

WISCAT (AGent) Public Access Catalog (PAC) Administration Quick Reference Guide

This Guide is intended as a *quick reference* to the use of features and functions available through the WISCAT PAC Administration module.

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GETTING STARTED

Logging In

Staff login to WISCAT union catalog is password-protected. Below are the PAC Administration features and functions available to you.

A *single login* provides access to PAC Administration and other staff modules such as User Administration or CAT (Cataloging) Administration.

1. Enter your library code in the Library text box, as necessary.
 - By default, the system will prefill the library code for your library.
2. Enter your library code in the **Username or Barcode** text box.
3. Enter the password in the **Password or PIN** text box.
 - Administration modes have the same password as staff has always used in WISCAT. (Contact WISCAT Support staff if you need the password.)
4. Click the **Go** button to submit your Staff Login request.
 - If you enter incorrect information in the Staff Login form, an error message displays. Click the **Try Again** button to return to the Login screen.

Changing the Staff Password

Libraries using WISCAT to submit interlibrary loan requests are encouraged NOT to change passwords.

1. **From WISCAT:** Select **Staff Menu** to access the administration modes, on the **Staff Menu** select **My Account**.
 - The My Account screen displays.
2. Remove the current Password in the **Password or Pin** text box.
3. Enter the new password in the **Password or Pin** and **Confirm Password or Pin** text boxes.
4. Click **Submit** to save the new Staff Password.
 - If the new password is not duplicated in both **Password or Pin** text boxes, an error message displays. Click the **OK** button to return to the My Account screen.
 - If your request is *successful*, the new Staff Password will be in effect the next time you login.

Logging Off

1. Click on **Sign Out** under the WISCAT banner
 - **Sign Out** is also an option on the Staff Menu

SCOPING

Modifying Scoping Profiles

From **WISCAT**: Click on **Staff Menu** to access the administration mode then on the **PAC Admin** menu, select **Define/Maintain Scoping Levels**.

- The Define Scoping Levels screen displays

Modifying Scoping Levels

1. **Scoping level headings** are used to describe the group of libraries included in a specific scoping level. Headings display in the drop down list in the **Scoping In** box on the **Advanced Search** screen.
2. Enter scoping level labels in the **Level 1** through **Level 9** text boxes of a database, as necessary.
3. Select the radio button for the scoping level you wish to use as the default scoping level. (**All Libraries** is the original default set by WISCAT.)
4. Click the **Submit** button.

Modifying Location Display Groups

1. From the **PAC Admin** menu, select **Define/Maintain Location Display Groups**.
2. Enter display group labels in the **Group 1** through **Group 9** text boxes of a database, as necessary.
3. Click the **Submit** button.

Setting Library Scoping

1. From the Define Scoping Levels screen, click on the **Configure** button next to the Scoping Level you want to modify.
2. The View Scoping screen displays with the Scoping level label in the Scoping window.
3. Select the libraries you wish to include in the scoping definition session (the libraries you wish to assign to scoping levels and/or display groups):
 - The **All Libraries** view displays all member libraries arranged alphabetically by Region code (locations not included in a Region head the list).
 - To locate libraries by a Region and/or keyword search, select **Additional Libraries** from the View pull down menu. Select the desired Region and/or enter keywords in the Library Name text box. Click the **Submit** button.

- If there are no matches to your selection criteria, an error message displays. Click the **Go Back** button to return to the Set Library Scoping screen and revise your selection criteria.
 - The **Scoped Libraries List** displays libraries meeting the search criteria (Region code, etc.)
4. To select all libraries which are currently members of the scoping level, select **All Scoped Libraries** from the View pull down menu.
 5. Modify the scoping member information for each listed library, as appropriate.
 - To assign a library to a display group, select the appropriate group label on the **Location Group** pull down menu. If you *do not* want the library assigned to a display group, select **None** on the **Location Group** pull down menu.
 - To assign a library to a scoping level, click in the appropriate radio box in the far left column; the column heading identifies the Scoping Level by name.
 - A library may also be assigned by clicking on the Library Name and selecting the Scoping Level radio buttons.
 6. Click the **Submit** button to effect the selections and return to the View Scoping screen.
 8. Click the **Close** button on the View Scoping screen. The system returns to the Define Scoping Levels screen.

DISPLAY PROFILES

Modifying Record Display Profiles

Changes to Record Display Profiles are accomplished in an identical manner for both the Full Record and Brief Record display profiles.

1. **From WISCAT:** Select the **Staff Menu** to access the administration mode, then on the **PAC Admin** menu select **Record Display Profiles**.
 - The Record Display Profiles screen displays.
2. Select the radio button for the record display profile you wish to modify, either **Full Record** or **Brief Record** and the Material Format/Type and then click the **Submit** button; the Tags For Record Display screen displays.
 - From the Tags For Record Display Profiles screen, you may choose to add a field, change a field, delete a field, or move a field.

