chamo
discovery

Chamo Administration

Chamo
Administration Guide
Version 3.2
October 2017

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1. Administering and Configuring Chamo

C hamo is the web-based OPAC for your Virtua library collection. This user's guide describes the tools Chamo offers to configure Chamo's display and behavior. With Chamo, you can perform all administrative functions through the web interface. However, as with any website, you can fine-tune the appearance, such as fonts, using stylesheets.

Chapter 2 of this guide presents the user screens in Chamo, and gives a key to those settings that control the components on the screen.

Chapter 3 of this guide discusses some features Chamo offers that are not part of the Chamo online interface.

Chapter 4 of this guide gives a detailed description of each configuration setting, and offers a key to those screens that are affected by the settings.

Chapter 5 of this guide gives a description of the functions available to (non-admin) staff users.

These chapters of the guide should make it easy for you to find out how to change the way something looks in Chamo, or to find out what effect an administrative setting has on the patron interface.

Before you explore the guide further, we suggest that you look at the rest of this introductory chapter, which covers the following topics:

⇒ Things to Know about Chamo
⇒ System Requirements
⇒ Getting Started with Chamo
⇒ Starting and Stopping Chamo
⇒ Chamo and Virtua Version Compatibility

1.1 Things to Know about Chamo

While you can find ways to configure most features in Chamo using this guide, a few limitations and restrictions are worth mentioning. These are presented here along with some background information.

♦ Non-configurable features:
- The primary entry for the author that is shown for each item comes from the heading for that value. This cannot be configured from within Chamo.
- If a record has information in the 856 tag subfield $u, the information will always be displayed as a hyperlink.
- All drop-down lists (except for library location lists) are presented in alphabetical order.

♦ Search and Search Results Behavior:
- When you do a search for a term, if a patron has added that term as a tag to a record, that record is returned in the search results.
- The search facets within each search facet category on the Search Results screen are sorted either by hit count or by value, depending on the settings you have configured on the Facet Configuration screen.
- If your database contains FRBR or linked bibliographic records, only the Manifestation record is indexed in Chamo. This means that when a user does a search in Chamo, only the Manifestation will be included in the results, even though the user will be able to see the full record tree on the Item Details screen when they click on a Manifestation's title.

♦ Patrons:
- When a (prospective) patron completes self-registration through Chamo, a patron record is created. On the Patron Registration Configuration screen, you can configure the patron type that is assigned to self-registering patrons using the *Patron type to assign to new patrons* setting. Then you can generate a report of new patrons by looking for patrons of that type using the InfoStation® Patron List report or by viewing the Patron_Type_v Ad Hoc report. (For more information, see the *InfoStation/Circulation Reports Reference Guide* or the *Ad Hoc Reporting Reference Guide*.)
- Whether a patron can request or renew an item depends on circulation settings defined in the Virtua Profiler. For information on circulation settings, see the *Virtua Profiler/Circulation Parameters User's Guide*.
- When a patron places a request, the patron's home library appears as the default pickup location unless the *Item-level requests use pickup location* setting is modified on the Circulation Settings screen.

- • Chamo respects settings in the Virtua Profiler regarding whether unencrypted patron passwords are stored in subfield $b of the respective ID field in the patron record.

- ♦ System Setup and Indexing Behavior:
  - • Innovative performs the initial installation of Chamo, which includes telling Chamo how to access your Virtua database.
  - • Chamo uses Apache Solr indexes to keep track of your library's data. When patrons or staff perform circulation transactions, such as requests or renewals, or update a patron's profile, Chamo interfaces directly with your Virtua database to update its indexes.
  - • Chamo only indexes numeric digits in the ISBN and ISSN fields. This means that any information stored in subfield $a of the 020 or 022 tag after the control number will not be searchable in Chamo.

1.2 System Requirements

Chamo 3.0 can be run on the following platforms:

Platform/Operating System	Hardware/CPU	Oracle
Redhat Linux 64-bit, 5.x and 6.x	Intel XEON 64-bit *or* AMD Opteron 64-bit	11.2.0.3
Solaris X64, 10 Kernel 127112-11 (or higher)	Intel XEON 64-bit *or* AMD Opteron 64-bit	11.2.0.3
Sun Solaris 10 *and* Solaris 11	Sun Sparc 64-bit	11.2.0.3
HP-UX 11i version 3 B.11.31	HP UX Itanium	11.2.0.3

You must have Virtua 2013.1 or above to run Chamo 3.0. See the section "Chamo and Virtua Version Compatibility" for more information.

1.3 Getting Started with Chamo

Before starting to use Chamo, you need to configure a few elements:

To get started with Chamo, do the following:

1. Configure your General Configuration settings to have a valid Chamo Base URL.

2. Configure the Indexing Control settings to have a valid Solr Server URL.

> **Note:** Because the Chamo Base URL must use the port on which Solr is running, the Solr Server URL is usually built upon the Chamo Base URL. For example, if the Chamo Base URL is **http://chamo.vtls.com:9999**, then the Solr Server URL would normally be **http://chamo.vtls.com:9999/solr**. These settings will be configured by Innovative upon installation.

3. If you want patrons to be able to a) receive e-mail when they renew items via the Chamo interface and b) renew items via e-mail (see the section, "Renewing Items via E-mail" in this guide), configure the Mail Server Settings.

1.4 Starting and Stopping Chamo

To stop Chamo,

1. Navigate to the Chamo installation directory.

2. Type: **bin/shutdown.sh**

To start Chamo after it has been stopped,

1. Navigate to the Chamo installation directory

2. Type: **bin/startup.sh**

> **Note:** Innovative recommends that you run the **shutdown.sh** and **startup.sh** scripts from the installation directory and not from the **bin** directory.

> **Important:** You must always re-start Chamo after editing any settings on the Keyword Indexing Configuration window in the Virtua Profiler.

1.5 Chamo and Virtua Version Compatibility

The following chart provides information on the Chamo versions and Virtua versions that can be used together.

Chamo version:	Is compatible with Virtua versions:
2.1 SP1	2013.1 2013.2 2014.1 2014.2 2014.3 15.0 15.1 SP1
2.0 SP1	2013.1 2013.2 2014.1 2014.2 2014.3 15.0
1.140.1	2013.1 2013.2 2014.1 2014.2 2014.3
1.139	2012.1 2012.2 2012.3 2013.1 2013.2 2014.1 2014.2
1.137	2012.1 2012.2 2012.3 2013.1 2013.2 2014.1
1.136	2012.1 2012.2 2012.3 2013.1 2013.2 2014.1
135.2	2012.1 2012.2 2012.3 2013.1 2013.2

1.133	2012.1
	2012.2
	2012.3
	2013.1
	2013.2
1.131	2012.1
	2012.2
	2012.3
	2013.1
	2013.2

1.6 Customizing Chamo Help Files

Chamo patron, staff, and admin users can view online help by clicking on the question mark icon that appears at the top right of every Chamo screen. You can edit the default help files to customize them for your library's use. See the *Chamo Installation Guide* for instructions on customizing online help files.

2. Configuring the User Interface

This chapter discusses the configurable components of the Chamo user interface. Each section contains screenshots of the user interface, and, where appropriate, the configurable elements on the screens are marked with numbers. Each number corresponds to a numbered description below the screenshot that discusses how to modify that element, if possible. If you are viewing an electronic copy of this guide, you can click on the number on the screenshot to be taken directly to the description of how to modify that item. Additional hyperlinks in the descriptions will help you find more information about these configurable settings, which are described in the section "Working with Administrative Screens" in this guide.

2.1 Configuring the Search Results Screen

The Search Results screen is the default screen in Chamo. It is the default start screen for the patron interface, as well as the screen that appears when a user performs a search.
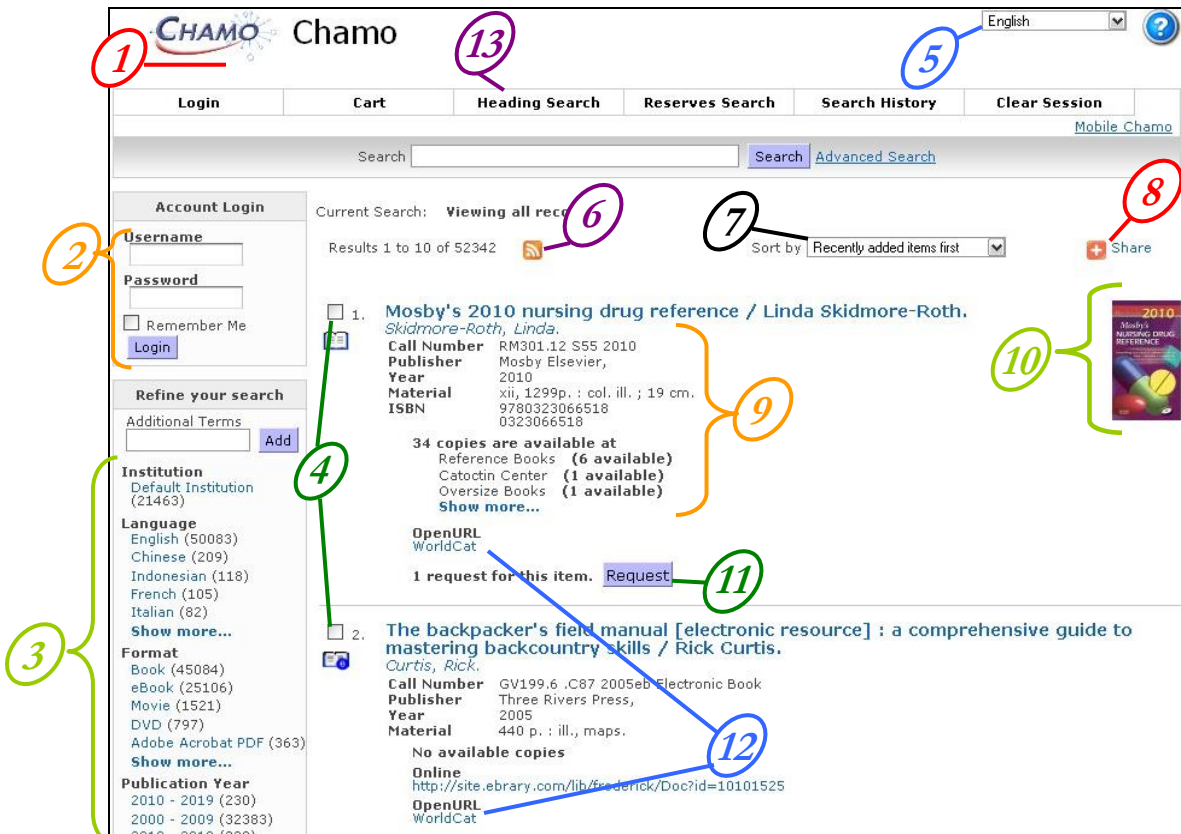
Figure 2-1. Search Results Screen

1. The Chamo logo is controlled by the *Change site logo* setting on the General Theme Settings screen. The text of the heading is controlled by the string **xx.application.name**, where **xx** is a language code, as defined in the language files available on the Language String Management screen.

2. The appearance of the Account Login panel is controlled by the *Display quick-login on search page* setting on the Patron Features screen. If enabled, the Account Login panel is displayed when no patron is logged in.

   You can choose to display an Account Summary panel in this space when a patron is logged in to Chamo. The appearance of the Account Summary panel is controlled by the *Display account summary on search page* setting on the Patron Features screen.

3. The search facets that appear on the Search Results screen and the order in which they appear are controlled by the Facet Configuration screen. You can configure search facet labels to be translated using the Translated Fields/Untranslated Fields settings on the Search Settings screen.

4. The ability to select items to add to the Cart is controlled by the *Enable Cart* check box on the List and Cart Configuration screen.

5. The default language and the languages available in the drop-down list box are configured using the Languages configuration screen.

6. The appearance of the RSS feed link is controlled by the *Enable RSS Feed* setting on the OPAC Settings screen.

7. The sort order that Chamo uses to display records on the Search Results screen when no search has been performed (i.e., when you are viewing all records) is determined by the *Default Sort for Bibliographic Search* setting on the Search Settings screen.

8. The appearance of the AddThis widget is controlled by settings on the External Data Configuration screen.

9. The elements that appear for each item are determined by the settings on the Field Placement configuration screen. The appearance of item availability counts is determined by settings on the OPAC Settings screen.

10. The appearance of thumbnails on the Search Results screen is controlled by the *Book cover and content services* settings on the External Data Configuration screen.

    The display of book cover art, reading recommendations, series information, and other enriched data from NoveList Select can be enabled via the NoveList settings on the External Data Configuration screen.

11. The appearance of the Request button on the Search Results screen, which lets you place bibliographic-level requests, is controlled by the *Display bib-level request button* setting on the Circulation Settings screen. (Note that if a patron's record is expired or blocked, Chamo displays a message ("Cannot place request") in place of the Request button.) The appearance of the request count is determined by the *Display request counts* setting on the Circulation Settings screen.

12. The appearance of OpenURLs on the search Results screen is controlled by the OpenURL Configuration screen.

13. The appearance of the Heading Search option is controlled by the *Enable Heading Search* setting on the OPAC Settings screen.

2.2 Configuring the Item Details Screen

The Item Details screen (*Figure 2-2*) appears when a user clicks on a title in Chamo.
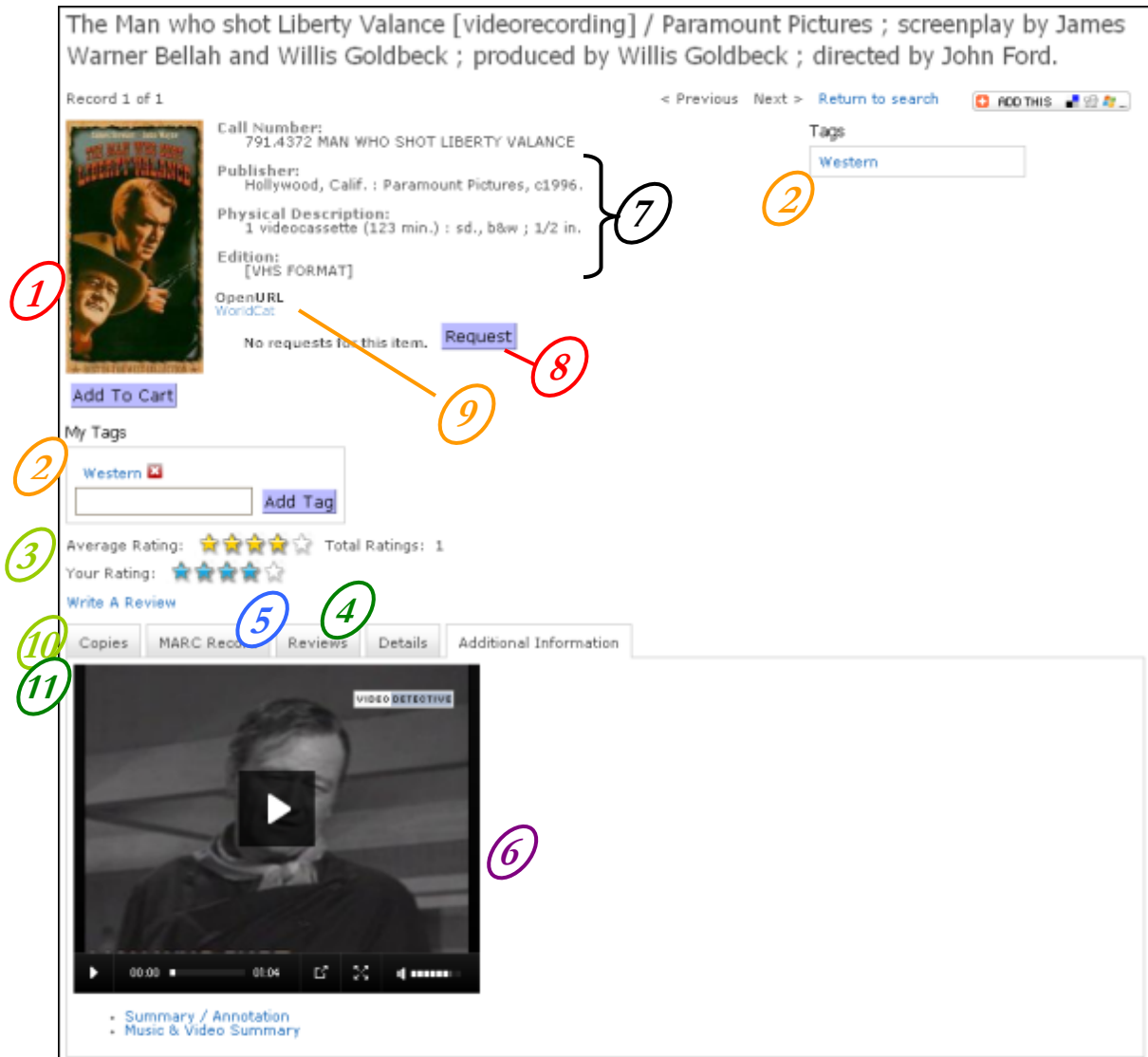
Figure 2-2. Item Details Screen

1. The appearance of book cover thumbnail images and links to additional information on the Additional Information tab of the Item Details screen are both controlled by the *Book cover and content services* settings on the External Data Configuration screen.

The display of book cover art, reading recommendations, series information, and other enriched data from NoveList Select can be enabled via the NoveList settings on the External Data Configuration screen.

2. The ability for logged-in patrons to add tags to items is controlled by the *Enable Tagging* check box on the Tagging configuration screen. The *staff* and *admin* users cannot add tags to items.

3. The ability for logged-in patrons to rate items is controlled by the *Enable Ratings* setting on the OPAC Settings screen. The *staff* and *admin* users cannot rate items.

4. The ability for logged-in patrons to write reviews for items, which will appear on the Reviews tab, is controlled by the *Enable Reviews* setting on the OPAC Settings screen. The *staff* and *admin* users cannot write reviews for items.

5. The appearance of the MARC Record tab on the Item Details screen is controlled by the *Enable MARC view on Item Details screen* setting on the OPAC Settings screen.

6. The appearance of movie trailers for motion pictures on the Additional Information tab is controlled by the *Enable Move Trailers*, *Trailer Customer ID* and *Trailer API URL* settings on the General Configuration screen.

7. The elements that appear for the item are determined by the settings on the Field Placement configuration screen.

8. The appearance of a Request button for bibliographic-level requests is defined by the *Display bib-level request button* setting on the Circulation Settings screen. (Note that if a patron's record is expired or blocked, Chamo displays a message ("Cannot place request") in place of the Request button.) The appearance of the request count is determined by the *Display request counts* setting on the Circulation Settings screen.

9. The appearance of OpenURLs on the Item Details screen is controlled by the OpenURL Configuration screen.

10. The default sort order for copies displayed on the Copies tab of the Item Details patron screen is controlled by the *By default, sort copies by status, then location* setting on the OPAC Settings screen.

11. The Recallable Date can be displayed on the Copies tab of the Item Details screen. To display the Recallable Date, edit and upload a language file that changes the translation of **"item.status.checkedOut"** to **"Recallable ${recallableDate}"**. When a patron views the Copies tab for a renewable item that is checked out, the Status column will display the recallable date.

2.3 Configuring the Reserves Search Screen

The Reserves Search screen (*Figure 2-3*) lets patrons search for materials that have been placed on reserve.

Figure 2-3. Reserves Search Screen

The appearance of the Reserves Search screen is controlled by the *Reserve Room Enabled* setting on the OPAC Settings screen.

2.4 Configuring the Login Screen

The Login screen appears when a user clicks on the Login link at the top of the Chamo screen. The Login link is only available when the *Allow Patrons to Log In* setting is enabled on the Patron Features screen.
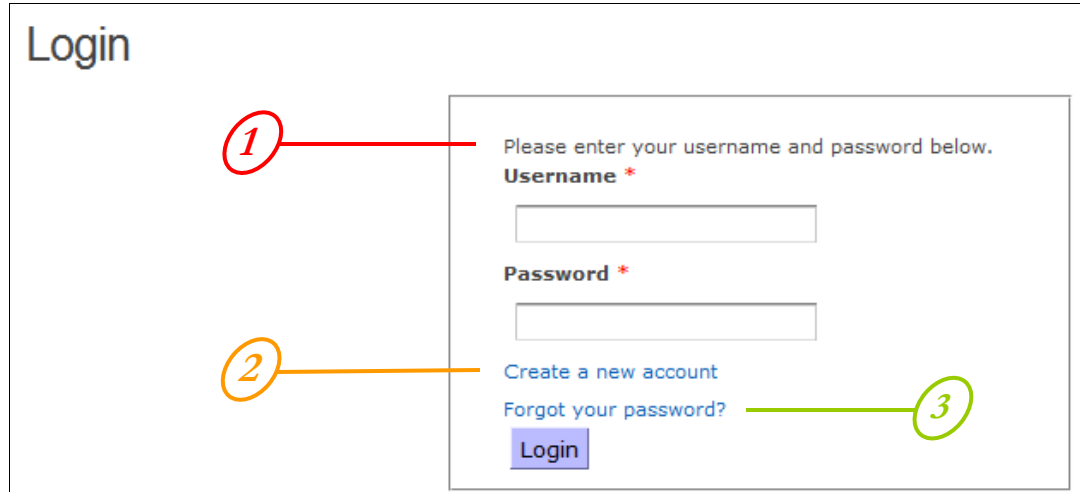
Figure 2-4. Login Screen

1. The message that appears above the log-in form is controlled by the **xx.login.instructions** string in the language file, which is available on the Language String Management screen.

2. The *Create a new account* link on the Login Screen appears only when the *Allow patron registration* check box is selected on the Patron Registration Configuration screen.

3. The *Forgot your password?* link appears only when the *Enable Forgotten Password* check box is selected on the Patron Features screen. Note that Chamo can send e-mails to patrons only if the patron has a valid e-mail address in their patron record, and the SMTP Settings on the Mail Server Settings screen are configured.

2.5 Configuring the List Details Screen

The patron List Details screen is accessed by clicking the My Lists link at the top of any Chamo screen. This link is not available to the *staff* or *admin* users.
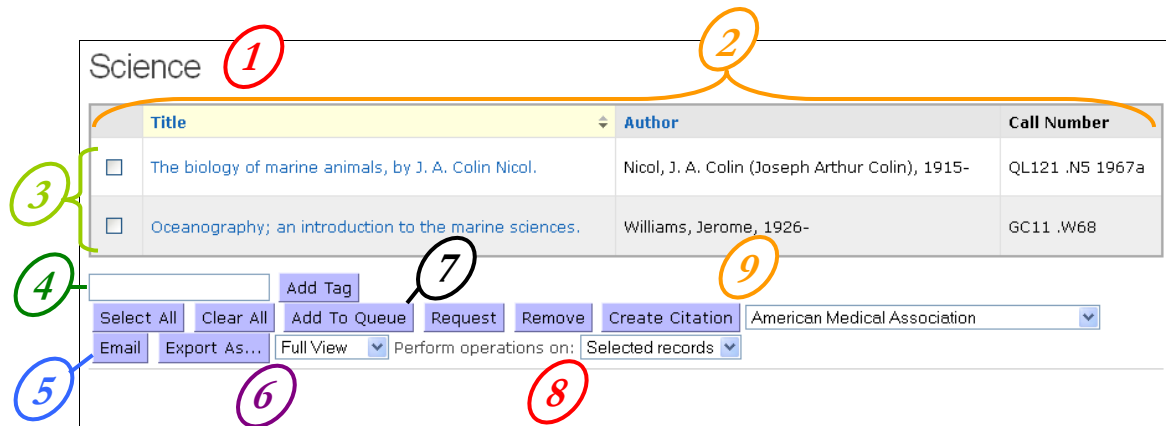
Figure 2-5. List Details

1. Saved item lists are available to logged-in patrons and *staff* users only when the *Enable Lists* check box is selected on the List and Cart Configuration screen.

2. The fields that display for each item on the List Details screen are determined by the Cart/List setting on the Field Placement screen.

3. The limit on the number of items that are permitted in each list depends on the *Maximum number of items in a cart or list* setting on the List and Cart Configuration screen.

4. The appearance of the Add Tag text box and button is available only when the *Enable Tagging* check box is selected on the Tagging configuration screen.

5. Lists can be e-mailed only if Chamo knows how to access an e-mail server. This is configured using the Mail Server Settings.

6. The export options are determined by settings on the List and Cart Configuration screen.

7. The appearance of the Add To Queue button is controlled by the *Enable patron queue* setting on the Patron Features screen.

8. The *Perform operations on* setting is available only when the *Allow operations on entire list/cart* check box is selected on the List and Cart Configuration screen.

9. The Create Citation button is controlled by the Vitation service settings on the List and Cart Configuration screen.

2.6 Configuring the Cart Screen

The Cart screen is accessed by clicking the Cart link at the top of any Chamo screen. The Cart can be enabled or disabled by the *Enable Cart* setting on the List and Cart Configuration screen.

Figure 2-6. Cart Screen

1. The fields displayed for each item on the Cart screen are determined by settings on the Field Placement screen.

2. The Copies tab is displayed only when the *Enable copies cart* check box is selected on the List and Cart Configuration screen.

3. The Holdings Records tab is displayed only when the *Enable holdings cart* check box is selected on the List and Cart Configuration screen.

4. The Authority Records tab is displayed only when the *Enable View Authority* check box is selected on the OPAC Settings screen.

5. The limit on the number of items that are permitted in the Cart depends on the *Maximum number of items in a cart or list* setting on the List and Cart Configuration screen.

6. The Add Tag text box and button is available to logged-in patrons only when the *Enable Tagging* check box is selected on the Tagging configuration screen.

7. The Save button is available only when the *Enable Lists* check box is selected on the List and Cart Configuration screen.

8. The Cart can be e-mailed only if Chamo knows how to access an e-mail server. This is configured using the Mail Server Settings.

9. The export options are determined by settings on the List and Cart Configuration screen.

10. The Add To Queue button appears only when the *Enable patron queue* check box is selected on the Patron Features screen.

11. The *Perform operations on* setting is available only when the *Allow operations on entire list/cart* check box is selected on the List and Cart Configuration screen.

12. The Create Citation button is controlled by the Vitation service settings on the List and Cart Configuration screen.

2.7 Configuring the My Account Screen

The My Account screen (*Figure 2-7*) appears when a logged-in patron clicks the My Account link at the top of the Chamo screen. The appearance of this screen mirrors that of the View Patron Accounts screen available to the *staff* user. This section covers the configurable tabs of the My Account screen ONLY.

2.7.1 Checked Out Tab
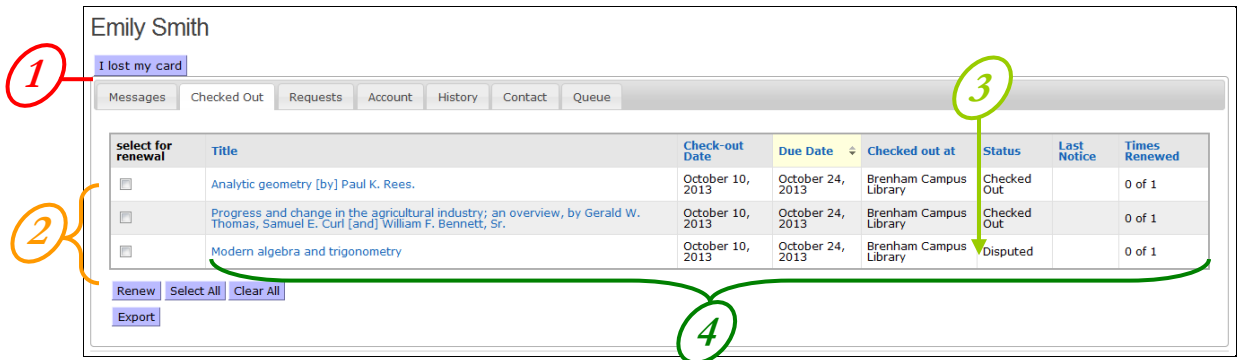
Figure 2-7. My Account Screen - Checked Out Tab

1. The *I lost my card* button is available only if your library has the 06 block code (Card reported lost) configured in the Block Codes window in the Virtua Profiler. This code is configured by default when you first install Virtua. For more information, see the *Virtua Profiler/Circulation Parameters User's Guide.*

2. The ability for patrons to renew items depends on circulation rules defined in the Virtua Profiler. For more information on circulation rules, see the *Virtua Profiler/Circulation Parameters User's Guide.* A check box appears for each item that is eligible for renewal. A label (such as *Overdue limit exceeded*, or *Too many fines owed*) appears instead of a check box for those items that cannot be renewed. If Profiler circulation rules allow, items that are overdue can have renewal enabled or disabled according to the *Allow patrons to renew overdue items* setting on the Circulation Settings screen.

3. The appearance of Disputed or Waived items on the Checked Out tab is controlled by the *Display disputed/waived checkouts in My Account* setting on the Patron Features screen.

4. The fields displayed for each item on the Checked Out tab are determined by the Patron Checked Out Tab settings on the Field Placement screen.

