User's
Guide

VTLS | VIRTUA
Integrated Library System

Chameleon
*i*Portal

Virtua ILS – Integrated Library System

Chameleon *i*Portal
User's Guide
Version 42.6
March 2003

Table of Contents

Table of Figures

1. Introduction

The Chameleon *i*Portal is Virtua's public Web interface. Your patrons can access your library's OPAC from within your facilities or remotely. Additionally, you can configure the *i*Portal to provide access to resources outside of the Virtua system and outside of your library.

The functionality and appearance of the Chameleon *i*Portal is controlled by over 200 settings in configuration files and by the customizable HTML template files. You can create one or more custom interfaces and configure the functionality based on the needs of your library and your patrons.

While we provide default interfaces and default configuration files, you will need to modify these files to work best for your library. This guide documents only the basic functionality of the Chameleon *i*Portal. You can use this information to get an idea of how certain aspects of the *i*Portal function. Since your *i*Portal will be customized for your library's unique needs, we may discuss features in this guide that are not available in your *i*Portal or that function or appear differently.

While in many cases the instructions provided in this document may closely mirror some of the functionality in your *i*Portal, you should closely evaluate the procedures before making them available to your patrons.

1.1 Using this Guide

The *Chameleon iPortal User's Guide* is one guide in a four-part set of Chameleon *i*Portal documentation. Other documents in this set are the . . .

- *Chameleon iPortal Interface Customization Guide* - Documents the information that you need to create or modify an interface for the Chameleon *i*Portal. This guide includes descriptions of header and object directives and instructions for generating an interface.
- *Chameleon iPortal Configuration Guide* - Describes in detail how to configure the features of the Chameleon *i*Portal. Topics covered include working with the **chameleon.conf** file.
- *Chameleon iPortal Drop-in/Pull-out (DIPO) Components User's Guide* - Describes how to configure and use the Drop-in/Pull-out (DIPO) components of the Chameleon *i*Portal such as the Thesaurus Search Interface and Extended Bibliographic Services.

The 42.6 version of the *i*Portal is designed to work with a 42.x version of the Virtua server. If you try to use this *i*Portal with another version of the Virtua server, some functionality may not be available.

While future releases of the *i*Portal will include functionality not covered in this guide, the functions discussed here will remain mostly consistent. If you are using a later version of the *i*Portal, contact VTLS for release notes describing new or modified functionality.

Additionally, if you are using an earlier version of the *i*Portal, the functions will also be mostly consistent, but there may be some features discussed in this guide that are not available in your version. For information on upgrading your *i*Portal to the most recently released version, contact your customer service representative.

Use the list below and the table of contents to locate specific information in this guide. For your easy reference, the guide also offers a table of figures, an index, and a reference section consisting of appendices. In addition, each chapter in this guide, where appropriate, begins with a list of hyperlinked topics that are included in the chapter.

For:	**See:**
General information about using the Chameleon *i*Portal	Chapter 2
Information about OPAC search forms	Chapter 3
Information about record screens	Chapter 4
Information about viewing reserve records	Chapter 5
Instructions for working with the Cart	Chapter 6
Instructions for working with Search History	Chapter 7
Information about patron empowerment features	Chapter 8
Information about sessions	Chapter 9
A list of MARC Views used by the Chameleon *i*Portal	Appendix A

2. Using the Chameleon *i*Portal

The Chameleon *i*Portal is a Web-based interface to the Virtua OPAC. Additionally, it can be configured to provide access to other information resources, both internal and external to your library. This chapter provides basic information about accessing and using the features available in the *i*Portal. You should be familiar with the content in this chapter before proceeding to the subsequent chapters in this user's guide.

In this chapter we discuss the following topics:

⇒ Web Browser Requirements
⇒ Security Considerations
⇒ Available Features
⇒ Accessing the *i*Portal
⇒ Working with the Start Screen

2.1 Web Browser Requirements

The design of your interface determines the optimum Web browser to use with the Chameleon *i*Portal. Different browsers will display the HTML pages differently. At a minimum, any Web browser used to access the *i*Portal must support HTML tables (most do). Additionally, some features, such as search history, require that the browser support JavaScript.

2.2 Security Considerations

When setting up publicly accessible computers, there are several security issues to consider. In this section, we discuss the following security issues related to navigating the Chameleon *i*Portal in a Web browser:

- Cached files.
- Auto-complete functions.
- Navigation history.

2.2.1 Cached Files
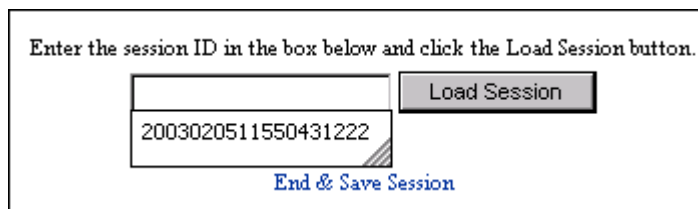
Be aware that any file that you access through your Web browser, including Web pages, is saved locally on your computer. This means that when you view a Web page that displays personal information, this information is, at least temporarily, stored on your hard drive. Anyone with access to the directory in which your browser stores temporary files may be able to view the pages you accessed.

For information about limiting storage of data or for clearing out the storage area, refer to the documentation for your browser.

2.2.2 Auto-complete Functions

Many browsers include auto-complete functions. These functions automatically complete information that you enter in a form field based on information that you previously entered in the field.

In Figure 2-1, we display the Load Session field on the Session Management screen.

Figure 2-1. Load Session Field With Auto-complete Enabled

In this example, the browser's auto-complete function offers to complete the session ID with the last session ID entered in the field. Using this feature, a patron could load another patron's session.

While you cannot control what functions are available in the browser of a patron accessing the *i*Portal remotely, you can determine which features are available on computers in your facilities. We *strongly* recommend that you turn off ALL auto-complete functions in any public browser used to access the *i*Portal.

For information about configuring auto-complete functions, refer to your Web browser's documentation.

2.2.3 Navigation History

Most browsers keep a list of the URLs that the user has visited. In most cases, a patron's session ID will be stored in the URL. If the patron does not properly close the session, it is possible for someone with access to the URLs accessed in the browser to reopen the session.

We recommend that you disable all navigation history functions in public Web browsers. For information about disabling navigation history functions, refer to the documentation for your browser.

2.3 Available Features

Your library chooses which functions are available in the Chameleon *i*Portal. The interface you access can include functions varying from basic OPAC searches to content from subscription Web services. Below, we list some of the functionality that may be available in the *i*Portal.

- OPAC searches of the Virtua database. The *i*Portal supports the following search types:
  - ♦ Browse (headings).
  - ♦ Keyword search (bibliographic and heading).
  - ♦ Broadcast search of multiple databases (bibliographic).
  - ♦ Precision search (bibliographic).
  - ♦ Reserve search.
- Keyword searches of non-Virtua OPACs. The *i*Portal supports searching of non-Virtua OPACs via bibliographic keyword searches and predefined precision search links. If properly configured, *i*Portal can submit a search to any OPAC on a server that uses Z39.50 communications protocol.
- Search filters. You can filter your searches by criteria such as location, format, and language.
- Temporary storage of records in the Cart. During your session, you can save records to the Cart. From the Cart screen, you can print, save, or e-mail these records.
- Search history and resubmit functions. The *i*Portal remembers the searches you did during the current session. At any point during the session, you can resubmit or modify the search.
- Session management. The *i*Portal lets you save session information for use at a later time. When you load your saved session, the *i*Portal will make available information such as the records you saved to the Cart and the searches you submitted.

- Patron information access. Patrons who provide authentication information can view details about their record, including information about account balances and circulation activity.
- Online requests. Patrons can initiate requests through the *i*Portal. The request is automatically processed by Virtua, and the result is immediately displayed to the patron.
- Online renewals. Patrons can renew circulated items through the *i*Portal. The renewal request is processed by Virtua, and the result is immediately displayed to the patron.

2.4 Accessing the *i*Portal

The URL of the *i*Portal depends on the configuration of the server on which it resides. Generally, the URL to access the Start screen of the Chameleon *i*Portal will be in the following format:

http://[hostname]/cgi-bin/gw_42_6/chameleon

Where **[hostname]** is the host name and, if required, port of the Web server on which the *i*Portal is installed.

This URL displays the Start screen of the *i*Portal for the default interface and language.

Note: For information about determining the default interface and language of the Chameleon *i*Portal, see the *Chameleon iPortal Configuration Guide*.

If you want to view the Start screen of an interface or language other than the default, use the following format:

http://[hostname]/cgi-bin/gw_42_6/chameleon?skin=[interface]&lng=[lang code]

Where . . .

- **[interface]** is the name of the directory in which the interface is stored.
- **[lang code]** is the name of the directory in which the translation of the interface is stored. The directory must exist in the interface directory specified by the **skin** parameter.

For information about interface and language directories, see the *Chameleon iPortal Interface Customization Guide*.

2.5 Working with the Start Screen

The Start screen is the first screen that appears when you access the Chameleon *i*Portal. When you access this screen, the *i*Portal creates a new session for you. From this screen, you will find links to some of the features available in the interface, such as search screens or patron information screens. Additionally, your Start screen may contain external content or links to other information resources.

Note:
- Some configurations of the *i*Portal require that you provide a username and password before you can access the Start screen.
- For information about sessions, see the chapter "Working with Sessions" in this user's guide.

Below, we show an example of a Start screen with . . .

- Links to search screens.
- Links to utility screens such as the Cart and Search History screens.
- A patron authentication form.
- A browse search form.
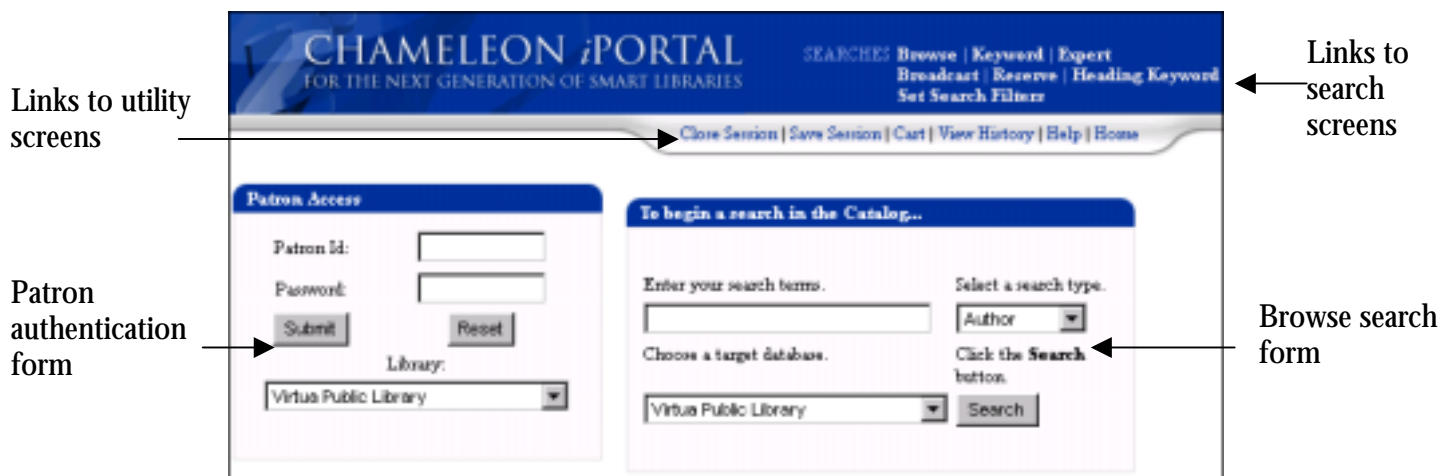
Figure 2-2. Start Screen

3. Searching the OPAC

In this chapter, we discuss the basic concepts of using the Chameleon *i*Portal to search the OPAC. Additionally, we describe each search type available in the *i*Portal and the associated results screens.

In this chapter we discuss the following topics:

⇒ About OPAC Searches in the Chameleon *i*Portal
⇒ Using the Browse Search Form
⇒ Using the Bibliographic Keyword Search Form
⇒ Using the Expert Search Form
⇒ Using the Reserve Search Form
⇒ Using the Heading Keyword Search Form
⇒ Using Search Filters
⇒ Working with the Browse Results Screen
⇒ Working with the List of Titles Screen
⇒ Working with the Heading Keyword Results Screen
⇒ Working with the Reserve Browse Results Screen

3.1 About OPAC Searches in the Chameleon *i*Portal

The Chameleon *i*Portal supports OPAC searches through a set of HTML forms. The search forms can be on any screen and are customizable by the library. Below, we list the types of search forms that are supported in the *i*Portal:

- **Browse search form** - Searches for a term in the specified index of headings. After the search, you can navigate the list of headings from the place closest to your search term.
- **Bibliographic Keyword search form** - Searches the bibliographic keyword index for the specified term or phrase. This search type can include options to join multiple search terms or to submit a search to multiple databases.
- **Expert search form** - Searches the bibliographic keyword index for the specified term or phrase. This search form supports precision searching with manually specified category codes and operators.

