading is repeated for each separate bibliographic record, and for each holdings record.

If the Include HOL Data option is selected, the list will include the following information: Index text, Bibliographic Information and Holdings Information.

Note that the **Include BIB/HOL Data** option works only from the BIB library.

3.2 Search Keyword in Heading Checkbox

This checkbox is relevant only for libraries that are configured to perform a keyword search in the heading list. Check **Search Keyword in Headings** to enable users to search by keyword (as typed-in at the "Enter Starting Point" field) in the heading list. The "Enter Starting Point" text is used as a keyword (not just as a starting point of the heading) that is searched in the heading list. The system returns a list of headings that contain the requested keywords.

When **Search Keyword in Headings** is checked, the **Enter Include Text** text box is inactive.

The following is an example of a keyword search in headings: A user performs a heading keyword search for "football" and the system returns the following headings list: "All about football and basketball", "American football", "Football Association", "world cup- football", and others.

For more details regarding Keyword Search in Headings, refer to the Search Keyword in Headings section of the *Aleph 20.01 System Librarian's Guide - Web OPAC*.

3.3 Browse List

The system displays an alphabetical list of headings for you to browse through, with the text you typed appearing near the top of the list. The system also displays the heading before your request. The number of documents associated with each heading is also shown (in the # Docs column). Only headings that are relevant for the logical base are displayed. When the code of the search database is the same as a library code, the Browse list will include all headings, both linked and unlinked.

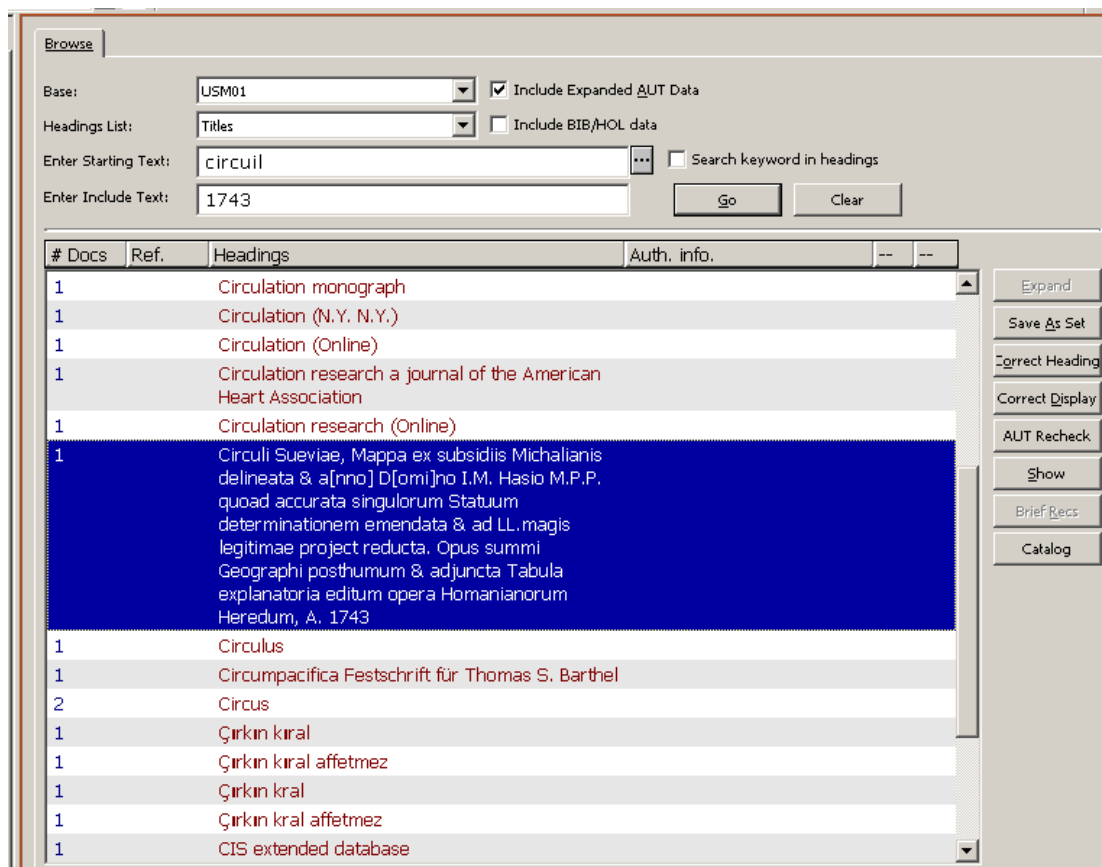
The screenshot shows the 'Browse' interface in the Aleph 20.01 System Librarian's Guide - Web OPAC. The search form includes the following fields and options:

- Base: USM01
- Headings List: Titles
- Enter Starting Text: bohém
- Enter Include Text: (empty)
- Include Expanded AUT Data:
- Include BIB/HOL data:
- Search keyword in headings:

The search results are displayed in a table with the following columns: # Docs, Ref., Headings, and Auth. info. The results list various headings related to Bohemia, such as 'Bogre penimiyot li-mehunanim', 'La Bohème', and 'Bohème Libretto Polyglot'. A sidebar on the right contains buttons for 'Expand', 'Save As Set', 'Correct Heading', 'Correct Display', 'AUT Recheck', 'Show', 'Brief Recs', and 'Catalog'.

To jump to a new location in the list type the new starting text in the **Enter Starting Text** field. You can enter up to 2000 characters in the **Enter Starting Text** field, so you can type the exact string to be retrieved.

To enable the efficient retrieval of long headings, type the specific string in the **Enter Include Text** field. This enables you to retrieve the exact heading efficiently by entering a specific string without having to type all the text.



3.3.1 Expand

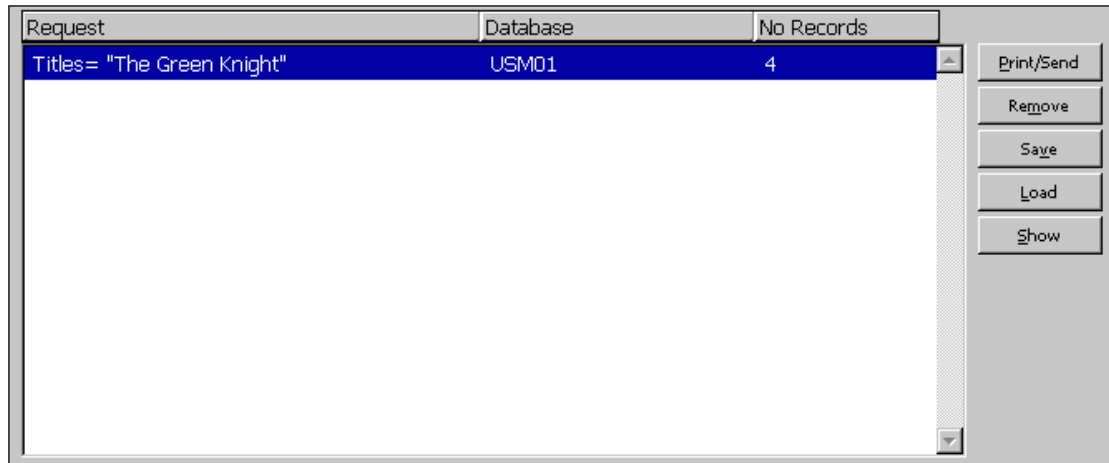
If you highlight an entry that has a related authority record, the Expand button is activated and you can click it to show the list of references from the Authority record associated with the selected heading. It enables the viewing of see, see also, and see from references. The Reference List window enables a direct transfer of the Authority record to the Records tab of the Cataloging module.

3.3.2 Save As Set

Highlight a single heading or a number of headings in the Browse List and click **Save As Set** to save as a set the records linked to the headings. A small window pops up, enabling you to identify the set by a name of your choice or simply to confirm the default name assigned to the set by the system.



The saved set will be displayed in the List of Sets in the Find node shown below:

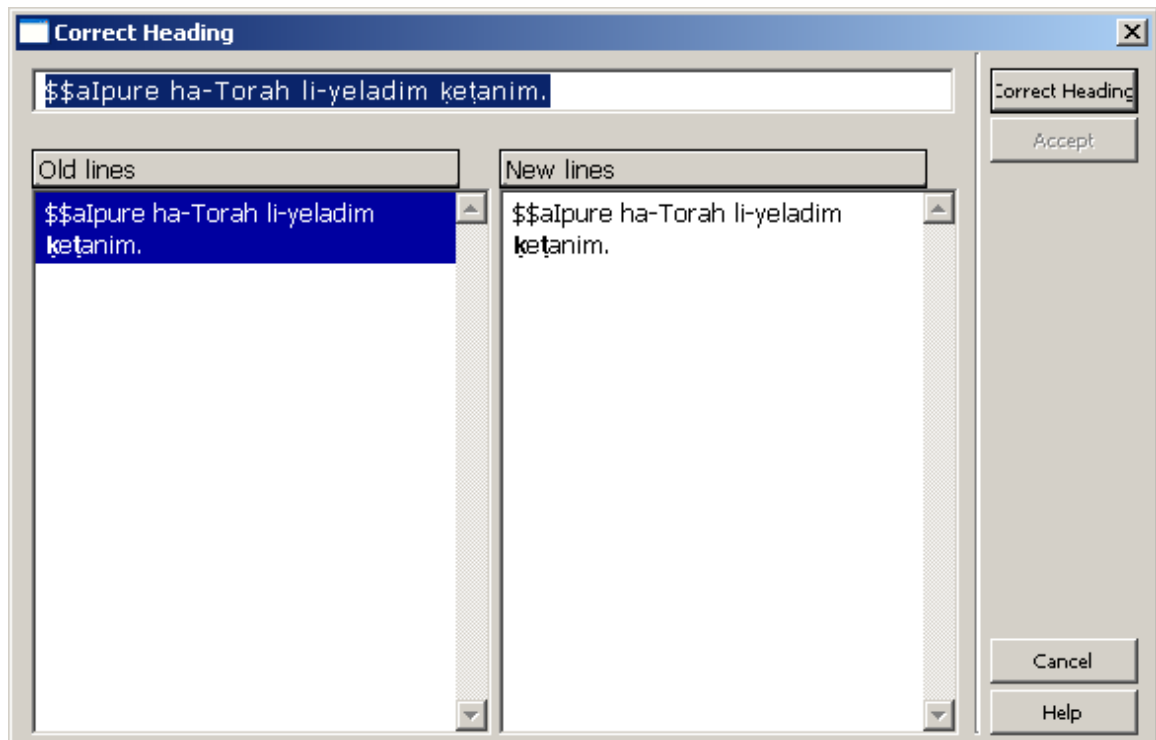


3.3.3 Correcting Headings

You can correct the highlighted heading by clicking **Correct Heading** displayed on the Browse List.

When **Correct Heading** is clicked for headings which are linked to an Authorities record, the following warning message is displayed, "Selected headings include authority related headings. Are you sure you want to correct the headings? Yes/No".

The Correct heading dialog box is displayed as follows:



To correct the selected heading, make changes in the upper line and click **Correct Heading** to view the changes you made on the right side of the dialog box (New lines). The previous lines are still displayed in the left side (Old lines). To accept the changes and update the Browse list, click **Accept** (after changes have been made, the button becomes active). If you want to make changes to the corrected heading before accepting the changes, you can edit the heading at the top of the dialog box and click **Correct** to view them in the New lines section. Note that all records connected to the corrected heading will be updated with the new text.

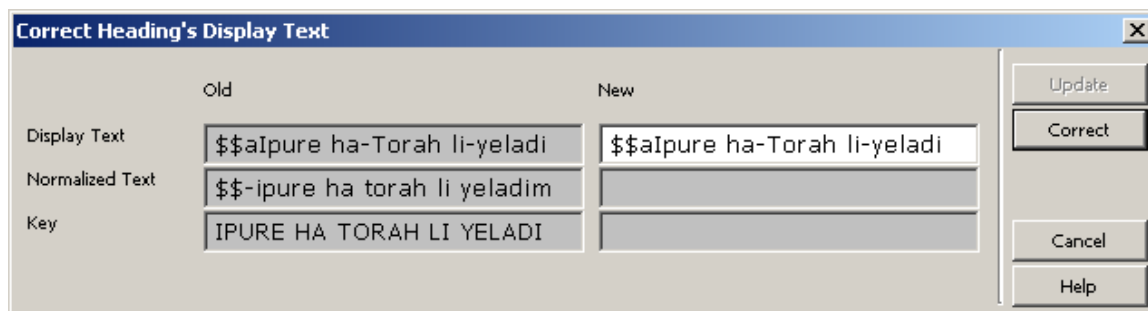
In order to delete a subfield, the contents of the subfield must be deleted, but the subfield code - including dollar signs - must not be deleted. For example, to delete subfield \$\$b from the heading "\$\$aPeople on the move:\$\$bstudies on internal migration" so that it becomes "\$\$aPeople on the move", enter the following text in the correction edit box (with subfield \$b empty):

"\$\$aPeople on the move\$\$b"

In order to change a subfield code, leave it as is and insert the new subfield code directly after it (preceding the subfield text). For example, to change \$\$b to \$\$g in the heading "\$\$aPeople on the move:\$\$bstudies on internal migration", enter "\$\$aPeople on the move:\$\$b\$\$gstudies on internal migration" .