2.7.2 Requests Tab
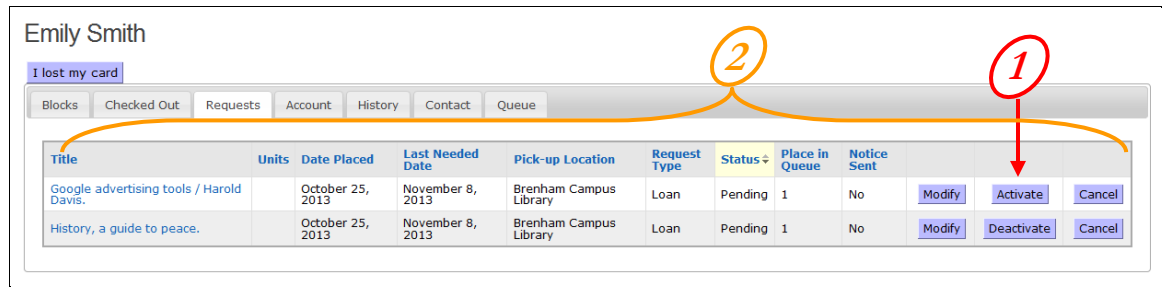
Figure 2-8. My Account Screen - Requests Tab

1. The Activate and/or Deactivate buttons on the Requests tab of the My Account screen are controlled by the *Allow patrons to deactivate requests* setting on the Circulation Settings screen.

> **Note:** The Cancel, Modify, Activate, and Deactivate buttons do not appear next to a request once an item has been trapped to satisfy it.

2. The fields displayed for each item on the Requests tab are determined by the Patron Requests Tab settings on the Field Placement screen.

2.7.3 Contact Tab
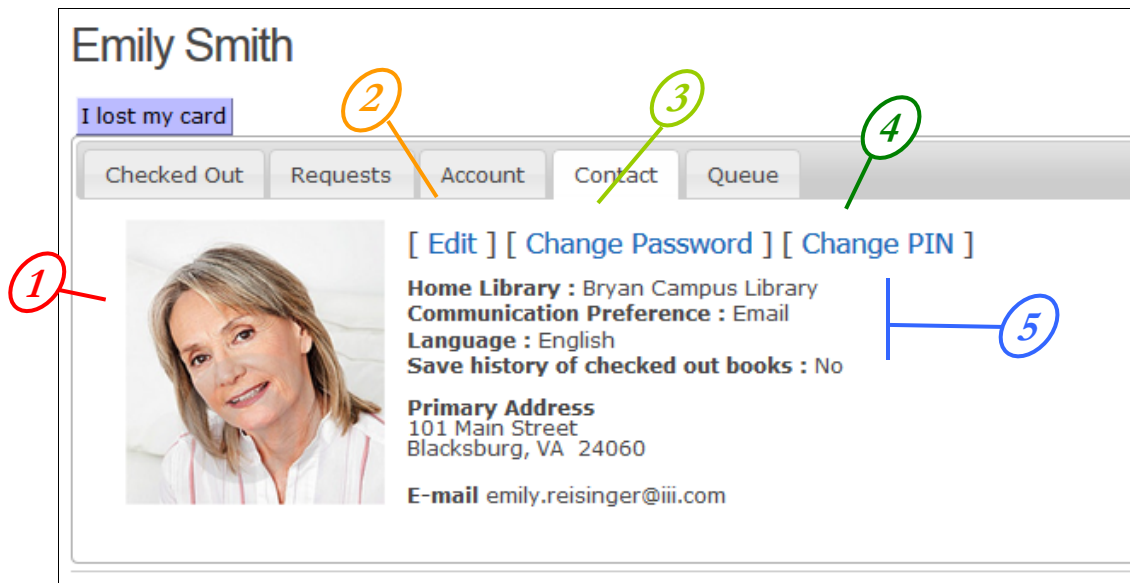
Figure 2-9.My Account Screen - Contact Tab

1. Profile pictures for patrons can be uploaded by the *staff* user on the View Patron Account screen.

2. Patrons can edit their contact information if the *Allow patrons to edit their contact information* check box is selected on the Patron Features screen.

3. Patrons can change their password if the *Allow patron to change password* check box is selected on the Patron Features screen.

4. Patrons can change their PIN if the *Allow patron to change PIN* check box is selected on the Patron Features screen.

5. Patrons can choose a home library, communication preference, and whether to maintain a checkout history when they sign up for Chamo via the Patron Registration screen.

2.7.4 Messages Tab

If the patron has a message waiting for them, a Messages tab (*Figure 2-10*) will also appear on the My Account Screen.
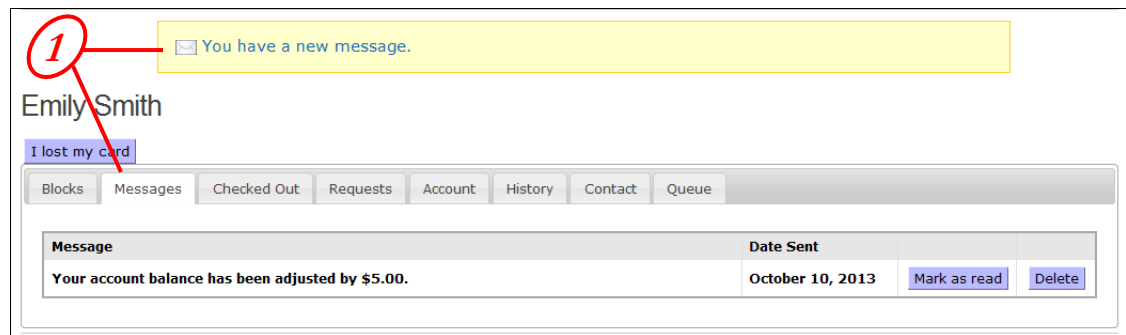
Figure 2-10. My Account Screen - Messages Tab

1. The *staff* user can send and delete messages to patrons on the View Patron Account screen.

2.7.5 History Tab

The History tab (*Figure 2-11*) shows a patron's check-out, check-in, and renewal transaction history. This tab is available on the My Account screen only if the patron's account is configured to store the transaction history AND the History tab is configured to be displayed via the *Account Tabs/Enabled Account Tabs* setting on the Patron Features administrative screen (*Figure 4-35*).

Patrons can choose to store check-out and check-in history by . . .

- Enabling the *Save history of checked out books* setting that appears on the Register screen (*Figure 2-15*) during patron registration.
  -OR-
- Clicking the **[Edit]** link on the Contact tab (*Figure 2-9*) to edit their contact information and enabling the *Save history of checked out books* setting.

Figure 2-11. My Account Screen - History Tab

1. The *Maximum age (days) of patron history* setting on the Patron Features screen determines the maximum ages, in days, of the entries displayed on the History tab.

2. The *Enable history CSV export* and *Enable history text export* options on the Patron Features screen determine whether patrons can export their history in CSV or text format.

2.7.6 Queue Tab

The Queue tab (*Figure 2-12*) appears on the My Account screen only when the *Enable patron queue* setting on the Patron Features screen is enabled, and when a staff member or the patron has added items to their queue from the Cart screen. A patron's queue can be also be viewed and edited by the *staff* user; see the section "Using the Staff Cart, Saved Lists, and Patron Queues" in this guide for more information.

Figure 2-12. My Account Screen - Queue Tab

2.8 Configuring the Contact Information Screen

Patrons can access the Contact Information screen (*Figure 2-13*) by clicking the **[Edit]** link on the My Account screen. The **[Edit]** link is available only when the *Allow patrons to edit their contact information* check box is selected on the Patron Features screen.

The elements of the Patron Contact Information screen—and whether each element is visible, editable, and required—are controlled by the settings on the Patron Contact Configuration screen.

Figure 2-13. Contact Information Screen

2.9 Configuring the Patron Registration Screen

Patrons can access the Register screen (*Figure 2-15*) by clicking the **Register here** link on the Login screen. The **Register here** link is available only when the *Allow patron registration* check box is selected on the Patron Registration Configuration screen.

The elements of the Register screen—and whether each element is visible, editable, and required—are controlled by the settings on the Patron Registration Configuration screen.

Note: If you select and configure a Registration Policy message to appear on the Patron Registration Configuration screen, then the patron will see the message configured as the registration policy before they see the Register screen:

Figure 2-14. Optional Registration Policy Message

Figure 2-15. Patron Registration Screen

2.10 Configuring the Advanced Search Screen

The Advanced Search screen is available by clicking on the *Advanced Search* link at the top of any Chamo screen. The Advanced Search screen lets users search within specific search categories, select the nature of the search within a selected category, and/or limit the search results using search filters.

Figure 2-16. Advanced Search Screen

1. The Advanced Search categories are determined by settings on the Search Settings screen.

2. The Advanced Search filter categories are determined by settings on the Search Settings screen. The filter categories shown here are Chamo's default search filters.

3. The Language list on the Advanced Search screen contains the languages of the records in the database, as defined in the 008 tag.

4. The Place of Publication list contains all of the places of publication of all the records in the database.

5. The Location list contains the locations configured on the Filters screen.

6. The Format list contains the formats configured on the Format Facet configuration screen.

2.11 Configuring the Heading Search Screen

The Heading Search screen can be used to search for authority records. Clicking on a hyperlinked heading performs a keyword search on that term.
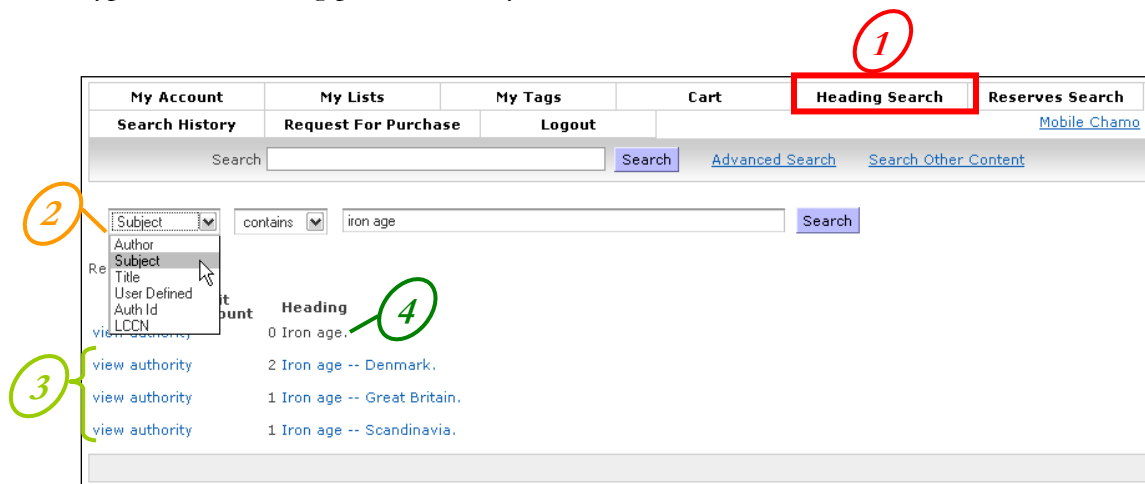
Figure 2-17. Heading Search Screen

1. The appearance of the Heading Search option is controlled by the *Enable Heading Search* setting on the OPAC Settings screen.

2. The search types available for the Heading Search are determined by the *Available Heading Searches* and *Selected Heading Searches* settings on the Search Settings screen, and by the *Enable View Authority* setting on the OPAC Settings screen.

3. The View Authority link, which displays MARC information for the authority record (*Figure 2-18*), is enabled using the *Enable View Authority* setting on the OPAC Settings screen.

4. The appearance of blind authorities is controlled by the *Show Blind Authority Headings* setting on the OPAC Settings screen.
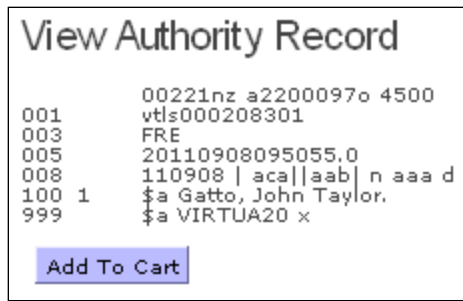
Figure 2-18. View Authority Record Screen

2.12 Configuring the Search History Screen

The Search History screen lets patrons (both logged-in and not logged-in) view the searches they have performed during the current Chamo session. If a search has no results, that search is not saved in the Search History.

Figure 2-19. Search History Screen

The appearance of the Search History screen is controlled by the *Maintain Search History* setting on the Search Settings screen.

On the Search History screen,
- The **Time** column contains the time at which the search was performed according to the web server's clock.

- The **Search** column contains terms typed in any of the Search text boxes. This includes the . . .
  - ♦ Quick search bar at the top of each Chamo screen,
  - ♦ Text boxes on the Advanced Search screen, and

♦ Additional Terms text box in the *Refine your search* section of the Search Results screen. Note that when a search is performed and that search is then refined with an additional term, both terms appear in the Search column, as illustrated in the "car detroit" entry in Figure 2-19.

● The **Type** column contains the type of search performed.

● The **Refined By** column contains the name of any search facets the patron clicks along the side of the search results screen.

● The **Sorted By** column contains the sort criteria as defined in the drop-down list box on the Search Results screen.

● The **Filtered By** column contains the name of filters chosen on the Advanced Search screen.

● The **Results** column contains the number of hits for a given search.

2.13 Configuring the Request for Purchase Screen

The Request for Purchase screen (*Figure 2-20*) lets patrons request that the library purchase items that are not currently part of the collection.

Required fields are designated with a red asterisk (*) on the Request for Purchase screen.

You can specify which fields are displayed, required, or optional on the Request for Purchase screen (for both anonymous and patron purchase requests). To configure required fields, see either the Purchase Request Anonymous Fields admin screen or the Purchase Request Patron Fields admin screen.

Figure 2-20. Patron Request for Purchase Screen

1. The appearance of the Request for Purchase window is controlled by the "Enable purchase requests by patron" setting on the Purchase Request Configuration screen.

2. The appearance of the Request for Purchase window for users who are not logged in is controlled by the "Enable anonymous purchase requests" setting on the Purchase Request Configuration screen.

3. The "Library policy regarding purchase requests" link is configured by the "Policy URL" setting on the Purchase Request Configuration screen.

4. The "Most Frequently Visited Branch" setting is controlled by the Branch Location settings on the Purchase Request Configuration screen.

5. The "Where did you learn of this item?" setting contains drop-down list entries that are configured in the Source of Selection parameter in the Profiler.

3. Configuring Other Chamo Functions

Chamo is capable of performing functions in addition to what is available for patrons in the Chamo interface. Many of these functions affect the behind-the-scenes functions, such as automatically reindexing patron and item data. Other functions, such as renewing via e-mail or text message, affect the patron experience. We discuss these patron-related functions in this chapter.

This chapter contains the following sections:

⇒ E-mail Functions
⇒ Text Message Functions

3.1 E-mail Functions

Two configurable e-mail functions are a) renewing checked-out items via e-mail and b) receiving e-mail confirmations of requests and renewals.

⇒ Modifying Strings in E-mail Messages
⇒ Renewing Items via E-mail
⇒ E-mail Request and Renewal Confirmation

3.1.1 Modifying Strings in E-mail Messages

Like the strings in the Chamo interface, most of the strings in the e-mails sent by Chamo are contained in the language file, and can be translated or changed by updating this file (see the section "Translating Strings in Chamo" in this guide for more information).

However, some strings in the e-mails sent by Chamo have dynamic strings that use FreeMarker templates (http://www.freemarker.org/).

These templates appear in the **webapps/ROOT/WEB-INF/templates** directory. The strings that appear in e-mails are as follows:

Renewal confirmation e-mail (when a renewal is performed via Chamo, text message, or e-mail)

- **Subject:** String xx.patron.checkouts.renew.heading
- **Body:** Template file **renew-email.ftl**

Request confirmation e-mail (for requests made through Chamo only)
- **Subject:** String xx.patron.requests.email.subject
- **Body:** Template file **request-email.ftl**

List e-mail (when a list is e-mailed through Chamo only)
- **Subject:** String lists.detail.email.subjectPrefix
- **Body:** Template file **list-email.ftl**

If you want to just change the text of the strings, you can do so using the language file(s). However, if you want to change the order in which the strings appear or other formatting within the e-mail message, you can use the Freemarker templates. See http://www.freemarker.org/ for information about Freemarker templates.

Notes:
- This section does NOT apply to which data elements appear in e-mail messages sent when a patron or staff member e-mails a Cart or list. The Cart or list e-mail is configured by the "Email of Cart/List" setting on the Field Placement configuration screen.
- You can preserve your customized e-mail template files when you upgrade to a new version of Chamo. To do this, create a directory named "templates" in your Chamo home directory and copy any customized e-mail template files from **webapps/ROOT/WEB-INF/templates** into this new directory. After an upgrade, Chamo will use the e-mail template files found in the Chamo home directory before looking for template files in the **WEB-INF/templates** directory.

You can also edit e-mail template files to specify a "locale" for some or all of the data elements in the template. The locale you specify overrides the locale of the current theme, and allows you to "hard code" translations in e-mail messages in a specific language or multiple languages (rather than using Chamo's current language).

This functionality is useful for libraries that want to use a specific language or languages in e-mail messages, regardless of Chamo's current language.

See http://docs.oracle.com/javase/6/docs/api/java/util/Locale.html for a list of the supported locale constants. Replace any "locale" variable in the template files with any of the constants from this page. For example:

Locale.ENGLISH
Locale.TRADITIONAL_CHINESE
Locale.SPANISH

3.1.2 Renewing Items via E-mail

In addition to the renewal function available on the My Account screen, patrons can renew their checked out items via e-mail.

If Chamo is correctly configured, patrons can attempt to renew all of their items via e-mail. Chamo's e-mail renewal function can handle only requests to renew *all* items checked out to a patron; patrons cannot choose to renew a specific item via e-mail.

1. Chamo must be configured to permit e-mail renewal according to the Renewal POP Mailbox Settings on the Mail Server Settings screen.

2. Patrons must send an e-mail to the address specified in the Username field on the Renewal POP Mailbox Settings.

   - The e-mail address from which the patron sends the renewal request must be stored in the patron's record as the primary e-mail address, which is stored in the 271 tag subfield $a, with a first indicator of 1.

   - The body of the e-mail must contain the patron's barcode in the following format:

     Barcode:XXXX

     where **XXXX** is the patron's barcode. Chamo ignores the subject of the e-mail as well as any text in the body of the e-mail other than the patron's barcode.

3. If Chamo does not recognize the e-mail address or does not recognize the patron barcode, the e-mail is disregarded.
   -OR-

   If the e-mail address and barcode are valid for a patron in the database, Chamo processes the renewals according to settings in the Virtua Profiler. For information about Profiler settings that affect renewals, see the *Virtua Profiler/Circulation Parameters User's Guide* and the *Virtua Profiler/Global Settings User's Guide*.

4. Chamo sends an e-mail to the patron stating which items were successfully renewed and which were not renewed (*Figure 3-1*).
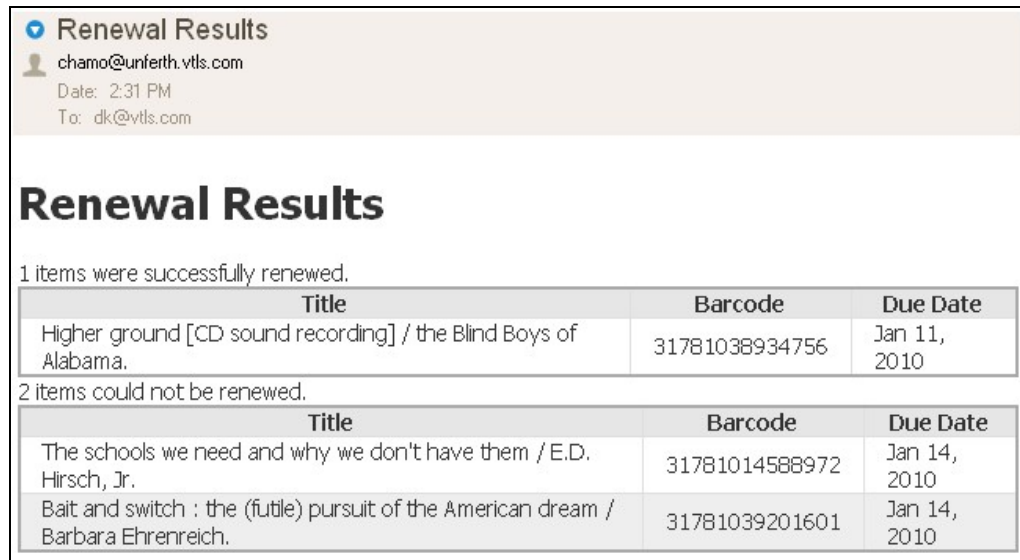
Figure 3-1. Sample Renewal Confirmation E-mail

3.1.3 E-mail Request and Renewal Confirmation

If a patron has a valid e-mail address in the 271 tag subfield $a and the patron's communication preference (as defined in the 008 tag position 10) is *E-mail* or *Text and E-mail*, you can use the *Send email notifications for placing requests* and *Send email notifications for renewals* settings on the Circulation Settings screen to specify that the patron will receive an e-mail confirmation message when he or she successfully places a request or performs a renewal in Chamo.

For Chamo to send e-mail notifications to patrons, the Mail Server Settings must be correctly configured.

3.2 Text Message Functions

If your library has an agreement with Clickatell™, you can configure Chamo to permit patrons to renew items via text message.

Like e-mail renewals, text message renewals can be attempted only for *all* the items checked out to a patron.

To use the text message renewal feature:

1. You configure the Text Messages settings in the administrative module.

2. A patron sends a text message from a cell phone number that is in their patron record (tag 270 subfield $j, first indicator 1). The text of the message must be the word *renew*. The text message is sent to the number assigned to the library by Clickatell. Chamo then attempts to renew all items that patron has checked out.

3. If Chamo does not recognize the cell phone number, it sends a message stating that the number is not recognized and the patron should contact the library.

   -OR-

   If the cell phone number is valid, Chamo attempts the renewals and sends the patron a text message, indicating the number of items that were renewed and the number of items that were not renewed; e.g., "2 items renewed, 1 item not renewed."

   Due to restrictions on the number of characters sent in a text message, the message sent to the patron does not identify which titles were renewed and not renewed.

   Notes:
   - Patrons can remove themselves from the text messaging service by sending the text *stop* or *cancel* to your Callback username. When a patron does this, Chamo will no longer send messages to that number. In addition, the patron's communication preference will be changed from *Text Message* to *E-mail* when applicable.
   - Patrons can send the text *help* to your Callback username to receive instructions from Chamo on how to renew items by text message. You can customize the text of the help message by modifying the **textMessage.help** entry in the language strings file.

4. Working with Administrative Screens

The Administrative screens discussed in this chapter are available from links on the left side of the any Administrative screen (*Figure 4-1*) when you are logged in to Chamo as the *admin* user.

Note that to log in as the *admin* user, you must add **/chamo** to the end of your Chamo URL. You CANNOT log into Chamo as an *admin* or *staff* user using the same login screen that patrons use.
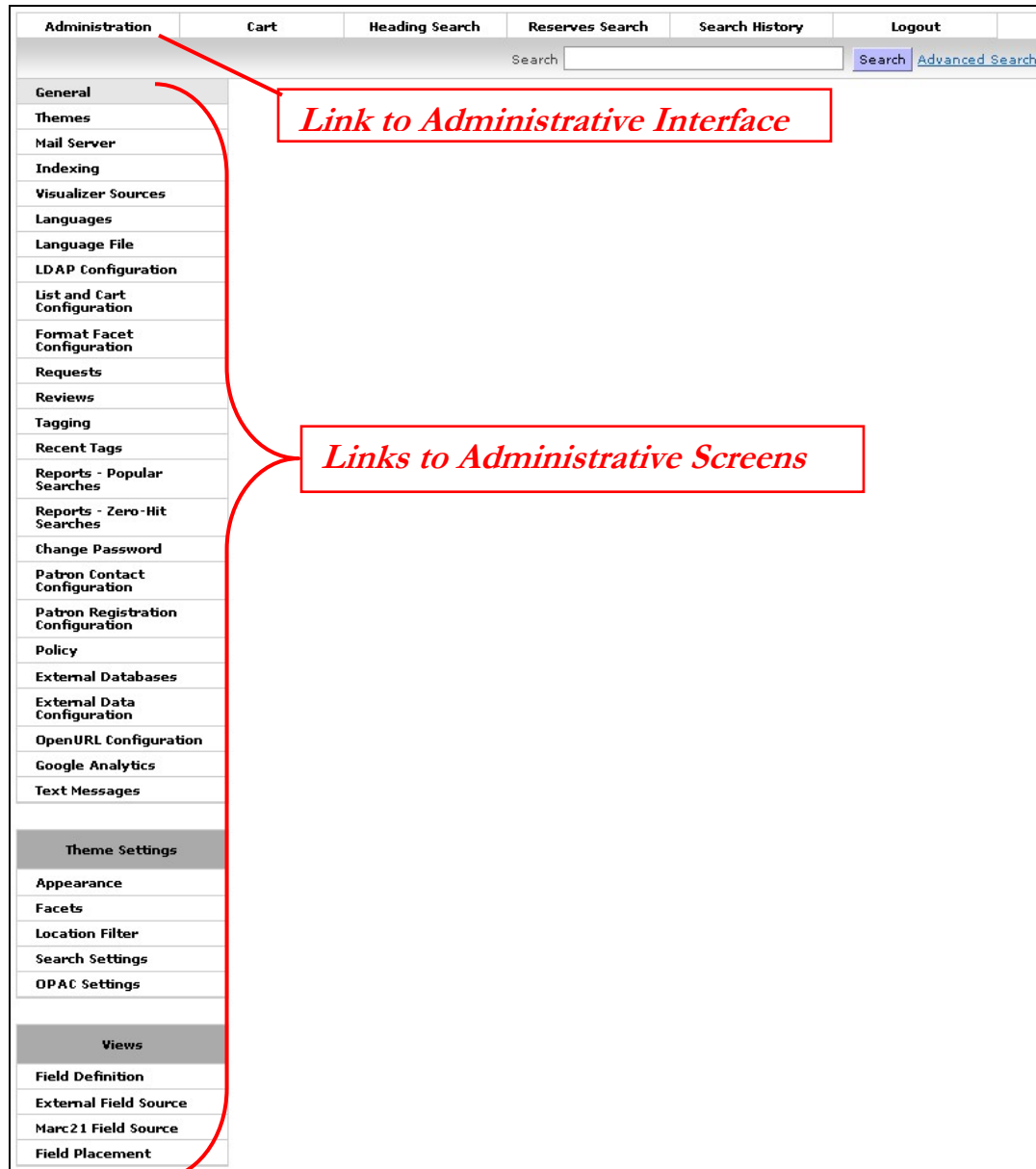
Figure 4-1. Links to Administrative Screens

4.1 General Configuration Screen

The General Configuration screen is the first screen displayed when the *admin* user clicks on the Administration link at the top of the Chamo screen.

Figure 4-2. General Configuration Screen

After you make changes to the General Configuration settings, click the Save button.

The following configuration settings are available on the General Configuration screen:

1. **Chamo Base URL:** This field contains the base URL for your Chamo installation. Note that the port specified in the Chamo Base URL field must be the port on which Solr is running.

2. **Base URL for secure (HTTPS) pages:** This field contains the base URL for secure pages, which include the Register screen for patrons, the Reset Password screen for patrons, the My Account screen for patrons, the Edit Contact Information screen for patrons, and the Login screen for both patrons and staff.

3. **Display Date Format:** This field lets you determine the format of dates in the interface. This date format is used for dates appear on the My Account screen. You can use any standard date format in this field. See http://download.oracle.com/javase/6/docs/api/java/text/SimpleDateFormat.html for complete information on possible date formats.

4. **Display Timestamp Format:** This field lets you determine the format of timestamps in the interface. This format is used when a date is not precise enough and the time should also be displayed -- for example, the time a transaction occurred. You can use any standard date format in this field. See http://download.oracle.com/javase/6/docs/api/java/text/SimpleDateFormat.html for complete information about supported date formats.

5. **Input Date Format:** This field determines how dates must be entered in Chamo, such as when a patron defines a Last Needed Date for a Request. You can use any standard date format in this field. See http://download.oracle.com/javase/6/docs/api/java/text/SimpleDateFormat.html for complete information on possible date formats.

6. **Session Timeout (minutes):** This field lets you define the number of minutes that pass before resetting the session, thus logging out any logged-in Chamo users and emptying the Cart. The maximum session timeout period is 30 minutes. Note that the screen automatically refreshes when a user is logged out. Also note that this setting only applies to OPAC sessions. For *staff* and *admin* users, a thirty minute session timeout period applies, regardless of the period specified in this setting.

7. **Display Translation Codes**: When this check box is selected, translation codes are displayed in front of each string in the interface. This helps you to find strings for translation when you use the Language File.

8. **Require cookies for login:** This check box determines whether a patron's web browser must be configured to accept cookies before the patron can log in.

9. **Index Cross References:** This check box determines whether cross-references in the 4XX tag of authority records will be indexed.

10. **Display Transaction Reference Number:** This check box determines whether the transaction reference number will appear in the confirmation message when a patron places or modifies a request or renews an item. This is the same

transaction reference number that appears in the Transaction Log in the Virtua client.

11. **Display reason an item cannot be renewed:** This check box determines whether the reason an item cannot be renewed is displayed on the Checked Out tab of the patron My Account screen. If this check box is not selected, then the phrase "not renewable" appears instead of a specific reason.

12. **Enable Movie Trailers:** If you have a subscription to Video Detective, selecting this check box will enable Chamo to display trailers on the Item Details screen. If you select this check box, you must provide a Trailer Customer ID and a Trailer API URL.

13. **Trailer Customer ID:** This is the ID assigned to your library by Video Detective.