- **Reserve search form** - Searches for a term in the index of course IDs or instructor names. After the search, you can navigate the list of course IDs and instructor names from the place closest to your search term.
- **Heading Keyword search form** - Searches one of the heading keyword indexes for the specified term or phrase. This search type can include options to join multiple search terms.

If provided in the interface, you can apply search filters to limit the results of your bibliographic searches and restrict the items that appear in records.

After any successful search, a results screen appears that lets you navigate the results and view records. For detailed information about OPAC searches see the *Virtua OPAC User's Guide*.

In the following sections, we discuss the search forms, search filters, and results screens that you can use in the Chameleon *i*Portal.

3.2 Using the Browse Search Form

The Browse search form lets you initiate a browse search on an index of headings. In Figure 3-1, we display an example of a Browse search form with the following components:

- Browse search text box - The text box in which you type the search term. The maximum length of the text that you can type is determined by the library.
- Browse category pull-down list box - The list box from which you choose a heading index to search.
- Database pull-down list box - The list box from which you choose a database to search.
- Search button - The button that you click to initiate the search.

Figure 3-1. Browse Search Form

Note: Browse searches are available only for Virtua databases.

When you enter a search term and click the Search button, the *i*Portal sends the search query to the Virtua server. A Browse search *always* returns results. When the *i*Portal receives the results set, it displays the records in the Browse Results screen. For information about the Browse Results screen, see the section "Working with the Browse Results Screen" in this user's guide.

3.3 Using the Bibliographic Keyword Search Form

The Bibliographic Keyword search form lets you initiate a keyword search on the bibliographic index. In Figure 3-2, we display an example of a Bibliographic Keyword search form with the following components:

- Bibliographic keyword search text box - The text box in which you type the search term. The maximum length of the text that you can type is determined by the library. There may be up to three keyword search text boxes in the search form.

  In addition to search terms, you can use the following symbols in the bibliographic keyword search text box:
  - **?** - Indicates a single-character wild card.
  - * - Indicates a multiple-character wild card.
  - "" - Encloses one or more terms to signify a phrase search.

  For more information about these symbols, see the *Virtua OPAC User's Guide*.

  > **Note:** If you enter multiple terms in a single text box without enclosing them in quotation marks, the terms will be connected with an implicit AND operator, meaning that *both* terms must exist somewhere in an indexed field.

- Bibliographic keyword category pull-down list box - The list box from which you choose a bibliographic keyword category to search. There is one keyword category pull-down list box for each keyword search text box.
- Operator pull-down list box - The list box from which you choose an operator to connect the terms entered in multiple keyword search text boxes. This field can include the following values:
  - AND - Specifies that the record must contain both search terms joined by the operator.
  - OR - Specifies that the record must contain either of the search terms joined by the operator.
  - NOT - Specifies that the record must contain the first search term but not the second search term.

- ♦ NEAR - Specifies that the record must contain the first search term within one word of the second search term.
- Database pull-down list box - The list box from which you choose a database to search.
- Search button - The button that you click to initiate the search.
- Reset button - The button that you click to reset the search form to its original values.

Figure 3-2. Bibliographic Keyword Search Form

Note: Keyword searches are available for both Virtua and non-Virtua databases.

When you submit a search query by pressing the Search button, the *i*Portal sends the search to the server for the selected database. If the search returns . . .

- **No results** - An error screen appears indicating that your query returned no results.
- **A single record** - The record screen of the matching record appears. The type of record screen that appears is determined by the configuration of the *i*Portal. For information on record screens, see the chapter "Viewing Records" in this user's guide.
- **Two or more records** - The List of Titles screen appears, listing the matching records. For information about the List of Titles screen, see the section "Working with the List of Titles Screen" in this user's guide.

3.3.1 Using the Keyword Search Form to Search for Control Numbers

You can use the keyword search form (*Figure 3-2*) to search for control numbers, such as ISSN, ISBN, and LCCN numbers.

To search for a control number,

1. In the *first* search text box, type the control number for which you want to search.
2. In the associated search type pull-down list box, choose a control number search type, such as Item ID.
3. Click the Submit button.

Note:
*   When searching for a control number, use only the first text field of the search form, and do NOT join it with a keyword or another control number.
*   Control number searches return only exact matches. Keyword search options such as truncation, wild cards, and grouping are NOT available with a control number search.
*   Filters (other than location) do not affect the result set of a control number search.

3.3.2 Submitting a Bibliographic Keyword Search to Multiple Databases

If available in your *i*Portal, you can use a Broadcast search to submit a bibliographic keyword search to multiple databases. A Broadcast search uses the same search form as does a bibliographic keyword search. The only difference in the search form is that the available databases are listed in a table rather than a pull-down list box (*Figure 3-3*).

Figure 3-3. Keyword Search Form with Broadcast Search Available

For each database you want to search, select the associated check box.
-OR-
To select all available databases, click the Check All button.

When you submit a search query by pressing the Search button, the *i*Portal sends the search to the servers that you selected. When the *i*Portal receives responses from each server, the Broadcast Results screen appears, displaying the number of hits returned by each server (*Figure 3-4*).

Figure 3-4. Broadcast Results Screen

Click the View Results link to view a List of Titles screen that displays results returned by the associated server.

Note: If a server returns only one result, the View Results link goes directly to a record screen.

3.4 Using the Expert Search Form

The Expert search form lets you initiate a precision search on the bibliographic keyword index. Figure 3-5 displays an example of an Expert search form with the following components:

- Expert search text box - The text box in which you type the search term. The maximum length of the text that you can type is determined by the library. For information about entering a search query in this text box, see the section "Entering a Precision Search Query" in this user's guide.
- Database pull-down list box - The list box from which you choose a database to search.
- Search button - The button that you click to initiate the search.
- Reset button - The button that you click to reset the search form to its original values.

Figure 3-5. Expert Search Form

Note: Expert searches are available only for Virtua databases.

When you submit a search query by pressing the Search button, the *i*Portal sends the search to the server for the selected database. If the search returns . . .

- **No results** - An error screen appears indicating that your query returned no results.
- **A single record** - The record screen of the matching record appears. The type of record screen that appears is determined by the configuration of the *i*Portal. For information on record screens see the chapter "Viewing Records" in this user's guide.
- **Two or more records** - The List of Titles screen appears, listing the matching records. For information about the List of Titles screen, see the section "Working with the List of Titles Screen" in this user's guide.

3.4.1 Entering a Precision Search Query

Enter precision search terms in the following format:

```
[category]:[search term]
```

Where . . .

- **[category]** is the code of the keyword category that you want to use. For information about keyword categories, see the *Virtua OPAC User's Guide*.
- **[search term]** is the word or phrase for which you want to search. **Tip:** If your search term contains more than one word, you must mark it as a phrase by enclosing the words in quotation marks.

Below, we show an example of a single search term:

a:Faulkner

Note: You must specify a keyword category for every term in your search. If you do not specify a keyword category for a term, the *i*Portal will return an error message.

3.4.1.1 Joining Multiple Search Terms

If you use multiple search terms, you need to join them with one of the following binary operators:

- **&** - Specifies that the record must contain both search terms joined by the operator. If you follow the **&** operator with a number, you are indicating that the terms must be in a given number of words of each other within a single indexed field. For example, the operator **&5** specifies that the terms must be in five words of each other within a single field.
- **+** - Specifies that the record must contain either of the search terms joined by the operator.
- **-** - Specifies that the record must contain the first search term but must not contain the second search term.

Note: If you do not specify an operator between search terms, the *i*Portal uses an implicit AND operator.

3.4.1.2 Grouping Search Terms

Virtua does not assign an implicit grouping based on operators. By default, search queries are processed from left to right. You can determine how parts of a search query are evaluated by grouping with parentheses.

Below, is a query that does not specify a grouping:

s:beagles & aw:shedding + aw:grooming

In this example, the system looks for . . .

- All records that have the text *beagles* in the fields indexed for category represented by the code **s** AND *shedding* in the fields indexed for category represented by the code **aw**.
  -OR-
- All records that have the text *grooming* in the fields indexed for category represented by the code **aw**.

Below, we display the same query, but with parenthetical grouping applied:

s:beagles & (aw:shedding + aw:grooming)

In this example, the system looks for . . .

- All records that have the text *beagles* in the fields indexed for the category represented by the code **s**.
  AND
- All records that have the text *shedding* in the fields indexed for the category represented by the code **aw** OR *grooming* in the fields indexed for the category represented by the code **aw**.

3.4.1.3 Thesaurus Operators

Note: Thesaurus operators are NOT available for searching databases on which a thesaurus has not been loaded.

Thesaurus search operators are unary operators that expand a search to records with terms that are related to the search term. For example, if your search term is **beagle** and you are using an operator that searches three levels broader than the search term, Virtua might return hits with . . .

- Beagle [the search term]
- Hound [one level broader]
- Dog [two levels broader]
- Mammal [three levels broader]

You can use the thesaurus operators to expand your search to terms that are broader than or narrower than your search term. The syntax for using the thesaurus operators is as follows:

- **Broader than . . .** - [search category code]:>[number of levels broader]:[search term]

  For example, if you want to search the subject category for **dog** and two levels broader, type:

  s:>2:dog

  Note: If you do not specify a number of levels, or if you specify **0** levels, the search returns hits for ALL levels broader than your search term.

- **Narrower than . . .** - [search category code]:<[number of levels narrower]:[search term]

  For example, if you want to search the subject category for **shed** and four levels narrower, type:

  s:<4:shed

  Note: If you do not specify a number of levels, or if you specify **0** levels, the search returns hits for all levels narrower than your search term.

3.4.1.4 Other Options

You can enhance your precision searches by using any of the following options:

- Wild cards.
- Phrase searching.
- First in field operator.
- Complete field operator.

3.4.1.4.1 Using Wild Cards

You can specify left, right, or medial truncation by using wild cards within your precision search terms. The *i*Portal recognizes the following wild cards:

- A question mark (?) represents a *single* wild card character. For example,
  - ♦ If you type `ho?`, the *i*Portal will find **hop**, **hog**, **hot**, etc.
  - ♦ If you type `l?st`, the *i*Portal will find **list**, **lost**, **last**, etc.
  - ♦ If you type `w??en`, the *i*Portal will find **women**, **woven**, **woken**, etc.

- An asterisk (*) represents *one or more* wild card characters. For example,
  - ♦ If you type `hos*`, the *i*Portal will find **hose**, **hosts**, **hostile**, **hospitality**, etc.
  - ♦ If you type `ni*e`, the *i*Portal will find **nine**, **Nile**, **nicotinamide**, etc.

3.4.1.4.2 Using Quotation Marks to Denote a Phrase

In your search strings, use double quotation marks to denote a phrase. For example,

- To search for the title *Sonnets from the Portuguese*, type: **"Sonnets from the Portuguese"**
- To search for the title *Much Ado About Nothing*, type: **"Much Ado About Nothing"**

3.4.1.4.3 Using the First in Field Operator

The first in field operator lets you specify that the associated search term or phrase must occur at the beginning of an indexed field. You can specify the first in field operator by inserting =**:** after the category code. For example . . .

<div align="center">

a:=:Stevens

</div>

In this example, the query returns all records where the text *Stevens* appears at the beginning of the field indexed for the category associated with the category code **a**.

3.4.1.4.4 Using the Complete Field Operator

The complete field operator lets you specify that matching records must contain the associated search term or phrase as the *entire* value of an indexed field. You can specify the complete field operator by inserting **^:** after the category code. For example . . .

t:^:As I Lay Dying

In this example, the query returns all records where the text *As I Lay Dying* appears as the complete value of the field indexed for the category associated with the category code **t**.

3.5 Using the Reserve Search Form

The Reserve search form lets you initiate a browse search on an index of instructors or course IDs that have items on reserve. Figure 3-6 displays an example of a Reserve search form with the following components:

- Reserve search text box - The text box in which you type the search term. The maximum length of the text that you can type is determined by the library.
- Reserve category pull-down list box - The list box from which you choose an instructor name or course ID to search.
- Database pull-down list box - The list box from which you choose a database to search.
- Search button - The button that you click to initiate the search.

Figure 3-6. Reserve Search Form

Note: Reserve searches are available only for Virtua databases.

When you enter a search term and click the Search button, the *i*Portal sends the search query to the Virtua server. A Reserve search *always* returns results. When the *i*Portal receives the results set, it displays the records in the Browse Results screen. For information on the Reserve Browse Results screen, see the section "Working with the Reserve Browse Results Screen" in this user's guide.

3.6 Using the Heading Keyword Search Form

The Heading Keyword search form lets you initiate a keyword search on one of the heading indexes. Figure 3-7 displays an example of a Heading Keyword search form with the following components:

- Search heading type pull-down list box - The list box from which you choose the heading index for the search, such as author or title.