3.3.4 Correcting Display

You can correct the display text of the highlighted heading by clicking **Correct Display** on the Browse node. The Correct Heading's Display Text dialog box is displayed as follows:



The Correct Heading's Display Test dialog box appears on the left side of the dialog box (Old). There you can see the current forms of the heading, including the display text, the normalized text and the filing key of the heading. To correct the display text of the selected heading, correct the display text that appears in the right side of the dialog box (New) and click Correct to view the changes you made. To accept the changes and update the Browse list, click the Update button. Note that the display text of the heading can only be corrected if the original normalized form of the heading and the filing key of the heading are not modified by this change. For example, you can correct the punctuation.

3.3.5 AUT Recheck - Authority Recheck for Selected Headings

Click **AUT Recheck** to initiate rechecking of a heading for a matching Authority record. Rechecking can be activated only if the heading is not related to an authority record and only if a single heading has been chosen.

This action sets the heading to NEW, in order that the *Update BIB from AUT* (ue-08) process will handle the heading again.

The ue-08 process enriches the headings of the BIB library with data from a matching record in the AUT library. This procedure checks headings in the BIB library against an AUT library and adds cross-references and/or multi-lingual equivalents to the BIB headings table.

3.3.6 Show

Click **Show** to see the bibliographic records associated with a heading. These records are explained in Show on page 21.

3.3.7 Brief Records

Some libraries use brief record displays. The brief record display format is used to sub-arrange the records that are attached to a particular heading. When a heading has brief records attached to it, the **Brief Recs** button becomes active. If you click it, the records will be shown via the Brief records tab in the Show node.

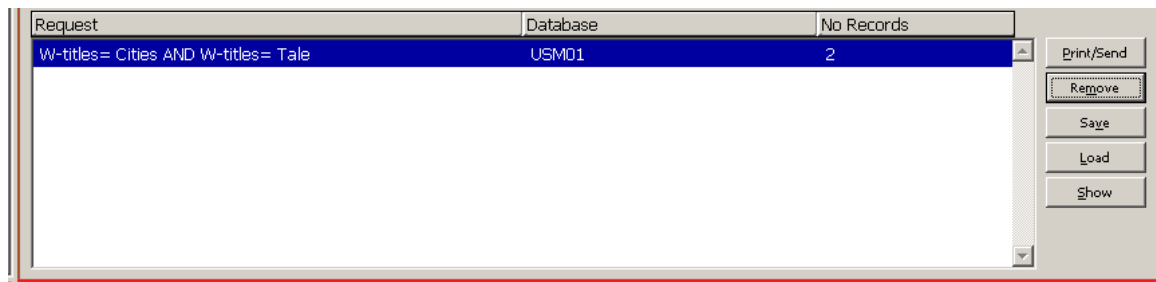
3.3.8 Catalog

Click **Catalog** to directly transfer records related to one or more headings to the cataloging tab of the Cataloging module. You can select multiple headings, but this action is limited to 100 records.

4 List of Sets

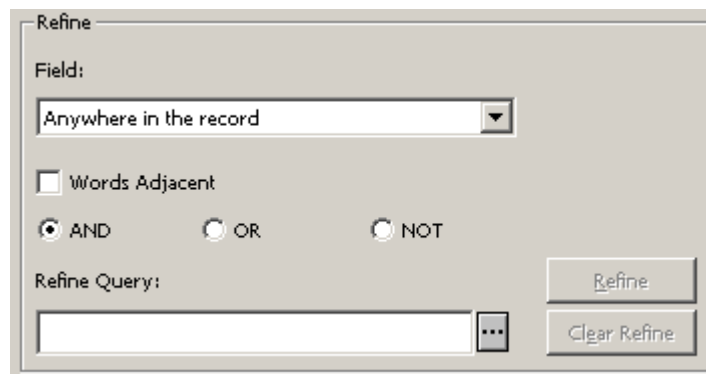
The List of Sets (shown below) displays the set of records created as a result of a Find query, or, in the Browse function, as a result of saving selected records using the Save As option. The list appears in the lower pane of the Find node.

To see brief and full display of records in a specific set, highlight a set and click **Show**. The display of the records is explained in Show on page 21.



4.1 Refine

If a set is too large or too small, you can narrow or broaden the search by entering "Refine" qualifiers in the right side of the right pane in the Find node:



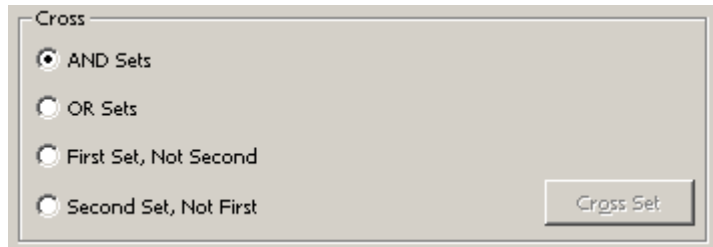
To broaden the search, choose, for example, OR. To narrow a search, choose AND, NOT or a specific field to perform the search in, then enter a string in the Refine Query field. The **Refine** button will now be active. To perform the refine operation, click **Refine**.