Adding a Field

1. From the Tags For Record Display screen, click the **Add** button; the Add Tag Maintenance screen displays.
2. Enter the following information:
 - **MARC Tag:** Enter the three digit MARC tag for the field you wish to add.
 - **Display Label:** Enter a descriptive name for the field. The **Display Label** is used to identify the field when a Title List (Brief Record Display) or Full Record Display is viewed in Labeled Format.
 - **Show:** Identify which subfields of the tag will be displayed by selecting the appropriate radio button:
 - ◇ **All Subfields** – Displays *all* subfields of the tag.
 - ◇ **Only Listed Subfields** – Displays *only* those subfields identified in the **Listed Subfields** text box.
 - ◇ **All Except Listed Subfields** – Displays all subfields *except* those identified in the **Listed Subfields** text box.
 - **Listed Subfields:** If either the **Only Listed Subfields** or **All Except Listed Subfields** option is selected for the **Show** parameter, enter the appropriate subfields. Enter subfields as a continuous list, with *no* spaces. *Do not* separate subfields with commas.
3. Determine the location in which the *added* tag is to be displayed.
4. Select the *position* in which you wish the *added* tag to display (in relation to a *destination* tag), either **Before** or **After**, from the **first Place This Tag** drop-down menu. Select the *destination* tag from the **second Place This Tag** drop-down menu.
5. Click the **Submit** button. The system returns to the Tags For Record Display screen, with the added tag shown in the selected location.
 - If you enter an *invalid* MARC tag in the **MARC Tag** text box, an error message displays. Click the **OK** button to return to the Record Display Profiles screen.

Changing a Field

1. From the Tags For Record Display screen, select the field you wish to change in the field list box, then click the **Change** button; the Change Tag Maintenance screen displays.
2. Change the following information as desired:
 - **MARC Tag:** Edit the three digit MARC tag for the selected tag.

- **Display Label:** Edit the name for the field. The **Display Label** is used to identify the field when a Title List (Brief Record Display) or Full Record Display is viewed in Labeled Format.
 - **Show:** Identify which subfields of the tag will be displayed by selecting the appropriate radio button:
 - ◇ **All Subfields** – Displays *all* subfields of the tag.
 - ◇ **Only Listed Subfields** – Displays *only* those subfields identified in the **Listed Subfields** text box.
 - ◇ **All Except Listed Subfields** – Displays all subfields *except* those identified in the **Listed Subfields** text box.
 - **Listed Subfields:** If either the **Only Listed Subfields** or **All Except Listed Subfields** option is selected for the **Show** parameter, enter or edit the appropriate subfields. Enter subfields as a continuous list, with *no* spaces. *Do not* separate subfields with commas.
3. Click the **Submit** button. The system returns to the Tags For Record Display screen.
 - If you enter an *invalid* MARC tag in the **MARC Tag** text box, an error message displays. Click the **OK** button to return to the Modify Record Display Profiles screen.

Deleting a Field

1. From the Tags For Record Display screen, select the field you wish to delete in the field list box.
2. Click the **Delete** button; a verification dialog displays.
3. Click the **OK** button on the verification dialog to delete the field and return to the Tags For Record Display screen.

Moving a Field

1. From the Tags For Record Display screen, select the field you wish to move in the field list box, then click the **Move** button; the Move Tag Maintenance screen displays.
2. Select the *position* in which you wish the *selected* tag to display (in relation to a *destination* tag), either **Before** or **After**, from the **first Place This Tag** drop-down menu.
3. Select the *destination* tag from the **second Place This Tag** drop-down menu.
4. Click the **Submit** button. The system returns to the Tags For Record Display screen, with the selected tag shown in the new location.

MANAGING SEARCH OPTIONS

Selecting the Default Search Method

1. **From WISCAT:** Click on **My Preferences** under any one of the search screens,
- **OR** -
From Staff Menu: Open **My Account** and select **My Preferences**. The **User Preferences** screen displays.
2. In the **Default Search Indexes** section, select the desired search method from the Select Default Search Method drop down menu.
3. Click the **Submit** button and select **OK** in the pop-up window “Apply changes to the current session?”

You must exit WISCAT and log in again for this change to actually take effect. The User Preferences set when logged in as staff does **not** affect the public access WISCAT.



Selection of the default search method for your library patrons/users (public access) is made from the **User Admin** menu, Edit User Accounts, in the Guest account using the Edit Preferences feature.

MANAGING SEARCH RESOURCES

Working with Resource Headings

Resource headings are used to create *category groupings* (folders) on the **Resources** menu shown on *each* WISCAT Search screen. WISCAT is pre-configured with a set of default resource headings. Resource headings may be added, deleted, or modified by staff with PAC Admin access.