- Heading keyword search text box - The text box in which you type the search term. The maximum length of the text that you can type is determined by the library. There may be up to three keyword search text boxes in the search form.

  In addition to search terms, you can use the following symbols in the heading keyword search text box:
  - **?** - Indicates a single-character wild card.
  - * - Indicates a multiple-character wild card.
  - "" - Encloses one or more terms to signify a phrase search.

  For more information about these symbols, see the *Virtua OPAC User's Guide*.

- Data format pull-down list box - The list box from which you specify what type of matches the search will return. You can choose from the following options:
  - **All Words** - Specifies that matching record will have all of the words in the associated search text box in a field indexed for the heading type you selected.
  - **Phrase** - Specifies that matching record will have a phrase matching the text in associated search text box in a field indexed for the heading type you selected.
  - **Exact Match** - Specifies that matching record have a field indexed for the heading type you selected that matches exactly the terms in the search text box from the beginning of the field. If you choose this option, a heading with words and phrases prior to those specified in the search text box will not be considered a hit.

- Operator pull-down list box - The list box from which you choose an operator to connect the terms entered in multiple keyword search text boxes. This field can include the following values:
  - AND - Specifies that the record must contain both search terms joined by the operator.
  - OR - Specifies that the record must contain either of the search terms joined by the operator.

- ◆ NOT - Specifies that the record must contain the first search term but not the second search term.
- ◆ NEAR - Specifies that the record must contain the first search term within one word of the second search term.
- Database pull-down list box - The list box from which you choose a database to search.
- Search button - The button that you click to initiate the search.
- Reset button - The button that you click to reset the search form to its original values.

Figure 3-7. Heading Keyword Search Form

Note: Heading keyword searches are available only for Virtua databases.

When you enter a search term and click the Search button, the *i*Portal sends the search query to the Virtua server. When the *i*Portal receives the results set, it displays the records in the Heading Keyword Results screen. For information on the Heading Keyword Results screen, see the section "Working with the Heading Keyword Results Screen" in this user's guide.

3.7 Using Search Filters

The Chameleon *i*Portal provides the following options for filtering OPAC searches:

- **Publication Year** - Filters your search results by publication date.
- **Context Year** - Filters your search results by context date of the material (945 tag).
- **Format** - Filters your search results on form of item.
- **Nature of Contents** - Filters your search results on nature of contents.
- **Language** - Filters your search results on the language of the material.
- **Place of Publication** - Filters your search results by the place of publication.

- **Location** - Filters your search by item location.

With the exception of the location filter, search filters affect only bibliographic keyword and precision searches. They are not used for browse, reserve, or heading keyword searches.

3.7.1 Setting Search Filters

In most cases, search filters are set on the Search Filters screen (*Figure 3-8*). This screen is accessible via a link provided in your interface.

Figure 3-8. Search Filters Screen

The Search Filters screen can contain any of the following filters.

- **Publication Year** - Filters your search results by publication date.
- **Context Year** - Filters your search results by context date of the material (945 tag).
- **Format** - Filters your search results on form of item.
- **Nature of Contents** - Filters your search results on nature of contents.
- **Language** - Filters your search results on the language of the material.

- **Place of Publication** - Filters your search results by the place of publication.
- **Location** - Filters your search by item location.

3.7.1.1 Working with Filters on the Search Filters Screen

The Format, Nature of Contents, Language, Place of Publication, and Location filters have the following components:

- A list box that lists the available criteria for the filter. In this list box you can choose one or more criteria to use to filter your search. **Tip:** To choose multiple entries, hold down the CTRL key as you click.
- A set of radio buttons that determine whether the selected filtering criteria are included or excluded from the search. Choose the . . .
  - ♦ **Include** radio button if you want to include the criteria you selected in the list box in your search.
  - ♦ **Exclude** radio button if you want to exclude the entries you selected in the list box from your search.

    Note: For the Location filter, do NOT choose the Exclude option. All location filters must be inclusive.
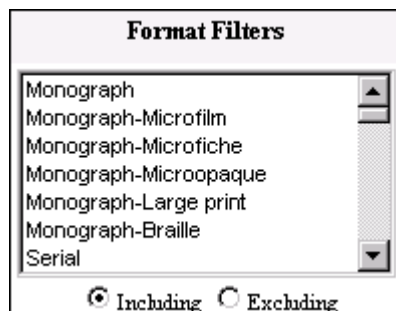
Figure 3-9. Format Filter

The Publication Date and Context Date filter have two text boxes (*Figure 3-10*). In the first text box, type the beginning date of the date range. In the second text box, type the ending date of the date range.
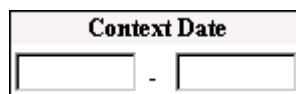
Figure 3-10. Context Date Filter

3.7.1.2 After You Set Filters on the Search Filters Screen

Once you set search filters, you can . . .

- Save the filters as they are set on the screen.
- Clear all filters.
- Restore the filters that were set before you accessed the search filters screen.

To save search filters,

- Click the Save button.

Note: When you save search filters, they are in effect until you change them or until the session ends.

To clear all search filters,

- Click the Clear button.

To restore the original search filters,

- Click the Restore button.

3.7.1.3 Using Enhanced Location Filters

Your library can choose to make available location filters on any search form. If you are using a search form with Enhanced Location filters available, you can set location filters directly from the search form (*Figure 3-11*).

Figure 3-11. Keyword Search Form - Enhanced Location Filters Available

To set location filters from the search form,

- In the location filters list box, choose the locations that you want to include in your search. **Tip:** To choose multiple entries, hold down the CTRL key as you click.

Note: Once you set location filters from the search form, they are applied to all searches that you do until you clear the filters.

3.7.1.4 Filtering Search Results From the List of Titles Screen

You can filter the results of a keyword or expert search from the List of Titles screen. To do this, click the link to the Search Filters screen, and set filters as desired. When you save the filters, the *i*Portal will display the filtered results set in the List of Titles screen.

3.7.2 Filtering Searches by Location

Unlike other types of filters, location filters affect all search types. When you set a location filter, searches from the keyword or expert search forms are filtered by location just as any other search criteria. Records that do not have the locations specified by the filter are not included in the results set.

For searches other than keyword or expert, the location filter acts as an *item-level* filter. This means that your search results will always be the same, no matter which locations you choose to filter. Instead of removing records from the results set, the location

filter affects the list of items that are available on the Items List screen for a record. If an item shelved at a location that was not included in the location filter is attached to a record returned by the search, it will not appear on the Items List screen.

Below, we show the Items List screen for a bibliographic record that has two items attached. One item is shelved at the Main Library location and the other at the Reference location.

Figure 3-12. Items List Screen - Displaying Two Items

If you apply a location filter to include items only from the Reference location, only the item at the Reference location will appear on the Items List screen (*Figure 3-13*).

Figure 3-13. Items List Screen - Displaying One Item

3.8 Working with the Browse Results Screen

After you initiate a browse search, the Browse Results screen appears, displaying the headings that most closely match your search term (*Figure 3-14*).

Figure 3-14. Browse Results Screen

3.8.1 Aspects of the Browse Results Screen

The Browse Results screen lists authority headings or call numbers in the database in which you searched, starting with the records that most closely matched your search term. The results are sorted alphabetically.

Below, we list some of the aspects of the Browse Results screen:

- Exact matches for your search term appear first on the results list. If no exact match is found, the term before the closest match to the word(s) you searched appears first on the results list.
- The number of titles in the database associated with each term is listed in the column labeled Hit Count.
- A - (minus) sign instead of a number in the column labeled Hit Count indicates that a *See* cross-reference is associated with this item.
- A + (plus) sign in addition to a number in the column labeled Hit Count indicates that a *See Also* cross-reference is associated with this item.

Note: We discuss cross-references in more detail in the section "Viewing Cross-references" in this user's guide.

From the Browse Results screen you can . . .

- Navigate to other screens containing lists of headings.
- View the record associated with a selected title.
- View authority records.

Note: Depending on the design of your interface, there may be other features or links available from this screen.

3.8.2 Navigating the Browse Results Screen

The Browse Results screen is configured to display a library-defined number of records. It is likely that the number of headings in the index you searched is greater than the number of headings displayed at one time on the Browse Results screen. You can use navigation links to view the headings that are not initially displayed.

The Chameleon *i*Portal provides two types of navigation links on the Browse Results screen:

- Links to the *first, previous, next,* and *last* pages of results (*Figure 3-15*).

Figure 3-15. Browse Results Screen - Displaying First, Previous, Next, And Last Page Links

- Links directly to a number of headings forward or backward in the index of headings (*Figure 3-16*).

Figure 3-16. Browse Results Screen - Displaying Links To A Number of Headings Back Or Forward

In this example, clicking the **>20** link moves forward 20 headings in the index of headings.

Note: The navigation links in your interface may not resemble the links in these examples.

Your interface may contain one or both of these link types.

To navigate the list of headings,

• Click one of the navigation links available.

3.8.3 Viewing Records Listed on the Browse Results Screen

To view the record associated with a heading or term,

- Click the hyperlinked heading for the record you want to view.

  If there is only one record associated with the heading, the Record screen appears, displaying information about the record. For information on the Record screen, see the section "Viewing Records in the Chameleon *i*Portal" in this user's guide.
  -OR-
  If there is more than one record associated with the heading you selected, the List of Titles screen appears, displaying the list of records associated with the heading (*Figure 3-17*).

Figure 3-17. List of Titles Screen

For information about the List of Titles screen, see the section "Working with the List of Titles Screen" in this user's guide.

3.8.4 Viewing Authority Records

If enabled in your *i*Portal, you can view the authority record for each heading on the Browse Results screen. If this option is enabled, a View Authority link appears next to each heading (*Figure 3-18*).

Figure 3-18, Browse Results Screen - With Link To Authority Records

To view the authority record for a heading,

• Click the View Authority link next to a heading.

The Authority Record screen appears (*Figure 3-19*).

```
Tag  In                                              Data
001       vtls000662177
003       VMW
008       900912__ anannbab _b ana

010       \a sh 85061212

       9
039       \y 199808270636 \z

040       \a DLC \c DLC \d DLC

053       \a B61 \c History and philosophy

053       \a D

053       \a HM36 \c History and sociology

053       \a JA78 \c History and political science

053       \a JX1253 \c History and international law

053       \a PN50 \c History and literature

       0
150       \a History.

360       \i subdivision \a History \i under specific subjects and under names of countries, states, cities, etc.

       0
450       \a Annals.

       0
550       \a Auxiliary sciences of history.
```

Figure 3-19. Authority Record Screen

3.8.5 Viewing Cross-references

The Chameleon *i*Portal uses two types of cross-references:

- *See* references - Tells you the heading is not valid and directs you to the valid, authoritative heading.
- *See Also* references - Points you from one heading to another related heading, both of which are valid.

Below, we show an example of links to *See* and *See Also* references appearing on the Browse Results screen. By default, the link to the *See* reference is a ⊟ icon and the link to a *See Also* reference is a ⊞ icon.

Figure 3-20. Browse Results Screen - See *And* See Also *Cross-references*

To view the Cross-references screen,

- Click the ⊞ or ⊟ icon next to the browse heading.

  The Cross-references screen appears.

3.8.5.1 Aspects of the Cross-references Screen

The Cross-references screen (*Figure 3-21*) displays the . . .

- Terms related to the selected browse heading.
- Number of titles associated with each related term.
- Notes associated with a cross-reference. These are drawn from the note fields of the MARC authority record.

Figure 3-21. Cross-reference screen

> **Note:** Depending on the design of your interface, there may be other features or links available from this screen.

If specified in the authority record, the Cross-references screen also indicates whether cross-referenced terms are . . .
- Broader,
- Narrower,
- Earlier, or
- Later

than the original browse term.

From the Cross-references screen, you can . . .

- Do a browse search on a heading in the list.
- View the titles related to a heading in the list.

To do a browse search on one of the headings in the list,

- Click the *Search on term* link to the left of the term.

To view the titles related to a heading in the list,

- Click the hyperlinked text of the heading.

3.9 Working with the List of Titles Screen

The List of Titles screen (*Figure 3-22*) displays the records in the database that were returned by your search. You can get to the List of Titles in several ways, including . . .

- A search from the following search forms:
  - ♦ Keyword (including Broadcast)
  - ♦ Expert
- A link from one of the following results screens:
  - ♦ Browse Results screen.
  - ♦ Heading Keyword Results screen.

Figure 3-22. List of Titles Screen

From the List of Titles screen, you can . . .

- Sort the list of results.
- Navigate to the First, Previous, Next, or Last screen of the List of Titles.
- View the record of a selected title.

Additionally, for each record, the List of Titles screen displays the following information:

- Bibliographical information from the record, such as Author, Title, and Publisher.
- *(Optional)* The number of items available.

- *(Optional)* If there are items available, the locations at which they are available.

Note: Depending on the design of your interface, there may be other features or links available from this screen.