The Refine action will only be performed on an existing set. The selected set is crossed with a new find query in order to produce a new set that is broader or narrower than the original one.

If you select the *Words Adjacent* option, the system retrieves records in which the words in the search string are in the same field (word index) and appear next to each other in the record.

4.2 Cross Sets

You can cross sets by highlighting the appropriate sets, choosing the appropriate cross function, and clicking **Cross Set** (which will only be active if more than one set is chosen).



For crossing sets with AND and OR, choose as many sets as you want. For *First set not second* and *Second set not first*, you may choose two sets only.

First set not second will retrieve all records that contain the keyword(s) of set 1 but not the keyword(s) of set 2. *Second set not first* is the opposite condition, that is, it will retrieve all records that contain the keyword(s) of set 2 but not those of set 1.

5 Show

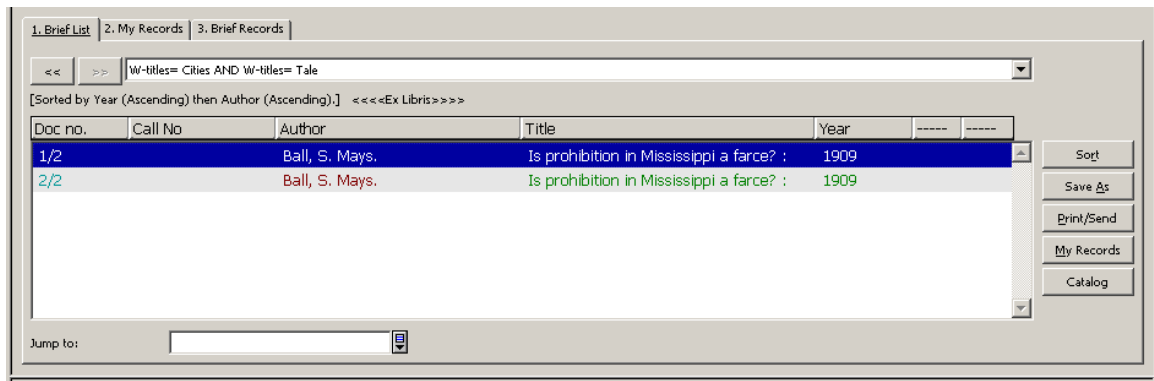
This chapter includes the following sections:

- Brief List
- My Records
- Brief Records
- Full+Link Format
- Additional Full Formats

From the Browse and Find functions, you can choose to see Bibliographic records in the Brief, Full+Link, or other Full formats (such as MARC tags, Catalog card and so on). You can set up the Search Function to display a set in the List of Sets in the Find node after a FIND command, or to immediately display the records themselves. A threshold can be set so that if there are under a certain number of records in a set, the records will be displayed in Full format. If, on the other hand, there is more than that number of records in a set, the records will be displayed in a set.

5.1 Brief List

To view the Brief format of records in a set, highlight a set in the Find node or a line in the Browse node and click **Show**. The window below is displayed.

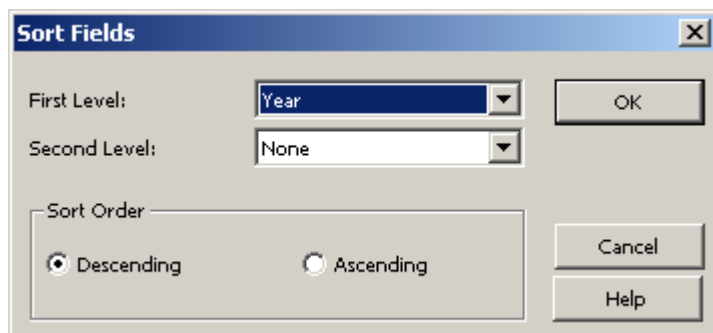


You can select either one or several lines to perform the following actions:

- Save the records to the List of Sets on the Find node by clicking **Save As**.
- Save records to the My Records tab for later use by clicking **My Records**.
- Print, save on local disk or send by e-mail selected records by clicking **Print/Send**.
- View the records in the Catalog module by clicking Catalog. This option is available only from the Search tab in the Cataloging module.

