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Search Scoping

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SEARCH SCOPING

Overview: Search scoping allows you to create subsets of your database, and determine which records belong in each scope. Although scoping can also be applied to staff activities, this poster is concerned with scoping as applied to the web catalog.

SETUP OPTIONS

Location-Based Scopes: Scopes can be created based on your branch location codes. These codes can represent actual physical locations, or specific collections within locations. Patrons will then be able to limit their searches based on location, for example "Main Library" or "Shakespeare Collection."

Tip #1

Innovative will ask for a list of paired bibliographic and item locations. Make sure your pairs match!

If the scope has no bibliographic locations, it will always return no hits.

Tip #2

For each bibliographic code listed in your scope, you should include ALL corresponding item locations. Missing item locations can result in "naked" bibliographic records being displayed—and patrons wondering where to find the item!
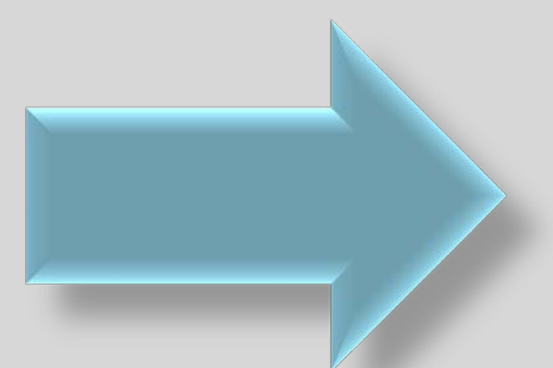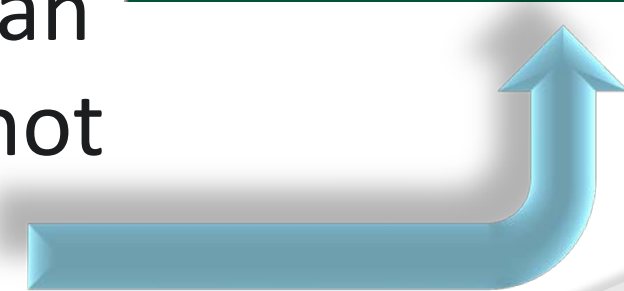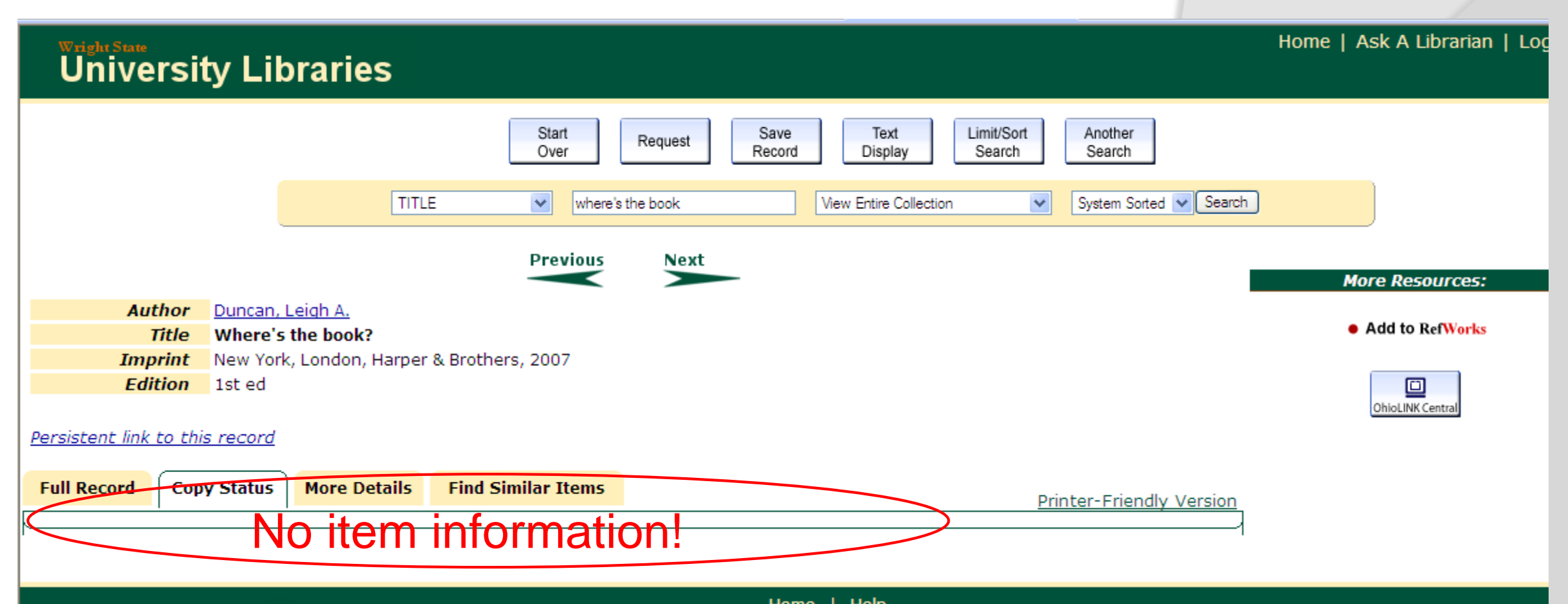
How it Works:

1. The patron chooses a scope and enters a query
2. The system looks for all bibliographic records that match both the query and the bibliographic locations listed for the scope
3. The system then looks for any item records containing item locations listed in the scope, which are attached to these bibliographic records
4. The search will display ALL bibliographic records returned in the search, along with items containing locations listed for that scope. See Tips #1 and #2!