3.9.1 Sorting Records

If allowed in your *i*Portal configuration, you can sort the list of results that appear on the List of Titles screen. Depending on settings in your **chameleon.conf** file, you can sort by the following criteria:

- Title
- Author
- Call Number
- Publication Date (title subsort)
- Publication Date (author subsort)

3.9.1.1 Aspects of the Sort Controls

Sort controls appear on the List of Titles screen in a location determined by your configuration (*Figure 3-23*).

Figure 3-23. List of Titles Screen With Sort Controls

The Sort controls on the List of Titles screen consist of . . .

- **Sort pull-down list box** - Contains a list of available sort types.

- **Ascending/Descending radio buttons** - Determines the direction of the sort.
- **Sort button** - Initiates the sort.

3.9.1.2 Sorting a Results Set

To sort the list of records on the List of Titles screen,

1. In the Sort pull-down list box, select the type of sort you want to apply.
2. Choose the Ascending radio button to sort the list from lowest value to highest value.
   -OR-
   Choose the Descending radio button to sort the list from highest value to lowest value.
3. Click the Sort button.

The *i*Portal displays the List of Titles screen using the Sort type you selected.

Note: If you choose to sort the list of results, the *i*Portal returns you to the first record in the sorted results list regardless of your position at the time of the sort.

3.9.2 Navigating the List of Titles Screen

The List of Titles screen is configured to display a library-defined number of records. If the number of records in a results set exceeds the number of records that the List of Titles screen is configured to display, you can use navigation links to view the records that are not initially displayed.

The Chameleon *i*Portal provides two types of navigation links on the List of Titles screen:

- Links to the *first, previous, next,* and *last* pages of results (*Figure 3-24*).

first set | previous set | next set | last set

You searched Library of the Anolis Carolinensis - (Author) faulkner

Records 7 through 8 of 10

| Save to Cart | Check 7-8 | Clear All |

🔖 7

full
items(1)
marc

Select to add
record to cart
☐

	Number Available: 1
	Available At: Main Library
Request	Request
Author	Fadiman, Regina K.
Title	Faulkner's Intruder in the dust : n... adapted for film by Clarence Brov...
Publisher	Knoxville : University of Tennes...
Material	xiv, 329 p. : ill.

🔖 8

full
items(1)
marc

Select to add
record to cart
☐

	Number Available: 1
	Available At: Main Library
Request	Request
Author	Faulkner, William, 1897-1962.
Title	Novels, 1936-1940 / William Fau...
Title	Novels.
Publisher	New York : Library of America : Viking Press, c1990.
Material	1117 p. ; 21 cm.
Series Stmt	The Library of America ; 48

| Save to Cart | Check 7-8 | Clear All |

Figure 3-24. List of Titles Screen - Displaying First, Previous, Next, and Last Page Links

- Links directly to specific pages of results (*Figure 3-25*). With this configuration, you also have the ability to go to the *previous* or *next* pages of results.

Figure 3-25. List of Titles Screen - Displaying Links to Specific Pages of Results

Note: The navigation links in your interface may not resemble the links in these examples.

Your interface may contain one or both of these link types.

To navigate the search results,

- Click one of the navigation links available.

3.9.3 Accessing Records

The List of Titles screen provides links to record screens in one of the following formats:

- Single-link format (*Figure 3-26*).

Figure 3-26. List of Titles Screen - Displaying Links in Single-link Format

This format provides a single link to the available record screens. To view the record screen, click the *number* that indicates the record's position in the results list. The screen that appears when you click this link depends on the configuration of the *i*Portal, but can be any of the following:

- ♦ Full Record screen.
- ♦ Items List screen.
- ♦ Holdings screen.
- ♦ MARC Record screen.

- Multiple-link format (*Figure 3-27*).

Figure 3-27. List of Titles Screen - Displaying Links in Multiple-link Format

This format provides a link to each record screen that is available for the record. To view the record screen, click the link for the type of record screen that you want to view. Depending on the configuration of the *i*Portal and the content of the record, you can access the following screens:

♦   Full Record screen.
♦   Items List screen.
♦   Holdings screen.
♦   MARC Record screen.

3.10 Working with the Heading Keyword Results Screen

The Heading Keyword Results screen (*Figure 3-28*) displays the headings that were returned by your Heading Keyword search.

Links	Hit Count	Heading and Notes
Search on term	2	Baker, Elizabeth (Faulkner) 1885-
Search on term	1	Bryan, Charles Faulkner
Search on term	1	Faulkner & Gray's Healthcare Information Center.
Search on term	1	Faulkner and Yoknapatawpha Conference (11th : 1984 : University of Mississippi)
Search on term	1	Faulkner and Yoknapatawpha Conference (12th : 1985 : University of Mississippi)
Search on term	1	Faulkner and Yoknapatawpha Conference (13th : 1986 : University of Mississippi)
Search on term	1	Faulkner and Yoknapatawpha Conference (14th : 1987 : University of Mississippi)
Search on term	1	Faulkner and Yoknapatawpha Conference (18th : 1991 : University of Mississippi)
Search on term	1	Faulkner and Yoknapatawpha Conference (21st : 1994 : University of Mississippi)
Search on term	1	Faulkner and Yoknapatawpha Conference (3rd : 1976 : University of Mississippi)

next set | last set
You searched Library of the Anolis Carolinensis - Author: (All Words) faulkner
Records 1 through 10 of 57

Figure 3-28. Heading Keyword Results Screen

The Heading Keyword Results screen displays the following columns for each result:

- **Links** - A hyperlink to a browse search on the heading.
- **Hit Count** - The number of bibliographic records associated with the heading.
- **Heading and Notes** - The heading of the result and any notes related to the authority record.

From this screen, you can . . .

- Navigate to the *first*, *previous*, *next*, or *last* page of results.
- Initiate a browse search on the heading.
- View the records associated with the heading.

3.10.1 Navigating the Heading Keyword Results Screen

The Heading Keyword Results screen is configured to display a library-defined number of results. If the number of records in a results set exceeds the number of records that the Heading Keyword Results screen is configured to display, you can use navigation links to view the records that are not initially displayed

The Chameleon *i*Portal provides links to the *first*, *previous*, *next*, and *last* pages of Heading Keyword results (*Figure 3-29*).

first set	previous set	next set	last set		

You searched Virtua Public Library - Author: (All Words) smith

Records 11 through 20 of 87

Links	Hit Count	Heading and Notes
Search on term	2	Smith, Albert Richard, 1816-1860.
Search on term	2	Smith, Bradford Horace, 1904-
Search on term	5	Smith, Bruce L. R.
Search on term	3	Smith, Charles Alphonso, 1864-1924.
Search on term	3 ⊞	Smith, Charles Harold
Search on term	1	Smith, Charles John, 1818-1872.
Search on term	1	SMITH CHARLYLE S.
Search on term	4	Smith, Clark H.
Search on term	1	Smith, Dan Throop 12.
Search on term	2	Smith, Denison Langley, 1924-

Figure 3-29. Heading Keyword Results Screen - Displaying First, Previous, Next, And Last Page Links

> **Note:** The navigation links in your interface may not resemble the links in these examples.

To navigate the list of headings,

- Click one of the navigation links available.

3.10.2 Initiating a Browse Search on a Heading

To initiate a browse search on a heading,

- Click the text in the Links column.

The Browse Results screen appears displaying the heading you chose in an alphabetic list of headings.

3.10.3 Viewing Records Associated with a Heading

To view the records associated with a heading,

- Click the text of the heading in the Heading and Notes column.

If the heading has . . .

- **One associated record** - The record screen appears for that record.
- **Two or more associated records** - The List of Titles screen appears displaying the records.

3.11 Working with the Reserve Browse Results Screen

After you initiate a reserve search on a instructor name or course ID, the Reserve Browse Results screen appears, displaying the instructor names or course IDs that most closely match your search term (*Figure 3-30*).

Figure 3-30. Reserve Browse Results Screen

Note: For information about initiating a Reserve search, see the section "Using the Reserve Search Form" in this user's guide.

From this screen, you can . . .

- Navigate to the *first*, *previous*, *next*, or *last* page of results.
- View information about reserves related to an instructor or course ID.

3.11.1 Navigating the Reserve Browse Results Screen

The Reserve Browse Results screen is configured to display a library-defined number of records. It is likely that the number of instructors or course IDs returned is greater than the number of results displayed at one time on the Reserve Browse Results screen. You can use navigation links to view the results that are not initially displayed.

The Chameleon *i*Portal provides links to the *first, previous, next,* and *last* pages of results (*Figure 3-31*).

First Page Previous Page Next Page Last Page

You searched Virtua Public Library - (Instructor) Dabner

Hit Count	Instructor/Courses with Items on Reserve
6	Chickering, Susan R.
1	Dabner, Barbara
1	Fleisher, Ramona S.
1	Heterick, Bruce
1	Heterick, Robert
2	Horgan, Barbara
1	Kean, B.
1	King, Leslie
1	Kriz, Harry M.
1	Lee, Carl R.

Figure 3-31. Reserve Browse Results Screen - Displaying First, Previous, Next, And Last Page Links

Note: The navigation links in your interface may not resemble the links in these examples.

Your interface may contain one or both of these link types.

To navigate the list of headings,

- Click one of the navigation links available.

3.11.2 Viewing Information About Reserves

To view information about the reserves related to a instructor or course,

- Click the linked text of the instructor or course ID.

The Reserve Information screen appears for the instructor or course you chose (*Figure 3-32*).

Figure 3-32. Reserve Information Screen

For details about viewing reserve information, see the chapter "Viewing Reserves" in this user's guide.

4. Viewing Records

I n this chapter, we discuss the record screens that the Chameleon *i*Portal uses to display information about bibliographic and holdings records. The information in this chapter is limited to the features that are basic to the functionality of the record screens. For information about optional features, such as requests, see the appropriate section in this user's guide.

In this chapter we discuss the following topics:

⇒ Viewing Bibliographic Records
⇒ Viewing Holdings Records

4.1 Viewing Bibliographic Records

The Chameleon *i*Portal displays information about bibliographic records on the following screens:

- **Full Record screen** - Displays selected information from the bibliographic record.
- **Items List screen** - Lists the items attached to the bibliographic record.
- **Holdings screen** - Displays information about holdings records attached to the bibliographic record.
- **MARC Record screen** - Displays the MARC record.

4.1.1 Navigating the Record Screens

For each bibliographic record, there may be up to four record screens available. You can access each available record screen by using the record navigation links (*Figure 4-1*).

Figure 4-1. Record Screen Navigation Links

Any of the following links may exist on a record screen:

- Full - A link to the Full Record screen.
- Items - A link to the Items List screen. Notice that the link indicates the number of item records attached to the bibliographic record.
- Holdings - A link to the Holdings screen. Notice that the link indicates the number of holdings records attached to the bibliographic record.
- MARC - A link to the MARC Record screen.

We discuss each of these screens in the following sections.

4.1.2 The Full Record Screen

The Full Record screen displays the public view format of the record (*Figure 4-2*). Your library determines what information displays on the Full Record screen and what fields (if any) are hyperlinked.

full | items(1) | marc

You searched Library of the Anolis Carolinensis - (Author) faulkner, will

Total Requests 0   Unsatisfied Requests 0

Request	Request
Author	Ruppersburg, Hugh M.
Title	Reading Faulkner. Light in August : glossary and commentary editorial collaboration of James Hinkle and Robert McCoy.
Imprint	Jackson : University Press of Mississippi, c1994.
Description	xiv, 324 p. ; 24 cm.
Series	Includes bibliographical references and index.
Notes	Includes bibliographical references and index.
Subject	Faulkner, William, -- 1897-1962. -- Light in August.
Subject	Faulkner, William, -- 1897-1962 -- Dictionaries.
Added author	Hinkle, James.
Added author	McCoy, Robert.
Added author	Faulkner, William, 1897-1962. Light in August.
ISSN	0878057315
ISSN	0878057323 (pbk.)
LCCN	94-17077 //r94
Status	m

Save to Cart

Figure 4-2. Full Record Screen

From the Full Record screen you can continue your search by performing a browse or keyword search on a hyperlinked term (tracings).

4.1.2.1 Following a Tracing Link

Tracing links provide a way to expand searches from the Full Record screen. If properly configured, your *i*Portal can provide links to a browse or keyword search for any field appearing on the Full Record screen. For example, if your *i*Portal is configured to create a tracing link to a browse search on an Author tag, when you click the hyperlink, the *i*Portal searches the database for the text in the author field.

To perform a browse or keyword search on a term in the Full Record screen,

- Click the hyperlinked text on which you want to search.

4.1.3 The Items List Screen

The Items List screen displays information about the item records attached to the bibliographic record (*Figure 4-3*).

Figure 4-3. Items List Screen

The Items List screen displays two separate sections: 1) a header containing bibliographic information and 2) a table listing the copies and volumes—the physical and/or virtual items—associated with the record of the material you searched. A counter at the top left of the table helps you keep track of the records you are viewing.

