

Webopac Preferences – Profile Search Method

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1. Introduction

The screens in this option show various tabs that you can use to define how the user performs a search in the Web OPAC. The standard tabs are: Search, Expert Search, Index search, and Search tree. If the thesaurus module has been implemented there will also be a tab Thesaurus.

For each search method you can define the options for searching.

For each search method, you can determine whether the search method is available. If not you can delete it from the profile:

- At the bottom of the screen, click the **Delete this search method** button

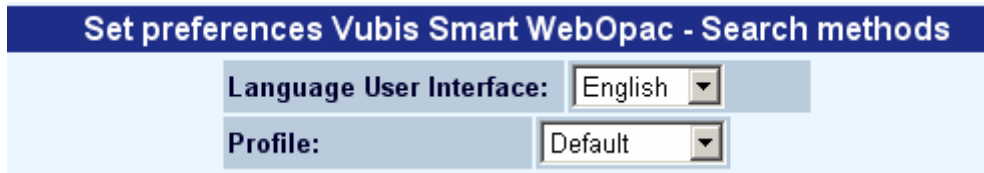
You can add a new Find or Browse type of search.

- Click the **Add Find method** or **Add Browse method** buttons

A new tab is added to the search methods. Configure this tab as described in section 2.

You can define options for each profile and for each language.

- Select the language for the profile from the drop-down menu
- Select the profile for which you want to make the changes



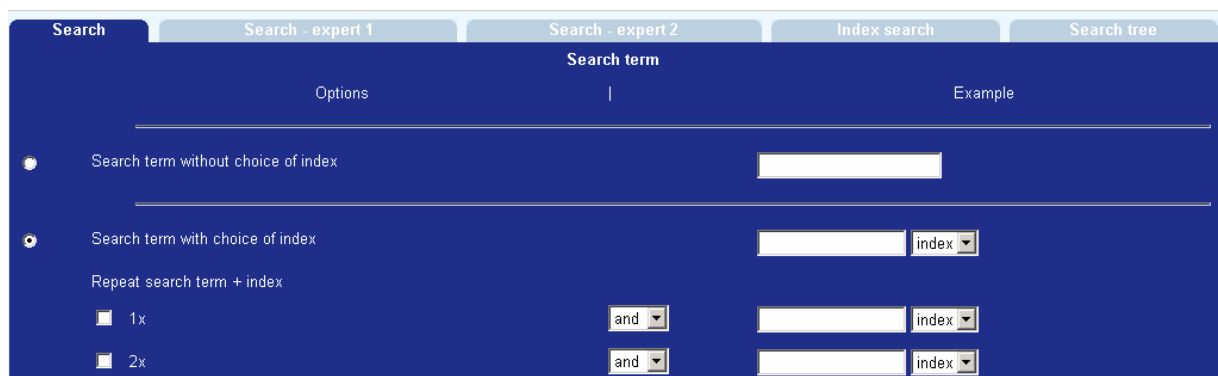
Languages are defined on the Start page.

2. Setup

For each of the tabs, the configuration screen is the same. You add or delete choices for the user, according to the type of search you want to present. So, for example, a simple Search may have no restrictions, whereas an Expert Search may have several restrictions offered.

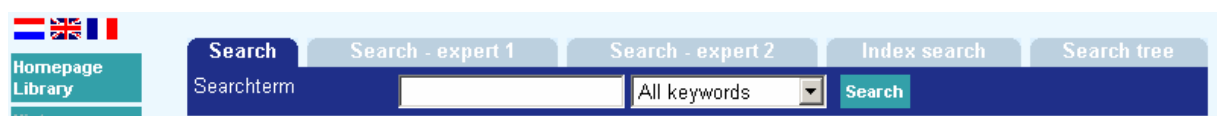
Indexes

You can specify whether the user has a choice of which index to use or not.



- Click the radio button to select which option is used.
- If **Search term with choice of index** is selected, indicate whether the user can search using more than one term.