14. **Trailer API URL:** This is the base URL for Video Detective content. This URL is usually **http://www.videodetective.com/**.

15. **Mask Bibliographic Record When:**

- **Record has no items:** A bibliographic record will not be displayed or included in search result counts in the patron interface when the record has no attached item records.

  Note: The bibliographic index MUST be reindexed via the Indexing Control Screen for bibliographic records to be masked.

- **All items under record are masked:** A bibliographic record will not be displayed or included in search result counts in the patron interface when all of the items attached to the record are masked.

  Note: The bibliographic index MUST be reindexed via the Indexing Control Screen for bibliographic records to be masked.

- **All items under record are unserviceable:** A bibliographic record will not be displayed or included in search result counts in the patron interface when all of the attached items are unserviceable according to the items' status.

  Note: The bibliographic index MUST be reindexed via the Indexing Control Screen for bibliographic records to be masked.

4.2 Theme Configuration

The Themes configuration screen lets you add and delete themes for use in the Chamo display, and to choose default and mobile themes. To modify the appearance of a theme, use the Appearance screen. You can also make theme-specific changes on the Facet Configuration, Filters Configuration, Search Settings, and OPAC Settings screens.
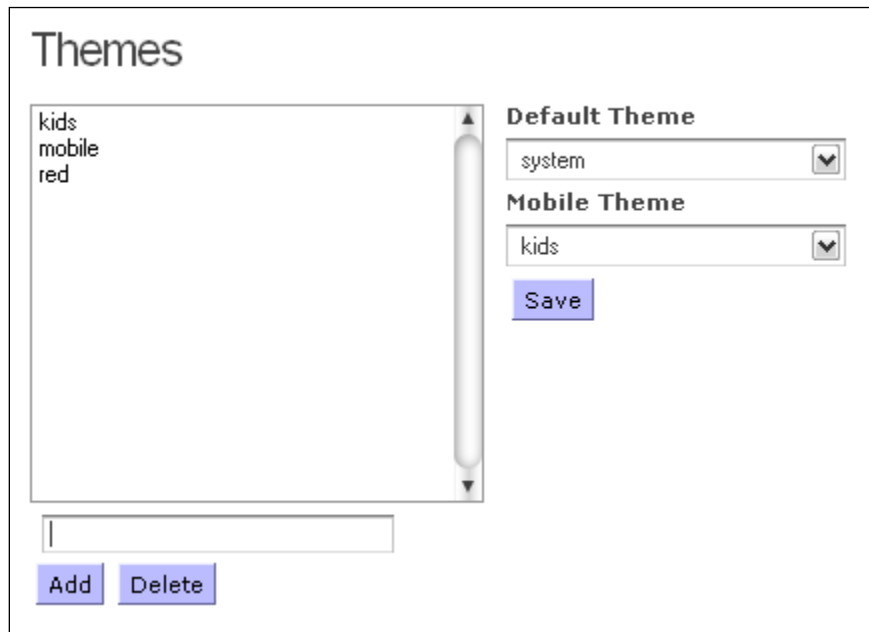
Figure 4-3. Themes Configuration Screen

To add a theme,

1. Type the name of the theme in the text box beneath the Themes list.
2. Click the Add button.

Your theme is added to the list of themes.

To delete a theme,

1. Type the name of the theme in the text box beneath the Themes list.
2. Click the Delete button.

Your theme is removed from the list of themes. Note that the system theme cannot be removed from Chamo.

To choose a default theme,

1. Select your desired theme from the Default Theme drop-down list box.
2. Click the Save button.

The default theme for Chamo is changed to your selected theme.

To choose a mobile theme,

1. Select your desired theme from the Mobile Theme drop-down list box. Note that the theme you choose should be compatible with mobile devices.
2. Click the Save button.

The mobile theme for Chamo is changed to your selected theme.

4.3 Theme Links Configuration

The Theme Links screen (*Figure 4-4*) lets you create theme links that allow users to navigate quickly between different themes. When you add two or more themes to the **Selected themes** list on the Theme Links screen, a *Current theme* drop-down list is displayed at the top of the Search Results screen in the patron interface. The user can switch themes by selecting one of the available themes from the drop-down list.
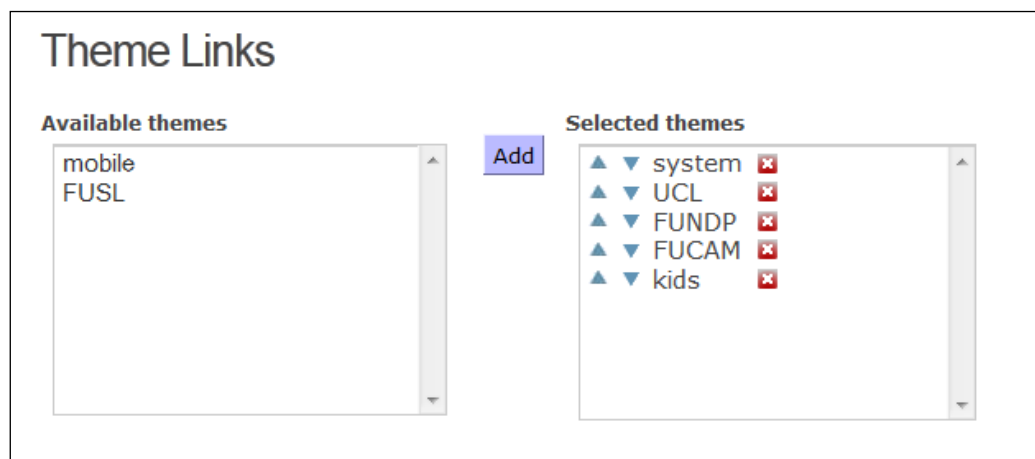
Figure 4-4. Theme Links Screen

The **Available themes** list contains the themes that are currently available but that are not configured to appear in the *Current theme* drop-down list in the patron interface.

The **Selected themes** list contains the themes that appear in the *Current theme* drop-down list in the patron interface.

- To **add a theme** to the *Current theme* drop-down list, select a theme in the **Available themes** list and click the Add button. The theme you selected will appear in the **Selected themes** list.
- To **remove a theme** from the *Current theme* drop-down list, click the red 'X' next to the theme in the **Selected themes** list. The theme you removed will appear in the **Available themes** text box.
- To **change the order** in which the available themes appear, click the Up or Down button next to a theme in the **Selected themes** list.

Your changes take effect immediately.

Note: For the *Current theme* drop-down list to be displayed in the patron interface, the **Selected themes** list must contain at least two themes.

4.4 Mail Server Settings

On the Mail Server Settings screen, you can configure your e-mail server settings for sending request confirmations, password reminders, and list/Cart contents via e-mail (SMTP Settings), as well as enabling and configuring an e-mail account for e-mail renewals (Renewal POP Mailbox Settings). Required fields for these functions are marked with an asterisk (*).

Figure 4-5. Mail Server Settings Screen

4.4.1 SMTP Settings

To enable Chamo to send e-mail request confirmations, send new passwords to patrons, and e-mail list and Cart contents, you must configure the SMTP Settings area of the Mail Server Settings screen.

1. The **Host** field should be populated with the e-mail server's hostname, e.g., *localhost* or *www.iii.edu*.

2. The **Port Number** field should be the port number on which the e-mail server is running.

> **Note:** If you have specified a Gmail address in the Sender field on the Mail Server Settings administrative screen AND you have specified either port 587 or port 465 in the Port Number field, you must also enable the "Access for less secure apps" option in your Gmail account settings.

3. The **Sender** field contains the e-mail address that will appear in the *From* field of the password change or request confirmation e-mail that patrons receive.
4. The **Username** is an optional username to access the e-mail server.
5. The **Password** is an optional password to access the e-mail server.

> **Note:** If you want to enable patrons to reset their passwords, you must also select the **Enable Forgotten Password** setting on the Patron Features screen.

4.4.2 Renewal POP Mailbox Settings

To enable patrons to renew items by e-mail, you must configure the Renewal POP Mailbox Settings.

For a patron to renew an item by e-mail, they must send an e-mail to your Renewal Username, and the body of the e-mail must contain the text **Barcode:XXXX**, where **XXXX** is the patron's barcode. Chamo attempts to renew all items the patron has checked out and returns an e-mail to the patron, notifying them which items were renewed and which were not.

6. Select the **Enable Renewals via Email** check box to enable e-mail renewals.
7. The **Host** field should contain the e-mail server's hostname, e.g., *localhost* or *www.iii.edu*.
8. The **Port Number** field should be the port number on which the e-mail server is running.
9. The **Username** is the e-mail address to which patrons must send renewal e-mail requests and which will appear in the *From* field of the renewal confirmation e-mail that patrons receive.
10. The **Password** field should contain the password required to access the e-mail account from which renewal e-mails are sent.
11. Select the **Use SSL** check box to send the renewal e-mail via SSL.

To save any configuration changes, click the Save button.

4.5 Index Configuration

The Index Configuration screen (*Figure 4-6*) allows you to configure all of your keyword indexes.

Chamo's index configuration is completely separate from the Virtua configuration in the Profiler. Virtua's indexing rules are automatically imported to Chamo as part of a new Chamo installation or a migration. After the indexing rules are imported, however, Chamo's index configuration is maintained separately from Virtua.

On this screen, you can. . .

- Add a new keyword index
- Edit an existing index
- Import Virtua's index configuration

Figure 4-6. Index Configuration Screen

4.5.1 Adding a New Keyword Index

To add a new keyword index,

1. Enter a **Name** for the index. Each name must be unique. The index name should be short and contain no spaces, such as 'a' for author. When displayed to the end user in the OPAC, the index name is automatically translated using the string code **search.field.[Index Name]**.

2. Enter an **Expression**. This is an XPath 2.0 expression that will extract data from the record in MARCXML format. Your expression may return multiple string nodes combined with the *union* (,) operator. Each node will be indexed separately under this index.

> **Note:** For examples of XPath expressions, see the section "Sample XPath Expressions" below. XPath expressions used for index configuration may be up to 10,000 characters long.

3. Select the **Type** of index:
   - **text** - A regular text index. This is the most common field and should be used for all textual data. It is the only field type that is searched by the Quick Search. The other field types can only be used as facets or Advanced search fields and should generally not be used for searching, since they must match exactly.

     > **Note:** text fields are the only field type that may not be a facet.

   - **string** - A case-sensitive, exact match string. The default for facets.
   - **integer** - A positive or negative integer value. The expression *must* return a valid integer or the field will be ignored for that record.
   - **date** - An ISO 8601 date. The expression *must* return a valid ISO 8601 date or the field will be ignored when indexing.
   - **boolean** - A boolean value. Must return 'true' or 'false', or the field will be ignored during indexing.

4. Check **Single-valued** for a single-valued field. This will improve performance of the index, but the expression must only return a single string for each record. Any values after the first one will be ignored.

5. Check **Facet** for a facet field. The facets you configure appear on the Facet Configuration screen, where you can specify the facets that are available in the patron interface.

   Facet fields may not be type **text** and should usually be **string**. A facet field is only configurable in Facet settings as a facet; conversely, a non-facet field will only show as a configurable Search field, not a facet. If you wish to provide both search and faceting on a field, you must define two fields. Note that in many cases you should use the **text** type for the non-facet version.

   > **Important:** In general, facet indexes should contain only a small set of distinct values. A facet containing a large number of distinct strings, such as a title field, will cause significant memory and performance issues when used.

6. To specify an index mapping file for an index, type the filename in the **Map file** text box. See the section "Working with Index Mapping Files" for more information about working with index mapping files.

7. Press the *Add* button to add the new index.

   The new index appears in the list below.

8. When you have completed all configuration changes, click the Save button.

Your changes are saved to the database.

Notes:
- After any change to the index configuration, you will need to re-index. Changes will take place immediately on any records that are updated in Virtua, so you should plan configuration changes carefully and make the actual changes when you are prepared to re-index immediately.

- The **System-defined** indexes in the list are for indexes and facets that are always present in Chamo. They appear on the page for informational purposes only and to allow users to see which index names are reserved by the system. They cannot be removed or edited.

4.5.2 Editing Keyword Indexes

You may edit any existing user-defined index.

To edit an index,

1. Navigate to the index you want to edit.
2. Click on the index Name or Expression to edit the field.
3. When you have completed all configuration changes, click the Save button.

    Your changes are saved to the database.

To delete an index completely, click the Remove button that appears next to the index.

4.5.3 Importing Virtua's Index Configuration

To import Virtua's index configuration, click the Copy Virtua Configuration button.

Chamo imports the index configuration settings found in the Keyword Indexing Catalog parameter in the Virtua Profiler and overwrites any indexing rules configured in Chamo. The new indexes appear on the Index Configuration screen (*Figure 4-6*).

After you have imported indexing rules, Chamo's index configuration is maintained separately from Virtua.

Note: Clicking the Copy Virtua Configuration button imports the indexing configuration from Virtua and also create four indexes (subject_form, subject_general,

subject_chronological, and subject_geographic) that do NOT come from Virtua. These four subject facets are available as user-defined indexes that libraries can delete or modify as they wish.

4.5.4 Working with Index Mapping Files

Chamo supports CSV mapping files for use with Chamo's indexing configuration. You can place a CSV mapping file in **$CHAMO_HOME/facets** and then enter the filename in the **Map file** field that applies to the appropriate index on the Index Configuration admin screen.

Your CSV file can be formatted as follows:

a,b
c,d

Chamo will output 'b' if the field is 'a', or 'd' if the field is 'c'. Any value not found in the CSV file will be discarded.

Your CSV file can also for formatted as follows for ranged matching:

start,end,output

Chamo will output 'output' for any value that falls between 'start' and 'end'. Missing ranges will be discarded. Ranged matching allows you to create multi-level facets that overlap each other.

Mapping files are reloaded each time you save the Index Configuration admin screen. Note that this might create multiple mappings for a single index if records have already been indexed. This can be resolved by re-indexing all records.

4.5.5 Understanding How Chamo Determines Relevancy in Search Results

Search result "relevancy" determines the records that Chamo returns when you perform a search, and the order in which they are sorted on the Search Results screen. In Chamo, relevancy depends on a scoring mechanism that used by Solr's internal document indexing engine, Lucene.

The following factors affect search result relevancy scoring:

- The frequency of a term in the entire document

- The rarity of a term in the entire system (for multi-term queries, rare terms are considered more relevant)
- The total number of terms in the query that match the document
- The size of the field in which a term is found (a term found in a smaller field is considered more relevant)
- A "boost factor" added to specific fields by the query

These factors explain why it is possible for a particular record to be listed on the Search Results screen above a different record that, for instance, has the search term in the title of the record.

You can adjust settings on the Index Configuration admin screen to influence how Chamo determines search result relevancy. When configuring settings on the Index Configuration screen, take the following information into account:

- Currently, the 'a' and 't' indexes receive a "boost" that makes Chamo consider search terms found in these fields relevant. To control how Chamo handles relevance, adjust these two indexes so that they exclude tags that you don't feel are important to ranking. If you want to search the tags you have excluded, create another index that includes them.
- The frequency of a term in the document increases the relevancy of the term. This means that, for instance, the more indexes that contain the 245 tag, the higher the relevancy of terms found in the 245 tag.

By using the Chamo indexing Configuration, customer can somehow control the relevance by adjusting the 'a' and 't' indexes and possibly excluding tags that may not be that important to ranking. Now if they want to search those fields still, then they should just crteated another index that includes them. Just make sure they are not included in the 'a' and 't' fields.

4.5.6 Sample XPath Expressions

Below we provide several sample XPath expressions similar to those you might use to specify the record data indexed for a keyword search. XPath expressions used for index configuration may be up to 10,000 characters long.

Example 1:

```
/record/datafield[@tag='600' and @ind2=0]/string-join(subfield[@code=('a','b','c')],' ')
```

Indexes subfield $a, subfield $b, and subfield $c data from 600 tags with 2nd indicator value of 0.

Example 2:

/record/datafield[@tag=('300','310','321')]/string-join(subfield[@code='a'],' '),
/record/datafield[@tag='506']/string-join(subfield[@code=('a','b','c')],' '),
/record/datafield[@tag='508']/string-join(subfield[@code=('a','b')],' ')

Indexes subfield $a data from the following tags: 300, 310, and 321. Also indexes subfield $a, subfield $b, and subfield $c data from 506 tags. Also indexes subfield $a and subfield $b data from 508 tags.

Example 3:

/record/translate(substring(leader,8,1),' |','')

Indexes data from the leader position 07.

4.6 Indexing Control

On the Indexing Control screen (*Figure 4-7*), you can . . .

- View the status of your indexes
- Re-index your indexes
- Set your Solr Server URL
- Create one or more synonym files

Indexing Control

Refresh

Type	Status	Started	Completed	Indexed	
Bibliographic Record	Last index was canceled. Index may be incomplete.	2014-01-08 17:15:41.470 -0500		77825	Re-index now / Resume Indexing
Heading	Full index completed.	2013-11-11 16:18:43.451 -0500	2013-11-11 16:38:41.440 -0500	199407	Re-index now
Holdings Record	Full index completed.	2013-04-01 18:09:35.115 -0400	2013-04-01 19:14:06.476 -0400	1062	Re-index now
Patron Record	Full index completed.	2013-04-01 18:09:32.555 -0400	2013-04-01 19:14:19.378 -0400	2510	Re-index now
Reserves	Last index was canceled. Index may be incomplete.	2014-01-15 18:24:03.171 -0500	2014-01-15 18:24:04.272 -0500	0	Re-index now / Resume Indexing
Invoices	Full index completed.	2013-11-01 15:50:10.654 -0400	2013-11-01 15:55:23.286 -0400	606	Re-index now
Payments	Full index completed.	2013-11-01 15:50:08.661 -0400	2013-11-01 15:56:36.445 -0400	375	Re-index now
Purchase Orders	Full index completed.	2013-11-01 15:50:06.415 -0400	2013-11-01 16:01:49.344 -0400	1815	Re-index now
Purchase Requests	Full index completed.	2013-11-01 15:50:05.318 -0400	2013-11-01 16:02:02.194 -0400	173	Re-index now
Receipts	Full index completed.	2013-11-01 15:50:03.834 -0400	2013-11-01 15:53:28.81 -0400	1100	Re-index now

Solr Server URL

http://unferth.vtls.com:8900/solr   Save

Synonym Configuration

Bibliographic Record*

Browse... No file selected.   Upload Download

Heading*

Browse... No file selected.   Upload Download

Figure 4-7. Indexing Control Screen

Note that while you may find it unnecessary to use the other tools on this page, you **must** define the Solr Server URL.

1. To view the status of your indexes, look at the table at the top of the Indexing Control screen. For each index available on the Indexing Control screen, the following information is displayed:

- **Type:** Displays the index name.
- **Status:** Displays the status of the index; i.e., whether the index is working normally or has a problem.
- **Started:** Displays the start time of the last full index.
- **Completed:** Displays the finish time of the last full index.

- **Indexed:** Displays the number of records indexed during the current or most recent indexing process.
- **Re-index now:** Clicking the *Re-index now* button re-indexes the Solr index. Chamo lets you index one index at a time. You can index only one index at a time; if you click the *Re-index now* button for multiple indexes, the software will add the indexes to a queue, and will re-index each index in turn. Users can still access and search the interface during the re-indexing process, which may take several hours.

  o To refresh the status of the index during the indexing process, click the *Refresh* button. This can be useful to view the progress of an index during the re-indexing process.

  o To cancel the current and all queued re-indexing processes, click the *Cancel indexing* button.

  o To re-start a re-indexing process that has stopped (either because it was manually cancelled, or because of a crash or other failure), click the *Resume indexing* button.

> **Note:** Usually, you will NOT need to re-index your data manually, since Chamo automatically updates its indexes once each minute. In addition, if cataloging occurs in Virtua while Chamo is down, Chamo automatically updates its indexes when it is started again. However, you should use the Indexing Control screen to re-index your data after . . .
> - You change the bibliographic masking rules on the General Configuration screen.
> - You update Virtua to a new version.
> - You add a new sort map to your database (see the *Virtua System Management Reference Guide*).
> - You make changes to your keyword indexing rules (see the *Virtua Profiler/Cataloging Parameters User's Guide*).
> - You delete a format on the Format Facet Configuration screen.
> - An index shows a status other than *Full index completed*.

2. **Solr Server URL:** Contains the URL for your Solr installation. This URL usually consists of the Chamo Base URL with **/solr** at the end. This URL must be populated for Chamo to work correctly.

3. **The synonym files** configuration areas let you create lists of synonyms for words so that users will get results when searching for alternate spellings or common misspellings of a term. Each set of synonyms must be a comma-delimited line, and each line must be separated by a line break. You can place spaces between the comma-delimited terms, but it is not necessary. A full explanation of the syntax used for the report can be found here:

   http://wiki.apache.org/solr/AnalyzersTokenizersTokenFilters#solr.SynonymFilterFactory.

   As an example, the lines:

   apple,apfel,pomme
   pumkin => pumpkin

   will allow users to search for the term "pomme" and find records with "apple" or "apfel" as a keyword, and vice versa. However, the second line indicates that a search for "pumkin" will show results for "pumpkin," but a search for "pumpkin," will not also perform a search for "pumkin." You can use Unicode characters, but you must make sure that the font you use to enter characters is Unicode-compliant. The file can only be uploaded as a synonym file if it is in Unicode format.

   1. Click the Download button to download and modify an existing synonym file. **Note:** The name of the file you download will *always* be **synonyms.txt**, even if you had previously uploaded a file with a different name.

   2. Open and edit the text file in a text editor.

   3. Save the file to your PC. The file **must** be in a Unicode-compliant text format.

   4. Click the Browse button.

   5. Navigate to the file you saved.

   6. Click the Upload button.

      Your synonym file will be applied immediately. Note that you may need to wait a few minutes for indexing to be updated before you are able to search on synonym terms; however, you can also manually re-index the index to which you added the synonym file.

4.7 Languages Configuration Screen

On the Languages screen, you can choose which languages are available to Chamo users from the drop-down list box of languages at the top of the Chamo screen.
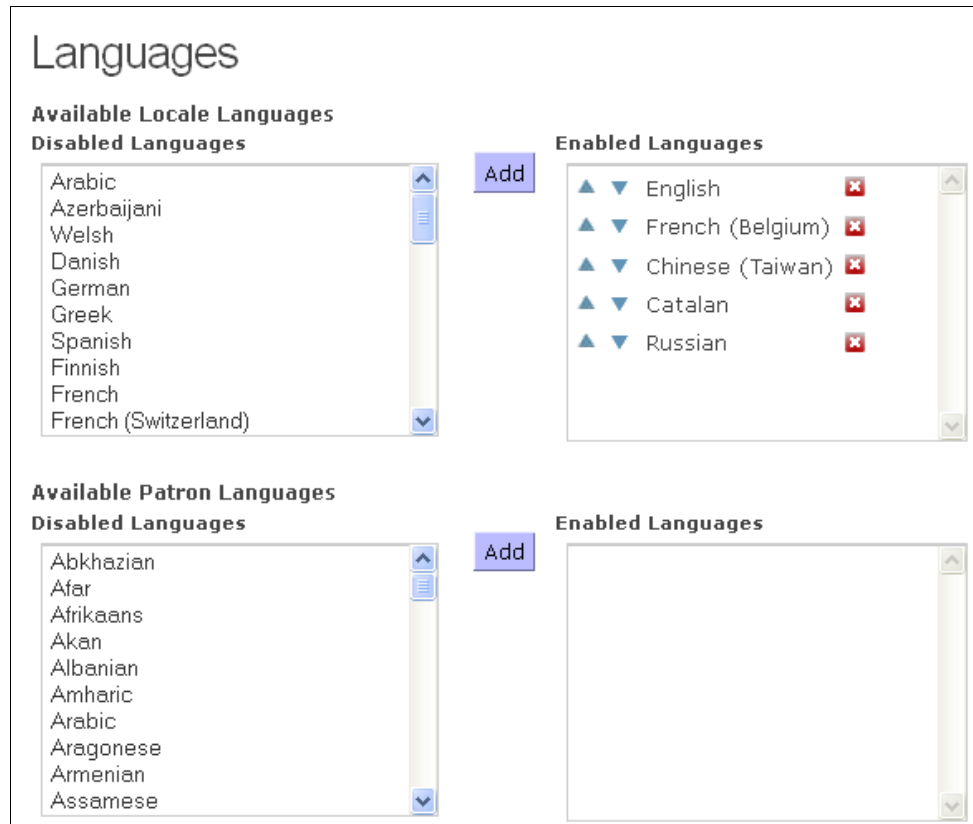
Figure 4-8. Languages Configuration Screen

The **Available Locale Languages** settings control which languages are available in the language drop-down list at the top of the screen, which is used to determine the language of the web interface. You should ensure that you have Language Files defined for each of the languages you select here.

The **Available Patron Languages** settings control which languages are available for patrons to choose as their preferred language on the Register or Contact Information screens. This language is used to determine the language for notices sent to the patron.

The languages in the Enabled Languages list contain the languages that are currently configured to be available for selection in Chamo.

The languages in the Disabled Languages text box contain languages that Chamo supports but that are not yet configured to be available for selection in the interface.

- To **add a language** to the drop-down list box of languages for the interface or fore the patron language, click the language in the Disabled Languages text box that you would like to add to the languages selection, and click the Add button. The language you chose will appear in the Enabled Languages list.

- To **remove a language** from the drop-down list box of languages, click the language in the Enabled Languages list that you would like to remove from the drop-down list of languages, and click the Remove button. The language you chose will appear in the Disabled Languages text box.

- To **change the order** in which the available languages appear, click the language name in the Enabled Languages list, and click the Up or Down buttons to move the language to the desired position.

Any changes take effect immediately.

Note: Chamo does not have translations for all the languages it supports. To download a file of strings for translation into a specific language, use the Language String Management tool.

4.8 Translating Strings in Chamo

The Language String Management screen lets you translate the strings in Chamo. To translate Chamo strings, you download an XLS file (spreadsheet) of Chamo strings to translate, and then upload the XLS file of the translated strings.

Hint: Enable the *Display Translation Codes* setting on the General Configuration Screen to find the codes for translatable strings in the Chamo interface.

Language String Management

Select a language file to import.

Import file [   ] [Choose...]

[Import]

Select a language to export.

| Arabic | ▼ | Excel ▼ | Export |

Arabic   ▲
Armenian
Azeri
Catalan   ≡
Chinese (China)
Chinese (Taiwan)
Danish
Dutch
English
Finnish
French
French (Belgium)
French (Switzerland)
German
Greek
Hebrew   ▼

S Valid | L
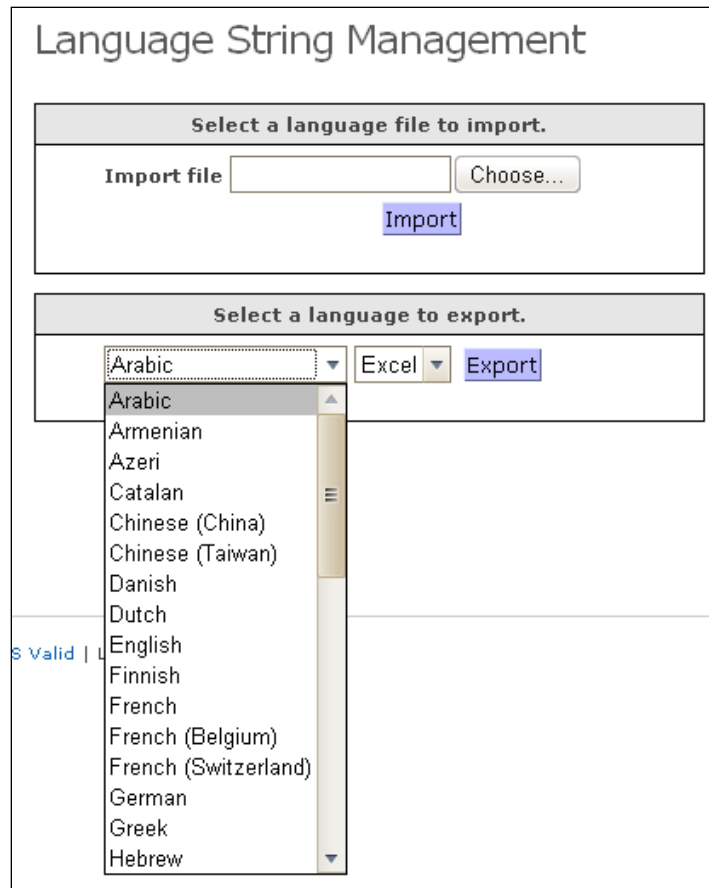
Figure 4-9. Language String Management Screen

To translate Chamo strings,

1. Download a file of Chamo strings to translate by selecting the language you would like to translate from the drop-down list box, and clicking the Export button. Save the XLS file to your PC.
2. Once you save the file to your PC, use Microsoft® Excel or another spreadsheet-editing program to type translations in the Translated String column of the spreadsheet.