From the Items List screen you can . . .

- Continue your search by performing a browse or keyword search on a hyperlinked term.
- Access detailed information about a particular item listed.

4.1.3.1 Following a Tracing Link

Tracing links provide a way to expand searches from the Items List screen. If properly configured, your *i*Portal can provide links to a browse or keyword search for any field appearing on the Items List screen. For example, if your *i*Portal is configured to create a tracing link to a browse search on a Title tag, when you click the hyperlink, the *i*Portal searches the database for the text in the title field.

To perform a browse or keyword search on a term in the Items List screen,

- Click the highlighted text on which you want to search.

4.1.3.2 Viewing an Item Record

On the Items List screen (*Figure 4-3*), specific information about each physical copy of the item is listed in a table. Information displayed about each item might includes . . .

- The location at which the item is shelved.
- The availability of the item.

You can view further information about an item by viewing the Item Record screen.

To view the Item Record screen for an item,

- Click the hyperlinked item barcode.

   The Item Record screen (*Figure 4-4*) appears, displaying all the elements in the item record, including . . .
   - Item Class
   - Shelf Location

For details about each data element, see the *Virtua Cataloging User's Guide*.

full | items(1) | marc

Request	Request
Barcode:	000406684
Item class:	Government Documents
Shelf Location:	Main Library
Location:	Main Library
Call number:	PS3511.A86 L577 1994
Copy Number:	1

Figure 4-4. Item Record screen

4.1.4 The Holdings Screen

The Holdings screen (*Figure 4-5*) displays the list of holdings records associated with the bibliographic record.

Title	JAMA : the journal of the American Medical Association.
Imprint	Chicago : American Medical Association, 1960-
ISSN	0098-7484
Current Frequency	Four issues per month <, Mar. 21, 1980->
Preceding Title	0002-9955

Holdings 1-3 of 3

1	☐ Select to add record to cart
Request	Request
Links	holdings detail
Location	Newport Branch
Copy Number	3

2	☐ Select to add record to cart
Request	Request
Links	holdings detail
Location	Off-Site
Copy Number	2

3	☐ Select to add record to cart
Request	Request
Links	holdings detail
Location	Off-Site
Copy Number	1

Figure 4-5. The Holdings Screen

The Holdings screen displays two separate sections: 1) a header containing bibliographic information and 2) a table listing the holdings records associated with the bibliographic record. A counter at the top right of the table helps you keep track of the records you are viewing.

Typically, the Holdings screen displays brief information about each serial record, including a Holdings Number, Location, and Copy Number. Additionally, your *i*Portal might display holdings summary information about holdings records. For information on configuring the display of the Holdings screen, see the *Chameleon iPortal Configuration Guide*.

From the Holdings screen you can . . .
- Access detailed information about a holdings record.
- Continue your search by performing a browse or keyword search on a hyperlinked term.

Note: Depending on the design of your interface, there may be other features or links available from this screen.

4.1.4.1 Viewing Information About a Holdings Record

To view information about a holdings record,

- On the Holdings screen, click a hyperlink in the Links field of the holdings you want to view.

  A screen displaying information about the holdings record appears. For information about viewing holdings records, see the section "Viewing Holdings Records" in this user's guide.

4.1.4.2 Following a Tracing Link

Tracing links provide a way to expand searches from the Holdings screen. If properly configured, your *i*Portal can provide links to a browse or keyword search for any field appearing on the Holdings screen. For example, if your *i*Portal is configured to create a tracing link to a keyword search on a Publisher tag, when you click the hyperlink, the *i*Portal searches the database for the text in the publisher field.

To perform a browse or keyword search on a term in the Items List screen,

- Click the highlighted text on which you want to search.

4.1.5 The MARC Record Screen

The MARC Record screen (*Figure 4-6*) displays all the fields in the MARC format view of the bibliographic record.

Tag	In 1	In 2	Data
			You searched Library of the Anolis Carolinensis - (Author) faulkner, will
001			vtls000293826
003			VMW
005			20020122213000.0
008			020122s1994 msu bd 001 0 eng
010			\a 94-17077 //r94
020			\a 0878057315
020			\a 0878057323 (pbk.)
035			\a (OCoLC)ocm30353220 950322
039		9	\a 200201222130 \b VLOAD \c 200201221450 \d VLOAD \y 1998080723000000 \z load
040			\a DLC \c DLC \d IAI
049			\a VMWW
050	0	0	\a PS3511.A86 \b L577 1994
082	0	0	\a 813/.52 \2 20
100	1		\a Ruppersburg, Hugh M.
245	1	0	\a Reading Faulkner. \p Light in August : glossary and commentary / \c by Hugh Ruppersburg ; with the editorial collaboration of James Hinkle and Robert McCoy.
260			\a Jackson : \b University Press of Mississippi, \c c1994.
263			\a 9410
300			\a xiv, 324 p. ; \c 24 cm.
440		0	\a Reading Faulkner series
504			\a Includes bibliographical references and index.
600	1	0	\a Faulkner, William, \d 1897-1962. \t Light in August.
600	1	0	\a Faulkner, William, \d 1897-1962 \x Dictionaries.
700	1	0	\a Hinkle, James.
700	1	0	\a McCoy, Robert.
700	1	1	\a Faulkner, William, \d 1897-1962. \t Light in August.
949			\a 000101

Figure 4-6. MARC Record Screen

4.2 Viewing Holdings Records

The Chameleon *i*Portal displays information about a holdings record on three screens:

- **Holdings Detail screen** - Displays selected information from the holdings record in a public view format.
- **Holdings Items List screen** - Lists the items attached to the holdings record.
- **Holdings MARC screen** - Displays the holdings MARC record.

4.2.1 Working with the Holdings Detail Screen

The Holdings Detail screen (*Figure 4-7*) displays the library's or a library location's holdings (copies and volumes) for a particular holdings record. The information on the Holdings Detail screen is the same as what appears for the holdings record on the Holdings screen.

Figure 4-7. The Holdings Detail Screen

From the Holdings Detail screen, you can continue your search by performing a browse or keyword search on a hyperlinked term (tracings).

4.2.1.1 Following a Tracing Link

Tracing links provide a way to expand searches from the Holdings Detail screen. If properly configured, your *i*Portal can provide links to a browse or keyword search for any field appearing on the Holdings Detail screen. For example, if your *i*Portal is configured to create a tracing link to a keyword search on a Title tag, when you click the hyperlink, the *i*Portal searches the database for the text in the title field.

To perform a browse or keyword search on a term in the Holdings Detail screen,

- Click the highlighted text on which you want to search.

4.2.2 Working with the Holdings Items List Screen

The Holdings Items List screen lists the items attached to the holdings record (*Figure 4-8*).

Figure 4-8. Holdings Items List Screen

The Holdings Items List screen displays two separate sections: 1) a header containing information from the holdings record and 2) a table listing the items associated with the holding record. A counter at the top left of the table helps you keep track of the records you are viewing.

From the Holdings Items List screen you can . . .

- Continue your search by performing a browse or keyword search on a hyperlinked term.
- View details about a particular item listed.

Note: These options are dependent on the configuration of your interface.

4.2.2.1 Following a Tracing Link

Tracing links provide a way to expand searches from the Holdings Items List screen. If properly configured, your *i*Portal can provide links to a browse or keyword search for any field appearing on the Holdings Items List screen. For example, if your *i*Portal is configured to create a tracing link to a keyword search on a Author tag, when you click the hyperlink, the *i*Portal searches the database for the text in the author field.

To perform a browse or keyword search on a term in the Holdings Items List screen,

- Click the highlighted text on which you want to search.

4.2.2.2 Viewing a Holdings Item Record

On the Holdings Items List screen (*Figure 4-8*), details about each physical copy of the item are listed in a table. Information displayed about each item includes . . .

- The location at which the item is shelved.
- The availability of the item.

You can view further information about an item by viewing the Holdings Item Information screen.

To view details about a particular physical item,

- Click the hyperlinked item barcode.

The Holdings Item Information screen (*Figure 4-9*) appears, displaying all the elements in the item record, including . . .

- Item Information
- Call Number Information

Figure 4-9. Holdings Item Information Screen

4.2.3 Viewing the Holdings MARC Screen

The Holdings MARC screen displays the holdings MARC record (*Figure 4-10*).

holdings detail | holdings item list (1) | holdings marc

You searched Virtua Public Library - (Title) jama

Tag	In 1	In 2	Data
001			vtls000000187
003			VRT
004			vtls000010797
008			9201304p 8 0001 eng0920505
010			\a 82643544 //r842 \z sn 78004483
014			\a 001124917 \b OCoLC
022			\a 0098-7484 \y 0002-9955
030			\a JAMAAP
039		9	\a 199911090452 \b staff \c 199911021830 \d staff \y 199911021830 \z staff
050			\a R15 \b .A48
245	0	0	\a JAMA : \b the journal of the American Medical Association.
246	1	0	\a Journal of the American Medical Association
246	1	7	\a J.A.M.A.
780			\t Journal of the American Medical Association
852			\b 010000 \t 1
853			\6 8 \a v. \b no. \u 52 \w r \i (year) \j (month) \k (day) \w w \x 01
863			\6 8.1 \a 1 \b 1-2 \i 1992 \j 01 \k 07-14
863			\6 8.2 \a b 4-5 \i 1992 \j 01-02 \k 28-04 \w g
863			\6 8.3 \a 12 \b 1-12 \i 1998 \j 01-03 \k 01-23 \w g
863			\6 8.4 \a 12 \b 13-14 \i 1998 \j n \k 15 \w g
863			\6 8.5 \a 12 \b 18 \i 1998 \j n \k 15
863			\6 8.6 \a 12 \b 15-16 \i 1998 \j n \k 15 \w g
863			\6 8.7 \a 12 \b 20 \i 1998 \j n \k 15
863			\6 8.8 \a 12 \b 17 \i 1998 \j n \k 15 \w g
863			\6 8.9 \a 12 \b 19 \i 1998 \j n \k 15 \w g
863			\6 8.10 \a 12 \b 21-22 \i 1998 \j 00 \k 15-15
866			\6 8.1 \a Special Issue

Figure 4-10. Holdings MARC Screen

5. Viewing Reserves

The Reserve Information screen displays the reserve list for the instructor or course ID that you chose on the Reserve Browse Results screen (*Figure 5-1*). From this screen you can access more detailed information about items on reserve.

Instructor/Courses with Items on Reserve	
Course ID	COMM 214
Instructor Name	Chickering, Susan R.
Items on Reserve	0
Course ID	CALL 777
Instructor Name	Chickering, Susan R.
Items on Reserve	1
Course ID	MTH 254
Instructor Name	Chickering, Susan R.
Items on Reserve	1
Course ID	HUM 320
Instructor Name	Chickering, Susan R.
Items on Reserve	1
Course ID	IST 401
Instructor Name	Chickering, Susan R.
Items on Reserve	1
Course ID	IST 455
Instructor Name	Chickering, Susan R.
Section Number	45
Items on Reserve	1

Figure 5-1. Reserve Information Screen

If your reserve search was by Instructor, the Reserve Information screen displays a list of the courses for which the instructor has placed one or more items on reserve. If your search was by course ID, the Reserve Information screen displays a list of the instructors who have placed one or more items on reserve for the course you chose.

Each entry on the Reserve Information screen lists the following information:

- Course ID - The ID of the course.
- Instructor Name - The name of the instructor.
- Section Number - *(Optional)* The section number of the course.
- Items on Reserve - The number of items on reserve.

From the Reserve Information screen, you can view detailed information about the items on reserve.

To view detailed information about items on reserve,

- Click the hyperlinked text in the Course ID field.

The Reserve Detail screen appears, displaying information about the items on reserve for the course you chose.

5.1 Viewing Items on Reserve

The Reserve Detail screen displays information about the items on reserve for a course (*Figure 5-2*).

Figure 5-2. Reserve Detail Screen

For each item on reserve, the Reserve Detail screen displays the following information:

- Title - The title of the item.
- Author - The author of the item.
- Reserve Location - The location at which the item is shelved.
- Status - The status of the item.
- Bib ID - The bibliographic ID of the record to which the item is attached.
- Barcode - The barcode of the item.
- Copy No. - The item's copy number.
- Item Class - The item class to which the item belongs.
- Owning Location - The location to which the item belongs.
- Begin Date - The date the item went on reserve.
- End Date - The date the item comes off reserve.

Tip: If an item on Reserve has been checked out, you can view the due date on the Item Information screen.

From the Reserve Detail screen, you can view the record screen of the bibliographic record to which a listed item is attached.

To view the record screen for an item on the Reserve Detail screen,

- Click the hyperlinked text in the Bib ID field.

6. Working with the Cart

In the Chameleon *i*Portal, you can save bibliographic, holdings, and item records to the Cart for later viewing. From the Cart screen, you can view, save, and e-mail the records that you saved.

The records that you save to the Cart are available for the life of your session. If you load a saved session, the records you saved during that session will still be available.