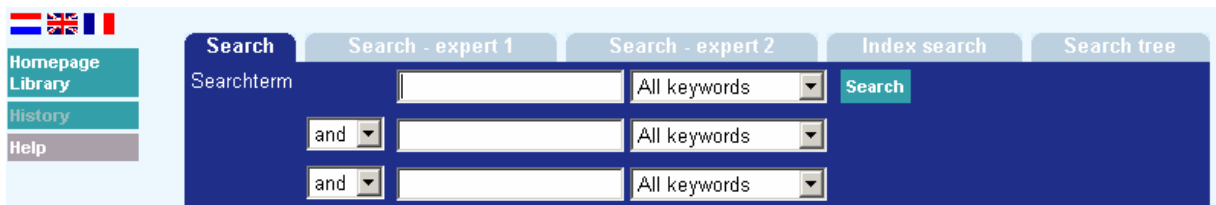
Example screen when **Repeat search term + index** is set to zero



Example screen when **Repeat search term + index** is set to 1



Example screen when **Repeat search term + index** is set to 2



Note

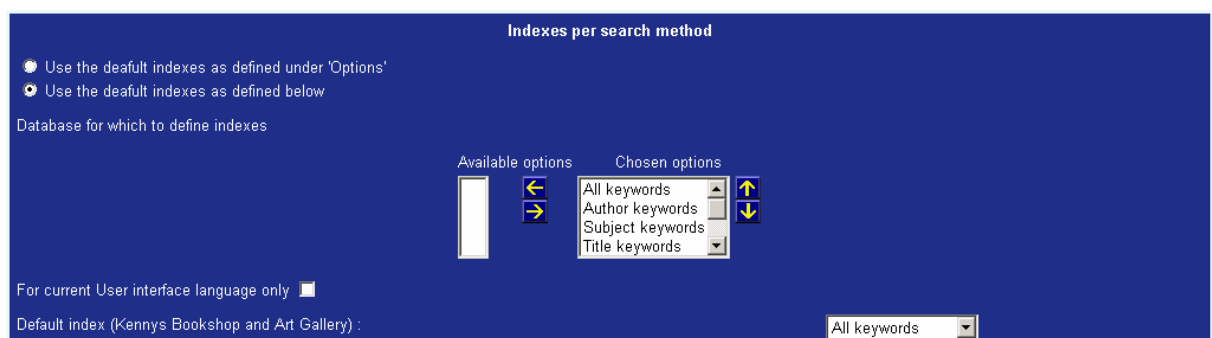
The maximum number of search indexes is 10.

Note

When creating search tabs where Boolean combinations between indexes are possible (see the previous screen shot), define the indexes available for selection to be of a similar mechanism type. Indexes using the "Personal name" mechanism should not be used where Boolean searches are possible.

Indexes per search method

This section allows you to decide whether to use the default index defined in Options (see above) or to define which indexes are available to search.



Database

Use this section to determine the default database, and whether the user can select another database or not.

The screenshot shows a window titled "Database" with a dark blue background. At the top, it says "Default database" followed by a dropdown menu containing "Vubis Smart development and test database". Below this is a button labeled "Possibility to choose more than one database". Underneath are two radio buttons: "No choice of database, always use the default" (which is selected) and "One selection possible".