5.1.1 Sort

You can sort the records in the Brief List by clicking **Sort** and filling in the following form:



5.1.2 Save As

You can save a set of records to the List of Sets in the Find node by highlighting the appropriate records and clicking **Save As**. A small window pops up, enabling you to identify the set by a name of your choice or simply to confirm the default name assigned to the set by the system.



5.1.3 Jump To

When a set shown in the Brief List contains a large number of records, you can browse for a specific headings string to redisplay the list from the text of the appropriate heading. For example, you can enter a string starting with *school* to jump to a title that begins with the word *school*.

5.2 My Records

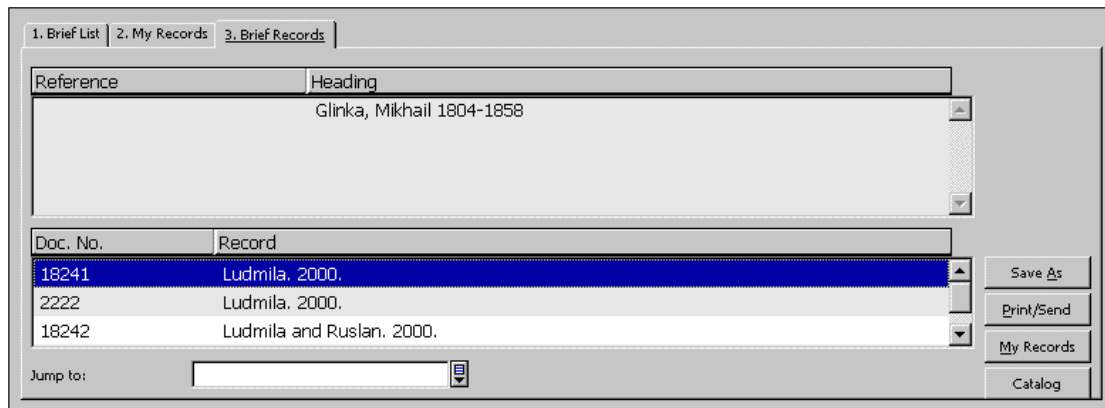
You can save records to the My Records tab for further use. You do this from the Brief List tab by clicking **My Records**. The My Records tab enables you to perform extra activities such as:

- Saving the records on a local PC by clicking **Save**.
- Loading records from a local PC by clicking **Load**.
- Removing all records from the tab by clicking **Clear**.
- Removing highlighted records from the tab by clicking **Remove**.
- Printing, saving on local disk or sending by e-mail selected records by clicking **Print/Send**.
- Viewing records in the Catalog module by clicking **Catalog**. This option is only available from the Search tab in the Cataloging module.

5.3 Brief Records

The brief record display format is used to sub-arrange the records that are attached to a particular heading. You send the records to the Brief Records tab by clicking the **Brief recs** button in the Browse node.

The upper pane of the Brief records tab displays the common heading of the records. The lower pane of the tab displays the bibliographic record number and its title.

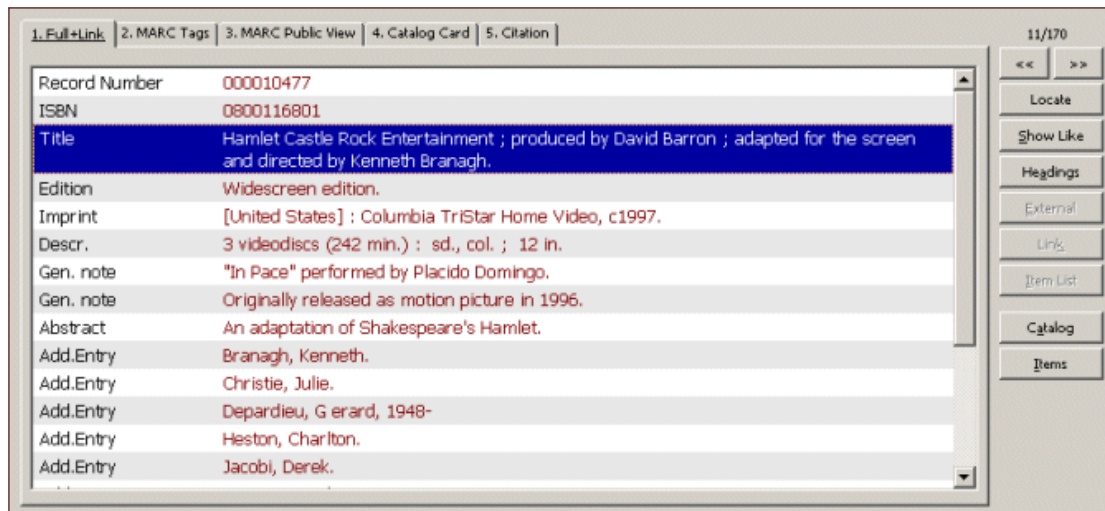


The following options are available from this tab:

- Saving the records to the List of Sets on the Find node by clicking **Save As**.
- Saving the records to the My Records tab for later use by clicking **My records**.
- Printing, saving on local disk or sending by e-mail selected records by clicking **Print/Send**.
- Viewing the records in the Catalog module by clicking **Catalog**. This option is only available from the Search tab in the Cataloging module.
- **Jumping to** a requested heading.