In this chapter, we discuss the following topics:

⇒ Saving Records to the Cart
⇒ Working with the Cart Screen . . .

6.1 Saving Records to the Cart . . .

Depending on the configuration of the *i*Portal, you can save records to the Cart from the following screens:

- List of Titles screen.
- Full Record screen.
- Items List screen.
- MARC Record screen.
- Holdings screen.
- Holdings Items List screen.

6.1.1 From the List of Titles Screen

If configured properly, the List of Titles screen (*Figure 6-1*) displays . . .
- A check box next to each record. Select the check box to mark a record to be saved to the Cart.
- A Check All button. Click this button to select all records that are displayed on the screen. **Tip:** The label for the Check All button displays the range of the displayed records in the result set. For example, if the List of Titles screen displays records 51 through 60 in a results set, the Check All button displays the text *Check 51-60.*
- A Clear All button. Click this button to uncheck all selected records.
- A Save to Cart button. Click this button to save the selected records to the Cart.

Figure 6-1. List of Titles Screen - With Saving Records to the Cart Enabled

To save records to the Cart from the List of Titles screen,

1. Select the check box next to each record that you want to save.
    -OR-
    Click the Check All button to select all check boxes on the current screen.

2. Click the Save to Cart button.

The *i*Portal saves the selected bibliographic records to the Cart.

6.1.2 From the Full Record Screen

If configured properly, the Full Record screen (*Figure 6-2*) displays a Save to Cart button below the record.

Figure 6-2. Full Record Screen - Displaying a Save to Cart Button

To save records to the Cart from the Full Record screen,

- Click the Save to Cart button.

The *i*Portal saves the bibliographic record to the Cart.

6.1.3 From the Items List Screen

If configured properly, the Items List screen (*Figure 6-3*) displays . . .
- A check box above each item record. Select the check box to mark a record to be saved to the Cart.
- A Save to Cart button. Click this button to save the selected records to the Cart.

Figure 6-3. Items List Screen - With Saving Records to the Cart Enabled

To save records to the Cart from the Items List screen,

1. Select the check box next to each record that you want to save.
2. Click the Save to Cart button.

The *i*Portal saves the selected item records to the Cart.

6.1.4 From the MARC Record Screen

If configured properly, the MARC Record screen (*Figure 6-4*) displays a Save to Cart button below the record.

Tag	In 1	In 2	Data
001			vtls000293826
003			VMW
005			20020122213000.0
008			020122s1994 msu bd 001 0 eng
010			\a 94-17077 //r94
020			\a 0878057315
020			\a 0878057323 (pbk.)
035			\a (OCoLC)ocm30353220 950322
039		9	\a 200201222130 \b VLOAD \c 200201221450 \d VLOAD \y 1998080723000000 \z load
040			\a DLC \c DLC \d IAI
049			\a VMWW
050	0	0	\a PS3511.A86 \b L577 1994
082	0	0	\a 813/.52 \2 20
100	1		\a Ruppersburg, Hugh M.
245	1	0	\a Reading Faulkner. \p Light in August : glossary and commentary / \c by Hugh Ruppersburg ; with the editorial collaboration of James Hinkle and Robert McCoy.
260			\a Jackson : \b University Press of Mississippi, \c c1994.
263			\a 9410
300			\a xiv, 324 p. ; \c 24 cm.
440		0	\a Reading Faulkner series
504			\a Includes bibliographical references and index.
600	1	0	\a Faulkner, William, \d 1897-1962. \t Light in August.
600	1	0	\a Faulkner, William, \d 1897-1962 \x Dictionaries.
700	1	0	\a Hinkle, James.
700	1	0	\a McCoy, Robert.
700	1	1	\a Faulkner, William, \d 1897-1962. \t Light in August.
949			\a 000101

Save to Cart

Figure 6-4. MARC Record Screen - Displaying a Save to Cart Button

To save records to the Cart from the MARC Record screen,

- Click the Save to Cart button.

The *i*Portal saves the bibliographic record to the Cart.

6.1.5 From the Holdings Screen

If configured properly, the Holdings screen (*Figure 6-5*) displays . . .
- A check box above each holdings record. Select the check box to mark a record to be saved to the Cart.
- A Save to Cart button. Click this button to save the selected records to the Cart.

Figure 6-5. Holdings Screen - With Saving Records to the Cart Enabled

To save records to the Cart from the Holdings screen,

1. Select the check box next to each record that you want to save.
2. Click the Save to Cart button.

The *i*Portal saves the selected holdings records to the Cart.

6.1.6 Holdings Items List Screen

If configured properly, the Holdings Items List screen (*Figure 6-6*) displays . . .
- A check box above each holdings item record. Select the check box to mark a record to be saved to the Cart.
- A Save to Cart button. Click this button to save the selected records to the Cart.

Figure 6-6. Holdings Items List Screen - With Saving Records to the Cart Enabled

To save records to the Cart from the Holdings Items List screen,

1. Select the check box next to each record that you want to save.
2. Click the Save to Cart button.

The *i*Portal saves the selected holdings item records to the Cart.

6.2 Working with the Cart Screen

The Cart screen displays the records that you have saved during the current session (*Figure 6-7*).

Figure 6-7. Cart Screen

The Cart screen has two main sections:

- Control Panel area - Contains controls for working with the records saved in the Cart (*Figure 6-8*).

Figure 6-8. Cart Screen - Control Panel Area

- Record Display area - Displays the records saved in the Cart (*Figure 6-9*).

Figure 6-9. Cart Screen - Record Display Area

The options in the Control Panel area determine the display of the Record Display area.

From the Cart screen, you can . . .

- Change the display of the records.
- Update the Cart.
- Delete one or more records from the Cart.
- Clear all records from the Cart.
- Save the records in the Cart.
- E-mail the records in the Cart.

6.2.1 Changing the Display of Records

The Cart displays records in the following formats:

- **Brief View** - Displays selected bibliographic information for each record.
- **Full View** - Displays expanded bibliographic information for each record.
- **Item View** - Displays selected elements of the bibliographic record and information about each item record that is saved to the Cart.
- **Holdings View** - Displays selected elements of the bibliographic record and information about each holdings record that is saved to the Cart.
- **MARC View** - Displays the bibliographic record in MARC format.
- **ISO 2709 View** - Displays the entire stream of the ISO 2709 format record.
- **Bib-ID View** - Displays the bibliographic ID of each record.
- **Endnote View** - Displays the record in a format formatted for use with Endnote software.

To change the format of the record display,

- In the list box in the Control Panel area, choose a display format.

The Cart screen refreshes to display records in the format you chose.

6.2.2 Updating the Cart

If you save records to the Cart while the Cart screen is open in another window, you can refresh the Cart screen to update the record display.

To update the Cart screen,

1. Select the Update Cart radio button.
2. Click the Submit button.

6.2.3 Deleting One or More Records

You can delete one or more bibliographic records from the Cart.

Note: You cannot choose to delete individual holdings or item records.

To delete one or more records from the Cart,

1. Click check box in the record display for each record that you want to delete.
2. Click the Delete Selected Records radio button.
3. Click the Submit button.

The *i*Portal deletes the selected records from the Cart.

6.2.4 Deleting All Records from the Cart

To delete all records from the Cart,

1. Click the Clear Cart radio button.
2. Click the Submit button.

The *i*Portal deletes all records from the Cart.

6.2.5 Saving Records

To save the records in the Cart,

1. Click the Save Cart radio button.
2. Click the Submit radio button.

   The Cart displays the records in a textual format (*Figure 6-10*).

Figure 6-10. Cart Screen - Displaying Records in a Text Format

3. Use your Web browser's Save function to save the screen in text format.

6.2.6 E-mailing Records From the Cart

To e-mail records from the Cart,

1. Choose the Cart display in which you want to e-mail records.

   Note:
   - If you choose ISO-2709, Bib-ID, or Endnote display formats, the records will be sent as attachments. For any other format, the records will be included in the body of the e-mail.
   - If you choose the Endnote display format, the attached file of records will be encoded as ISO-8859-1 data, rather than UTF-8. This encoding is used for compatibility with Endnote.

2. Select the E-mail radio button.
3. Click the Submit button.

The E-mail record dialog appears (*Figure 6-11*).


```
Recipient's Email Address:
[                                    ]
Your Email Address:
[                                    ]
Email Subject:
[                                    ]
Email Message
[                                    ] [▲]
[                                    ]
[                                    ]
[                                    ]
[                                    ]
[                                    ] [▼]

        [ Send Mail ]  [ Reset ]  [ Cancel E-mail ]


E-mail Content: Brief View Format

Your Session ID Number: 2003030715231324311   [▲]
Created: Fri Mar  7 15:25:52 2003


|---------------- Records Below ----------------|
Author: Creighton, Joanne V., 1942-
Title: William Faulkner's craft of revision : the
Publisher: Detroit : Wayne State University Press,
Material: 182 p. ; 24 cm.
|---------------- Record Break ----------------|
Author: Beck, Warren.
Title: Man in motion : Faulkner's trilogy.
Publisher: Madison : University of Wisconsin Press
Material: xi, 203 p. ; 23 cm.
|---------------- Record Break ----------------| [▼]
[◄]                                           [►]
```

Figure 6-11. E-mail Record Dialog

4. In the *Recipient's E-mail Address* field, type the recipient's e-mail address (*required field*).
5. In the *Your E-mail Address* field, type your e-mail address (*required field*).
6. In the *Subject* field, type a subject (*optional field*).
7. In the *Message* field, type a message (*optional field*).

8. Click the Send Mail button to send the e-mail to the recipient.
    -OR-
    Click the Reset button to reset all fields.
    -OR-
    Click the Cancel E-mail button to return to the Cart screen without sending the e-mail.

Important: Your system administrator is responsible for making sure the **sendmail** program is configured to allow the *i*Portal user account to send messages. If **sendmail** is not configured correctly, the *i*Portal e-mail function will not work. Additionally, if you want to send records or text using non-ASCII characters, **sendmail** version 8.7 or greater is required. Contact your system administrator to find out what version of **sendmail** your server uses.

---

7. Working with Search History

The Chameleon *i*Portal records the searches that you initiate during a session in a file on the server. Depending on the type of search history that is implemented in your *i*Portal, you can resubmit and/or refine your search.

The Chameleon *i*Portal supports two search history functions:

- Search History list - Lists the searches you have initiated during the current session.
- Search History form - Consists of a list of the searches you have initiated during a session and a search form in which you can modify and resubmit each search.

In this chapter, we discuss the following topics:

⇒ Working with a Search History List
⇒ Working with a Search History Form

7.1 Working with a Search History List

The Search History List is a list of the searches you have initiated during the current session (*Figure 7-1*).

Figure 7-1. Search History List

You can resubmit any search in this list.

To resubmit a search,

- Click the linked search query that you want to resubmit.

The *i*Portal resubmits the search query.

7.2 Working with a Search History Form

A Search History form combines a list of searches with a search form that lets you modify and resubmit a search. There are four types of search history forms:

- Browse Search History
- Bibliographic Keyword Search History
- Expert Search History
- Reserve Search History

Each search history form includes two sections:

- Search History list - A list of the browse, bibliographic keyword, expert, or reserve searches that you have initiated in the current session.
- Search form - The search form in which you can modify a search.

Below, we show an example of a Search History screen displaying all four types of search history forms.

Figure 7-2. Search History Screen

Note: Search history forms can appear on any screen.

For each search you have initiated, the search history form lists the following information:

- The original search query.
- The database on which the search query was executed.

From the history form, you can . . .

- Resubmit the original search.
- Modify and resubmit the search.

7.2.1 Resubmitting a Search

To resubmit a search,

- For the search that you want to resubmit, click the Resubmit Search link.

The *i*Portal resubmits the search.

7.2.2 Modifying a Search

To modify and resubmit a search,

1. For the search you want to resubmit, click the Modify Search link.

   The *i*Portal populates the search form with the original search query (*Figure 7-3*).

Figure 7-3. Keyword Search History Form

2. Modify the search query as desired.
3. Click the Search button.

The *i*Portal submits the modified search.

8. Using Patron Empowerment Features

The Chameleon *i*Portal includes several Patron Empowerment features that let patrons access extended functionality of the *i*Portal, such as renewals and requests. In this chapter, we provide information for accessing and using these features.

This chapter covers the following topics:

⇒ Working with Patron Information Screens
⇒ Renewing Checked out and Overdue Items
⇒ Using the Online Request Wizard to Place a Request

Important: If your library makes available computers that provide public access to your *i*Portal, we recommend that you read the section "Security Considerations" in this user's guide.

8.1 Working with Patron Information Screens
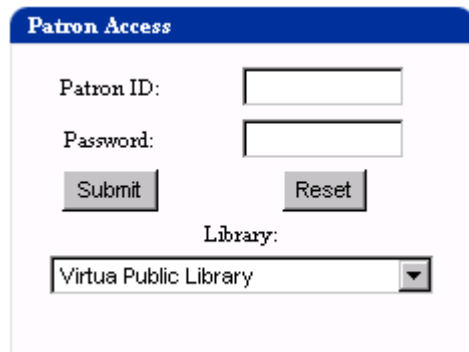
The Patron Information screens consist of the . . .