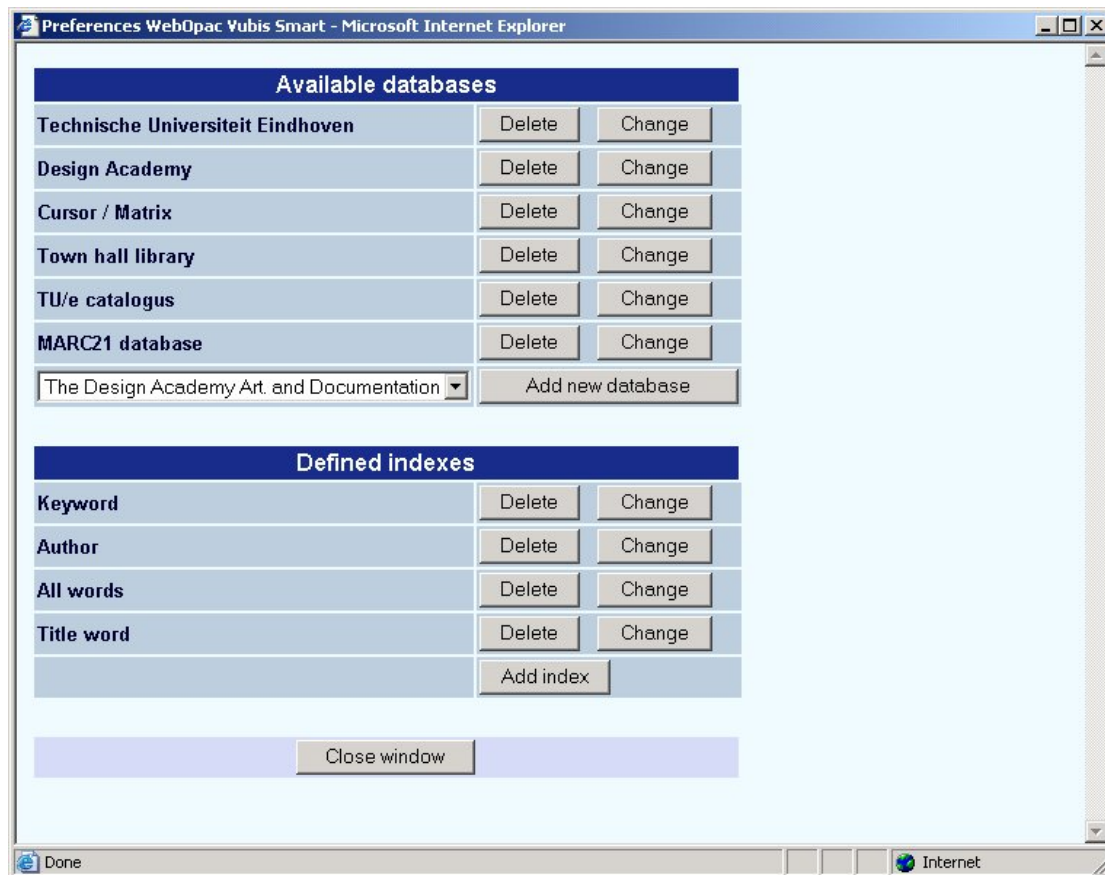
When you choose **Possibility to choose more than one database**, the following options are shown:

The screenshot shows the "Database" window with the "Possibility to choose more than one database" option selected. It features two lists: "Available options" and "Chosen options". The "Available options" list contains four entries: "Marc21 database | AVM WP Marc21", "Marc21 database | cen location database 6", "Marc21 database | WP for Marc21", and "Smartformat | All works in location BD". The "Chosen options" list contains two entries: "Vubis Smart development and test database" and "Marc21 database". Below the lists are radio buttons for "Databases in drop down list" (selected) and "Check boxes before databases". There is also a "Size drop down list:" dropdown set to "4". At the bottom are two buttons: "Definition of combination of databases and indexes" and "Back to choice of 1 database or 1 default database".

If a choice of multiple databases is possible, you can choose for either a drop down list or check boxes before the databases.

The button **Definition of combination of databases and indexes** gives access to a more detailed level of parameterisation, enabling you to define:

- [a] which databases should be displayed
- [b] which indexes should be displayed.