5.4 Full+link Format

The Full+Link format (shown below) is a more complete display of the bibliographic record. Above the buttons on the right side of the screen you can see the ordinal number of the displayed record and the total number of records in the selected set. In the example shown below, you can see the display of record 11 out of 170 in the set:



Various buttons on this screen are activated, depending on the links that exist between records. Each button is described below.

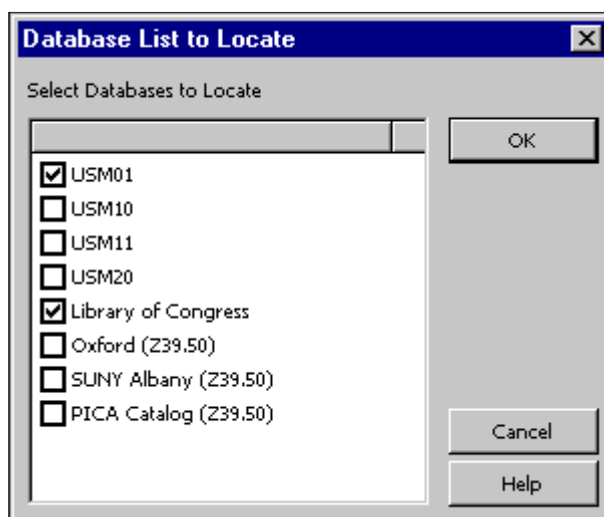
Previous and Next

Click the << button to display the previous Brief List record, and the >> button to display the next Brief List record.

Locate

To locate similar records in other databases, follow these steps:

1. Click **Locate**. The following window appears:



2. Choose one or more databases and click **OK**. The set containing the located records will be added to the List of Sets in the Find node.

Show Like

This option is available for some fields of the record, such as subject and author. When you highlight a field (for example, Subject Humorous poetry, American) and click **Show Like**, the Brief List of records is displayed, showing other records that have the same subject (Humorous poetry, American).

Headings

This option is available for some fields of the record, such as subject and author. When you highlight a field (for example, author: Shakespeare, William) and click **Headings**, the Browse List associated with the highlighted field will be displayed, with the highlighted text (Shakespeare, William) at the top of the alphabetical list.

External

The EXT field appears in a record when there is a link to an external document, image or program. When you highlight the EXT field, the External button will become active. Click **External** to see the document or image or to run the program.

Link

The cataloger may have linked two bibliographic records together in an UP, DOWN, or PARALLEL relationship. When you highlight the Link field in the bibliographic record, the Link button will become active. Click **Link** to see the linked record displayed in the Full format.

Item List

Click **Item List** to see the list of items associated with the bibliographic record and to read information such as each item's call number, loan status, due date, and so on.

Catalog

This is an example of a button which transfers the record to a functional tab in the module. In this case, taken from the Cataloging module - when you click **Catalog**, the Records tab opens, allowing you to make changes in the cataloging record.

In the Acquisitions/Serials module, there are buttons for Acquisitions (the Order List tab) and Serials (the Serials tab); in the Circulation module there is a button for Circulation (Items tab).

Items

This is another button which transfers the record to a functional tab in the module. This example is taken from the Cataloging module - when **Items** is clicked, the Items tab opens.

5.5 Additional Full Formats

In addition to the Full+Link format, four other Full formats are available by clicking the tabs that appear in the Full+Link screen. The default formats are **MARC Tags**; **MARC Public View**; **Catalog Card** and **Citation**, which display the bibliographic information in a paragraph format. Your system librarian can modify these formats and add more.

Note that the display of these formats does not have the functional buttons such as those described above for the Full+Link screen.

6 Save/Send/Print/Load records

You can print, send by e-mail or save (on your local workstation) an individual bibliographic record or a set of records. You can also save a set of records on the

server. A set saved on the server can be recalled into Search or used by other functions, such as a batch service.