- Patron Record screen.
- Patron Account screen.
- Patron Activity screen.

In this chapter, we provide information for accessing and working with these screens.

8.1.1 Logging in to your Patron Account

The Patron Authentication form lets you submit username and password information to the Virtua server (*Figure 8-1*).

Figure 8-1. Patron Authentication Form

This form can be located on any screen in the *i*Portal interface.

To log in to your patron account,

1. In the Patron ID text box, type your patron ID (tag 015 subfield $a).
2. In the Password text box, type your password (tag 015 subfield $b).
3. In the Library pull-down list box, choose the database in which your patron record is stored.
4. Click the Submit button.

If you enter the correct authentication information, the Patron Authentication form will be replaced by links to patron-specific functions (*Figure 8-2*) and the Patron Welcome display appears (*Figure 8-3*).

Figure 8-2. Links to Patron-specific Functions

Figure 8-3. Patron Welcome Display

The Patron Welcome display lists brief information about your account and circulation activity.

8.1.2 Viewing the Patron Full Record Screen

The Patron Full Record screen displays personal information about the patron.

To access the Patron Full Record screen,

- In the list of patron-specific links, click the Full link.

The Patron Full Record screen appears, displaying information from the patron record (*Figure 8-4*).

Figure 8-4. Patron Full Record Screen
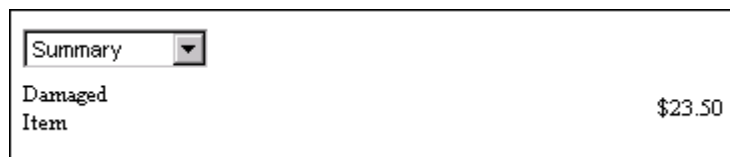
8.1.3 Viewing the Patron Account Screen

The Patron Account screen displays information about the fines and fees owed by the patron.

To access the Patron Account screen,

- In the list of patron-specific links, click the Patron Account link.

The Patron Account screen appears, displaying summary information about the patron's account (*Figure 8-5*).

Figure 8-5. Patron Account Screen

8.1.3.1 Viewing Patron Account Information

Initially, the Patron Account screen displays information about the fines and fees owed by the patron. If the patron's account has any assessed fines or fees, a description of each fine or fee type appears in the display box along with the total amount of money owed for that category. For each category, you can view more detailed information.

8.1.3.1.1 Viewing Detailed Account Information

To view detailed information about a fine or fee category,

- Choose a fine or fee category in the pull-down list box above the summary information (*Figure 8-6*).

Figure 8-6. Account Pull-down List Box

The Patron Account screen displays detailed information about each fine or fee in the category that you chose (*Figure 8-7*).

Figure 8-7. Patron Account Screen - Displaying Detailed Information

8.1.4 Viewing the Patron Activity Screen

The Patron Activity screen displays information about a patron's circulation activity.

To access the Patron Activity screen,

- In the list of patron-specific links, click the Patron Activity link.

The Patron Activity screen appears, displaying summary information about the patron's circulation transaction activity (*Figure 8-8*).

Figure 8-8. Patron Activity Screen

8.1.4.1 Viewing Patron Activity Information

Initially, the Patron Activity screen displays summary information for the patron's borrowing record (*Figure 8-8*). The summary screen lists the different categories of activity for this patron and the number of items associated with each category. All the possible categories of activity are listed below:

- Items **Checked Out**.
- Items **Overdue**.

- Items **Billed** for replacement.
- Items **Requested** *from* the patron.
- Items **Requested** *from* the patron and **Overdue**.
- Items **Pending** (that is, requested *by* or *for* the patron).
- Requests *for* the patron that are available for **Pickup**, including holds, recalls, and loans.
- Items **Disputed** by the patron.
- Items **Waived** by the library staff.
- **History** of patron transactions.

For each transaction type, you can view more detailed information.

8.1.4.1.1 Viewing Detailed Activity Information

To view detailed information about a transaction category,

- Choose a transaction category in the pull-down list box above the summary information (*Figure 8-9*).

Figure 8-9. Activity Pull-down List Box

Detailed information about transaction in the category that you selected appears (*Figure 8-10*).

Figure 8-10. Patron Activity Screen - Detail

For each line item, the *i*Portal lists detailed information. The information displayed depends on the category.

8.2 Renewing Checked out and Overdue Items

If available in your *i*Portal, you can renew items from the Checked Out, Overdue, and/or Billed detail display information of the Patron Activity screen.

To renew an item via the *i*Portal,

1. Navigate to the Patron Activity screen, as outlined in the section "Working with Patron Information Screens"
2. In the pull-down list box of the Patron Activity summary area, select either Checked Out, Overdue, or Billed.

   The detail area of the Patron Activity screen appears for the category you chose (*Figure 8-11*).

Figure 8-11. Patron Activity Screen

3. Click the Select for Renewal check box for each item you want to renew.
4. Click the Renew button.

   The *i*Portal displays for each item the results of the renewal attempt (*Figure 8-12*).

The following renewals were attempted:

User ID:	789987

Barcode:	75944261
Title	Mike Mulligan and his steam shovel / story and pictures by Virginia Lee Burton.
Author	Burton, Virginia Lee, 1909-1968.
Call Number	PZ7.B954 M5x 1939
Due Date:	6-9-2003

Barcode:	968930335
Title	I am a fugitive from a Georgia chain gang! / Robert E. Burns ; foreword to the Brown Thrasher edition by Matthew J. Mancini.
Author	Burns, Robert Elliott.
Call Number	HV6248.B79 A3 1997
Due Date:	6-9-2003

Figure 8-12. Renewal Results

- If the renewal is successful, the item information includes a *Due Date* field that displays the new due date.
- If the renewal is unsuccessful, the *i*Portal displays a message saying that the item could not be renewed.

For more information on renewals see the *Virtua Circulation Control/Introduction and Basic Circulation Transactions User's Guide*.

8.3 Using the Online Request Wizard to Place a Request

The Online Request Wizard uses a combination of predefined criteria and Circulation Matrix parameters to automatically place hold, recall, loan, and page requests on records that your patrons select. In most cases, requests placed through the *i*Portal are processed by the Virtua server in the same way as Auto requests placed in the Virtua client.

> **Important:** You CANNOT use the Online Request Wizard to place requests on records that are not stored in the same database as your patron record.

For information about how Virtua handles Auto requests, see the *Virtua Circulation Control User's Guide*.

8.3.1 Accessing the Online Request Wizard

Depending on the configuration of your *i*Portal, you can make a request from the following screens . . .

- Full Record screen
- Items List screen
- Item Record screen
- Holdings screen
- Holdings Record screen
- Holdings Items screen

For information on enabling or disabling requests from any of these screens, see the *Chameleon iPortal Configuration Guide*.

If requests are allowed from a screen, a Request button appears (*Figure 8-13*).

Figure 8-13. Full Card Screen - Request Button Available

To access the Online Request Wizard,

- From a screen on which Requests are available, click the Request button.

Important: If your patron record is not stored in the same database as the requested material, you will not be able to place a request.

The Online Request Wizard appears (*Figure 8-14*).

Figure 8-14. Online Request Wizard

8.3.2 Placing a Request

You can place a request from the Chameleon *i*Portal Online Request Wizard (*Figure 8-15*).

Figure 8-15. Online Request Wizard

Important: If your patron record is not stored in the same database as the requested material, you will not be able to use the Online Request Wizard to place a request.

To place a Request,

1. Type your patron barcode in the Patron Barcode text box. **Tip:** If you have logged into the *i*Portal using your patron account, the Patron Barcode text box already lists your patron barcode.
2. From the Pickup Location pull-down list box, select the location from which you want to pick up the requested material.
3. Choose an expiration date for your request, using the Expiration Date pull-down list boxes.
4. In the Minimum Period Needed text box, choose a minimum number of days that you need the material.

Note:
- If the number of days in the Minimum Period Needed field exceeds the circulation period, the request will be canceled.
- The Minimum Period Needed field does NOT appear if the Minimum Circulation Question parameter is set to No. For information on the Minimum Circulation Question parameter, see the *Virtua Profiler/Circulation Parameters User's Guide*.

5. Click the Submit button to send the information you entered to the Virtua server.
   -OR-
   Click the Reset button to clear your changes.
   -OR-
   Click the Cancel button to cancel your request and close the Online Request Wizard.

After you press the Submit button, the Virtua server attempts to place the request.

- If your request does not succeed, a message appears saying that your request could not be processed (*Figure 8-16*).
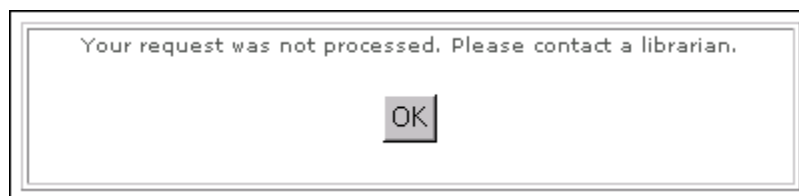
Figure 8-16. Online Request Wizard - Unsuccessful Request

- If a Hold, Recall, or Loan request is successfully placed, a screen appears, telling you what kind of request you placed and any other associated details (*Figure 8-17*).
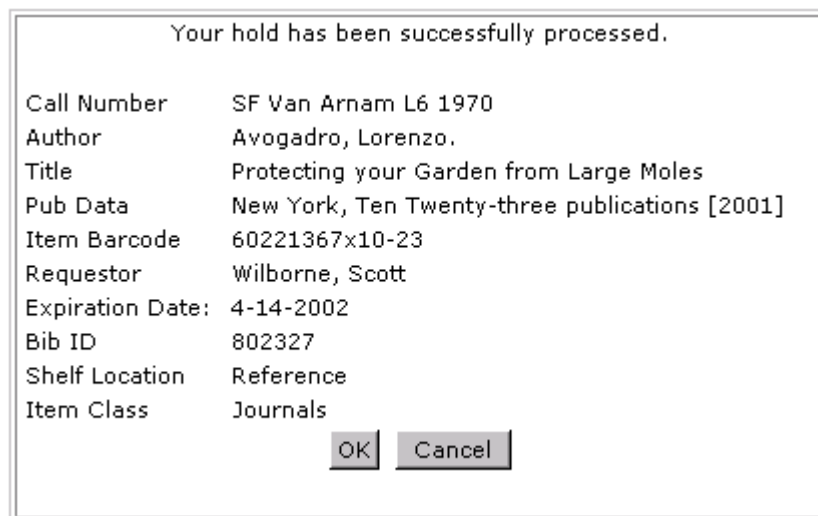
Figure 8-17. Online Request Wizard - Recall Request Information Screen

- If a Page request is successfully placed, a Paging Information screen appears (*Figure 8-18*).
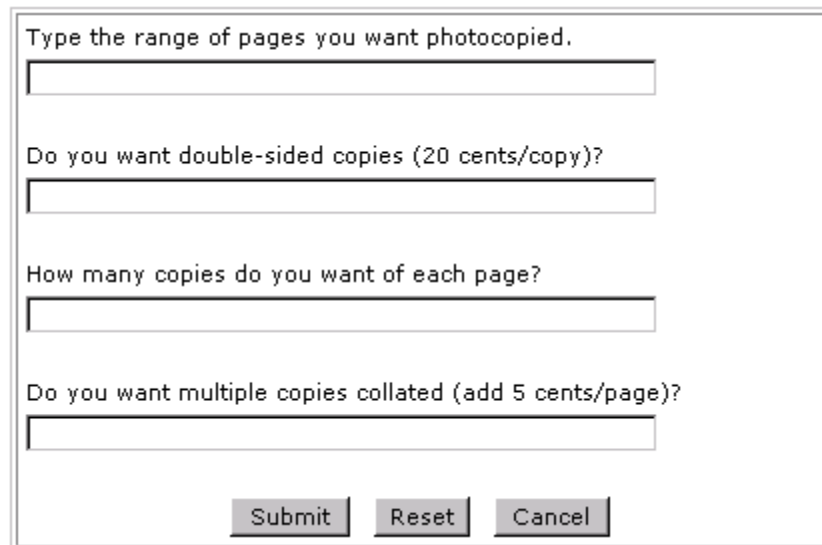
Figure 8-18. Online Request Wizard - Page Request

a. If a Paging Pickup Location pull-down list box appears, select a pickup location. This location overrides the location you selected on the initial screen of the Online Request Wizard.
b. If your library uses the Request Slip Printing system, select the radio button associated with a library-defined list of page types.

> **Note:** For information on setting page request types, see the *Chameleon iPortal Configuration Guide.*

c. Click the Submit button.

A Patron Paging Input screen appears (*Figure 8-19*).