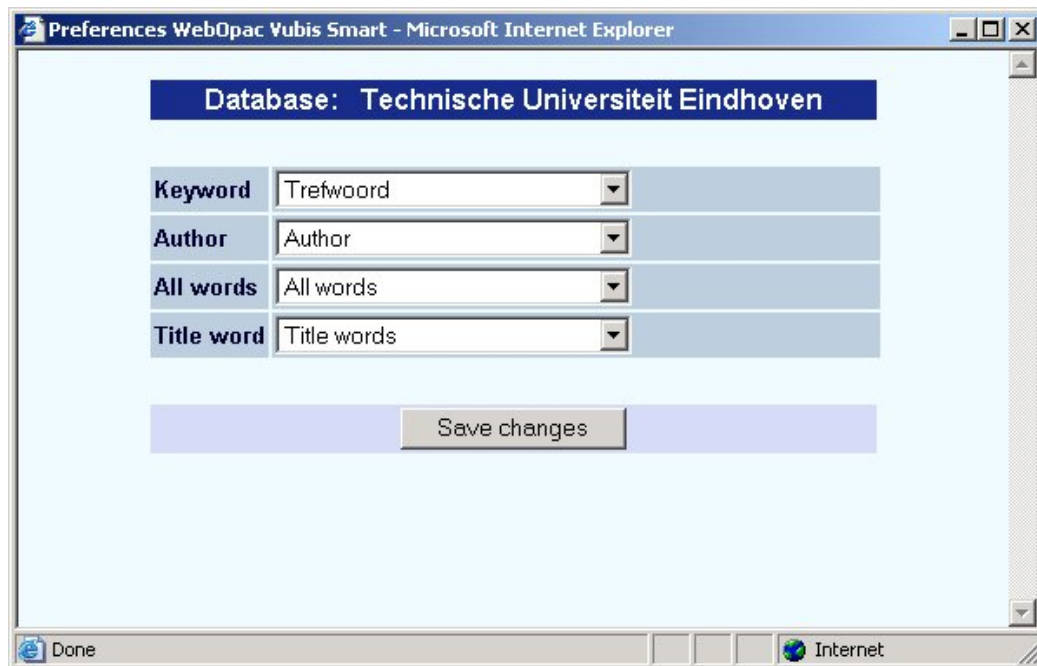


As the system will now search in multiple database, it may well be that these databases do not have identical indexes. Therefore it is necessary that you define "index mappings", i.e. which index from which database should be used if a "logical" index is selected.

Note

We make a distinction here between a "physical" index, which is the actual index, which is created on a per database basis, and a "logical" index, which does not exist as a physical index on disk, but which is just a mapping (or grouping) of physical indexes. If the system is configured for concurrent searching, the system displays the logical indexes, but does the actual searching for each database in the physical indexes.

These settings can be accessed through the **Change** button for each database definition.



What this actually means is the following:

- Four logical indexes have been defined. They have been named “Keyword”, “Author”, “All words” and “Title word”.
- The screen shot shows the mapping for each of these logical indexes for searches in the database “Technische Universiteit Eindhoven” (see title bar).
- Example: a search in the logical index “Keyword” uses the physical index “Trefwoord” of database “Technische Universiteit Eindhoven”

Notes

This feature is only available for Find searches, and *not* for Browse searches.

The feature can also be used to allow concurrent searches in multiple partial indexes, and thus not only in multiple databases.

Spread of search results

For the display of the search results in record lists, the system offers two options:

1. The record list is displayed immediately, and the search results from all selected databases are concatenated.

- The system displays an overview screen that shows how much records were found in each database.

The latter intermediate screen looks as follows:

The screenshot shows a search interface with a dark blue header and a light blue background. The header contains tabs for 'Search', 'Search - expert 1', 'Search - expert 2', 'Index search', 'Search tree', and 'Thesaurus'. The 'Search' tab is active. Below the header, there is a search term input field containing 'art', a dropdown menu set to 'Title word', and a 'Search' button. Below this, there is a 'Database' section with a list of checkboxes: 'Technische Universiteit Eindhoven' (checked), 'Design Academy' (checked), 'Cursor / Matrix' (unchecked), 'Town hall library' (checked), 'TU/e catalogus' (unchecked), and 'MARC21 database' (unchecked). Below the database list, there is a table titled 'Result of a search in several indexes'.

Result of a search in several indexes	
Title words Town hall library	164
Title words Technische Universiteit Eindhoven	1383
Title words Design Academy	251
Total	1798

The user can now select either the results from one of the selected databases, or the total result.

Restrictions

Use this section to determine whether restrictions can be applied to the search, and how many columns they display in.

The screenshot shows a 'Restrictions' dialog box with a dark blue background. It has two columns: 'Available options' and 'Chosen options'. The 'Available options' column contains a list of items: 'Year of publication', 'Type', 'Location', 'Language', 'Number of pages', and 'Owned since'. The 'Chosen options' column is currently empty. There are left and right arrow buttons between the columns, and up and down arrow buttons to the right of the 'Chosen options' column. Below the columns, there are two radio buttons: 'Display in 1 column' (selected) and 'Display in 2 columns'.

For a simple search, you may wish to prevent any restrictions being offered.

Size drop-down list

Use this section, if restrictions are allowed, to determine the size of the drop-down menu box.