	A	B	C
1	String Code	Native String (do not edit)	Translated String
2	sv.admin	Administration	
3	sv.admin.externalDataConfig		
4	sv.admin.externalDataConfig.coverLabel	Book cover and content services	
5	sv.admin.externalDataConfig.googleBooks	Google Books	
6	sv.admin.externalDataConfig.heading	External Data Configuration	
7	sv.admin.externalDataConfig.quikBibEnabl	Enable QuikBib service	
8	sv.admin.externalDataConfig.quikBibLabel	QuikBib service	
9	sv.admin.externalDataConfig.quikBibSecre	Secret Code	
10	sv.admin.externalDataConfig.quikBibVend	Vendor Code	
11	sv.admin.facets	Facets	Facetter
12	sv.admin.facets.add	Add	Lägg till
13	sv.admin.facets.heading	Facet Configuration	Konfigurera facetter
14	sv.admin.facets.name	Name	Namn
15	sv.admin.facets.order	Change Order	Ändra ordning
16	sv.admin.facets.remove	Remove	Ta bort
17	sv.admin.facets.title	Facet Configuration	Konfigurera facetter
18	sv.admin.general	General	Allmän
19	sv.admin.general.accountEdit	Allow patrons to edit their contact information	Tillåt låntagare att ändra sin kontaktinformation
20	sv.admin.general.allowRegistration	Allow patron registration	Tillåt låntagarregistrering
21	sv.admin.general.chamoBaseUrl	Chamo Base URL	
22	sv.admin.general.changeSiteLogo	Change Site Logo	Ändra logotyp för sajten
23	sv.admin.general.displayTranslationCodes	Display Translation Codes	Visa översättningskoder

Figure 4-10. Sample Language Translation File - Viewed in Microsoft Excel

3. When you are finished typing the translations for the strings in Chamo, save the spreadsheet to your PC.
4. To upload the file of translated Chamo strings, click the Browse button to locate your file, and click the Import button. Your translated strings will be available in Chamo immediately. Note that you may need to enable the language(s) you translate in the Chamo interface using the Languages configuration screen.

The file of Chamo strings you download will have a filename in the format **LanguageStrings_xx.xls**, where **xx** is a language code. For reference, a list of language codes and their corresponding languages appears below:

ar	-	Arabic
hy	-	Armenian
az	-	Azeri
bg	-	Bulgarian
ca	-	Catalan
zh_CN	-	Chinese (China)
zh_TW	-	Chinese (Taiwan)
hr	-	Croatian
cs	-	Czech
da	-	Danish
nl	-	Dutch
en	-	English
et	-	Estonian
fi	-	Finnish

fr	-	French
fr_BE	-	French (Belgium)
fr_CH	-	French (Switzerland)
de	-	German
el	-	Greek
iw	-	Hebrew
hi	-	Hindi
hu	-	Hungarian
is	-	Icelandic
id	-	Indonesian
iu	-	Inuktitut
ga	-	Irish
it	-	Italian
ja	-	Japanese
ko	-	Korean
lv	-	Latvian
lt	-	Lithuanian
ms	-	Malay
mt	-	Maltese
no	-	Norwegian
pl	-	Polish
pt	-	Portuguese
pa	-	Punjabi
ro	-	Romanian
ru	-	Russian
sk	-	Slovak
sl	-	Slovenian
es	-	Spanish
sv	-	Swedish
zgh	-	Tamazight
th	-	Thai
tr	-	Turkish
uk	-	Ukrainian
ur	-	Urdu
vi	-	Vietnamese
cy	-	Welsh

Note: You can delete language string translations for a given language (English, Spanish, etc.) by uploading a string file that contains blank entries for the translations you wish to delete. If you delete the translation for a string, its native translation will be displayed in the interface.

4.9 LDAP Configuration

On the LDAP Configuration screen (*Figure 4-11*), you can configure an LDAP server to use for patron authentication.

Figure 4-11. LDAP Configuration Screen

To use an LDAP server to authenticate patrons,

1. Select the Enable LDAP Authentication for Patrons check box.

2. Populate the LDAP Server URL with the URL of your LDAP server.

3. **[Optional]** Specify the Base DN for LDAP authentication.

4. Populate the DN/search pattern text box with the appropriate information.

5. **[Optional]** Specify a DN in the Search bind DN field. Note that you must enter a full DN, such as "cn=manager,dc=vtls,dc=com".

6. **[Optional]** Specify a password in the Search bind password field.

> **Note:** If the Search bind DN and Search bind password fields are configured, Chamo authenticates patrons to verify that they have valid LDAP credentials before allowing them to log in. These settings make it possible for libraries that do not allow anonymous LDAP bind requests to use LDAP authentication with Chamo.

7. **[Optional]** Populate the Barcode attribute text box with an attribute IF your patrons will be logging in using an ID that is NOT their library barcode.

8. Click the Save button.

> **Note:** The LDAP Configuration settings affect *patron* authentication only; *admin* and *staff* users can log in using non-LDAP authentication when LDAP patron authentication is enabled.

4.10 SSO Configuration

> **Note:** As of version 3.1 SP1, Chamo supports single sign on (SSO) using SAML 2.0.

On the SSO Configuration screen (*Figure 4-12*), you can enable single sign-on (SSO) header-based patron authentication. This form of patron authentication is an alternative to LDAP authentication

When header-based authentication is enabled, patrons who attempt to access Chamo are authenticated automatically via the header information provided in the HTTP request. Since header-based authentication does not require the patron to enter a username and password, the Login screen is not available in the patron interface when header-based authentication is being used. Patrons are automatically logged in to Chamo when they access the patron interface from a service that provides the required header information – a valid patron barcode – in the HTTP request.

In addition to enabling or disabling header-based authentication, the SSO Configuration screen also allows you specify whether a valid header is required for *every* HTTP request.

Figure 4-12. SSO Configuration Screen

- **To enable header-based authentication,**

  o Select the *Enable header-based authentication* check box.

  o In the *Header name* text box, enter the name of the HTTP header that will contain the patron barcode.

- **To specify that a valid header be required for *every* HTTP request,** select the *Require header for every HTTP request* check box. If header-based authentication is enabled and this check box is *not* selected, Chamo only requires a valid header for initial patron authentication.

4.11 List and Cart Configuration

On the List and Cart Configuration screen, you can . . .

- Determine whether logged in patrons and staff are permitted to use the Cart.
- Determine whether holdings records and copies can be added to the Cart.
- Determine whether users can add all search results, or all search results displayed on the current page, to the Cart.
- Set the maximum number of records that can be added to the Cart. This lets you limit the Cart size to a number that will not cause performance problems.
- Determine whether logged-in patrons and staff are permitted to create and save lists of items.
- Set the maximum number of lists that are permitted for each patron.
- Set the maximum number of items that are permitted for each list. This lets you limit the list size to a number that will not cause performance problems.

- Determine whether logged-in patrons and staff can perform operations on the entire list or Cart.
- Specify the number of days to keep an idle list before deleting it.
- Determine which export options are available for patrons to export items in the Cart or on a list.
- Determine whether a CAPTCHA must be successfully completed before an e-mail can be sent from the Cart or a list.
- Configure access to the Vitation citation service, which will enable a Create Citation button on the List Details and Cart screens.
- Specify the citation styles that are available to be selected on the List Details and Cart screens.

Figure 4-13. List and Cart Configuration Screen

- **To enable the bibliographic Cart functionality for patron and staff users**, select the *Enable Cart* check box.

- **To enable the holdings Cart functionality,** select the *Enable holdings cart* check box. When the user adds a title to the Cart, all of its holdings are displayed on the Holdings Records tab of the Cart screen.

- **To enable the copies Cart functionality,** select the *Enable copies cart* check box. When the user adds a title to the Cart, all of its copies are displayed on the Copies tab of the Cart screen.

- **To allow patrons and staff to save all search results shown on the page to the Cart,** select the *Allow user to add all results on the page to the cart* check box. When this setting is enabled, an Add Page To Cart button will appear on the Search Results screen.

- **To allow users to save all search results to the Cart,** select the *Allow user to save all results to cart* check box. If the setting is enabled, an Add All To Cart button will appear on the Search Results screen.

- **To set the maximum number of records allowed in the bibliographic Cart,** enter a number in the *Maximum number of records in a cart* field. If a user tries to add records to the Cart that would exceed the configured limit, an error message will appear, and none of the records will be added to the Cart. The maximum number of records in the bibliographic Cart cannot exceed 500, and it is recommended that you set the limit no higher than 100.

- **To allow operations on the entire list or Cart,** select the *Allow operations on entire list/cart* check box. When this setting is enabled, a new *Perform operations on* drop-down list is displayed at the bottom of the Cart and List screens. The drop down list contains the options *Selected records* and *All records*.
  - When the *All records* option is selected, the buttons on the List or Cart screen (Export, Save, E-mail, etc.) will operate on all records in the list or cart.
  - When the *Selected records* option is selected, the buttons on the List or Cart screen operate on only the records that are checked.

- **To enable lists for patrons in Chamo,** select the *Enable Lists* check box.

- **To set the maximum number of lists allowed per patron,** enter a number in the *Maximum number of lists per patron* field. If a patron tries to add a list that would exceed the configured limit, an error message will appear, and the list will not be created.

- **To set the maximum number of records allowed in a list,** enter a number in the *Maximum number of records in a list* field. If a user tries to add items to a list that would exceed the configured limit, an error message will appear, and none of the

items will be added to the list. The maximum number of items in a list cannot exceed 1000.

- **To set the number of days Chamo will keep an idle list** before deleting it, enter a number in the *Number of days to keep idle lists* field. When a patron creates a list, Chamo will display a message warning the patron that the list will expire after a certain period of inactivity. Once a list has been idle (not modified) for the specified number of days, Chamo will delete the list.

  Note: If you leave this setting blank, Chamo will not delete idle lists.

- **To configure which export options** are available from the Cart or List screen, select the check box next to the export formats you would like to be available.

- **To enable sorting on the Call Number column** on the Bibliographic Records tab of the Cart screen, select the *Enable cart sorting by call number for bibs* check box.

  Note: The availability of sortable call number data depends upon the call number indexing that has been configured via the Call Number Index and Priority parameter in the Profiler. Customers who have not configured this parameter will not be able to sort by call number on the Cart screen.

  Also note that if you modify the Call Number Index and Priority settings in the Profiler, you should run the following scripts to ensure that the call number sort on the Cart screen works correctly:

  - Run CallIndexForm.sh to update the call number indexing
  - Run WriteBibIdsFile.ksh <filename>
  - Run PopulateBibFields.exe <filename>

- **To enable a CAPTCHA** that must be completed before an e-mail is sent from the Cart or a list, select the *Enable CAPTCHA when sending email* check box.

- **To enable the Create Citation link** on the Cart and List Details screens, you must configure the Vitation Service settings. The Create Citation link lets patrons use the Vitation service to create citations.

  1. Select the *Enable Vitation service* check box.

  2. Enter the Vitation URL. This is assigned to you by Innovative.

- **To specify the citation styles that are available** to be selected on the Cart and List Detail screens, click the red 'x' to remove a citation style from the Vitation available citation styles list, or click the Add button to add a new citation style. You can reorder the list of citation styles by clicking the up or down arrow that appears next to each citation style.

Note: If you add a citation style to the list, it must be one of the styles supported by Vitation (AMA, Chicago author/date, CSE, JAMA, MLA, NEJM, NLM, and Turabian author/date). New style names can been translated by adding a custom string **vitation.styles.<style name>** to Chamo's strings file.

Click the Save button to save your configuration changes.

4.12 Format Facet Configuration

On the Format Facet Configuration screen (*Figure 4-14*), you can...
- View existing formats
- Edit existing formats
- Delete existing formats
- Add new formats

Figure 4-14. Format Facet Configuration

Note the formats you configure on this screen will be displayed whenever the Format facet is enabled. Search facets, including the Format facet, can be enabled for display in the Refine your search panel via settings on the Facet Configuration screen.

If you need further help configuring the formats, you can view XPath expression examples section below.

- To view existing formats, look at the table at the top of the screen. For each format available on the Format Facet Configuration screen, the following information is displayed:
  - **Name:** This field is for reference only; the string corresponds to entries on the strings spreadsheet. This field should contain no spaces.

> o **Expression:** The XPath 2.0 expression that defines the format based on MARCXML bibliographic record data. Among other data elements, you can specify the record Type (leader position 06), Bib Level (leader position 07), Form (008 tag position 23) and Material Type (value from 007 tag position 01 or 04) for the format. At the bottom of this page, we provide several XPath expression examples.
>
> > **Note:** For examples of XPath expressions, see the XPath expression examples section below.
>
> o **Icon:** Appears next to entries on the Search Results screen. This can be any image file up to 130KB; Chamo will automatically resize the dimensions of the image if necessary.
> o **Edit:** Clicking the Edit button opens a pop-up window where you can edit the name, expression, and icon of the facet. Click the Save button to save your changes.
> o **Delete:** Clicking the Delete button removes the selected format from the list of possible formats.
>
> > **Note:** If you delete a format, you must re-index your bibliographic record data in order for the change to take effect. To re-index data, see the Indexing Control screen.

- To add a new format, click the Add button. In the pop-up window that appears, enter the name, expression, and icon of the facet. Click the Save button to save your changes.

4.12.1 Sample XPath Expressions

Below we provide several XPath expression examples similar to those you might use to define a format to be included in the Format facet.

Example 1:

/record[substring(leader,7,1)='a' and substring(leader,8,1)=('a','c','d','m')]

Specifies a format with a Type (leader position 06 value) of 'a' and a bib level (leader position 07 value) of 'a', 'c', 'd', or 'm'.

Example 2:

/record[substring(leader,7,1)='a' and substring(leader,8,1)=('a','c','d','m') and substring(controlfield[@tag='008'],24,1)='s']

Specifies a format with a Type (leader position 06 value) of 'a', a bib level (leader position 07 value) of 'a', 'c', 'd', or 'm', and an 008 tag position 23 value of 's'.

Example 3:

/record[substring(leader,7,1)='g' and exists(controlfield[@tag='007' and substring(.,5,1)='v'])]

Specifies a format with a Type (leader position 06 value) of 'g' and a 007 tag position 04 value of 'v'.

4.13 Circulation Settings

The Circulation Settings screen (*Figure 4-15*) lets you configure what circulation functions are available to patrons. Settings in the Virtua Profiler determine whether a patron is allowed to place a request. For more information, see the *Virtua Profiler/Circulation Parameters User's Guide*.

The following settings are available on the Circulation Settings screen:

- Select an institution to configure
- Transaction Location
- Send email notifications for renewals
- Allow patrons to renew overdue items
- Disallow patrons to modify/deactivate page requests
- Require confirmation for late renewal
- Enable requests
- Allow patrons to specify request last needed date
- Enable unit-level requests
- Allow patrons to modify requests
- Allow patrons to deactivate requests
- Enable request deactivation date range
- Allow patrons to cancel page requests
- Allow patrons to cancel trapped requests
- Display bib-level request button
- Display request counts
- Item-level requests use pickup location
- Display confirmation page for requests

- Send email notifications for placing requests
- Minimum request expiration days
- Maximum request expiration days
- Item Status Availability
- Pick-up Location Availability
- Library IP Addresses

Figure 4-15. Circulation Settings Screen

- **Select an institution to configure:** This drop-down list box lets you choose an institution if your library has multiple institutions.

- **Transaction Location:** This drop-down list lets you choose a default location for requests and renewals. This location is used in the Transaction Log ONLY when a transaction is not associated with another location due to the settings on the General Theme Settings screen. This location will also be used if Virtua is configured to use the transaction location for calculating due dates.

- **Send email notifications for renewals:** If this check box is selected, patrons will receive an e-mail confirmation of their successful renewals, as long as the patron has a valid e-mail address in the 271 tag subfield $a and the patron's communication preference (as defined in the 008 tag position 10) is E-mail or Text and E-mail.

- **Allow patrons to renew overdue items:** This setting lets you determine whether logged-in patrons can renew overdue items via the Patron Account screen.

- **Disallow patrons to modify/deactivate page requests:** This setting works in conjunction with the "Allow patrons to deactivate requests" setting. If you enable both the "Allow patrons to modify requests" and the "Disallow patrons to modify/deactivate page requests" settings, Chamo allows patrons to modify or deactivate hold, loan, and recall requests but prevents them from modifying or deactivating page requests.

- **Require confirmation for late renewal:** If this check box is selected, a message ("At least one item is overdue. Renewing may incur a fine.") is displayed to the patron if he or she attempts to renew an item that is overdue. The patron may click an Accept button to continue with the renewal, or a Cancel button to cancel the renewal. The late renewal message can be edited or translated via Chamo's language file.

- **Enable requests:** This setting lets you determine whether patrons can place requests in the Chamo interface.

- **Allow patrons to specify request last needed date:** This setting lets you determine whether patrons are prompted to specify a Last Needed Date when placing or modifying a request.

- **Enable unit-level requests:** This setting lets you determine whether patrons can place unit-level page requests in Chamo for material that is not associated with any item record.

- **Allow patrons to modify requests:** This setting lets you specify whether or not patrons can modify the requests they have placed. If you want the Modify button to appear on the Requests tab of the patron's My Account screen, select this check box.

- **Allow patrons to deactivate requests:** If this check box is selected, patrons will be allowed to deactivate requests from the Requests tab of the My Account screen, thereby postponing the request until the patron reactivates the request. This is a useful feature for patrons to use when they take a vacation.

- **Enable request deactivation date range:** If this check box is selected, when the patron clicks the Deactivate request button from the Requests tab of the My Account screen, they will be prompted to enter a deactivation Start and End date. If this check box is not selected, patrons will not be prompted for a date range and the request deactivation will take effect immediately.

- **Allow patrons to cancel page requests:** If this check box is selected, a Cancel button appears for a page request displayed on the Requests tab of the My Account screen. If the check box is *not* selected, no Cancel button appears for a page request displayed on the Request tab.

- **Allow patrons to cancel trapped requests:** If this check box is selected, a Cancel button appears for a trapped request displayed on the Requests tab of the My Account screen. If the check box is *not* selected, no Cancel button appears on the Request tab for a trapped request.

- **Display bib-level request button:** This set of radio buttons lets you determine whether a Request button appears beneath the item description on the Search Results and Item Details screens (*Figure 4-16*) always, only if the library has copies of the item, only if no copies include units data, or never. This Request button allows patrons to place bib-level requests on the item.

> **Note:** If the Request button beneath the item information (*Figure 4-16*) does not appear, patrons must use the Request button that appears next to each *copy* of the item on the Copies tab of the Item Details screen.
>
> American library laws.
>
> Record 14 of 5,683
>
> **Publisher:**
>   Chicago, American Library Association, 1964.
>
> **Physical Description:**
>   vii, 1559 p. 26 cm.
>
> **Edition:**
>   3d ed.
>
> Request
>
> *Figure 4-16. Item Details Screen - With Bib-level Request Button*
>
> Also note that the bib-level Request button is never displayed if the bibliographic record is for an e-resource. A bibliographic record is considered an e-resource if it has. . .

- A record type (Leader/06) of a, c, d, i, j, k, m, o, p, r, or t
  -AND-
- A form (008/23) of s, o, or q

- **Display request counts:** This set of radio buttons lets you determine whether request counts are displayed to the *admin* user on the Search Results and Item Details (*Figure 4-17*) screens always, never, or only when bib-level request buttons are displayed.

- **Item-level requests use pickup location:** This set of radio buttons lets you determine whether a patron can select the pickup location when placing a request for a specific copy of an item, or whether the pickup location is automatically set to the item's owning location or the item's shelving location.

- **Display confirmation page for requests:** The five *Display confirmation page for requests* settings let you choose, for each request type (loan, page, hold, recall, and unit), whether a confirmation page is displayed to the patron when a successful request is placed. Select the check box next to each request type for which you want to display request confirmations.

  Note: The information that appears on the request confirmation page can be customized for each request type and institution combination by editing the default **request-confirmation.ftl** template file, which is found in the **webapps/ROOT/WEB-INF/templates** directory of your Chamo installation.

- **Send email notifications for placing requests:** If this check box is selected, patrons will receive an e-mail confirmation of their successful requests, as long as the patron has a valid e-mail address in the 271 tag subfield $a and the patron's communication preference (as defined in the 008 tag position 10) is E-mail or Text and E-mail.

- **Minimum request expiration days:** This setting allows you to configure the minimum number of days that the patron can specify when placing a request and selecting a Last Needed Date for the requested material. When a patron places a request, Chamo checks the Last Needed Date against the specified minimum request expiration days and displays a message to the patron if he or she has entered an invalid date.

- **Maximum request expiration days:** This setting allows you to configure the maximum number of days that the patron can specify when placing a request and selecting a Last Needed Date for the requested material. When a patron places a request, Chamo checks the Last Needed Date against the specified maximum request expiration days and displays a message to the patron if he or she has entered an invalid date.

- **Item Status Availability:** This setting lets you specify, for each item status, whether an item that carries that status is considered available or unavailable (for the purpose of the item availability counts shown on the Search Results screen).
  - o Items that carry a status listed in the Available list box are counted as available.
  - o Items that carry a status listed in the Unavailable list box are not counted as available.
- **Pickup Location Availability:** This setting lets you to configure the list of pickup locations that are available for users placing requests in Chamo. The setting also allows you to specify the order in which pickup locations are listed in the Pickup Location drop-down list on the Request screen.
  - o Locations listed in the Available list box appear in the Pickup Location drop-down list on the Request screen.
  - o Locations listed in the Unavailable list box are not available request pickup locations, and are not listed in the Pickup Location drop-down list.
- **Library IP Addresses:** This setting lets you define the IP range used by library terminals.
  - o Transactions performed from IP addresses *within* this range have a Log-in Mode of OPAC in the Circulation Transaction Log in the Virtua client.
  - o Transactions performed through the web OPAC but *outside* this IP range have a Log-in Mode of Internet in the Circulation Transaction Log in the Virtua client.

  The Library IP Addresses setting also lets you assign a location to each IP address range.
  - o When a circulation transaction (placing a request, renewing an item, or clicking a federated search link) is performed, Chamo logs the location linked to the IP address as the circulation location.
  - o If the IP address has no associated location configured, the location linked to the user's current Chamo theme is used.
  - o If no theme location is set, the default circulation location (as specified by the Transaction Location setting) is used.

Click the Save button to save any changes.

4.14 Request Buttons Settings

The Request Buttons screen (*Figure 4-17*) allows you to . . .
- Configure rules that determine when a Request button is displayed on the Item Details screen.
  -AND-

- Specify the level and type of request that is placed when a patron clicks the Request button.

You can set define a sub-set of items by setting matching criteria (item class, status, shelf location, etc.), and then set rules that apply to requests on items that belong to that sub-set.

Figure 4-17. Request Buttons Screen

To configure Request Buttons settings,

1. Click the *Add* button to create a new sub-set of items and define request button rules for it. A new entry appears on the Request Buttons screen.

2. **Item Class:** Click the *Add* button and then select the item class(es) for which you want to define item request button rules. If no item classes are selected, the software considers items with any item class to belong to this sub-set.

3. **Status:** Click the Add button and then select the item status(es) for which you want to define item request button rules. If no statuses are selected, the software considers items with any status to belong to this sub-set.

4. **Location:** Click the *Add* button and then select the item shelf location(s) for which you want to define item request button rules. If no locations are selected, the software considers items with any shelf location to belong to this sub-set.

5. **Checked Out:** Select a radio button to determine whether items that are checked out are considered part of this sub-set:

- *Any* - The software does not exclude any items from this sub-set based on the circulation status.
- *No* - Items that are not currently checked out are considered part of this sub-set.
- *Yes* - Items that are currently checked out are considered part of this sub-set.

6. **Noncirculating:** Select a radio button to determine whether noncirculating items are considered part of this sub-set:
   - *Any* - The software does not exclude any items from this sub-set based on the circulating/noncirculating designation.
   - *No* - Only circulating items are considered part of this sub-set. An item is considered "circulating" if it has a non-zero Use Loan Period value specified in the item record, OR if no Use Loan Period is specified and the Circ Period specified in the Location + Patron + Item matrix is used instead.
   - *Yes* - Only noncirculating items are considered part of this sub-set. An item is considered "noncirculating" if it has a Use Loan Period of 0 days specified in the item record (this setting overrides the Circ Period set in the Location + Patron + Item matrix).

7. **Paging Location:** Select a radio button to determine whether items shelved at a designated paging location are considered part of this sub-set:
   - *Any* - All items are considered part of this sub-set, regardless of paging location status.
   - *No* - Items that have a shelf location that is NOT designated a paging location are considered part of this sub-set.
   - *Yes* - Items that have a shelf location that is also designated a paging location are considered part of this sub-set.

8. **Off-site:** Select a radio button to determine whether off-site items are considered part of this sub-set:
   - *Any* - All items are considered part of this sub-set, regardless of whether they are off-site items.
   - *No* - Items that have a shelf location that is the same as the owning location are considered part of this sub-set. (Note that the shelf location and the owning location must match exactly; a sublocation and its main location are not considered a match.)
   - *Yes* - Items that have a shelf location that is NOT the same as the owning location are considered part of this sub-set.

9. **Serial:** Select a radio button to determine whether serial items are considered part of this sub-set:
   - *Any* - All items are considered part of this sub-set, regardless of whether they are serial items.
   - *No* - Serial items are NOT considered part of this sub-set.
   - *Yes* - Serial items are considered part of this sub-set.

10. **Show Button:** Select the *Show Button* check box to specify that the item request button is displayed on the Item Details screen for an item that belongs to this sub-set.

11. **Level:** Select a request level from the *Level* drop-down list. The request level you select (Auto, Bibliographic, Volume, or Item) will apply to the request that is placed when the patron clicks the Request button for an item that belongs to this sub-set.

12. **Type:** Select a request type from the *Type* drop-down list. The request type you select (Auto, Hold, Recall, Loan, Page) will apply to the request that is placed when the patron clicks the Request button for an item that belongs to this sub-set.

13. **Button Name:** To translate or edit the label that is displayed for the Request button shown on the Item Details screen, type a button name in this field. You can then download the language file from the Language String Management admin screen and translate the button text by entering a translated string for the string code **button.request.[Button Name]**.

14. Click the *Save* button to save your changes.

> **Notes:**
> - You can configure request button rules for multiple sub-sets of items and use the up and down arrows to prioritize the entries. If an item belongs to more than one configured sub-set of items, the software uses the set of request button rules with the highest priority to determine whether the Request button is displayed for that item.
> - If you do not configure any request button rules, a Request button will be displayed on the Item Details screen for every item and the software will perform an auto request when the button is clicked.
> - To delete request button rules for a sub-set of items, click the red 'X' next to the sub-set of items you would like to remove.
> - If an item does not belong to any of the sub-sets you have configured, the software will display the Request button for that item and an auto request will be performed when the button is clicked.
> - Chamo does not display a Request button for an item if it is an e-resource. An item is considered an e-resource if its bibliographic record has. . .
>   - A record type (Leader/06) of a, c, d, i, j, k, m, o, p, r, or t
>   -AND-
>   - A form (008/23) of s, o, or q

4.15 Page Request Settings

On the Page Requests screen (*Figure 4-18*), you can configure the questions that are displayed to a patron placing a page request. The answers to these page request questions appear on the request slip. You can configure different page types, and then define customized page request questions for each page type. When a patron places a page request, he or she will be prompted to select a page type and then to answer the page request questions configured for that page type.

The Page Requests screen also allows you to configure page restrictions. You can specify that certain locations *not* be considered valid pickup locations for page requests placed on items at a particular shelf location. You can also specify that some patron types be exempt from the pickup location restrictions you configure.

Figure 4-18. Page Requests Screen

4.15.1 Configuring Page Request Questions

To configure page request questions,

1. *(Optional)* Select an institution from the drop-down list.

2. Type a page type code in the Page Types text box.

3. Click the *Add* button.

4. On the window that appears, enter the number of page request questions you would like to configure for the current page type.

5. To specify that this page type not be allowed when placing a page request on an item that carries a particular status (or statuses), select one or more statuses in the Item Statuses list and click the *Add* button to add them to the Restricted Item Statuses list. When a patron places a page request, the Page Type selection list will not include any page types that are restricted for the item's status.

6. When you have finished configuring this page type, click the *Save* button. The new page type appears in a list.

   • **To add or modify a page type,** click the *edit* link and then change the number of questions in the Questions list box.

   • **To remove a page type,** click the red 'X' next to the page type entry you would like to remove.

Once you have configured a page type and defined the number of page request questions you would like to define for it, you must add the text of your page request questions to the language strings file so that the questions can be displayed in the patron interface.

To add page request questions to Chamo's file of language strings,

1. Navigate to the Language String Management configuration screen.

2. Download a file of language strings used in Chamo by selecting the language you would like to translate from the drop-down list box, and clicking the *Export* button. Save the XLS file to your PC.

3. Open the XLS file in Microsoft® Excel or another spreadsheet-editing program.

4. Add strings for the page request questions you would like to configure. For example, if you added the page type code **"thesisRequest"** and specified that four page request questions be defined for that page type, add the following five lines to the language file for the five strings:

String Code	Translated String
[language code].request.page.type.thesisRequest	Thesis Request
[language code].request.page.type.thesisRequest.q1	Title
[language code].request.page.type.thesisRequest.q2	Author

[language code].request.page.type.thesisRequest.q3	Call Number
[language code].request.page.type.thesisRequest.q4	Year

In the example above, the first string ("Thesis Request") represents the label that is used to represent the page type code in the patron interface. The next four strings specify the text of the page request questions one through four. Note that you must populate the String Code and Translated String columns for the strings you add to the language file, but that it is not necessary for you to populate the Native String column.

5. When you are finished entering strings, save the spreadsheet to your PC.

6. Upload the file of strings by clicking the Browse button to locate your file, and then clicking the *Import* button. Your page request question strings will be available in the interface immediately.

Note: For more information on working with language strings in Chamo see the section "Translating Strings in Chamo" in this guide.

