

# Library Scoping in WISCAT

Scoping is the function used to configure WISCAT to search holdings within your library only, libraries in your library system, and/or to any other WISCAT member library or region. Those holdings can also be grouped together to display in the Locations Information area on a full WISCAT record.

1. Login as staff and select **Staff Menu**
2. Select **PAC Admin** from the menu bar if it is not already displayed.
3. Select **Define/Maintain Scoping Levels** from the **PAC Admin** menu.  
The **Define Scoping Levels** screen displays.
  - **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.
4. **All Libraries** is pre-configured as a scoping level.  
Up to **9 additional levels** may be established by your library.
5. Enter a description in the **Level 1 Scoping Labels** text box for your library system.  
For example, enter Arrowhead Library System.
6. Select the radio button for this scoping level if you want staff searches to default to this scoping group.  
The **default scoping level** determines which libraries' holdings are retrieved in search results *unless* the searcher chooses one of the other available scoping levels for a specific search.
  - **All Libraries** is the pre-configured Default option
7. Click the **Submit** button to make any changes take effect.  
The **Define Scoping Levels** screen displays again.

***You have now NAMED a scoping level for your library system.  
Continue with the steps below to select the libraries to be included in the Scoping group.***

8. On the **PAC Admin** menu, select **Define/Maintain Location Groups**.  
Enter a label for the display group heading for your library system in the **Group 1** text box. For example, enter Arrowhead Library System.
9. Click the **Submit** button.  
The **Define Location Groups** screen displays again.

***You have now created a label describing a group of selected libraries to be listed at the top of the Locations Information on a WISCAT record.  
Continue with the steps below to select the libraries to be included in this group.***

10. **Return to the Define Scoping Levels function.**  
Click on the **Configure** button now displaying next to the **Scoping Label** text box on the **Define Scoping Levels** screen  
.  
The **View Scoping** form displays.
  - The scoping label displays in the **Scoping** box. All other scoping labels for your library are visible on the Scoping pull down menu.

- **All Libraries** displays in the **View** box. Other view choices include All Scoped Libraries, Selected Libraries, and all other Scoping Level labels listed on the Define Scoping Levels form.

**11.** Select **Selected Libraries** in the pull down menu to display the screen showing **Select Libraries Where Region =**, select the library system or you want to add to the scoping group. Or, a library name may be searched for using the **Library Name =** text box.

**12.** Click the **Submit** button.

The **View Scoping** screen displays. All libraries in the library system should be listed.

**13.** Click in the radio box associated with the library system or the individual library(ies) you want included in a **Scoping Group**.

In the **Location Group** column use the pull down menu associated with the library system or library(ies) you want to assign to a **Location Group Label**. It is not necessary for a library to be in a Scoping Level to be assigned to a Location Group.

**14. Submit prior to leaving each page** to save the selections on that page. This mandates periodic saving to minimize loss in case of web connection issues or accidental logout, etc. If mistakes are made on a page, the work on previous pages will remain unaffected.

**Remember:** A library may be assigned to *more* than one Scoping Level but can only be assigned to *one* Location Group.

Copy Scoping allows a scoped group to be automatically copied as another scoped group. Both scoping levels must already exist.

For example, two scoping labels/groups are named "City Libraries" and "City High School Libraries". Level 2 is a subset of Level 1. Rather than scope from scratch when setting up Level 2, use the **Copy Scoping** feature to set Level 2 to automatically mimic Level 1. Once copied, modify Level 2 to remove any non-high school libraries. The Copy Scoping feature is intended to be a short-cut when two different scoping levels contain many of the same libraries.

## Location Groups Configuration

- After a Location Group has been configured as described above, all libraries within the Group may be viewed using the Configure button next to the Location Group label on the Define/Maintain Location Groups screen.
- Any changes to a Location Group must be made by entering the Scoping Level configuration area. Changes *cannot* be made by using the Location Group configure button.