Size drop down list

If a restriction was selected, choose the size of the drop down list.
If the size of a list is more then 1, user can choose more then 1 options at the same time.

Language

Location

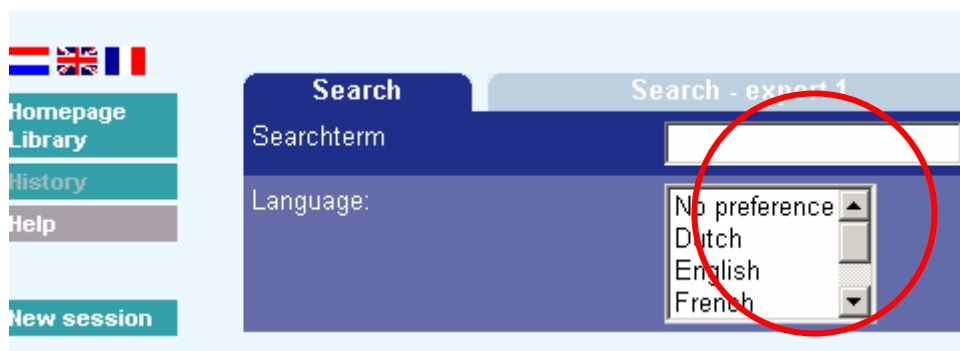
Type

For example, if you select 1 for Language, the default text will be displayed in the drop-down menu:



The screenshot shows a search interface with a sidebar on the left containing links for 'Homepage', 'Library', 'History', 'Help', 'New session', and 'Save preferences'. The main search area has a 'Search' tab and a search box. Below the search box is a 'Language:' dropdown menu. The dropdown menu is open, showing 'No preference' as the selected option. A red circle highlights the dropdown menu.

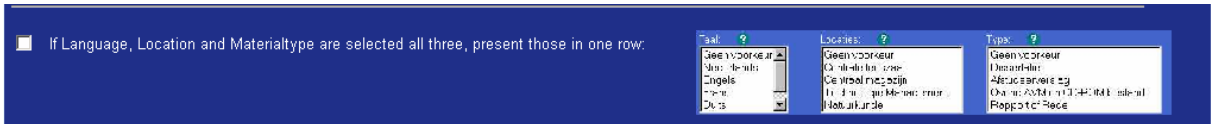
If you select 4, the size of the box increases so that four language options will be displayed:



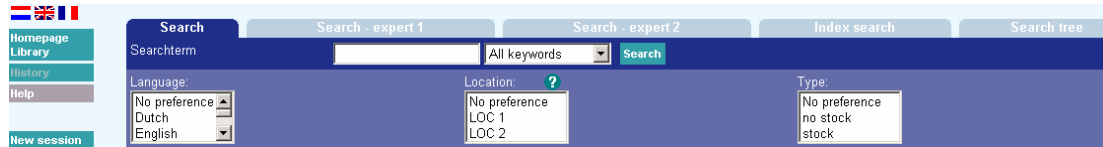
The screenshot shows the same search interface as above, but the 'Language:' dropdown menu is open and displays four options: 'No preference', 'Dutch', 'English', and 'French'. A red circle highlights the dropdown menu.

Display of restriction drop-down menus

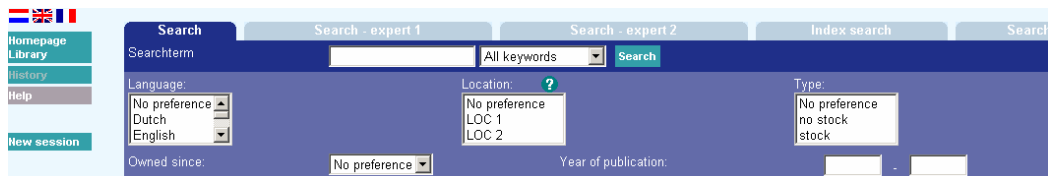
If the three restrictions for Language, Location, and Material Type are all selected, tick this checkbox to display those particular drop-down menus in a line.