4.15.2 Configuring Page Restrictions

To configure page request restrictions,

1. Select the *Immediately reject requests for restricted pickup locations* check box to specify that a page request placed for an item will be immediately rejected if Chamo detects that the pickup location specified by the patron is a restricted pickup location.

    Note: If this check box is NOT selected, when a patron chooses a restricted pickup location Chamo will display a message and the patron will be prompted to select another pickup location from a list that no longer contains restricted locations.

2. Select an item/holdings shelf location from the Shelf Locations list.

3. Click the *Add* button.

4. On the window that appears,

    •   Specify the locations that are not to be considered valid pickup locations for page requests placed on items at the current shelf location. To do this, select

one or more locations from the Pickup Locations list and click the *Add* button to add them to the Restricted Pickup Locations list.

> **Note:** You can configure multiple sets of page restriction rules for a single shelf location. However, once you designate a location as a restricted pickup location for a particular shelf location, the pickup location cannot be used in another set of page restriction rules for the same shelf location.

- Specify the patron types that you want to be exempt from the pickup location restrictions you configured. To do this, select one or more patron types from the Patron Types list and click the *Add* button to add them to the Exempt Patron Types list.

- Click the *Save* button. The page restrictions you configured appear in a list.

4.16 Request Slip Printer Configuration

The **Request Slip Printer Configuration** screen lets you enable and configure the printing of request slips.

Figure 4-19. Request Slip Printer Configuration Screen

This screen has the following settings:

- **Print request slips for page requests:** Select this check box to print request slips when patrons place Page requests through the OPAC.

- **Output Directory:** Contains the directory where the request slip files will be sent.

> **Note:** If the specified Output Directory is not found on the OPAC server, Chamo displays a warning message. Note that the warning message does not prevent you from saving the Output Directory. Customers who use slip printing and who have the Chamo OPAC running on a separate server should ignore the warning message.

- **Default Printer Name:** Contains the network name of the default printer.

- **Add Printer:** Click this button to add additional printers. When you click the button, a new window opens where you can choose a location and a printer name. The location should be the shelving location of the items whose request slips you want to print on the printer you are adding. When you add a printer, the printer appears in the table.

- **Printer table:** Shows the non-default printers you have configured. To remove a printer, click the ☒ button next to the printer you want to remove.

- **Save button:** Click the Save button to save any changes.

4.17 Request Slip Email Configuration

The Request Slip Email Configuration screen (*Figure 4-20*) allows you to enable and configure the e-mailing of request slips.

Figure 4-20. Request Slip Email Configuration Screen

Select the *Email request slips for page requests* check box to specify that Chamo e-mail a request slip to the paging location when a patron places a page request.

Clicking the *Add Email* button opens a pop-up window (*Figure 4-21*) where you can select a location from a drop-down list of paging locations, and enter the e-mail address to which page request slips for items shelved at that location will be sent.
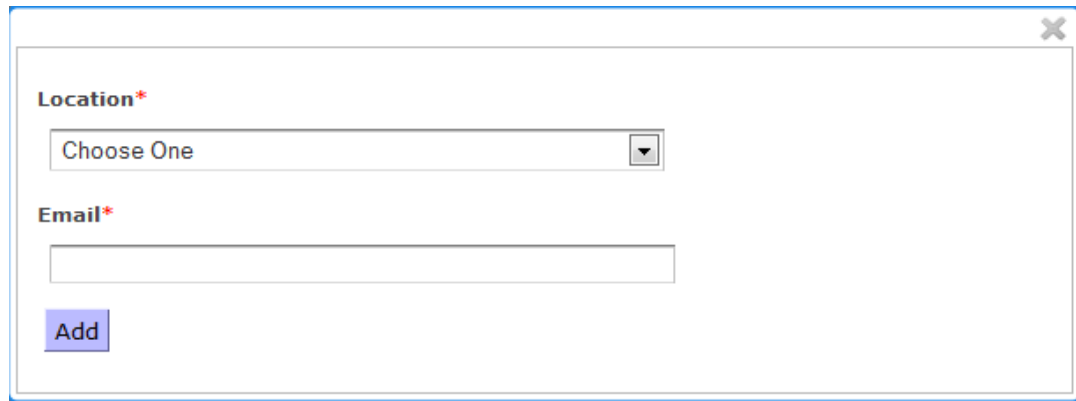
Figure 4-21. Request Slip E-mail Configuration Pop-up Window

Note that you can configure the request slip e-mail by editing the **request-slip-email.ftl** template file that appears in the **webapps/ROOT/WEB-INF/templates** directory. Consortium users can create and use institution-specific request slip e-mail templates that will override Chamo's default request slip template file. To do this, create a new template file and append the institution symbol to the filename with an underscore (e.g., **request-slip-email_UCL.ftl**).

4.18 Administrating Reviews

The Administrate Reviews screen (*Figure 4-22*) lets you view, approve, and delete user reviews.

Figure 4-22. Administrate Reviews Screen

- To view user reviews, enter the number of days' worth of reviews you would like to see, and click the Refresh button. A list appears with the reviews written within your selected timeframe.

  Note: If you would like to view only those reviews that have not been approved, select the *Only show reviews needing approval* check box.

- To approve a review so that it appears for all users on the Item Details screen, click the Approve button.
- To **approve all** of the reviews, click the Approve All button at the top of the screen.
- To delete a review, click the Delete button next to the review.

To view a review on the Item Details screen, click the title, and then click the Reviews tab on the Item Details screen. The most recent review appears at the top of the list of reviews. You can delete reviews using the Delete button (*Figure 4-23*).

Figure 4-23. Item Details Screen, Reviews Tab - Admin View

4.19 Tagging Configuration Screen

The Tagging screen lets you choose whether patrons are allowed to add tags to records. This screen also lets you create, upload, and/or edit a list of banned tags. If a patron attempts to add a banned tag, they will receive a notice that the tag is banned (*Figure 4-24*), and the tag will not be saved.
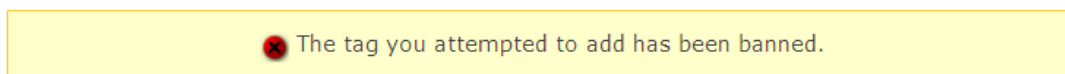
Figure 4-24. Banned Tag Message

Figure 4-25. Tagging Configuration Screen

1. To enable tagging, which lets logged-in patrons add words or phrases as tags to an item, select the Enable Tagging check box, and click the Save button.

2. To add a banned tag, type the banned tag in the Tag Name text box, and click the Ban button. If there are already instances in the database of a tag you are adding to the Banned Tag List, all instances of that tag will be hidden.

3. To un-ban a tag, select the tag on the Banned tag List you would like to un-ban, and click the Unban button. Tags that were added to records and then banned will reappear.

4. To upload a list of tags to ban, click the Browse button to locate a **.txt** or **.csv** file of tags to ban, and click the Import button.

4.20 Recent Tags

The Recent Tags screen lets you view and ban recent tags.
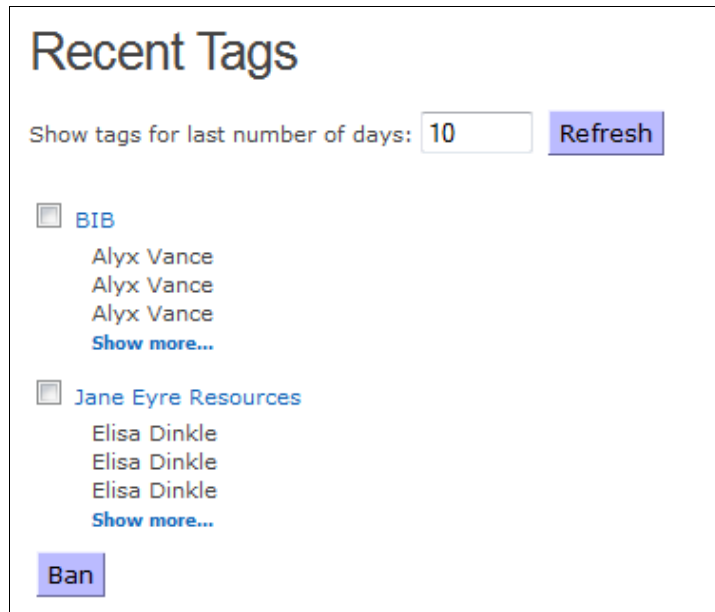
Figure 4-26. Recent Tags Admin Screen

- To view user tags, enter the number of days' worth of tags you would like to see, and click the Refresh button. A list appears with the tags written within your selected timeframe, along with the patron(s) who added the tag.
- To ban a tag, select the check box next to the tag you would like to ban, and click the Ban button at the bottom of the screen. You can also ban tags from the Tagging screen.
- To view a tag on the Item Details page, click the tag name. Chamo performs a search for all items to which that tag has been added. Click on the title of an item to see the Item Details page for that item. The most recent tag appears at the top of the list of tags.

4.21 Popular Searches Report

The Popular Searches Report screen lets you create a report of search terms used during a given time period.

Figure 4-27. Popular Searches Report Configuration

The Popular Searches Report output lists search terms in order of popularity, with the most popular search term at the top. The report shows how many times each search term was used, and what percentage of the total number of searches performed contained that search term.

To create a list of search terms used within a given time period,

1. Select a Report format from the drop-down list. The HTML format is recommended if your collection contains non-Latin characters.

2. Type a date in the Start Date text box OR click the calendar icon to choose a start date. If you do not choose a Start date, the report defaults to a Start Date of 01 January 2000.

> **Note:** If you type a date, you MUST use the Input Date Format as defined on the General Configuration screen.

3. Type a date in the End Date text box OR click the calendar icon next to the text box to choose an ending date. If you do not choose an End Date, the report defaults to an End Date of 31 December 2099.

> **Note:** If you type a date, you MUST use the Input Date Format as defined on the General Configuration screen.

4. Type a number in the Maximum number of results text box to limit the number of results. If this text box is empty, the report will return all searches performed within the defined time period.

5. Click the Run button.

A PDF or new HTML screen is produced containing a list of search terms. Depending on your web browser settings, the report may open in your browser in a new tab or a new window; or you may be prompted to open the report with a PDF reader or save the report to your workstation.

Popular Searches

01-Jun-2010 - 30-Sep-2010

Term	Volume	Percentage
international	40	5.15 %
test	18	2.32 %
dragon	13	1.67 %
introduction to therapeutic	13	1.67 %
M1234567890123	12	1.54 %
animals	12	1.54 %

Figure 4-28. Popular Searches Report - PDF Example

4.22 Records Viewed Report

In the administrative interface, the new Records Viewed Report screen allows you to generate reports on the bibliographic, authority, and patron records viewed by Chamo users.

Figure 4-29. Records Viewed Report Configuration

To run the Records Viewed report,

1. Select a Record Type from the drop-down list.

2. Select a Report format from the drop-down list. The HTML format is recommended if your collection contains non-Latin characters.

3. Type a date in the Start Date text box OR click the calendar icon to choose a start date. If you do not choose a Start date, the report defaults to a Start Date of 01 January 2000.

    Note: If you type a date, you MUST use the Input Date Format as defined on the General Configuration screen.

4. Type a date in the End Date text box OR click the calendar icon next to the text box to choose an ending date. If you do not choose an End Date, the report defaults to an End Date of 31 December 2099.

    Note: If you type a date, you MUST use the Input Date Format as defined on the General Configuration screen.

5. Type a value in the Maximum number of results field.

6. Click the Run button.

    A PDF (*Figure 4-31*) or new HTML screen is produced containing brief record information and a count of the number of times the record was viewed within the specified time period. Depending on your web browser settings, the report may open in your browser in a new tab or a new window; or you may be prompted to open the report with a PDF reader or save the report to your workstation.

4.23 Zero-Hit Searches Report

The Zero-Hit Searches Report screen (*Figure 4-30*) lets you create a report of search terms that returned no results during a given time period.

Figure 4-30. Zero-Hit Searches Report Configuration

To create a list of search terms that returned no results,

7. Select a Report format from the drop-down list. The HTML format is recommended if your collection contains non-Latin characters.

8. Type a date in the Start Date text box OR click the calendar icon to choose a start date. If you do not choose a Start date, the report defaults to a Start Date of 01 January 2000.

    Note: If you type a date, you MUST use the Input Date Format as defined on the General Configuration screen.

9. Type a date in the End Date text box OR click the calendar icon next to the text box to choose an ending date. If you do not choose an End Date, the report defaults to an End Date of 31 December 2099.

> **Note:** If you type a date, you MUST use the Input Date Format as defined on the General Configuration screen.

10. Click the Run button.

    A PDF (*Figure 4-31*) or new HTML screen is produced containing an alphabetical list of search terms that returned no results. Depending on your web browser settings, the report may open in your browser in a new tab or a new window; or you may be prompted to open the report with a PDF reader or save the report to your workstation.

Search Terms With Zero Results
03-Oct-2017 - 05-Oct-2017

S.No	Search Term	Search Index	Search Type	Time
1				
	sssssss444444	Any Field	Advance	05-10-17 15:50:25
2				
	xqy123		Keyword	05-10-17 15:40:00
3				
	sssss333333		Advance	05-10-17 15:50:18
4				
	xyz123	Any Field	Advance	05-10-17 15:40:10

Figure 4-31. Example Zero-Hit Search Terms - HTML Example

4.24 Login Statistics Report

The Login Statistics Report screen lets you create a PDF report of the number of patron logins during a given time period.

Figure 4-32. Login Statistics Report Configuration

To create a report of the number of patron logins within a given time period,

1. Select a Report format from the drop-down list. The HTML format is recommended if your collection contains non-Latin characters.

2. Type a date in the Start Date text box OR click the calendar icon to choose a start date. If you do not choose a Start date, the report defaults to a Start Date of 01 January 2000.

    Note: If you type a date, you MUST use the Input Date Format as defined on the General Configuration screen.

3. Type a date in the End Date text box OR click the calendar icon next to the text box to choose an ending date. If you do not choose an End Date, the report defaults to an End Date of 31 December 2099.

    Note: If you type a date, you MUST use the Input Date Format as defined on the General Configuration screen.

4. Select the Daily or Monthly radio button to determine whether the report lists the number of patron logins each day or each month.

5. Click the Run button.

    A PDF (*Figure 4-33*) is produced containing a report of the number of patron logins. Depending on your web browser settings, the report may open in your browser in a new tab or a new window; or you may be prompted to open the report with a PDF reader or save the report to your workstation.

Figure 4-33. Example Login Statistics Report PDF

4.25 Change Password

The Change Password (*Figure 4-34*) screen lets you change the password for the *admin* user.

Figure 4-34. Change Password Screen

To change the *admin* password,

1. Type the current password in the Current Password field.
2. Type your new password in the New Password and Confirm Password fields.
3. Click the Save button.

Chamo changes the admin password to the new password you selected.

4.26 Patron Features

The Patron Features screen (*Figure 4-35*) allows you choose which features are available to patron users.

The following settings are available on the Patron Features screen:

- Select an institution to configure
- Allow Patrons to Log In
- Allow Expired Patrons to Log In
- Warn patrons when expiration is within this many days
- Prevent Patron From Login Brute Force Vulnerability
- Lock patron account after this many login attempts
- Lock patron account for this many minutes
- Allow patron to change PIN
- Notify patrons of a PIN change via e-mail
- Allow patron to change password
- Notify patrons of a password change via e-mail
- Enable Forgotten Password
- Change all patron's passwords at once
- Display lost card reason for login failure
- Display account summary on search page
- Display quick-login on search page
- Display disputed/waived checkouts in My Account
- Enable patron queue
- Allow patrons to edit their contact information
- Allow patron to report a lost card
- When a card is reported lost
- Enable history CSV export
- Enable history text export
- Enable validation on request cancellation
- Maximum age (days) of patron history
- Account Tabs/Enabled Account Tabs

Patron Features

☑ Allow Patrons to Log In

☑ Allow Expired Patrons to Log In

Warn patrons when expiration is within this many days

[30]

☑ Allow patron to change PIN.

☑ Notify patrons of a PIN change via email

☑ Allow patron to change password.

☑ Notify patrons of a password change via email

☑ Enable Forgotten Password

☑ Change all patron's passwords at once

☑ Display lost card reason for login failure

☑ Display account summary on search page

☑ Display quick-login on search page

☑ Display disputed/waived checkouts in My Account

☑ Enable patron queue

☑ Allow patrons to edit their contact information

☑ Allow patron to report a lost card

When a card is reported lost,
- ⦿ add a 'lost card' block to the patron
- ◯ disable the lost barcode

☑ Enable history CSV export

☑ Enable history text export

☑ Enable validation on request cancellation

Maximum age (days) of patron history

[   ]

Account Tabs   **Enabled Account Tabs**

[   ]   Add   ▲ ▼ Checked Out ❌
                                ▲ ▼ E-books ❌
                                ▲ ▼ Account ❌
                                ▲ ▼ Queue ❌
                                ▲ ▼ Notes ❌
                                ▲ ▼ Blocks ❌
                                ▲ ▼ History ❌

Save

Figure 4-35. Patron Features Screen

- **Select an institution to configure:** This drop-down list box lets you choose an institution if your library has multiple institutions.

- **Allow Patrons to Log In:** If this check box is selected, the Login screen (*Figure 2-4*) is displayed in the patron interface. If the setting is not enabled, the Login screen is not displayed, preventing patrons from logging in to Chamo.

- **Allow Expired Patrons to Log In:** This check box determines whether patrons with expired library cards are still able to log in to the web interface using the Login screen (*Figure 2-4*).

- **Warn patrons when expiration is within this many days:** If you want to issue a warning to a patron before his or her account expires, enter a number of days value in the entry box. A warning message is displayed on the My Account screen if a patron is within the configured number of days of his account expiration date. If the Account Login form is configured to be displayed on the Search Results screen, a warning message also appears there. If you do NOT want to warn patrons when their accounts are approaching the expiration dates, leave this setting blank.

- **Prevent Patron From Login Brute Force Vulnerability:** This setting can be used to help protect your Chamo installation against possible brute-force log-in attacks. When this setting is enabled, you can 1) specify that a patron's account be locked after X unsuccessful log-in attempts and 2) specify the period of time for which a patron account is locked because of unsuccessful log-in attempts. When a patron's account is locked because of unsuccessful log-in attempts, a message is displayed to the patron and an e-mail containing an account activation link is sent to the patron's e-mail account.

- **Lock patron account after this many login attempts:** This setting lets you specify the number of failed log-in attempts after which a patron's account is locked because of unsuccessful log-in attempts.

- **Lock patron account for this many minutes:** This setting lets you specify the number of minutes a patron's account is disabled when it is locked because of unsuccessful log-in attempts.

- **Allow patron to change PIN:** This check box determines whether patrons are permitted to change their password via a **[Change PIN]** link on the Contact tab of the My Account screen.

- **Notify patrons of a PIN change via email:** This check box determines whether a patron will receive an e-mail message when the patron's PIN is changed. Selecting this check box means an e-mail will be sent to the patron e-mail address configured in the 271 tag, first indicator 1, subfield $a.

- **Allow patron to change password:** This check box determines whether patrons are permitted to change their password via a **[Change Password]** link on the Contact tab of the My Account screen.

- **Notify patrons of a password change via email:** This check box determines whether a patron will receive an e-mail message when the patron's password is changed. Selecting this check box means an e-mail will be sent to the patron e-mail address configured in the 271 tag, first indicator 1, subfield $a.

- **Enable Forgotten Password:** This check box determines whether the *Forgot your password?* link appears on the Login screen. If this check box is selected, patrons can click on the *Forgot your password?* link and enter their username and e-mail address to have a new password generated and sent to their e-mail address. The e-mail address the patron enters must match the e-mail address in the patron record.

- **Change all patron's passwords at once:** This check box determines whether all of a patron's passwords will be reset to the same new password when the patron clicks the *Forgot your password?* link. When this check box is selected, any password in subfield $b of the 015, 016, and 017 tags will be reset. When the patron assigns a new password, the new password will be applied to all of the patron's IDs. When this check box is not selected, only the password associated with the username entered by the patron will be reset.

  Note: If your library has multiple institutions, clicking the *Forgot your password link?* only changes patron passwords that are associated with the patron's (or staff user's) current log-in institution. If a *staff* user attempts to change all passwords for a patron that does not have any passwords associated with the *staff* user's institution, an error message will be displayed.

- **Display lost card reason for login failure:** This check box determines whether patrons receive a message with specific details when they try to log in with a disabled barcode. When this check box is selected and the "disable the lost barcode" setting below is enabled, if a patron logs in with a barcode reported lost, the message displayed will inform the patron that they cannot log in because their card was reported lost.

- **Display account summary on search page:** This check box determines whether the Account Summary panel is displayed in the left sidebar of the Search Results screen for logged in patrons.

- **Display quick-login on search page:** This check box determines whether the Account Login panel is displayed in the left sidebar of the Search Results screen.

- **Display disputed/waived checkouts in My Account:** This check box determines whether disputed and/or waived check-outs will appear on the Checked Out tab of the My Account screen.

- **Enable patron queue:** This check box determines whether a patron will be able to create and save a queue of books they wish to have sent to them. This queue is available on the patron's My Account screen, and it is also viewable and editable by *staff* users.

- **Allow patrons to edit their contact information:** This check box determines whether patrons will be allowed to edit their address and telephone information through the My Account screen in Chamo.

- **Allow patron to report a lost card:** This check box determines whether the *I lost my card* button appears on the My Account screen. If this check box is selected, patrons can click the *I lost my card* button to report a lost library card.

- **When a card is reported lost:** This setting lets you determine what actions Virtua takes when a patron's library card is reported lost through the web interface, either by the patron or by a staff member.

  o **Add a 'lost card' block to the patron:** When a patron's card is reported lost, a lost card block (01X field subfield $x) is put in the patron record, and the patron will be unable to use their patron ID until the block is removed.

  o **Disable the lost barcode:** When a patron's card is reported lost, a lost card block (01X field subfield $x) is put in the patron record, AND, if the lost card ID is in the 017 tag, a subfield $o is added to the 017 tag. The patron will be unable to use that ID until the block is removed, but the patron will be able to log in with other IDs they have registered with the library.

- **Enable history CSV export:** This check box determines whether patrons are permitted to export their history in CSV format. If this check box is selected, an Export As button appears on the History tab of the My Account patron screen, and the patron can select CSV as the export format.

- **Enable history text export:** This check box determines whether patrons are permitted to export their history in text format. If this check box is selected, an Export As button appears on the History tab of the My Account patron screen, and the patron can select Text as the export format.

- **Enable validation on request cancellation:** This check box determines whether a validation message will be shown to patrons when canceling a request. When this setting is enabled, Chamo prompts the user to confirm that they wish to cancel a request before the software performs the cancellation.

- **Maximum age (days) of patron history:** This setting allows you to specify the maximum age, in days, of entries displayed on the History tab of a patron's My Account screen.

- **Account Tabs/Enabled Account Tabs:** This setting lets you select the My Account tabs that will be displayed in the patron interface, and allows you to determine the order in which the enabled tabs are shown.

  1. **To specify that a tab is displayed on the My Account screen,** select the name of the tab in the Account Tabs list and click the Add button.

     The tab is moved to the Enabled Account Tabs list, and will be displayed on the My Account screen.

2. **To configure the order in which the tabs are displayed on the My Account screen,** select the name of a tab in the Enabled Account Tabs list and click the up or down arrow next to the tab name to move the tab up or down in the list of displayed tabs.

4.27 Patron Contact Configuration

The Patron Contact Configuration screen (*Figure 4-36*) lets you determine which account information and contact information fields appear on the Contact Information screen (*Figure 2-13*) and which are editable, optional, or required.

The patron accesses the Contact Information screen by clicking on the **[Edit]** link on the Contact tab of the My Account screen.

Note: The appearance of the **[Edit]** link is controlled by the *Allow patrons to edit their contact information* setting on the Patron Features settings screen.

Figure 4-36. Patron Contact Configuration Screen (detail)

On the Patron Contact Configuration screen, you can . . .

- Enable or disable the display of certain read-only fields on the Contact tab of the My Account screen.

- Specify whether an alternate name is displayed for the patron.

- Determine which contact information fields appear on the Contact Information screen and which are editable, optional, or required.

1. To configure the *Display read-only* settings, select the check box next to each field that you would like to display on the Contact tab.

2. The *Language for patron alternate name display* setting determines whether an alternate name for the patron will be displayed. If an alternate patron name is stored in the 111 tag of the patron record, that name will be displayed when the patron views the interface in the language configured here. The languages available in this drop-down list correspond with the languages configured on the Languages configuration screen.

3. For each patron contact information data element, you can select one of the following options:

   - **Do not show** - Does not display this field on the Contact Information screen.

   - **Display only** - Displays this field on the Contact Information screen, but the patron cannot change the value of this field.

   - **Editable (optional)** - Displays this field and lets patrons edit the field. If this field is blank, Chamo will still let patrons save changes to their contact information.

     Note: The Last Name and Street fields are required by Virtua, and these fields cannot be assigned the **Editable (optional)** status.

   - **Editable (required)** - Displays this field and lets patrons edit the field. If this field is blank, Chamo will NOT let patrons save changes to their contact information.

Note: In the Virtua Profiler, if the Patron Cataloging Option *Valid Birth Date Required* is selected, the Birth Date field on the Contact Information screen will be required, regardless of the Birth Date setting on the Patron Contact Configuration screen.

For information about Patron Cataloging Options, see the *Virtua Profiler/Cataloging Parameters User's Guide*.

4.28 Patron Registration Configuration

The Patron Registration Configuration screen (*Figure 4-37*) lets you determine whether patrons are permitted to register online, and lets you configure various elements of the registration process. Patrons access the Register screen by clicking the **[Register]** link on the Login screen.

Figure 4-37. Patron Registration Configuration Screen

- **Allow patron registration:** This check box determines whether patrons who are not yet members of the library will be able to register using the Register link on the Login screen. When a patron registers in Chamo, the patron's barcode and password are stored in the 014 tag.

- **Patron type to assign to new patrons:** This drop-down list box lets you choose which patron type will be assigned to patrons who register using the online self-registration form. You may want to create a patron type for use only for patrons who register online to restrict these users' library privileges and to make these patrons easier to find for review, and have restricted library privileges until they can be verified by library staff.
- **Enable Registration Policy:** This check box determines whether the registration policy configured on the Policy Configuration screen is displayed when a patron clicks on the Register link on the Login screen. To add or edit your registration policy, click the Edit button. A new window appears where you can add or edit a registration policy (*Figure 4-38*).
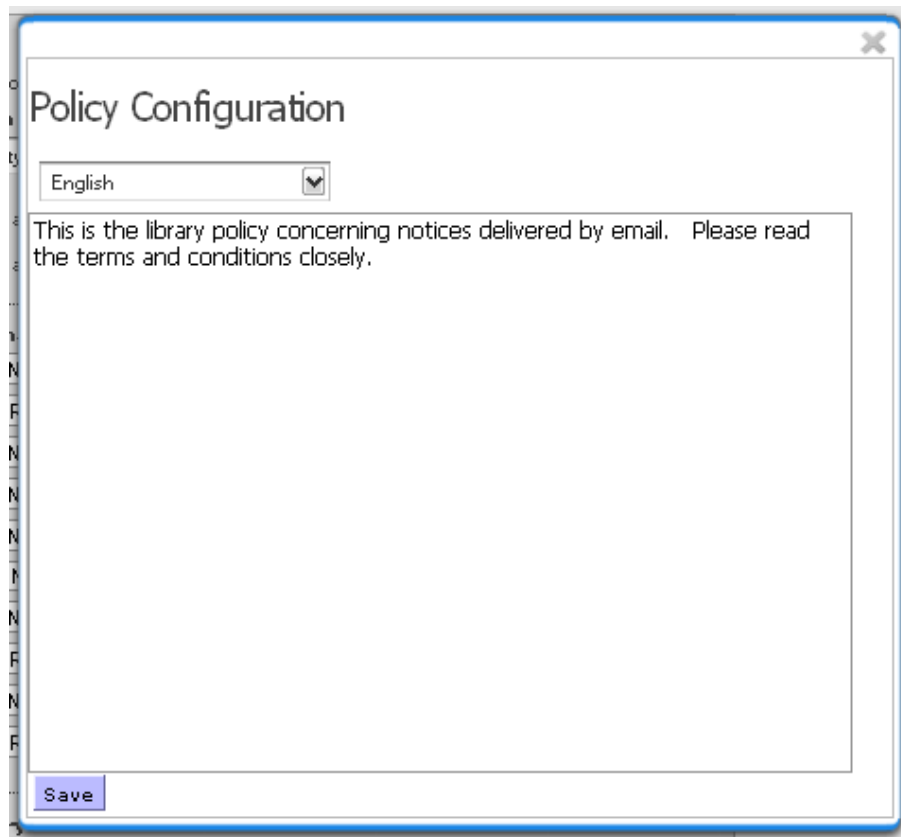
Figure 4-38. Policy Configuration Pop-up Window

- **Enable Communication Policy:** This check box determines whether a communication policy will be displayed when a patron changes their communication preference to E-mail on the Patron Registration screen or the patron Contact Information screen. To add or edit your communications policy, click the Edit button. A new window appears where you can add or edit a communication policy (*Figure 4-38*).

- **Enable CAPTCHA:** This check box determines whether a CAPTCHA image will be displayed at the bottom of the Patron Registration screen, which patrons would be required to complete before their registration information would be accepted.
- **Enable Duplicate Checkouts:** This setting allows you to specify whether multiple check-outs are allowed for a patron who self-registers via Chamo. When this setting is enabled, Virtua will allow multiple check-outs of the same item to the patron.