Example:

Your Scope lists the following locations:

East (bib)
EJuve
EYA
EFic
ENonFic

However, your database also contains records that have a bibliographic location of *East* and an item location of *EBio*. If that item location is not included in the scope—and it's the only item attached to the bib—the bibliographic record will still display in a scoped search, but no item information will be shown.

SEARCH SCOPING

BCode-Based Scopes: Scopes can be created based on the bcodes in your bibliographic records. Each library customizes their bcodes, but they are often used to specify bibliographic level, material type and display. Patrons will then be able to limit their searches based on these codes, for example "Journals/Serials," "Music ," or "Maps."

How it Works:
1. The patron chooses a scope and enters a query
2. The system looks for all bibliographic records that match both the search terms and the bibliographic code listed for the scope
3. The search will display ALL bibliographic records returned in the search

MAINTENANCE

Maintaining Record Links: Successful search scoping depends on pairs of item and bibliographic location codes being up to date. When new records are added to the system, scopes need to be considered so that all associated item and bibliographic codes are represented correctly. Diligent staff can certainly make sure this happens. But to make life easier—why not automate this process?

Update Locations in Bibliographic Records

This Innovative program, part of the Link Maintenance product, will examine your records and add locations as needed according to a table you configure. Here is an example of an entry:

```
Bib location      Locations in item, checkin or order record
01 > East         EJuve EYA EFic ENonFic ERef
02 > Ref          ERef SRef WRef NRef
```

Notice that the item location **ERef** is associated with two bibliographic locations: East and Ref. If you add a record to your system with a bibliographic location of **East** and an item location of **ERef**, but forget to also add a bibliographic location of **Ref**, this program will do it for you. This insures the record will display correctly in both the East Branch scope and the Reference scope.

Maintaining the Scope Menu: Scope rules can be viewed (editing is done by Innovative) on this menu and scoping maintenance options include:
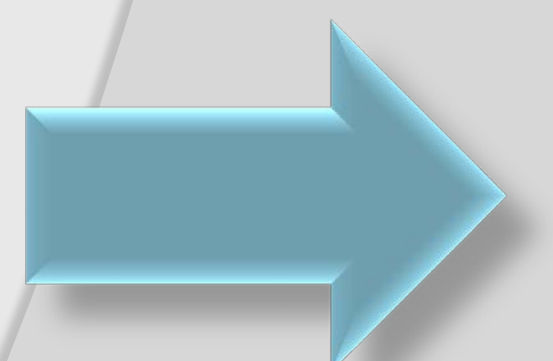
      M > Change MENU Line – the scope name patrons see
      N > Change Scope NAME – the scope name "behind the scenes"
      O > Change scope ORDER – the order of the scopes in the catalog drop-down menus

Example:

```
                    MAINTAINING THE SCOPE MENU
#   MENU LINE                  MENU ORDER           SCOPE NAME

01 > Journal Title                20                Journals
02 > Reference                    30                Reference
```

SEARCH SCOPING

DISPLAY

Create OpacMenu Pages: Separate search pages can be created to make "mini-catalogs" from each of your scopes. For example, opacmenu_s1.html would be a search page for your scope in menu line #1. Each mini-catalog has the same search options—Keyword, Title, Author, etc—but the searches are limited to the parameters defined in the scope.

This method is particularly useful for branch or special libraries. For example, the Art and Architecture library may want their "own" catalog for students to search for materials housed in their library. This can be achieved through creating opacmenu and srchhelp pages specifically for the scope for their location.

Tip #6

Be creative! Consider different color schemes or headers for each scope to help patrons realize they are in a subset of the catalog. Many of the webopac options are customizable by scope. Check the manual!

Scope Token: The scope token `<!--{scope}-->` can be added to srchhelp pages (Keyword, Title, Author, etc) to give patrons the option to search within scopes.

HTML Form: HTML code can be added to search boxes outside the catalog to include scoping options.

```
<td width="12%" nowrap="nowrap">
<label for="searchscope" title="Select search scope">
</label>
<select name="searchscope" id="searchscope"  alt=
"Select search scope">
        <option value="7">Books &amp; More</option>
        <option value="1">Journal Title</option>
        <option value="2">Reference</option>
        <option value="3">Media</option>
        <option value="6">Music</option>
        <option value="4">Online Resources</option>
        <option value="10">Archives</option>
</select>
</td>
```