Figure 8-19. Online Request Wizard - Patron Paging Input Screen

d. If your library uses Request Slip Printing, type the requested information in each text box. Otherwise, skip to the next step.

Note:
- The information you type in these fields is printed using the Request Slip printing system. The Virtua server does not store this information.
- For information on setting page request questions, see the *Chameleon iPortal Configuration Guide*.

e. Click the Submit button.

A summary screen appears, displaying information about your request (*Figure 8-20*).

Your page has been successfully processed.

Call Number	SF Van Arnam L6 1970
Author	Avogadro, Lorenzo.
Title	Protecting your Garden from Large Moles
Pub Data	New York, Ten Twenty-three publications [2001]
Item Barcode	60221367x10-23
Requestor	Wilborne, Scott
Page Type	Standard circulating request
Type the range of pages you want photocopied.	15-20
Do you want double-sided copies (20 cents/copy)?	No
How many copies do you want of each page?	2
Do you want multiple copies collated (add 5 cents/page)?	Yes
Expiration Date:	1-14-2003
Bib ID	802327
Shelf Location	Reference
Item Class	Journals

OK   Cancel

Figure 8-20. Online Request Wizard - Page Request Information Screen

    f.   Review the information about your request.
    g.   Click the OK button to complete the Request.
        -OR-
        Click the Cancel button to cancel the Request and close this window.

8.3.3 Placing a Request as a Guest

If allowed by your library's configuration, you can place a page request as a Guest patron. This type of request allows anyone with access to an *i*Portal to place a page request without entering a patron barcode.

If Guest Requests are enabled, a Guest radio button appears on the Online Request Wizard (*Figure 8-21*).

Figure 8-21. Online Request Wizard

Important: The Guest patron is a patron record stored in the database and is NOT related to the Guest user profile. For information on creating the Guest patron record, see the *Chameleon iPortal Configuration Guide*.

To place a page as a Guest patron,

1. In the Online Request Wizard, select the Guest radio button.
2. From the Pickup Location pull-down list box, select the location from which you want to pick up the requested material.
3. Choose an expiration date for your request, using the Expiration Date pull-down list boxes. By default, this date is six months from the current date.

> **Note:** If you select to use a default expiration period in the **chameleon.conf** file, the number of days you specify in the configuration for a default expiration period overrides any date that you choose from this screen.

4. In the Minimum Period Needed text box, choose a minimum number of days that you need the material.

> **Note:**
> - If the amount of days in the Minimum Period Needed field exceeds the circulation period, the request will be cancelled.
> - The Minimum Period Needed field does NOT appear if the Minimum Circulation Question parameter is set to No. For information on the Minimum Circulation Question parameter, see the *Virtua Profiler/Circulation Parameters User's Guide*.

6. Click the Submit button to send the information you entered to the Virtua server.
-OR-
Click the Reset button to clear your changes.
-OR-
Click the Cancel button to cancel your request and close the Online Request Wizard.

After you press the Submit button, the Virtua server attempts to place the request.

• If your request does not succeed, or if a Hold, Recall, or Loan request is successfully placed instead of a page request, a message appears, saying that your request could not be processed (*Figure 8-22*).

Figure 8-22. Online Request Wizard - Unsuccessful Request

• If a Page request is successfully placed, a Paging Information screen appears (*Figure 8-23*).

Figure 8-23. Online Request Wizard - Page Request

a. If a Paging Pickup Location pull-down list box appears, select a pickup location. This location overrides the location you selected on the initial screen of the Online Request Wizard.

b. If your library uses the Request Slip Printing system, select the radio button associated with a library-defined list of page types.

> **Note:** For information on setting page request types, see the *Chameleon iPortal Configuration Guide.*

c. Click the Submit button.

A Patron Paging Input screen appears (*Figure 8-24*).

Figure 8-24. Online Request Wizard - Patron Paging Input Screen

d. If your library uses Request Slip Printing, type the requested information in each text box. Otherwise, skip to the next step.

> **Note:**
> *   The information you type in these fields is printed using the Request Slip printing system. The Virtua server does not store this information.
> *   For information on setting page request questions, see the *Chameleon iPortal Configuration Guide.*

e. Click the Submit button.

A summary screen appears, displaying information about your request (*Figure 8-25*).

```
Your page has been successfully processed.

Call Number                           PN5600.a
Author                                Soi-lyn, T. Greene
Title                                 Feeding the World in the
                                      21st Century.
Pub Data                              Blacksburg, VA: Notalgae
                                      Press
Requestor                             Guest user for Gateway
                                      requests
Page Type                             Standard circulating
                                      request
Type the range of pages you want      All pages
photocopied.
Do you want double-sided copies (20   Yes
cents/copy)?
How many copies do you want of each   3
page?
Do you want multiple copies collated  No
(add 5 cents/page)?
Expiration Date:                      1-14-2003
Bib ID                                802483
                      OK   Cancel
```

Figure 8-25. Online Request Wizard - Page Request Information Screen

   f. Review the information about your request.
   g. Click the OK button to complete the Request.
      -OR-
      Click the Cancel button to cancel the Request and close this window.

8.3.4 Canceling a Request

If enabled, you can cancel any requests you placed via the Chameleon *i*Portal or Virtua Client.

To cancel a request,

1. Navigate to the Patron Activity screen of your Patron Information window. For information on accessing the Patron Activity screen, see the section "Working with Patron Information Screens" in this user's guide.

    The Patron Activity screen displays a summary of borrowing and request activity (*Figure 8-26*).

Figure 8-26. Patron Activity - Summary Information

2. In the Activity pull-down list box, choose either:
    - **Pending** to view a list of pending requests.
      -OR-
    - **Pickup** to view a list of requests that are trapped and ready to pick up.

    A list of Pending or Available items appear as appropriate (*Figure 8-27*).

Figure 8-27. Patron Activity - Pending Details

3. For the request you want to cancel, click the Cancel link in the far right column.

    The *i*Portal displays a confirmation screen indicating that your request has been canceled.

9. Working with Sessions

When you access the Chameleon *i*Portal, the software assigns a unique ID for the duration of your session. This session ID allows the *i*Portal to remember who you are so that you can maintain sustained access to features such as search history, patron authentication, and Web requests.

Briefly, here is how the *i*Portal uses session IDs. The software creates a session file with a unique ID on the Web server and appends the ID as a parameter to each *i*Portal link in the interface. When you click a link, the session ID is passed to the next screen. In this way, the *i*Portal remembers aspects of your session, such as which records you have stored in the Cart and whether or not you have logged in to your patron account.

This chapter covers the following topics:

⇒ Beginning a New Session
⇒ Ending a Session
⇒ Working with the Session Management Screen

9.1 Beginning a New Session

The Chameleon *i*Portal assigns a new session ID each time you access the Start screen. At this point, your session file contains no data about searching. As you navigate and use the *i*Portal, the session file will retain information such as . . .

- The records you have saved to the Cart.
- Your patron information (if you have logged in).
- The search filters you have set.
- The last record screens you have viewed.
- The search queries you have entered.

9.2 Ending a Session

There are three ways that a session can end:

- When you click the New Session/Close Session link.
- When the reset time expires.
- When you close the browser window.

If you close a session by clicking the New Session/Close Session button or by letting the reset time expire, the *i*Portal deletes the session file from the server.

If you close the browser window without ending the session, the session file will remain on the server until it is manually removed.

9.3 Working with the Session Management Screen

The Chameleon *i*Portal lets you save your search session and retrieve the session at a later time. When you save a session, you retain session information such as a list of searches that you performed and the contents of your Cart.

Note: For security reasons, if you save a session in which you logged in to your patron account, you will NOT be logged in to your account when you reload the session.

To save a search session,

1. Where it is provided in your interface, click the link to the Session Management screen.

   The Session Management screen appears (*Figure 9-1*).

Figure 9-1. Session Management Screen

2.   Record the Current Session ID.
3.   Click the End and Save Session link.

The *i*Portal closes the session but retains the session file in a directory on the Web server. The session file will remain on the server until you load and close the session or the system administrator deletes the file.

To load a session,

1.   Where it is provided in your interface, click the link to the Session Management screen.

     The Session Management screen appears (*Figure 9-2*).

Figure 9-2. Session Management Screen
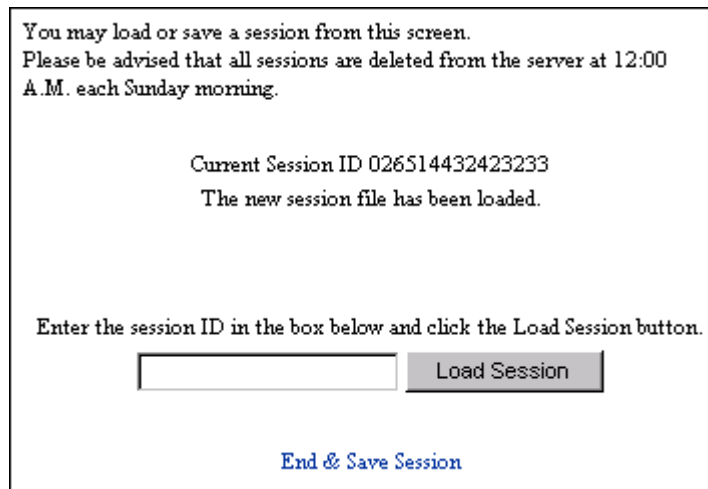
2. In the Load Session text box, type the session ID that you want to load.
3. Click the Load Session button.

A message appears on the Session Management screen, informing you that your session has been loaded (*Figure 9-3*).

Figure 9-3. Session Management Screen - New Session File Loaded

At this point, your session is loaded and you can access information from your previous session such as the records stored in your Cart and a list of searches performed.

Note: Patron authentication information does NOT carry over from a saved session. This means that when you load a session, you will need to log in to the *i*Portal before you can access patron information.

10. Appendix A - MARC Views Used in the Chameleon *i*Portal

The information that the Chameleon *i*Portal displays for bibliographic, holdings, and patron records is determined by a set of MARC Views that are configured in the Virtua Profiler. These Views specify which fields appear on a screen for each record.

The *i*Portal uses the Views listed under the *iPortal Views* section of the OPAC tab in the Virtua Profiler. If a View does not exist, the *i*Portal uses the same View in the *Client Views* section.

Note: For information about MARC Views, see the *Virtua Profiler/OPAC Parameters User's Guide*.

In the table below, we list each View record used by the Chameleon *i*Portal and the screens on which they are used.

View Name (and former View number)	Chameleon *i*Portal Screen
List of Titles (20001)	• List of Titles • Cart - Brief view • E-mail screen - Brief view
View Record: Holdings Header/Item Details (20002)	• Holding List screen • Cart - Holdings view • E-mail screen - Holdings view **Tip:** The bibliographic display is set on the Primary Display tab, and the holdings display is determined on the General Tabular Display tab.
View Record: Full Display (20003)	• Full Record screen • Cart - Full view • E-mail screen - Full view
Patron Information/Check-out Renew (20006)	Patron Information screen - Full Card
View Record/View Holdings Record: Items tab (20009)	• Item List screen • Holdings Item List screen **Tip:** The bibliographic display is set on the Primary Display tab, and the Item display is determined on the Items Tabular Display tab.

View Name (and former View number)	Chameleon *i*Portal Screen
Patron Activity: Checked Out (20010)	Patron Activity screen - Checked Out information
Patron Activity: Overdue (20011)	Patron Activity screen - Overdue information
Patron Activity: Billed (20012)	Patron Activity screen - Billed information
Patron Activity: Requested (20013)	Patron Activity screen - Requested information
Patron Activity: Requested Overdue (20014)	Patron Activity screen - Requested Overdue information
Patron Activity: Pending (20015)	Patron Activity screen - Pending information
Patron Activity: Pickup (20016)	Patron Activity screen - Pickup information
Patron Activity: Disputed (20017)	Patron Activity screen - Disputed information
Patron Activity: Waived (20018)	Patron Activity screen - Waived information
Patron Account Tabs (20019)	Patron Account screen - Any and all information

Index

T

U

V

W

Z

Reader's Comment Form

Chameleon *i*Portal User's Guide

VTLS Inc. welcomes your comments and suggestions on the quality and usefulness of this publication. We will consider your input for future revisions of the guide.

Did you find any errors? If so, please indicate the chapter, section, and page number.

_____

_____

_____

Is the information clearly presented? If not, please indicate where we need improvement.

_____

_____

_____

Do you need more information? If so, where?

_____

_____

_____

Are our examples correct? Helpful? Do you need more examples?

_____

_____

_____

What features did you like about the guide?

_____

_____

_____

Have you any other suggestions for improvement?

_____

_____

_____

Please send your comments to:
> *Documentation Manager*
> *VTLS Inc.*
> *1701 Kraft Drive*
> *Blacksburg, VA 24060*
> *U.S.A.*
> *Fax: 540/557/1210*
> *E-mail:* gulbenkiang@vtls.com

Thank you for helping us improve our documentation.