The Start page Search will look similar to this:

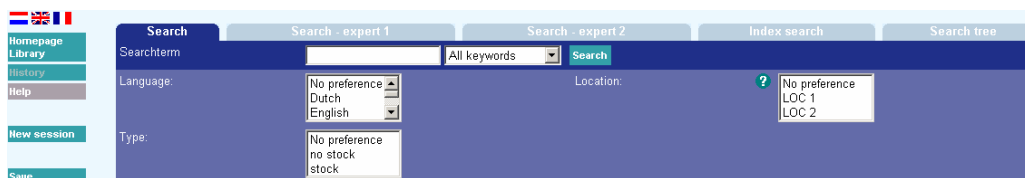


Any further restrictions will be displayed underneath these three restrictions:

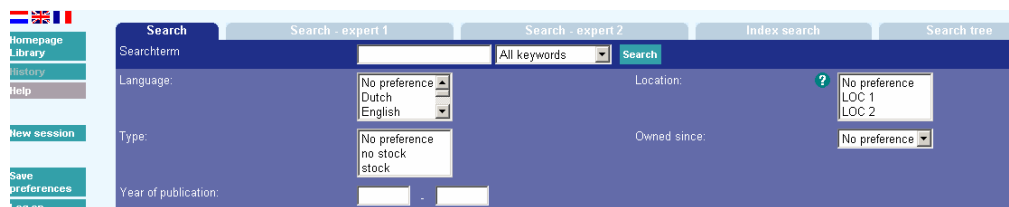


Do not tick this checkbox if you do not want the three restrictions to display in a line.

The Start page Search will look similar to this:



Any further restrictions will be displayed below these three restrictions:



Labels for search

Name search method:	<input type="text" value="Search"/>	
Label for search term:	<input type="text" value="Searchterm"/>	
Width of the input box:	<input type="text"/>	
Caption for search button:	<input type="text" value="Search"/>	Style class: <input type="text" value="buttontekst"/>
Caption for button for more search input boxes:	<input type="text" value="More input boxes"/>	Style class: <input type="text" value="buttontekst"/>

- Enter a name for the search method in the **Name search method** text box. (this name appears on the tab)
- Enter a label for the search term in the **Label for search term** text box, this appears to the left of the box where the search term is entered.
- Enter the width of the input box in the **Width of the input box** text box.
- Enter a caption for the Search button in the **Caption for search button** text box.
- Enter the style class for the buttons in the **Style class** text boxes.

Order of search methods

You can determine in what order the tabs are displayed for the search methods.

Order of search methods:	<input type="text" value="Search"/> <input type="text" value="Search - expert 1"/> <input type="text" value="Search - expert 2"/> <input type="text" value="Index search"/> <input type="text" value="Search tree"/>	<input type="button" value="↑"/> <input type="button" value="↓"/>
Default Search method:	<input type="text" value="Search"/>	

- Use the up and down arrows to change the order of the search methods
- Enter the default search method from the drop-down menu. This is the search method that will be presented on the Start page.

Informational texts

You can add information and help pages for the user.

Informational texts	
Searchterm (per search method)	Database
Language	Location
Type	Number of pages
Owned since	Year of publication
Help button - start screen	Help button - lists
Help button - full description	Help button - history
Help button - search tree	Help button - save lists
Help button - user actions	

- Move the mouse cursor to one of the terms you want to add help text for and click the left mouse button. A dialog window is displayed.

English	
Français	
German	
Spanish	
Height of help window:	<input type="text"/>
Width of help window:	<input type="text"/>
<input type="button" value="Save changes"/> <input type="button" value="Cancel"/>	

- Add help text in any of the languages used. You can use HTML code to make the texts more legible.
- Determine the size of the help pop-up screen in which the help text will be shown.
- Instead of inputting text, you can also specify the url of a help document for the button help.

Informational texts	
Help button - full description	
Hyperlink ...	
Dutch	<input type="text"/>
English	<input type="text"/>
Français	<input type="text" value="[[?]]"/>
German	<input type="text"/>
Spanish	<input type="text"/>
... or content. Content will only be shown if no hyperlink is defined.	
Dutch	<input type="text" value="volledige beschrijving"/>
English	<input type="text"/>

For more information on constructing Help pages, please consult your Infor representative.

Note

Always remember to click the **Save changes** button to save any changes you have made.

<input type="button" value="Save changes"/>

- **Document control - Change History**

Version	Date	Change description	Author
1.0	July 2008	creation	