Each patron registration element on the Patron Registration Configuration screen lets you select from a drop-down list box whether that element is . . .

- **HIDDEN:** This element will not be displayed on the Register screen.
- **OPTIONAL:** Patrons will be able to edit this element, but they will be able to save their registration without populating this element.

  Note: The Username and Last Name are always required, and these fields cannot be assigned the Optional status.

- **REQUIRED:** Patrons must populate this element in order to save the registration form.

Click the Save button to save your changes.

4.29 External Data Configuration

On the External Data Configuration screen (*Figure 4-39*), you can configure whether information from external data sources appear in the interface.

The following services and settings are available for configuration on the External Data Configuration screen:

- Book cover and content services from Syndetics or Google Books and their alignment on the screen in the Chamo interface.
- Enriched data (book cover art, reading recommendations, etc.) from NoveList Select.
- Availability information for e-book records from OverDrive.
- Information about 3M Cloud Library e-books, including an interface that allows patrons to view e-book availability, check out or place holds on e-books, and view information about their current checked out or held e-books.
- Third party service codes from AddThis.
- A link to HanWeb, which allows Chamo users to view a translation of the interface in Simple Chinese.
- Compatibility with Zotero

External Data Configuration

Book cover and content services

○ None
○ Syndetics

Syndetics base URL

    http://www.syndetics.com.

Syndetics client code

◉ Google Books

Google Books API Key

Book cover alignment

○ Left
◉ Right

NoveList

Profile

Password

E-book services

OverDrive account ID

3M Cloud library ID

VTLS Visual Browser

Visual Browser base URL

Add This Widget

☑ Enable Add This Widget

☐ Customize Add This Widget

HTML code for add this widget

```
<a href="http://www.addthis.com/bookmark.php"
        class="addthis_button"
        style="text-decoration:none;">
        <img
src="http://s7.addthis.com/static/btn/sm-plus.gif"
        width="16" height="16" border="0"
alt="Share" /> Share</a>
```

CSS code for add this widget

```
facebook_like
```

HanWeb

☐ Enable HanWeb support

HanWeb URL

HanWeb IP Address

☑ Enable Zotero support

[Save]

Figure 4-39. External Data Configuration Screen

- If you do NOT want information from external sources to appear in Chamo, select the None radio button and deselect the Enable Add This Widget check box.
- The following book cover and content services will display thumbnail book cover images on the Search Results and Item Details screens and links on the Additional Information tab of the Item Details screen:
  - To display external information from Syndetic Solutions™, select the Syndetics radio button, and then:
    1. Enter the base URL for Syndetics. This is usually http://www.syndetics.com.
    2. Enter your library's Syndetics client code. This code is assigned to your library by Syndetics. If you are unsure of this code, contact Innovative Customer Services for assistance.
  - To display external information from Google™ Books, select the Google Books radio button, and then enter your Google Books API Key.
  - To change the alignment of book cover thumbnails on the Search Results and Item Details screens, use the Book cover alignment radio buttons to specify left or right alignment.

Notes:
- You can select either the Syndetics OR Google Books data source; you cannot enable both.
- For information on creating a Google Books API key, see Appendix D – Creating a Google Books Access Key in this guide.

- To display book cover art, reading recommendations, series information, and other enriched data from NoveList Select on the Search Results and Item Details screens, enter a valid NoveList profile and password.
- To retrieve availability information for e-book records from OverDrive and display it on the Search Results or Item Details screens, enter your OverDrive account ID. When you enable this feature, Chamo displays the following information when you view an e-resource on the Search Results or Item Details screen:
  - Total number of e-books
  - Number of available e-books
  - Number of holds
  - A *Details* link that launches an OverDrive page in your browser.

  Note: To use this functionality, you must also enable the *Show e-book availability information for e-resources* setting on the OPAC Settings admin screen.

- To enable the display of information about 3M Cloud Library e-books in the patron interface, enter your 3M Cloud Library ID. When you enable this feature, Chamo displays a Show button next to a Cloud Library e-resource when it is returned on the Search Results screen. Patrons can:
  - Click the Show button to view information about the e-book, including availability information and number of holds.
  - Check out an e-book if copies are available, or place a hold request on an e-book that has no available copies.

o View information about currently checked out or held e-books on the Ebooks tab of the My Account screen.

> **Note**: To enable the display of the Show button on the Search Results screen, you must also enable the *Show e-book availability information for e-resources* setting on the OPAC Settings admin screen.

- The Visual Browser base URL setting is not used by Chamo at this time.
- To enable and/or modify the AddThis widget on the Search Results and Item Details screens, select the Enable Add This Widget check box.
    - o To specify which services are available, select the Customize Add This Widget check box, and add or remove services from the HTML Code for add this widget text box. A full list of services that can be used with the AddThis widget can be found here: http://www.addthis.com/services/all.
    - o To modify the appearance of the AddThis widget, select the Customize Add This Widget check box, and edit the CSS code for add this widget text box.
- To enable HanWeb translations, select the Enable HanWeb support check box and enter the URL and IP address of the HanWeb server.
    When these settings are configured, a Simplified Chinese link appears in the patron interface for users that are not logged in. Clicking the Simplified Chinese link takes the user to a HanWeb interface that displays a translation of the Chamo screen in Simplified Chinese.
- To enable Zotero support, select the Enable Zotero support check box. See http://www.zotero.org/ for more information about Zotero.

Click the Save button to save your configuration changes.

4.30 Subscription Services

On the Subscription Services screen (*Figure 4-40*), you can enable or disable the display of links to external subscription services and federated search tools such as 360 Search. You can also configure Chamo to use EZProxy ticket authentication to authenticate users who attempt to access external subscription services.

Figure 4-40. Subscription Services Screen

To enable subscription services functionality,

1. Select the *Enable subscription services* check box and enter one or more URLs in the text fields below:

    - **Subscription service A - Z list URL** - When a URL is provided, Chamo displays an *A - Z Search* link on the Search Results screen in the patron interface, regardless of whether the patron is logged in. Clicking the *A - Z Search* link directs the patron to the URL configured.
    - **Subscription service URL (logged in user)** - When a URL is provided, Chamo displays a *Federated Search* link on the Search Results screen in the patron interface for logged in patrons only. Clicking the *Federated Search* link directs the patron to the URL configured.
    - **Subscription service URL (anonymous user)** - When a URL is provided, Chamo displays a *Federated Search* link on the Search Results screen in the patron interface for anonymous (not logged in) patrons only. Clicking the *Federated Search* link directs the patron to the URL configured.

        Note: Do not use a proxy address for any of the subscription service URLs described above.

2. If you would like to configure a disclaimer message to be displayed when a patron
    clicks the *A - Z Search* or *Federated Search* link, click the *Edit disclaimer* button.
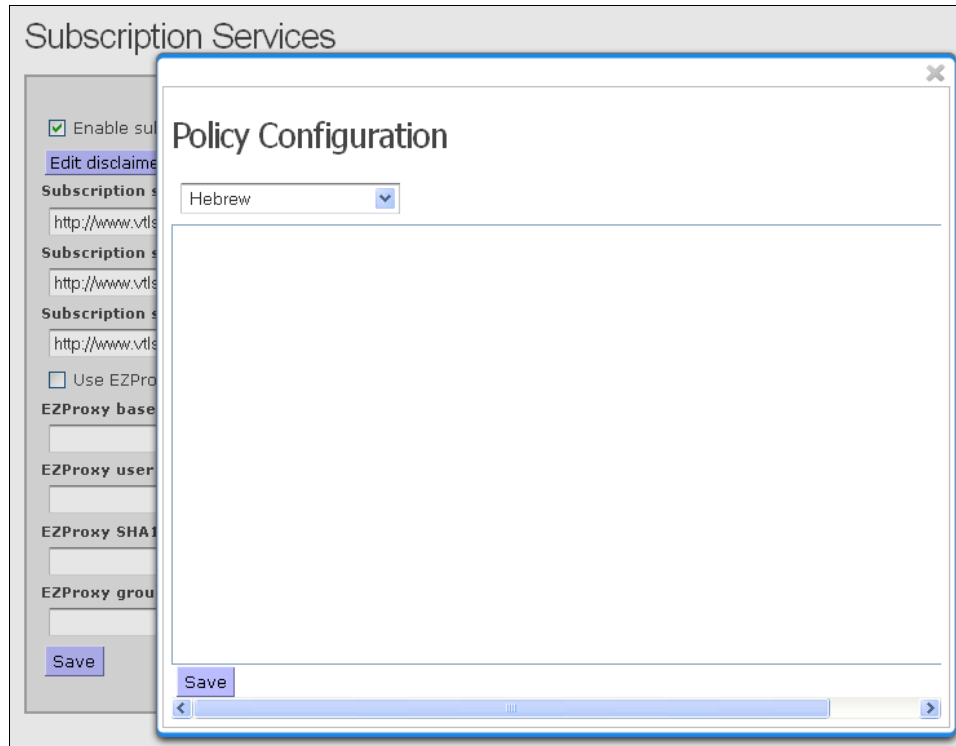   A pop-up window appears (*Figure 4-41*).

Figure 4-41. Policy Configuration Pop-up Window

On the Policy Configuration pop-up window, select the language for which you
would like to configure a disclaimer message. Type your disclaimer message into
the text box, and then click the Save button.

In the patron interface, the disclaimer message is displayed when a patron clicks
the *A - Z Search* or *Federated Search* link. The patron is prompted to accept the
disclaimer and continue to the external subscription service or federated search
tool, or decline the disclaimer message and return to the Search Results screen.

Note: The disclaimer message is only displayed if a disclaimer has been configured
for the language currently in use in the patron's session.

3. If you would like to use EZProxy ticket authentication to authenticate users who
    attempt to access external subscription services, click the *Use EZProxy ticket
    authentication* check box. When this check box is selected, Chamo treats each
    subscription services URL as an EZProxy server and uses ticket authentication to

grant access to authenticated users. Anonymous access (no log-in) will be used with EZProxy for unauthenticated users. To use EZProxy authentication, enter the following information:

- **EZProxy base URL** - The EZProxy base URL.

  Note: Do not include the "/login" portion of the URL.

- **EZProxy user** - The EZProxy username.

  Note: This information is not used for anonymous access.

- **EZProxy SHA1 key** - The SHA1 key shared with EZProxy ticket set-up.

  Note: This information is not used for anonymous access.

- **EZProxy groups** - The list of groups to use when authenticating, separated by spaces.

  Note: This information is not used for anonymous access.

4.31 OpenURL Configuration

The OpenURL Configuration screen (*Figure 4-42*) lets you add, change, and remove OpenURL resolvers.

Figure 4-42. OpenURL Configuration Screen

When one or more OpenURL resolvers are configured, the Search Results and Item Details screens will have links for qualifying books and serials to an OpenURL search on the resolver(s) you configure.
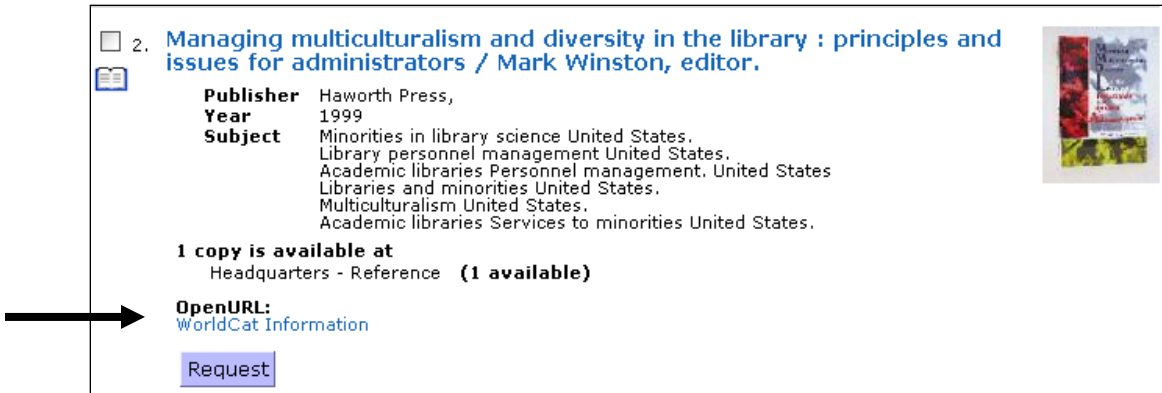
Figure 4-43. OpenURL Link for Book on Search Results Screen

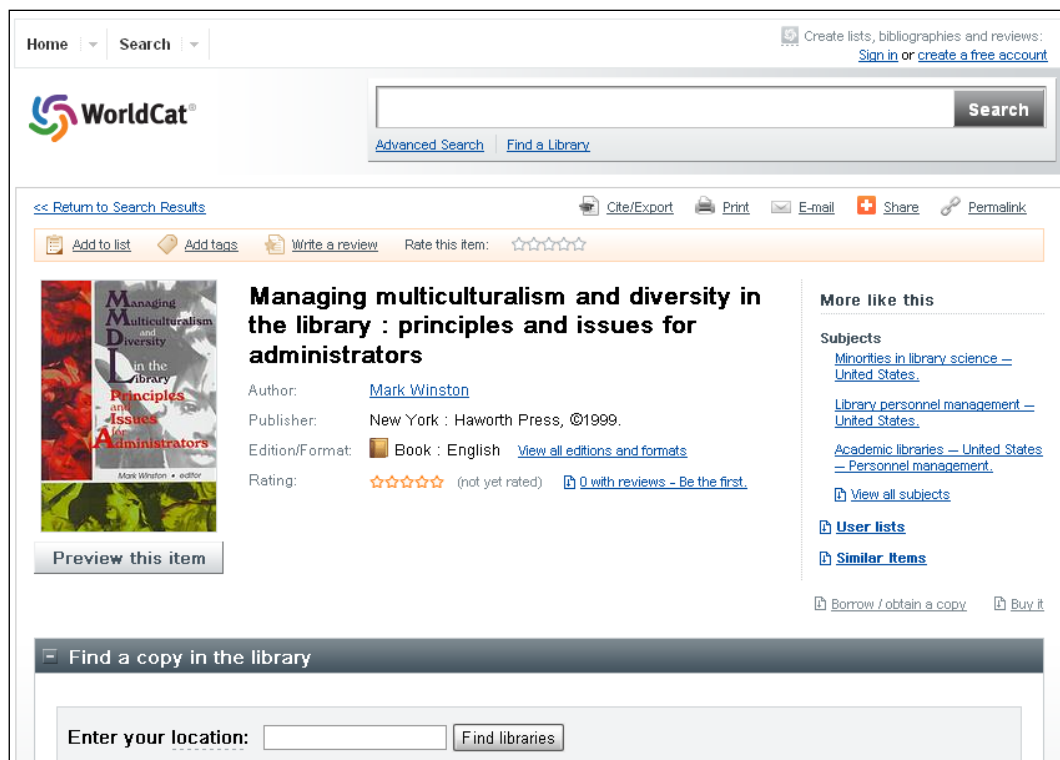When a user clicks this link, new window opens with search results for that item (*Figure 4-44*).

Figure 4-44. Sample Pop-up Window for OpenURL Resolver

To configure a new OpenURL server,

1. Click the Add button. A pop-up window opens (*Figure 4-45*).

Figure 4-45. OpenURL Configuration Pop-up Window

2. Fill in the Name and URL for the remote OpenURL server.

3. Fill in the SID for your library. Some resolvers will successfully resolve an OpenURL without a SID configured, but many resolvers require a SID.

4. Select the version of OpenURL that the server supports.

5. (*Optional*) Upload an icon to represent that OpenURL provider on the Search Results and Item Details screens. Note that this image file is saved to the **CHAMO_HOME/images/openurl** directory on your server.

6. (*Optional*) Define a filename or label to appear along with the icon on the Search Results and Item Details screens. This field can be blank even if you use an icon.

7. (*Optional*) Define a custom stylesheet script that conforms to the XSLT 1.0 standard to modify the query that Chamo sends to the OpenURL provider and thus the generated OpenURL. This way you can specify whether the results

returned have certain values in certain fields. Note that you must be familiar with modifying XSL to use this field.

8. Click the Save button.

The server you configured appears on the OpenURL Configuration screen. An OpenURL link will appear for qualifying items on the Search Results and Item Details screens.

Note: After you configure an OpenURL resolver, you must add a string to the relevant language file on the Language String Management screen. The string in the *String Code* column of this file must be in the format **xx.openUrl.link.Name**, where **xx** is the language code for the language you are configuring, and **Name** is the name specified when you configured the OpenURL resolver.

For instance, if you are modifying the **LanguageStrings_en.xls** file, and the name of your OpenURL resolver is **WorldCat Information**, then the string you'd add to the String Code column would be **en.openUrl.link.WorldCat Information**. You can then add your desired strings to the *Native String* and *Translated String* columns.

If you do not configure a string in the **LanguageStrings_xx.xls** file, the OpenURL link in the interface will appear as a warning message; e.g.:

OpenURL:
[Warning: Property for 'openUrl.link.WorldCat' not found]

Figure 4-46. OpenURL Link Appearing as Warning Message

To change the settings for an OpenURL resolver that is already configured, click the Edit button (*Figure 4-42*). A new window appears, which lets you change the settings for that entry.

To remove an OpenURL resolver, click the Delete button next to the resolver you want to remove (*Figure 4-42*).

4.32 Google Analytics Configuration

The Google Analytics screen lets you configure the software to send tracking information to Google™, which lets you track traffic to your OPAC website. For more information about Google Analytics, see http://www.google.com/analytics/.

To enable Google Analytics for your site, you must sign up with Google and obtain an Account ID.

Figure 4-47. Google Analytics Configuration Screen

To send tracking information to Google for analysis,

1. Select the *Send tracking data to Google* check box.
2. Type your Account ID in the text box.
3. Click the Save button.

You can then use the information provided to you by Google to view statistics for your Chamo site.

4.33 Text Messages Configuration

The Text Messages screen lets you configure Chamo to allow patrons to renew items via text message, as described in the section, "Renewing Items via Text Message" in this guide.

To use text messaging in Chamo, your library must have an agreement with Clickatell™.

Figure 4-48. Text Messages Configuration Screen

To enable item renewal by text message,

1. Select the *Use Clickatell for text messaging-based renewals* check box.
2. Fill in the Username, Password, API ID, Callback Username, Callback Password, and Source address you have registered with Clickatell.
3. Click the Save button.

4.34 Virtua Server

On the Virtua Server screen (*Figure 4-49*), you can configure a Virtua server instance to use for providing Authority links from the Heading Search Results screen.

Figure 4-49. Virtua Server Configuration Screen

To configure a Virtua Server for displaying authority links,

1. Populate the Host text box with the hostname of your Virtua server.
2. Populate the Port text box with the port on which a psdriver is running.
3. Click the Save button.

> **Note:** To display authorities in the user interface, in addition to the settings on this screen, you must also configure the OPAC Settings screen to select the *Enable View Authority* setting.

4.35 Purchase Request Configuration

The Purchase Request Configuration screen lets you configure whether patrons can place purchase requests.

The following settings are available on the Purchase Request Configuration screen:

*   Select an institution to configure
*   Enable purchase requests by patron
*   Enable anonymous purchase requests
*   Policy URL
*   Category to use for OPAC requests
*   Location Contact Configuration

Figure 4-50. Purchase Request Configuration Screen

- **Select an institution to configure:** This drop-down list lets you choose an institution if your library has multiple institutions.
- **Enable purchase requests by patron:** When this check box is selected, a *Request for purchase* link appears at the top of the screen of the patron interface. When a patron clicks this link, the Request for Purchase screen appears.
- **Enable anonymous purchase requests:** When this check box is selected, the *Request for purchase* link appears for patrons who are not logged in. Purchase requests placed anonymously will be saved without any patron contact information.
- **Policy URL:** This setting lets you configure a URL for your library's purchase request policy setting. A hyperlink to this URL will appear on the Request for Purchase screen, and patrons will be required to select a check box saying they agree to this policy in order to successfully submit their request.

- **Category to use for OPAC requests:** This drop-down list lets you choose the category for purchase requests placed in the OPAC. The categories that appear on this list are those configured by the Purchase Request Categories parameter in the Virtua Profiler; see the *Virtua Profiler/Acquisitions Parameters User's Guide* for information.
- **Branch Location and E-mail:** This table lets you select whether a library location will be displayed on the *Most Frequently Visited Branch* drop-down list on the patron Request for purchase screen, and to configure an e-mail address for each branch library. When an e-mail address is configured, an e-mail will be sent to that address each time a purchase request is made at that branch.

Click the Save button to save any changes.

4.36 Purchase Request Anonymous Fields

The Purchase Request Anonymous Fields screen (*Figure 4-51*) lets you configure the fields that appear on the Request for Purchase screen for anonymous purchase requests (purchase requests placed by users who are not logged in).

Figure 4-51. Purchase Request Anonymous Fields Admin Screen

For each Request field or Contact Information field, select an option from the drop-down list to specify whether the field is. . .

- Optional
- Required
- Not displayed

Click the Save button to save your changes.

> **Note:** To configure the fields that appear on the Request for Purchase screen for *patron* purchase requests, see the Purchase Request Patron Fields admin screen.

4.37 Purchase Request Patron Fields

The Purchase Request Patron Fields screen (*Figure 4-52*Figure 4-51*)* lets you configure the fields that appear on the Request for Purchase screen for patron purchase requests (purchase requests placed by patrons who are logged in).

Figure 4-52. Purchaes Request Patron Fields Admin Screen

For each Request field or Contact Information field, select an option from the drop-down list to specify whether the field is. . .

- Optional
- Required
- Not displayed

Click the Save button to save your changes.

Note: To configure the fields that appear on the Request for Purchase screen for *anonymous* purchase requests, see the Purchase Request Anonymous Fields admin screen.

4.38 Saved List Configuration

The Saved List Configuration screen (*Figure 4-53*) consists of:

- The *TPU Location* setting, which lets you identify a central processing location. Users whose log-in location is the TPU location will be considered TPU users, which will give those users access to saved list management tools on copy lists with workflows. To have full permissions for these workflows, a user must be a Saved List Superuser (as defined in the Virtua Profiler) whose default location is the TPU Location. Other Saved List Superusers and regular *staff* users do not have these tools.
- Workflow statuses in **bold**, which can be assigned to Withdrawal or LOLM copy saved lists.
- Item statuses in the drop-down lists, which correspond to the Status Displays settings in the Virtua Profiler.

Figure 4-53. Saved List Configuration Screen

For each Saved List status listed on the Saved List Configuration screen, you can select an item status to equate with that saved list status. Each item status can be assigned to only one saved list status.

To configure which item statuses correspond with each saved list workflow status,

1. Select the item status you want to correspond to each saved list workflow status.
2. Click the Save button.

Notes:
- To be added to a Lamination of Library Materials (LOLM) list, an item must have a status of In Processing (AR), In Processing (PR), TPU to Lib, or Temp Rec'd by TPU.
- Once items are added to an LOLM list, their statuses are changed to Awaiting Lamination.
- When an item is being received, only items with select statuses can be assigned other renewed statuses.

4.39 Saved List Fields

The Saved List Fields screen (*Figure 4-54*) allows you to configure, for each saved list type (Bibliographic Record, Patron, Copy), the columns of data that appear on the Saved List Management screen (*Figure 5-15*) and the order in which they appear.
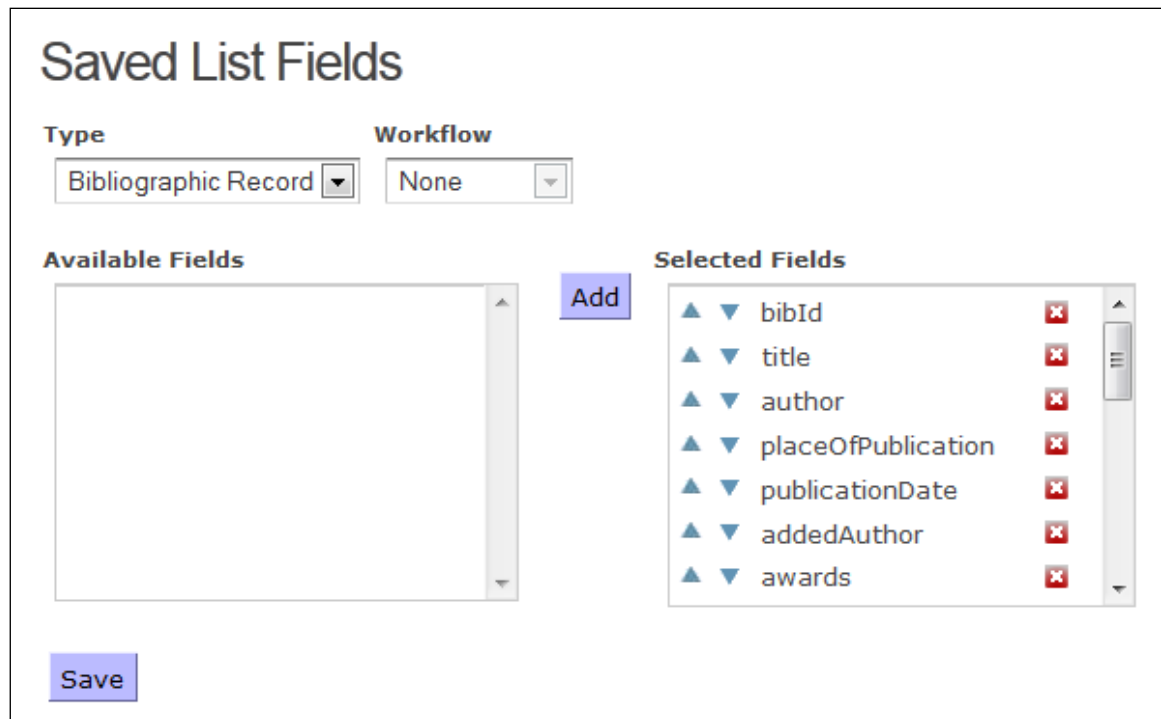
Figure 4-54. Saved List Fields Screen

To configure the columns that appear on the Saved List Management screen,

1. Select the saved list type for which you would like to configure fields from the *Type* drop-down list box. **Note:** If you selected the Copy saved list type, select a workflow from the *Workflow* drop-down list box.

2. Add, remove, or reorder saved list data fields using the workflows described below.

To add a data field as a column on the **Saved List Management screen**,

1. In the *Available Fields* list, select the data field(s) you would like to add as columns on the Saved List Management screen. You can select multiple fields by holding down the CTRL key or the SHIFT key, or by dragging your selection with your mouse.

2. Click the *Add* button. Your select appears in the *Selected Fields* list.

3. Click the *Save* button to save your changes.

To remove a column from the **Saved List Management screen**,

1. In the *Selected Fields* list, click the red X next to the data field you would like to remove.

2. Click the *Save* button to save your changes.

To change the order in which the columns appear on the **Saved List Management screen**,

1. In the *Selected Fields* list, locate the data field you would like to move and click the up or down arrow to the left of the entry until it is in the position you desire.

2. Click the *Save* button to save your changes.

4.40 API Configuration

The API Configuration screen lets you . . .
*   Enable SOAP APIs for Chamo. This lets you enable certain circulation transactions without a patron login.
*   Specify the license key and system process password for REST web services.
*   Enable or disable license checking for Open Skies REST APIs.

API Configuration

The current REST key will expire on Wednesday, January 1, 2020.

☑ Enable SOAP APIs

Trusted Service Authentication

Username

george

Password

george

License Key for Open Skies REST API

REVWOjE1Nzc4NTQ4MDAwMDA6MjpZWjR1cWpDOTJiNW
w4bXVkbzR2NF13PTO=

System process password

arctic

Save

Figure 4-55. API Configuration Screen

To enable SOAP APIs,

1. Select the Enable SOAP APIs check box. When this check box is selected, you MUST also provide a Username and Password.

2. Click the Save button to save your changes.

To specify the license key and system process password for REST web services,

1. Type your license key in the License Key for Open Skies REST API text field. Contact Innovative Customer Support to obtain your license key. Note that this setting must be configured properly in order for the Virtua features that use REST web services (including **3mdriver.exe** and some circulation features) to function.

2. Type your system process password in the *System process password* field. This setting specifies the password used for authorization when a transaction is performed as a system process. The password you configure here must be entered in the System Process Password parameter on the OPAC Basic Options window in the Virtua Profiler in order for some Virtua features (**3mdriver.exe**, **CircBackup.exe**, and **ncipd.exe**) to function.

3. Click the Save button to save your changes.

To disable license checking for Open Skies REST APIs,

1. Select the "Disable license checking for Open Skies REST API" check box.

2. Click the Save button to save your changes.

4.41 Item Location Configuration

The Item Location Configuration screen (*Figure 4-56*) lets you enable the display of floor maps that can help patrons locate materials in your library.

You can add one or more location, collection group, and call number range combination and then specify the map image file that corresponds to items that meet these criteria. A *Map* button will be displayed next to an item with a qualifying combination of location, collection group, and call number criteria. Clicking the *Map* button will display the floor map image in a new window.

Before you begin configuring settings on this screen, upload your digitized library floor maps to the **CHAMO_HOME/images/floormaps** directory.

Note: The filenames of images placed into the floormaps directory must not contain any underscores.

Figure 4-56. Item Location Configuration Screen

To configure floor maps. . .