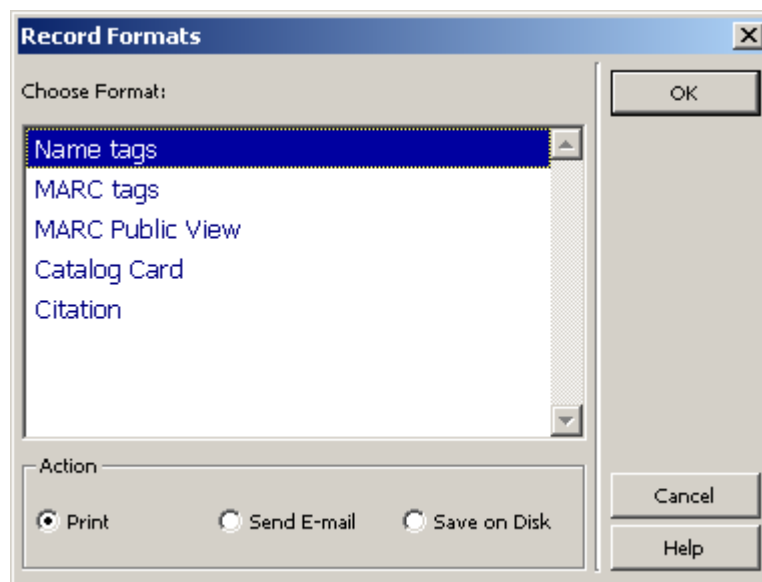
6.1 Print/Send by E-mail/Save locally

To print, send by e-mail or save records locally, perform the following steps:

1. Either highlight a record or records in the upper pane in the Show node, or in any one of the three tabs (Brief List, My Records, Brief Records), or

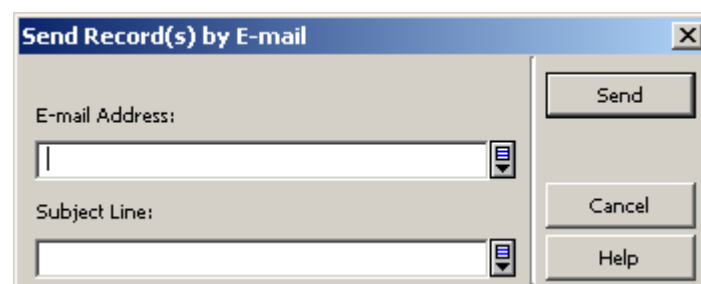
Highlight a set of records in the lower pane in the Find function.

2. Click **Print/Send**. The following window appears:



3. Choose a format and an action (Print, Send E-mail or Save on Disk), and click **OK**.

- If you choose **Send E-mail**, the following window appears:

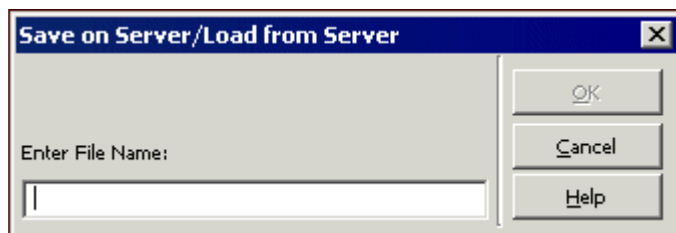


- If you choose **Print** or **Save on Disk**, the resulting action depends on the Print configuration setup on your workstation:

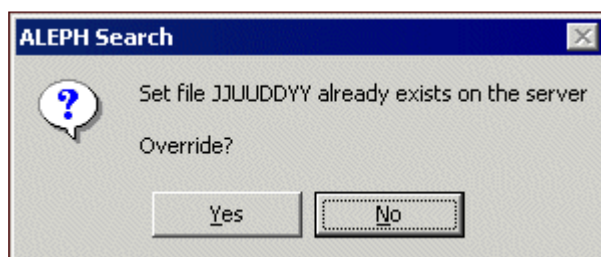
- Normal Printing + Print sends the printout to the workstation's default printer
- Normal Printing + Save on Disk displays a prompt window for "save in..."
- Preview displays the printout in a Browser window
- View Raw XML displays the printout in XML format in Notepad
- Browse XML displays the printout in XML format in a browser window

6.2 Set of Records

You can save, on the server, the record numbers of a set in the lower pane of the Find node. Highlight the set (only a single set can be chosen) and click **Save**. The following window will be displayed:



Enter a file name and click **OK**. If the file name is already in use on the server, the following message appears:



The record numbers are saved in a file in the `./alephe/scratch` directory on the server.

6.3 Load from Server

Click **Load** to recall a previously saved set of records from the server. This displays the Save on Server/Load from Server window shown above.