Define Resource Headings

- **Add** the name of the new resource heading in the **Add A New Heading** text box; click the **Submit** button.
- **Edit** the name of an existing resource heading in the appropriate **Headings** text box. When all desired resource headings have been edited, click the **Submit** button.
- **Arrange** the resource headings by using the text boxes to the right of each resource heading to enter the desired display sequence; click the **Submit** button to save your changes.
- A  icon is shown on the Define Resource Headings screen to the left of each resource heading to which no search sources are currently assigned. To **delete** a resource heading click the  icon to the left of the resource heading you wish to delete; a confirmation message displays. Click the **OK** button to continue with the deletion.

Configuring the Resources Menu

The **Resources** menu may be configured to suit the *specific* needs of your library's guests, patrons/users, and staff members. Each WISCAT member library retains *complete control* over the content and arrangement of the Resources menu for their library. The Resources menu is configured using the **Search Resources** screen.

To configure the **Resources** menu, you must:

- Select the search Resources you wish to include in the **Resources** menu, and assign them to the appropriate user levels.
- Assign each selected search resource to *one or more* resource headings.
- Configure the default search resources.
- Arrange the sort order of resource headings in the **Resources** menu.
- Arrange the sort order of search resources within each resource heading.

Additionally, you may disable search resources that you no longer wish to make available to *any* user level.

Selecting Search Resources

You must select *each* search resource you wish to include in the **Resources** menu for your library. Selected search resources may be enabled for *one or more* user levels.

1. The Search Resources screen shows a listing of *all* search resources currently available for your library.
 - The names of databases defined by WISCAT are shown in "plain" type. The definitions for these databases *cannot* be edited.
2. Use the checkboxes in the **Selected** column to select the search resources you wish to include in the **Resources** menu for *your library*.
3. Click the **Submit** button. The Search Resources screen refreshes to display your changes. A checkbox is added to the **Default** column for *each* selected search resource. The **Display For** checkboxes are selected, by default, for *each* user level; **Guest**, **Patron** and **Staff**.
4. Use the **Display For** checkboxes to enable or disable *each* selected search resource for *each* available user level, **Guest**, **Patron** and/or **Staff**, as desired.
5. Click the **Submit** button. The Search Resources screen refreshes to display your changes.

Assigning Search Resources to Resource Headings

You must assign *each* selected search resource to *one or more* resource headings. If you *do not* assign a selected search resource to *at least* one

resource heading, the search resource *will not* be included in the **Resources** menu.

1. Access the Search Resources screen. The Search Resources screen shows a listing of *all* search resources currently available for your library. *Selected* search resources are indicated by a in the **Selected** column.
2. Click the **Headings - Settings** button for the search resource you wish to assign to a resource heading. The Headings screen for the associated search resource displays in an *additional* browser window. (The **Headings - Settings** button is active for selected search resources *only*.)
3. Select the *first* resource heading to which you wish to assign the associated search resource from the *first* drop-down menu.
4. If desired, assign the search resource to *additional* resource headings using the remaining drop-down menus as necessary. (To *remove* a search resource from a resource heading, select **Choose Heading** from the appropriate drop-down menu.)
5. Click the **Submit** button to save your changes then click the **Close** button to close the headings screen and return to the Search Resources screen.

Configuring the Default Search Resources

You may designate *one or more* selected search resources as *default* search resources. Default search resources are *automatically* selected in the **Resources** menu each time a guest, patron/user or staff member logs into WISCAT, or whenever the **Reset** button on a WISCAT search screen is clicked.

1. If necessary, access the Search Resources screen. The Search Resources screen shows a listing of *all* search resources currently available for your library. Search resources *currently* selected as default search resources are indicated by a in the **Default** column.
2. Use the **Default** checkboxes to select the desired default search resources.
3. Click the **Submit** button to save your changes.

Arranging Search Resources

1. If necessary, access the Search Resources screen. The Search Resources screen shows a listing of *all* search resources currently available for your library. *Selected* search resources are indicated by a in the **Selected** column.
2. Click the **Display Resources** button. The **Resources** screen displays in an *additional* browser window. The **Resources** screen displays *all* currently selected search resources under the resource headings to which they have been assigned. Resource headings are displayed in their currently selected sort order.

3. Use the text boxes to the left of each search resource to enter its desired display sequence within its associated resource heading.
 - You can enter *any* number from "0" through "99" as a display sequence number.
 - The changes will appear in the **Resources** menu on the search screens.

Removing Search Resources

You may remove a search resource from appearing in the **Resources** menu for your library. Selected search resources may be disabled for *one or more* user levels.

1. Access the Search Resources screen. The Search Resources screen shows a listing of *all* search resources currently available for your library.
2. If the search resource you wish to disable is currently selected for display in the **Resources** menu, unselect the search resource by using the associated **Selected** checkbox.
3. Click the **Submit** button. The Search Resources screen refreshes to display your changes.
4. The changes will appear in the **Resources** menu on the search screens.