1. Select the *Enable map display* check box to enable the floor maps feature.

2. Click the Add Map button. A pop-up window appears.

3. In the resulting pop-up window, specify the location/collection group/call number range combination to which you wish to assign a floor map image.

4. Specify locations by selecting them in the *Available locations* list and clicking the *Add* button to add them to the *Selected locations* list.

5. Specify collection groups by selecting them in the *Available collection groups* list and clicking the *Add* button to add them to the *Selected collection groups* list.

6. Specify a call number range by typing the beginning call number in the *Call number start* text box and the ending call number in the *Call number end* text box.

7. Select the floor map image that corresponds to this location/collection group/call number range combination by selecting a file from the *Image* drop-down list.

8. Click the Save button to save your changes. The location/collection group/call number range combination you created is displayed on the Item Location Configuration screen.

9. Click the *Add Map* button to specify another floor map image and location/collection group/call number range combination, or click the *Save* button to save your changes.

4.42 Manage Settings

The Manage Settings screen lets you import and/or export your administrative settings. This lets you apply the settings configured in one instance of your OPAC to another instance, which can be useful in creating a test instance of your OPAC or in migrating your settings during the upgrade process.

Note that this copies your admin settings ONLY, it does NOT create a full backup of your OPAC instance.
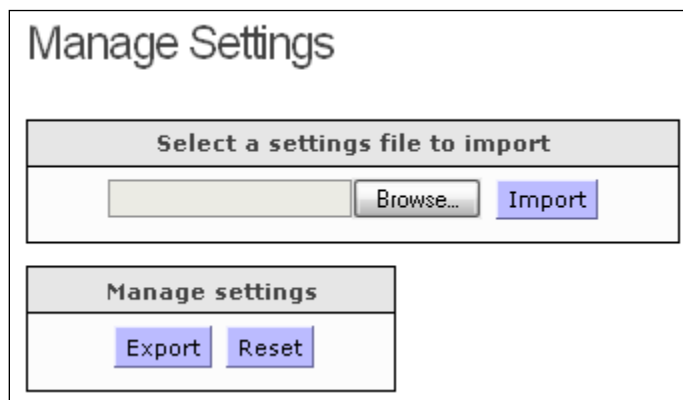
Figure 4-57. Manage Settings Configuration Screen

- To create a file of your admin settings, click the Export button.
  An XML file is created, and your web browser will ask you whether you want to view or save the file. To import your file to a different OPAC instance, save the file.

- To import a file of admin settings that was created from a different or earlier instance of your OPAC, click the Browse button to locate your XML file, and click the Import button.

Note: This feature does NOT copy the following admin settings, which should be unique for each OPAC instance:
- *Chamo Base URL* from the General Configuration screen
- *Base URL for secure (HTTPS) pages* from the General Configuration screen

- admin password from the Change Password screen.
- *Solr Server URL* setting from the Indexing Control screen.

4.43 Theme Settings

4.43.1 General Theme Settings

The General Theme Settings screen lets you configure settings that apply to a particular theme. On this screen you can . . .

- Associate a theme with a particular institution, if your site has multiple institutions. This means that you can configure different settings for each institution when you set theme-specific settings.

- Specify a Main Location, which will be used for all circulation transactions performed when the theme is in use. Selecting a Main Location also means that items at that location will appear at the top of a list of items sorted by location.

- Specify a default language for the theme.

- Associate each theme with a different logo image.

Figure 4-58. General Theme Settings Screen

To associate a theme with an institution,

1. Select a theme from the *Select Theme* drop-down list box. The list of themes is configured on the Themes configuration screen.

2. Select an institution from the *Institution* drop-down list box. The names in this list come from the names of the institutions configured in the Virtua Profiler.

3. Click the Save button.

To assign a main location to a theme,

1. Select a theme from the *Select Theme* drop-down list box. The list of themes is configured on the Themes configuration screen.

2. Select a location from the *Main Location* drop-down list. The location you select will be used for all circulation transactions performed from a workstation running this theme. In addition, items at this location will be displayed at the top of a list of items sorted by location.

> **Note:** If you do not assign a main location to a theme, Chamo uses the Transaction Location defined on the Circulation Settings screen for circulation transactions.

3. Click the Save button.

To specify a default language for a theme,

1. Select a theme from the *Select Theme* drop-down list box. The list of themes is configured on the Themes configuration screen.

2. Select a language from the *Default Language* drop-down list. The drop-down list box contains a list of all of the languages found in the *Enabled Languages* list on the Languages screen.

3. To specify that this theme always be displayed for logged in patrons with this home library location, select the *Use this theme for patrons belonging to this location* check box.

    When a patron logs in to this location, the Chamo interface immediately switches to this theme. In addition, when this setting is enabled Chamo disregards the Theme Links settings and the *Current theme* drop-down list is not displayed unless more than one theme is associated with the patron's home library location.

4. Click the Save button.

To associate a logo with a theme,

1. Select a theme from the *Select Theme* drop-down list box. The list of themes is configured on the Themes configuration screen.

2. Click the Browse button, locate your logo file in **.png** format, and then click the Save button. Note that the logo may be resized to fit the allotted space.

Notes:
Theme-specific settings can be configured on the following configuration screens:
- Appearance configuration screen, where you can change the colors of elements in the interface.
- Facet Configuration screen, which defines which search facets are available on the Search Results screen.
- Filters / Facet Values screen, which lets you choose Location and Collection Group filters for each theme, and also allows you to determine the locations and collection groups that appear in the Location and Collection Group facets
- Search Settings screen, where you can determine aspects of patrons' search experience.

- OPAC Settings screen, where you can determine whether patrons have access to tools such as ratings and reviews.

The Circulation Settings screen has settings that are not theme-specific, but are institution-specific.

4.43.2 Appearance Configuration

The Appearance configuration screen lets you determine which colors are used for elements in the display.

Each element on the Appearance screen lets you select from a drop-down list box the color for that element.
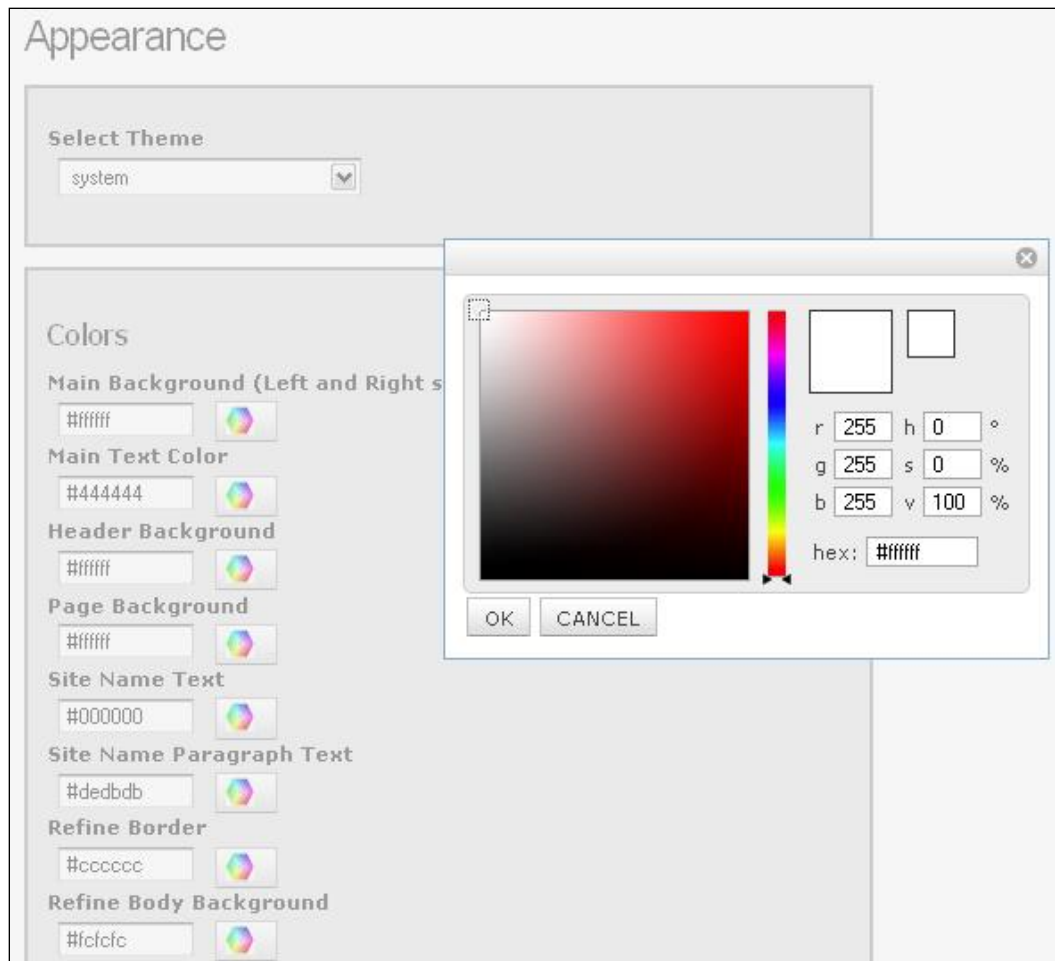

Figure 4-59. Appearance Screen with Color Picker Active

To change the color of an element on the interface,

1. Select which theme you want to modify using the Select Theme drop-down list box.
2. Type the hexadecimal color code in the text box beneath the element name.
   -OR-
   Click the icon next to the text box to choose a color, then . . .

   - Use the slider to choose a hue.

   - Click on the color field to choose a saturation.

   - Once you have the color you want, click the OK button.

3. Choose colors for any other elements you wish to modify.
4. Click the Save button to save your changes.

4.43.3 Facet Configuration

On the Facet Configuration screen (*Figure 4-60*), you can choose which search facets appear in the *Refine your search* panel along the side of the Search Results screen, as well as the order in which the facets appear.

Figure 4-60. Facet Configuration Screen

The facets that are available are determined by the Facet check box settings on the Index Configuration screen. The following facets are hard-coded in Chamo and are always available to be selected on the Facet Configuration screen:

- Author
- Author (Corporate)
- Publication Year
- Format
- Institution
- Location

- Item Class
- Collection Group
- Average Rating
- LC Call Number

1. The Select Theme area lets you choose a theme to which your changes will apply. This lets you have different facets available for different skins and/or institutions. The themes in this drop-down list box are determined by the Themes configuration screen.

2. The entries in the **Index** list are facets that are *not* currently configured to appear on the Search Results screen.

3. The list below contains the facets that *are* currently configured to appear on the Search Results screen.

4. The **Sort by** drop-down list boxes allow you to specify a sort order (hit count, value (descending), value (ascending), or name) for each search facet category. When you perform a search, the search facets within each facet category in the *Refine your search* panel are sorted in the order you specify.

- To **add a facet** to the Search Results screen, select the facet in the **Index** list box that you would like to add to the Search Results screen, and click the Add button. The facet you chose will appear in the list below.

- To **remove a facet** from the Search Results screen, click the Remove button next to facet that you would like to remove. The facet you chose will appear in the **Index** list box.

- To **change the order** in which facets appear, click the up or down arrow next to a facet to move it to the desired position.

   Your configuration changes take effect immediately.

4.43.4 Filters / Facet Values

The Filters / Facet Values screen (*Figure 4-61*) lets you choose Location and Collection Group filters for each theme, and also allows you to determine the locations and collection groups that appear in the Location and Collection Group facets.

- The Location filter let you configure which locations appear as filters on the Advanced Search screen, and which locations appear in the Location facet. You can also . . .
  - o Choose whether to display the main locations (and the sublocations beneath them) in the Locations search facet sorted by hit count or in alphabetical order.
  - o Specify whether to restrict search results to only those items in the selected locations.
- The Collection Group filter lets you limit search results by collection group and determines which collection groups appear in the Collection Group facet.

The **Select Theme** area lets you choose a theme to which your changes will apply. The themes in this drop-down list box are determined by the Themes configuration screen.

When the *Apply filters to serials and electronic resources that have no items* check box is selected, the filters you apply will also be applied to these resources. When this check box is selected, serials without items and electronic resources will NOT appear in any search results, since they are not associated with a location or collection group. To display electronic resources in search results, the *Apply filters to serials and electronic resources that have no items* check box should NOT be selected.

Figure 4-61. Filters / Facet Values Admin Screen

Locations

The **Unfiltered Locations** in the *left* list box are locations that are defined in the
Virtua Profiler but do not appear as location filters on the Advanced Search screen.
These locations also do not appear in the Location facet.

The **Filtered / faceted locations** in the *right* list box are locations that are configured to appear as location filters on the Advanced Search screen. These locations also appear in the Location facet.

- To **add a location** to the Location filter on the Advanced Search screen, choose the location you would like to add from the **Unfiltered Locations** list box, and click the Add button. The location you chose will appear in the **Filtered / faceted locations** list box on the right.

- To **remove a location** from the Location filter on the Advanced Search screen, choose the location you would like to remove from the **Filtered / faceted locations** list box, and click the Remove button. The location you chose will appear in the **Unfiltered Locations** list box on the left.

- To **change the order** in which the locations appear on the Location filter of the Advanced Search screen, click the location name in the Filtered locations list box, and click the Up or Down button.

- To **restrict searches** to only the locations specified in the *Filtered / faceted locations* list, select the *Restrict all searches to filtered locations* check box.

> **Note:** To ensure accurate heading search results when this setting is enabled, the *Mask Bibliographic Record When* check boxes on the General Configuration screen must NOT be selected.

Collection Groups

The **Unfiltered Collection Groups** in the *left* list box are collection groups that are defined in the Virtua Profiler. These collection groups do not appear in the Collection Group facet.

The **Filtered / faceted collection groups** in the *right* list box are collection groups to which all search results shown for the current theme must belong. These collection groups also appear in the Collection Groups facet.

- To add a collection group filter to the search results for the selected theme, choose the collection group you would like to use to limit search results from the **Unfiltered collection groups** list box, and click the Add button.

  The collection group you choose will appear in the **Filtered / faceted collection groups** list box on the right.

- To remove a collection group filter, choose the collection group you would like to remove from the **Filtered / faceted collection groups** list box, and click the Remove button.

  The collection group you choose will appear in the **Unfiltered collection groups** list box on the left.

Your changes take effect immediately.

4.43.5 Search Settings

On the Search Settings configuration screen, you can configure the following settings, which apply to the selected theme:

- **Select Theme:** Specifies the theme to which the settings below apply.
- **Maintain Search History:** Determines whether the Search History screen is available to all users.
- **Enable Auto-complete for QuickSearch:** Determines whether Chamo automatically completes search terms typed in the Search box at the top of the screen.
- **Show 'Additional Search Terms' box above facets:** Enables or disables the display of the Additional Terms box on the Search Results screen.
- **Navigate directly to a single search result:** Specifies how Chamo behaves when a search returns only one search result.
- **Default page size:** Specifies the default number of results for each Search Results screen.
- **Term display size:** Defines the maximum number of characters that will be displayed for a user's Current Search term.
- **Default Sort for Bibliographic Search:** Defines the default sort order for the Search Results screen (i.e., the order in which records are displayed when no search has been performed).
- **Available/Selected Sort Options:** Specifies the sort options that display in the Sort by drop-down list on the Search Results screen.
- **Available/Selected Filters:** Determines which search filters are available on the Advanced Search screen and change their order.
- **Available/Selected Advanced Search Fields:** Determines which search fields are available on the Advanced Search screen and change their order.
- **Available/Selected Heading Searches:** Determines which search types are available in the heading search drop-down list box on the Heading Search screen and the order in which they appear.
- **Untranslated/Translated Fields:** Configures facet labels to be translated.

Figure 4-62. Search Settings Screen

- **Select Theme:** This drop-down list box lets you choose which theme to configure.

- **Maintain Search History:** To determine whether the Search History screen is available to Chamo users,

  1. Select or deselect the *Maintain Search History* check box.

  2. Click the Save button.

  The Search History screen maintains a history of search terms used in the current Chamo session.

- **Enable Auto-complete for QuickSearch:** The *Enable Auto-complete for QuickSearch* setting determines whether or not Chamo displays search suggestions as the user is typing a search term in the quick Search box at the top of the screen. To enable this functionality, select the *Enable Auto-complete for QuickSearch* check box. When the user begins to type a term in the Search box, Chamo automatically suggests search terms from the index that best complete the partial search term.

- **Show 'Additional Search Terms' box above facets:** The *Show 'Additional Search Terms' box above facets* setting determines whether or not the Additional Terms box is displayed in the *Refine your search* panel on the Search Results screen. The Additional Terms box allows users to refine the previous search by adding a new search term without clearing the previous search term(s) or facet selection(s). To display the Additional Terms box on the Search Results screen, select the *Show 'Additional Search Terms' box above facets* check box.

- **Navigate directly to a single record search result:** When this setting is enabled, Chamo loads the Item Details screen immediately (bypassing the Search Results screen) when you perform a search that returns only one search result.

- **Default page size:** To set the default number of results shown on the Search Results screen in each theme,

  i. Select the theme to which you would like to apply changes using the *Select Theme* drop-down list box.

  ii. Choose the number of results that appear on the Search Results screen using the *Default page size* drop-down list box.

  iii. Click the Save button.

  The selected theme will show that number of search results on the Search Results screen. Note that users can still select their desired number of search results per page using the *Results per page* drop-down list box at the bottom of each Search Results screen.

- **Term display size:** To determine the maximum number of characters that will be displayed for a user's Current Search term on the Search Results screen,

i.   Select the theme to which you would like to apply changes using the Select Theme drop-down list box. This list is hard-coded.

ii.   Choose a sort criterion from the Default Sort for Bibliographic Search drop-down list box.

iii.   Enter a number in the *Term display size* text box.

iv.   Click the Save button.

Search terms longer than the defined size will have the configured number of characters displayed followed by an ellipsis (...), and the hovertext that appears when a user holds their mouse over this field will display the entire search term.

- **Default Sort for Bibliographic Search:** This setting determines the sort order that Chamo uses to display records on the Search Results screen when no search has been performed (i.e., when you are viewing all records). To determine the default sort for the Search Results screen,

i.   Select the theme to which you would like to apply changes using the Select Theme drop-down list box. This list is hard-coded.

ii.   Choose a sort criterion from the Default Sort for Bibliographic Search drop-down list box.

iii.   Click the Save button to save your changes.

While you can define the default sort option, users will be able to select any of these sort criteria on the Search Results screen.

- **Available/Selected Sort Options:** Available Sort Options and Selected Sort Options area lets you specify the sort options that display in the *Sort by* drop-down list on the Search Results screen.

i.   To add a sort option to the options available on the Search Results screen,

a.   Select the theme to which you would like to apply changes using the *Select Theme* drop-down list box.

b.   Select the sort option you would like to add. You can select multiple sort options by holding down the CTRL key or the SHIFT key, or by dragging your selection with your mouse.

c.   Click the Add button. Your selection appears in the Selected Sort Options list.

d.   Click the Save button to save your changes.

ii.   To change the order in which the sort options appear on the Search Results screen,

a.   Select the theme to which you would like to apply changes using the *Select Theme* drop-down list box.

      b.   Select the sort option whose position you would like to change.

      c.   Select the up or down arrow to the left of the entry until it is in the position you desire.

      d.   Click the Save button to save your changes.

iii. To remove a sort option from the *Sort by* drop-down list on the Search Results screen,

      a.   Select the theme to which you would like to apply changes using the *Select Theme* drop-down list box.

      b.   Click the red X next to the entry you want to remove.

      c.   Click the Save button to save your changes.

- **Available/Selected Filters:** The Available Filters and Selected Filters area lets you choose which filters are available on the Advanced Search screen and the order in which they appear.

  i.   To add a filter to the filters available on the Advanced Search screen,

      a.   Select the theme to which you would like to apply changes using the Select Theme drop-down list box.

      b.   Select the filter you would like to add. You can select multiple filters by holding down the CTRL key or the SHIFT key, or by dragging your selection with your mouse.

      c.   Click the Add button. Your selection appears in the Selected Filters list.

      d.   Click the Save button to save your changes.

Note: Adding a filter that has a very large number of values (such as Author or Subject) may cause performance problems when users attempt to access the Advanced Search screen. Innovative recommends that you not add filters that have more than 100 values.

  ii.   To change the order in which a filter appears on the Advanced Search screen,

      a.   Select the theme to which you would like to apply changes using the Select Theme drop-down list box.

      b.   Select the entry whose position you would like to change.

      c.   Select the up or down arrow to the left of the entry until it is in the position you desire.

      d.   Click the Save button to save your changes.

iii. To remove a filter from the Advanced Search screen,

      a.   Select the theme to which you would like to apply changes using the Select Theme drop-down list box.

b. Click the red X next to the entry you want to remove.

c. Click the Save button to save your changes.

- **Available/Selected Advanced Search Fields:** The Available Advanced Search Fields and Selected Advanced Search Fields area lets you choose which fields are available in the drop-down list boxes on the Advanced Search screen and the order in which they appear. The Advanced Search Fields that appear in the Available Advanced search Fields list box are those fields that are configured by the Keyword Index Configuration parameter in the Virtua Profiler.

  i. To add a field to the list of those available on the Advanced Search screen,

      a. Select the theme to which you would like to apply changes using the Select Theme drop-down list box.

      b. Select the field you would like to add. You can select multiple fields by holding down the CTRL key or the SHIFT key, or by dragging your selection with your mouse.

      c. Click the Add button. Your selection appears in the Selected Fields list.

      d. Click the Save button to save your changes.

  ii. To change the order in which a field appears on the Advanced Search screen,

      a. Select the theme to which you would like to apply changes using the Select Theme drop-down list box.

      b. Select the entry whose position you would like to change.

      c. Select the up or down arrow to the left of the entry until it is in the position you desire.

      d. Click the Save button to save your changes.

  iii. To remove a field from the Advanced Search screen,

      a. Select the theme to which you would like to apply changes using the Select Theme drop-down list box.

      b. Click the red X next to the entry you want to remove.

      c. Click the Save button to save your changes.

- **Available/Selected Heading Searches:** The Available Heading Searches and Selected Heading Searches area lets you specify the search types that are available in the heading search drop-down list box on the Heading Search screen and the order in which they appear.

  Note: The Auth ID and LCCN search types are enabled or disabled via the Enable View Authority setting on the OPAC Settings admin screen.

  i. To add a search type to the list of those available on the Heading Search screen,

    a. Select the search type to which you would like to apply changes using the Select Theme drop-down list box.

    b. In the Available Heading Searches list, select the search type you would like to add. You can select multiple fields by holding down the CTRL key or the SHIFT key, or by dragging your selection with your mouse.

    c. Click the Add button. Your selection appears in the Selected Heading Searches list.

    d. Click the Save button to save your changes.

ii. To change the order in which the search types appear on the Heading Search screen,

    a. Select the theme to which you would like to apply changes using the Select Theme drop-down list box.

    b. Select the entry whose position you would like to change.

    c. Select the up or down arrow to the left of the entry until it is in the position you desire.

    d. Click the Save button to save your changes.

iii. To remove a search type from the Heading Search screen,

    a. Select the theme to which you would like to apply changes using the Select Theme drop-down list box.

    b. Click the red X next to the entry you want to remove.

    c. Click the Save button to save your changes.

- **Untranslated/Translated Fields:** The Untranslated Fields and Translated Fields area lets you configure search facet labels to be translated in the patron and staff interfaces. If an index is found in the Translated Fields list, Chamo attempts to look up '**search.field.<index name>.<facet value>**' as a translation. For example, for the index '**bl**' Chamo might look up '**search.field.bl.m**'. If this fails (or the facet is not found in the list of Translated Fields), Chamo simply displays the facet value (in this case, '**m**').

Notes:
- For more information on translating strings and working with language files, see the section Translating Strings in Chamo in this guide.
- Facet translations apply to the list of facets in the *Refine your search* panel, as well as the search breadcrumbs.

4.43.6 OPAC Settings

The OPAC Settings screen (*Figure 4-63*) lets you configure some aspects of what patrons can see and do in Chamo.

- **Select Theme:** Specifies the theme to which the settings below apply.
- **Copies page size:** Specifies the maximum number of copies that are shown on the Copies tab.
- **Use 'title' field for main title display and record links:** Specifies how the title data is displayed on screens that display a title hyperlinked to a record.
- **Show item availability counts:** Determines whether item availability counts are displayed on the Search Results screen.
  - **For serials:** Determines whether item availability counts for serials are displayed on the Search Results screen.
  - **For e-resources:** Determines whether item availability counts for e-resources are displayed on the Search Results screen.
  - **Even when none of the items are available:** Determines whether item availability counts for no available items are displayed on the Search Results screen.
- **Enable Show All button:** Determines whether a Show All link is displayed on the Copies tab of the Item Details screen.
- **Enable Search Term Highlighting:** Determines whether to highlight your search term in the results shown on the Search Results screen.
- **Show navigation bar at top of results:** Determines whether to show the navigation bar at the top of the Search Results screen.
- **Show e-book availability information for e-resources:** Determines whether availability information for e-book records is retrieved from OverDrive and 3M Cloud Library.
- **Enable MARC view of Item Details screen:** Determines whether the MARC view of a bibliographic record is displayed on the Item Details screen.
- **Enable PO Status view on Item Details screen:** Determines whether the PO Status tab appears on the Item Details screen in the Chamo patron interface when you are viewing a title with one or more associated purchase orders.
- **Use VTLSSORT tag to order fields on MARC view:** Specifies the order in which MARC tags are displayed on the MARC Record tab of the Item Details screen.
- **Use location ID when sorting location columns:** Specifies whether to use the location ID or the location name when sorting the Location column on the Copies tab of the Item Details screen.
- **Enable copy location filter:** Determines whether users can filter the list of copies by location on the Copies tab of the Item Details screen.
- **Enable copy units filter:** Determines whether users can search for a specific volume and/or year of a serial record from the Copies tab of the Item Details screen.
- **By default, sort copies by status, then location:** Determines the default sort for copies displayed on the Copies tab of the Item Details screen.

- **Default to Issues tab for serials:** Determines whether users are shown the Issues tab by default when first accessing the Item Details screen for a serials record.
- **Enable Reserves Search:** Determines whether users can search for items on reserve using the Reserve Search.
- **Enable Ratings:** Determines whether users are permitted to rate items using a 1-5 star rating system.
- **Enable Reviews:** Determines whether users will be permitted to write, save, edit, and delete their own reviews of items on the Item Details screen.
  - **Reviews are moderated:** Determines whether a review is hidden from all patrons (except the author) until the admin user approves the review.
- **Enable RSS Feed:** Determines whether an RSS feed icon appears on the Search Results screen.
- **Enable Heading Search:** Determines whether heading searches are enabled or disabled.
- **Default choice for Heading Search:** Specifies the default choice for the Heading Search.
- **Show Blind Authority Headings:** Determines whether blind references are included in the results of a Heading Search.
- **Enable View Authority:** Determines whether a View Authority link appears when you perform a Heading Search.
- **Display thumbnails for multimedia links:** Determines whether to display thumbnails of images that are linked in the 856 tag subfield $u of a bibliographic record.
- **Open multimedia links in new window:** Determines whether clicking on a multimedia link opens the link in a new window.
- **Hide empty tabs on Item Details screen:** Determines whether tabs with no information to display are hidden on the Item Details screen.
- **Display 856$u (URI) only if no $z (public note) is present; otherwise display only $z:** Determines how 856 tag data, if it exists, is displayed on the Item Details screen.
- **Display 856 $u as hyperlink and display the $z public note where present in authority record display:** Determines how 856 tag data is displayed on the View Authority Record screen.
- **Configure 505 to display hyperlinked $u:** Determines how 505 tag subfield $u data is displayed on the Item Details screen.

OPAC Settings

Select Theme

[system ▼]

Copies page size*

[10]

☑ Use 'title' field for main title display and record links

☑ Show item availability counts

   ☑ for serials

   ☑ for e-resources

   ☑ even when none of the items are available

☑ Enable Show All button

☑ Enable Search Term Highlighting

☑ Show navigation bar at top of results

☑ Show e-book availability information for e-resources

☑ Enable MARC view on Item Details screen

☑ Use VTLSSORT tag to order fields on MARC view

☑ Use location ID when sorting location columns

☑ Enable copy location filter

☑ Enable copy units filter

☑ By default, sort copies by status, then location

☑ Default to Issues tab for serials

☑ Enable Reserves Search

☑ Enable Ratings

☑ Enable Reviews

   ☐ Reviews are moderated

☑ Enable RSS Feed

☑ Enable Heading Search

Default choice for Heading Search

[contains ▼]

☐ Show Blind Authority Headings

☑ Enable View Authority

☑ Display thumbnails for multimedia links

☑ Open multimedia links in new window

☑ Hide empty tabs on Item Details screen

☑ Display 856$u (URI) only if no $z (public note) is present; otherwise display only $z.

[Save]

Figure 4-63. OPAC Settings Screen

- **Select Theme:** This drop-down list box lets you choose which theme to configure.
- **Copies page size:** This setting lets you configure the maximum number of copies shown on each page of the Copies tab on the Item Details screen.
- **Use 'title' field for main title display and record links:** This setting lets you specify how Chamo determines the title data to display on the Search Results screen, the Item Details screen, and other screens that display a title hyperlinked to a record.
  - o If you select this check box, Chamo uses the 'title' view field (defined on the Field Definitions admin screen and linked to a MARC field via the MARC Field Source Rules admin settings) to generate the title displayed on the screens described above.
  - o If you do not select this check box, Chamo uses heading data to display the title.

  Note: The 'title' view field is expected to return only one value; if MARC Field Source Rules settings cause it to return multiple values, only the first one will be used as the title.

- **Show item availability counts:** This setting lets you specify whether availability counts are displayed on the Search Results screen.
  - o If you select this check box, item availability counts will be displayed on the Search Results screen for titles that are not serials or e-resources.
    - ▪ Select the *for serials* check box if you want to enable the display of item availability counts for serials.
    - ▪ Select the *for e-resources* check box if you want to enable the display of item availability counts for e-resources.
    - ▪ Select the *even when none of the items are available* check box if you want to enable the display of item availability counts (i.e., "Wilson library (0 of 10 available)") for locations that have no available items.
  - o If you do not select this check box, availability counts will not be displayed on the Search Results screen.
- **Enable Show All button:** This setting lets you enable or disable the display of a Show All link that, when clicked, will display all copies (with a maximum of 500) on a single Copies tab page, regardless of the Copies Page Size value that is configured.
- **Enable Search Term Highlighting:** This check box determines whether to highlight your search term in the results shown on the Search Results screen. When this setting is enabled, Chamo highlights search terms on the Search Results screen. By default, this setting is not enabled.
- **Show navigation bar at top of results:** This check box determines whether a navigation bar is displayed at the top of the Search Results screen in addition to the existing navigation bar that is displayed at the bottom of the screen. When this

setting is enabled, navigation bars are displayed at both the top and the bottom of the Search Results screen. The navigation bar allows you to change the number of search results displayed per page and to jump directly to any page of the search results.

- **Show e-book availability information for e-resources:** This setting lets you enable or disable the display of availability information for e-book records on the Search Results or Item Details screens. When you enable this feature, Chamo displays the following information from OverDrive when you view an e-resource on the Search Results or Item Details screen:
  - o Total number of e-books
  - o Number of available e-books
  - o Number of holds
  - o A *Details* link that launches an OverDrive page in your browser.

  > **Note**: To use this functionality, you must also configure the *OverDrive account ID* setting on the External Data Configuration admin screen.

- **Show e-book availability information for e-resources:** This setting lets you enable or disable the display of availability information for e-book records on the Search Results or Item Details screens. E-book records are maintained through your e-book services, which can be configured on the External Data Configuration admin screen. When OverDrive, 3M Cloud library, or both are configured in the External Data Configuration admin screen and this checkbox is selected, Chamo displays the following information:
  - o For an OverDrive account, on the Search Results or Item Details screen, Chamo displays the…
    - Total number of e-books
    - Number of available e-books
    - Number of holds
    - A *Details* link that launches an OverDrive page in your browser
  - o For a 3M Cloud Library ID, Chamo displays a *Show* button beside a 3M Cloud Library e-book when one is displayed on the Search Results screen. Patrons can click the *Show* button to view availability information for the e-book, or to check out or place a hold on the e-book.
- **Enable MARC view on Item Details screen:** This check box determines whether the Item Details screen will have a tab for the MARC view of a bibliographic record.
- **Enable PO Status view on Item Details screen:** When this setting is enabled, a PO Status tab appears on the Item Details screen in the Chamo patron interface when you are viewing a title with one or more associated purchase orders. The PO Status tab displays information for each associated purchase order, including purchase order number, order line item, order quantity, last order modification date, and additional information.
- **Use VTLSSORT tag to order fields on MARC view:** This check box allows you to customize the order in which MARC tags are displayed on the MARC Record tab

of the Item Details screen. When this check box is selected, the MARC Record tab displays tags in the order defined in the 999 VTLSSORT tag (configured via the MARC Editor window in the Virtua client).

> **Note:** Chamo's views also support the VTLSSORT tag. When the *Use VTLSSORT tag to order fields on MARC view* setting is enabled, tags will be selected for labels in the order specified in the VTLSSORT tag (and not in the native order of tags in the actual MARC 2709 record).

- **Use location ID when sorting location columns:** This setting lets you specify how Chamo determines the sort order when you click on the Location column to sort by location on the Copies tab of the Item Details screen. The setting also applies to location sorting on other screens in Chamo.
    - When this setting is enabled, clicking the Location column sorts copies according to location ID.
    - When this setting is not enabled, clicking the Location column sorts copies by location name.
- **Enable copy location filter:** This check box determines whether users can filter the list of copies by location on the Copies tab of the Item Details screen.
- **Enable copy units filter:** This check box determines whether users can search for a specific volume and/or year of a serial record from the Copies tab of the Item Details screen. If you select this check box, a *Filter copies for specific issues* setting appears on the Copies tab.

> **Notes:**
>
> o When you filter copies to search for a specific issue, Chamo returns only issues that are associated with an item record attached to a *holdings* record. Issues that are associated with an item record attached to a bibliographic record are not returned.
>
> o The filter only returns issues associated with item records that use enumeration and chronology Units values (and not free text Units information).

- **By default, sort copies by status, then location:** This check box determines the default sort for copies displayed on the Copies tab of the Item Details screen.

    - If you select this check box, copies displayed on the Copies tab of the Item Details patron screen will be sorted by status and then by location.

    - o If you do not select this check box, copies displayed on the Copies tab will be sorted by status.

- **Default to Issues tab for serials:** This check box determines whether users are shown the Issues tab by default when first accessing the Item Details screen for a serials record.

    - If you select this check box, the Issues tab will be shown when you first access a serials record.

o If you do not select this check box, the Copies tab will be shown when you first access a serials record.

- **Enable Reserves Search:** This check box determines whether the Reserves Search is available. The Reserves Search lets patrons search for items on reserve by class, title, or instructor name.
- **Enable Ratings:** This check box determines whether logged-in patrons will be permitted to rate items using a 1-5 star rating system.
- **Enable Reviews:** This check box determines whether logged-in patrons will be permitted to write, save, edit, and delete their own reviews of items on the Item Details screen.
- **Reviews are moderated:** This check box determines whether a review is hidden from all patrons (except the author) until the *admin* user approves the review on the Administrate Reviews screen.
- **Enable RSS Feed:** This check box determines whether an RSS feed icon appears on the Search Results screen.
- **Enable Heading Search:** This check box determines whether the Heading Search option is displayed at the top of the Search Results screen.
- **Default choice for Heading Search:** This drop-down list allows you to specify whether a Heading Search is, by default, a "contains" search or a "starts with" search.
- **Show Blind Authority Headings:** This check box determines whether blind references are included in the results of a Heading search.
- **Enable View Authority:** This check box determines whether a View Authority link appears when you perform a Heading Search. When this is enabled, you can click on the View Authority link to view the authority record for the selected heading. Selecting this check box also enables the LCCN and Auth ID search types in the heading search drop-down list on the Heading Search screen.
- **Display thumbnails for multimedia links:** This check box determines whether to display thumbnails of images that are linked in the 856 tag subfield $u of a bibliographic record. When this setting is enabled and the URL in the 856 tag points to a **jpg**, **gif**, **png**, **bmp**, or **tif** image file, a thumbnail of this image appears wherever the 856 tag is configured to display.

> **Note:** The 856 tag must have a second indicator value of 8 for images to be displayed.

- **Open multimedia links in new window:** This check box determines whether clicking on a multimedia link opens the link in a new window. When this setting is enabled and you click on a multimedia link, the link is opened in a new browser window.
- **Hide empty tabs on Item Details screen:** This check box determines whether tabs on the Item Details screen are displayed, even if no information is available to be displayed on the tab. When this setting is enabled, the Copies tab, the Additional

Information tab, and the Ratings tab are not displayed on the Item Details screen if there is no information to be shown on the tab.

- **Display 856 $u (URI) only if no $z (public note) is present; otherwise display only $z:** This setting lets you specify how 856 tag data, if it exists, is displayed on the Item Details screen.
  - o When this setting is NOT enabled, and the 856 tag contains both subfield $u and subfield $z data, Chamo displays the subfield $z (public note) data as simple text and the subfield $u (URI) data as a hyperlink. This is Chamo's default behavior.

  - o When this setting IS enabled, and the 856 tag contains both subfield $u and subfield $z data, Chamo displays the subfield $z (public note) data as a hyperlink that directs you to the web location specified in subfield $u (URI).

- **Display 856 $u as hyperlink and display the $z public note where present in authority record display:** This setting lets you specify how 856 tag data is displayed on the View Authority Record screen.
  - o When this setting is enabled, and the 856 tag of an authority record contains both subfield $u data and subfield $z data, Chamo displays the subfield $u data as a hyperlink on the View Authority Record screen. The subfield $z data is also displayed as a hyperlink and then link directs the user to the URL specified in subfield $u.

  - o When this setting is not enabled, subfield $u data and subfield $z data is displayed as simple text on the View Authority Record screen.

- **Configure 505 to display hyperlinked $u:** This setting lets you specify how 505 tag data is displayed on the Item Details screen.

  - o When this setting is enabled, if a subfield $u exists in the bibliographic record 505 tag the subfield $u data is displayed as a hyperlink on the Item Details screen.

  - o When this setting is not enabled, subfield $u data is displayed as simple text on the Item Details screen.

4.44 View Settings

There are five screens for configuring which item elements are displayed for each item in Chamo. We recommend that you configure item display using the following screens in this order:

- The Field Definition configuration screen lets you define which fields are available to choose to display for items.

- The External Field Source configuration screen lets you choose which Visualizer fields correspond with configured field definitions. This means that you can then configure which Visualizer fields appear for each Visualizer item on the Field Placement screen.
- The MARC Field Source configuration screen lets you configure which MARC tags are associated with the field definitions.
- The Field Placement configuration screen lets you configure which fields from VITAL and Visualizer records correspond to fields in Chamo.
- The Library Members configuration screen lets you lets you configure links to libraries that you have defined as Library Members in the Virtua Profiler.

These screens are available from the Views section of the administrative sidebar (*Figure 4-64*).
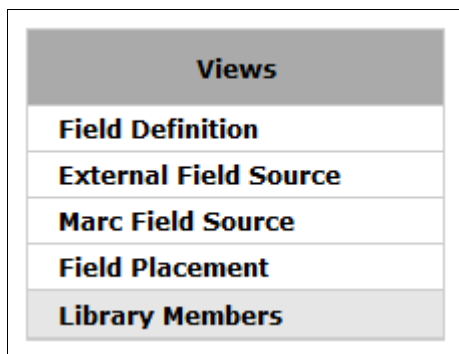
Figure 4-64. Item View Settings on Admin Interface

These configuration screens are discussed below.

4.44.1 Field Definition Configuration

On the Field Definition configuration screen (*Figure 4-65*), you can . . .

- Add a bibliographic or holdings field to be available on the Field Placement, MARC Field Source, and External Field Source configuration screens.
- Remove a field from the fields available on the Field Placement, MARC Field Source, and External Field Source configuration screens.

Field Definition

Add

Name	Displayed Label	
HoldAcqStatus	Acquisition Status	Delete
abbreviatedTitle	Abbreviated Title	Delete
addedAuthor	Added Author	Delete
author	Author	Delete
edition	Edition	Delete
holdingsCallNumber	[Warning: Property for 'record.field.holdingsCallNumber' not found]	Delete
holdingsNote	Holdings Note	Delete
isbn	ISBN	Delete
multimedia	Multimedia	Delete
publication	Publication	Delete
publisher	Publisher	Delete
series	Series	Delete
subject	Subject	Delete
title	Title	Delete
year	Year	Delete

Showing 1 to 15 of 15

Showing 1 to 15 of 15

Figure 4-65. Field Definition Configuration Screen

To add a field to the list of fields available on the Field Placement, MARC Field Source, and External Field Source configuration screens,

1.   Click the Add button. A pop-up window appears (*Figure 4-66*).
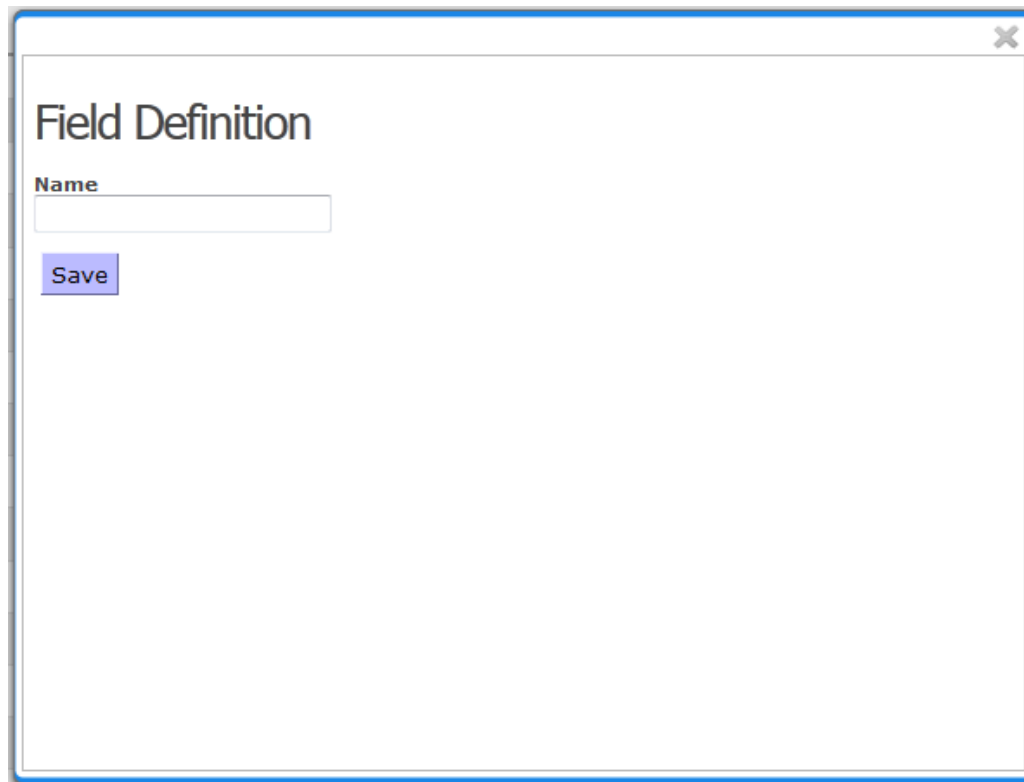
Figure 4-66. Field Definition Pop-up Window

2. In the resulting pop-up window, type a field name in the text box. You can type up to 100 number of letters and numbers. Spaces or other punctuation marks are not permitted.

3. Click the Save button.

    The new field is displayed on the Field Definition screen (*Figure 4-65*). Configure a Displayed Label for the new field by adding a translation to the language file(s) from the Language String Management screen.

    To remove a field from the list of fields available on the Field Placement, MARC Field Source, and External Field Source configuration screens, click the Delete button in the appropriate row.

    Your configuration changes take effect immediately.

    Note: To assign or change the MARC fields used for the field definitions, use the MARC Field Source Configuration screen.

4.44.2 MARC Field Source Configuration

On the MARC Field Source Rules screen (*Figure 4-67*), you can choose which MARC fields are used for the data elements that appear for each item. The default values for each Field Source are taken from your library's View Bibliographic Record: Full Display Profiler view. For information on Profiler views, see the *Virtua Profiler/OPAC Parameters User's Guide.*

Note: Before making your initial configurations on this screen, use the Field Definition configuration screen to determine which fields are available in the Field list.

Marc Field Source Rules

Select Theme

system

Format   **Field**

--- DEFAULT ---   addedAuthor

Add Tag

	Tag	Occur.
▲ ▼ edit	700	✖
▲ ▼ edit	710	✖
▲ ▼ edit	711	✖

Add Fixed/Subfield

Fixed/Subfields

edit	%a*	✖
edit	%b*	✖
edit	%c*	✖
edit	%d*	✖
edit	%e*	✖
edit	%f*	✖
edit	%g*	✖
edit	%h*	✖

◉ Show all found
○ Show only the first
○ Show only the last

880 Tag

880 Tag Selection

Display 880 and original

☐ Display unlinked 880

OPAC Search Hyperlinks

☐ Use search hyperlink   ☐ Show search links by subfield

Search field   **Non-Filing Indicator**
                          ◉ None
Choose One   ○ First indicator
                          ○ Second indicator
Linking entry fields MARC code

Formats

Add

	Name	Record types	Bib levels	
edit	Holdings	y	s	✖

Figure 4-67. MARC Field Source Rules Screen

To choose which tags are displayed for the MARC data elements,

1. Select which theme you want to modify using the Select Theme drop-down list.

2. From the Format drop-down list (*Figure 4-67*), choose the format for which you would like to define MARC field source rules. The display rules you configure will apply only to items with the selected material format.

   Note: The formats in the Format drop-down list are configured by the Formats section at the bottom of the screen. See step 13 of this workflow.

3. From the Field drop-down list, choose a data element for which you would like to define a tag. The MARC tags already associated with that data element are displayed in the list of tags that appears below the Format and Field settings.

   Notes:
   - The Field drop-down list contains fields configured on the Field Definition screen.
   - The primary Author field is hard-coded to display the author heading, and this value cannot be configured on this screen.

4. Click the Add Tag button to define a MARC tag to be displayed for the selected data element.

   The Add Tag window (*Figure 4-68*) appears.

Figure 4-68. Add Tag Window

5. On the Add Tag window,
   a. Type a MARC tag number in the Tag list box.
   b. Type the first and/or second indicators in the Indicators list boxes. These specify which indicator(s) must be present for the subfield to display. If you leave the Indicator boxes blank, then the indicators will not be used as criteria for displaying a tag value.
   c. Type the occurrence of that tag you want to appear for that data element in the Occurrence text box. For instance, if you want only the first instance of a tag to appear, type 1 in the Occurrence field. If the Occurrence field remains blank, then all instances of that tag/subfield combination will be displayed.

6. Click the Save button to save your tag information and return to the MARC Field Source Rules screen (*Figure 4-67*).

   The new tag you defined is now displayed in the list of tags that appears below the Format and Field settings.

7. Click the Add Fixed/Subfield button to define the fixed fields and/or subfields to be displayed for the selected data element.

   The Add Fixed/Subfield window (*Figure 4-69*) appears.

Figure 4-69. Add Fixed/Subfield Window

8. On the Add Fixed/Subfield window, define fixed fields or subfields for display:

- **Subfields:**
  o **Leading Text** - Any text (including punctuation marks or spaces) that you want to appear in front of the subfield information.
  o **Code** - The code of the subfield you want to appear.
  o **Occurrence** - A number that indicates which occurrence of the subfield you want to appear when there is more than one occurrence. To display all instances of the subfield, leave this field blank.
  o **Tailing Text** - Any text (including punctuation marks or spaces) that you want to appear after the subfield information.

- **Fixed Fields:**
  o **Leading Text** - Any text (including punctuation marks or spaces) that you want to appear in front of the fixed field.
  o **Starting Position** - The position within the fixed field of the first character you want to display.
  o **Ending Position** - The position within the fixed field of the last character you want to display.
  o **Tailing Text** - Any text (including punctuation marks or spaces) that you want to appear after the fixed field.

o   **Translation Prefix** - A translation prefix that allows you to configure a translation for the subfield or fixed field.

After you save the subfield or fixed field information, add a string to the Language File that contains that prefix followed by the string you want to translate, using the format **prefix.string**. Type the translated string in the Translated String column of the Language file, and upload the file to Chamo. That translation will then appear instead of the string in the Chamo interface.

9. Click the Save button to save your fixed field or subfield information and return to the MARC Field Source Rules screen (*Figure 4-67*).

The new fixed/subfield information you defined is now displayed in the list of fixed/subfields that appears below the Format and Field settings.

10. To specify which occurrences of MARC tags are displayed, select one of the following radio button options:
    *   "Show all found" - All occurrences of tags will be displayed.
    *   "Show only the first X" - Only the first X occurrences will be displayed. You can specify X by entering a number between 1 and 99 in the box provided.
    *   "Show only the last X" - Only the last X occurrences will be displayed. You can specify X by entering a number between 1 and 99.

11. To specify whether the data in the 880 tag will be displayed, and in what order,
    *   Select an option from the 880 Tag Selection drop-down list.
        o   "Ignore 880" - 880 tag data will not be displayed.
        o   "Display 880 or original" - Only 880 tag data will be displayed, unless there is no 880 tag data, then the original tag data will be displayed.
        o   "Display original and 880" - The original tag data will be displayed first, followed by the 880 tag data.
        o   "Display 880 and original" - The 880 tag data will be displayed first, followed by the original tag data.
    *   Select or deselect the "Display unlinked 880" check box to show or hide unlinked 880 tag data.

12. To configure OPAC search hyperlinks,
    *   Select the "Use search hyperlink" check box.
    *   Select the "Show search links by subfield" check box if you want a separate link to appear for each subfield in a given MARC tag. If you do NOT select this check box, a single hyperlink appears containing text from all configured subfields.
    *   Select a field from the "Search field" drop-down list.

- In the "Linking entry fields MARC code" areas, click the "edit" link to specify the MARC code for any linking field (001, 760-789) that has been designated as a search hyperlink. This should only be considered if . . .
  - o The 001 tag has been designated to do a CN: Control Number Link search for a component part analytic record
    -AND-
  - o Any of the linking fields 760-789 has been designated to do a control number search, such as a Bib-ID search.
- If you want to prevent some fields from appearing as search hyperlinks, select the indicator position to use as the non-filing indicator.
- In the Fixed/Subfields list, select the check box next to each subfield and fixed field that you want Chamo to use when performing the search.

13. To add a format to the Format list,
- Click the Add button under the Formats heading
- Type a name, record type, and list of bib levels in the text boxes provided, and click the Save button.

The name of the format you configured will appear in the Format list box at the top of the screen.

Note: After configuring these settings, use the Field Placement configuration screen to determine which MARC elements display for items on the Search Results and Item Details screens.

4.44.3 External Field Source Mapping

On the External Field Source Mapping screen, you can choose which Visualizer fields correspond with configured field definitions. This means that you can then configure which Visualizer fields appear for each Visualizer item on the Field Placement screen.

Figure 4-70. External Field Source Mapping

- The Field column contains the names of fields as configured on the Field Definitions screen.
- The External Field column contains the names of fields from Visualizer.

To choose which Visualizer fields can be configured to display,

1. Choose "visualizer" from the Field Source drop-down list box.
2. In the External Field text boxes, type the name of the Visualizer field that corresponds with each field name in the Field column.
3. Click the Save button.

The Visualizer fields you defined can now be configured to display for each item on the Field Placement screen.

4.44.4 Field Placement Configuration

On the Field Placement configuration screen, you can . . .

- Choose which fields are displayed for each item on various screens in the patron interface.
- Change the order in which the fields appear for items on each screen.

About the elements on the Field Placement screen:

- The drop-down list box beneath the Field Placement screen title lets you choose the screen or tab for which you want to configure item display elements. The following options are available in the drop-down list:
    - **Holdings** - Allows you to configure item display elements for the Issues tab of the Item Details screen.
    - **Item Details** - Allows you to configure item display elements for the Item Details screen.
    - **Search Results** - Allows you to configure item display elements for the Search Results screen.
    - **Copies** - Allows you to configure item display elements for the Copies tab of the Item Details screen.
    - **Details** - Allows you to configure item display elements for the Details tab of the Item Details screen.
    - **Cart/List** - Allows you to configure item display elements for the Cart and List screens.
    - **Email of Cart/List** - Allows you to configure item display elements for the e-mail messages that are sent from the Cart and List screens.
    - **Email of Copy Cart** - Allows you to configure display elements for the Copies tab data included in e-mail messages that are sent from the Cart screen.
    - **Copies in the Cart** - Allows you to configure display elements for the Copies tab of the Cart screen.
    - **Patron Checked Out Tab** - Allows you to configure item display elements for the Checked Out tab of the My Account screen.

- o **Patron Requests Tab** - Allows you to configure item display elements for the Requests tab of the My Account screen.
- o **Patron Account Tab** - Allows you to configure item display elements for the Account tab of the My Account screen.

- The fields in the left text box are possible fields that are *not* configured to appear for each item.

- The fields in the right text box contain the fields that *are* currently configured to appear for each item.

- The fields available for display are determined by the settings on the Field Definition Configuration screen.

- To change the label that appears for each element of the item display, use the Language String Management screen to download the language file and translate the fields. The field names appear in the file with the prefix **record.field**.
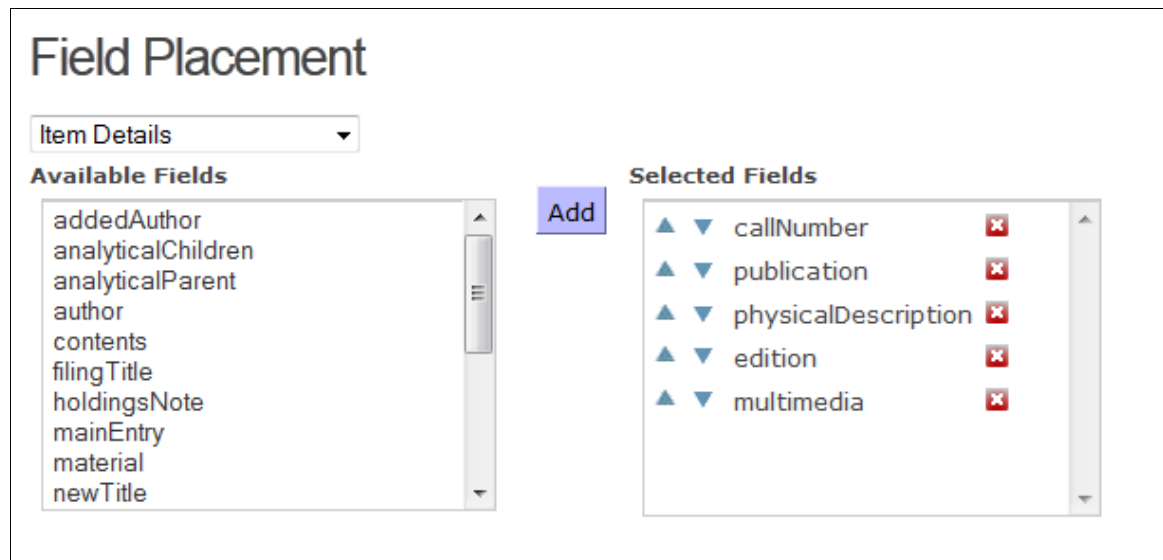
Figure 4-71. Field Placement Configuration Screen

To choose which fields are displayed for items on a given screen,

1. Select the component you would like to configure from the drop-down list box just below the Field Placement screen title.

2. To add a field to the item display, click a field in the left list box that you would like to add to the selected screen, and click the Add button. The field you chose will appear in the list box on the right.
   -OR-

To remove a field from the item display, click the field in the right list box that you would like to remove from the selected screen, and click the Remove button. The field you chose will appear in the list box on the left.

Your configuration changes take effect immediately.

To change the order of the fields displayed for each item,

1. Select the component you would like to configure from the drop-down list box just below the Field Placement screen title.

2. Select a field whose order you would like to change from the right list box.

3. Click the Up or Down button to move the field to the desired position.

Your configuration changes take effect immediately.

4.44.5 Library Members

The Library Members screen (*Figure 4-72*) lets you configure links to libraries that you have defined as Library Members in the Virtua Profiler. On this screen, you can:

- Choose to display or hide library links.
- Change the order in which these library links appear.
- Define a hyperlinked search query to offer to the patron via the Item Details screen.

> **Important:**
> - The library names will appear on the Item Details screen just as they are entered in the Profiler, unless you add additional entries to the Language File for the entries in question. To do this, add the string **xx.librarysymbol.name.[symbol]** where **xx** is the language code, and **[symbol]** is the library symbol configured for that library, along with the translated string for that location.
> - The Item Details screen displays a label for the tag in which the library symbol appears. To display text instead of the tag number, add **xx.librarysymbol.taglabel.[###]** to the Language File(s), where **xx** is the language code and **[###]** is the tag number, along with a translation for the text you want to appear before the search URL for that library (e.g., "Search for more works by this author at this library:" or "Dublin").

Figure 4-72. Library Members Configuration Screen

To choose to display or hide Library Member tags as search links,

- Select the check box next to the tag number you want to display

  -OR-

- De-select the check box next to the tags you do not want to display as hyperlinks.

Click the Save button for your changes to take effect.

To change the order in which library links appear,

- Click the up or down arrows next to the elements you want to move.

To define a search query to perform,

1. Click the *edit* link next to the tag you want to modify. A new window appears (*Figure 4-73*).

Figure 4-73. Edit Search Information Pop-up Window

2. Type a new tag and subfield for the search. this is the tag and subfield that the software will read to form a search query.
3. If there are characters at the beginning of the subfield that you do not want to include as part of the search term, type a number in the Offset text box that matches the number of characters that appear before the desired information. If there are no characters to ignore, type 0 (zero) in this text box.
4. To create a search hyperlink, type the URL to create a search for the library you are linking to. Include the text "${term}" (without quotes) to insert the contents of your specified tag and subfield into the search query.
5. Click the Save button.

5. Working with Staff Screens

While the *admin* user has privileges that affect the appearance of the Chamo interface, *staff* users have access to functions in Chamo that the *admin* user does not. This section describes these functions.

Unlike the *admin* user, the *staff* user can be any user configured to log in to Virtua as defined in the Virtua Profiler. In this guide, the term "*staff* user" will be used to refer to any Virtua staff user.

5.1 Configuring Permissions for the Staff User

While most *staff* functions in Chamo are enabled for all Virtua staff users, there are a few Chamo-specific options in the Operational Security permissions of the Virtua Profiler (*Figure 5-1*).
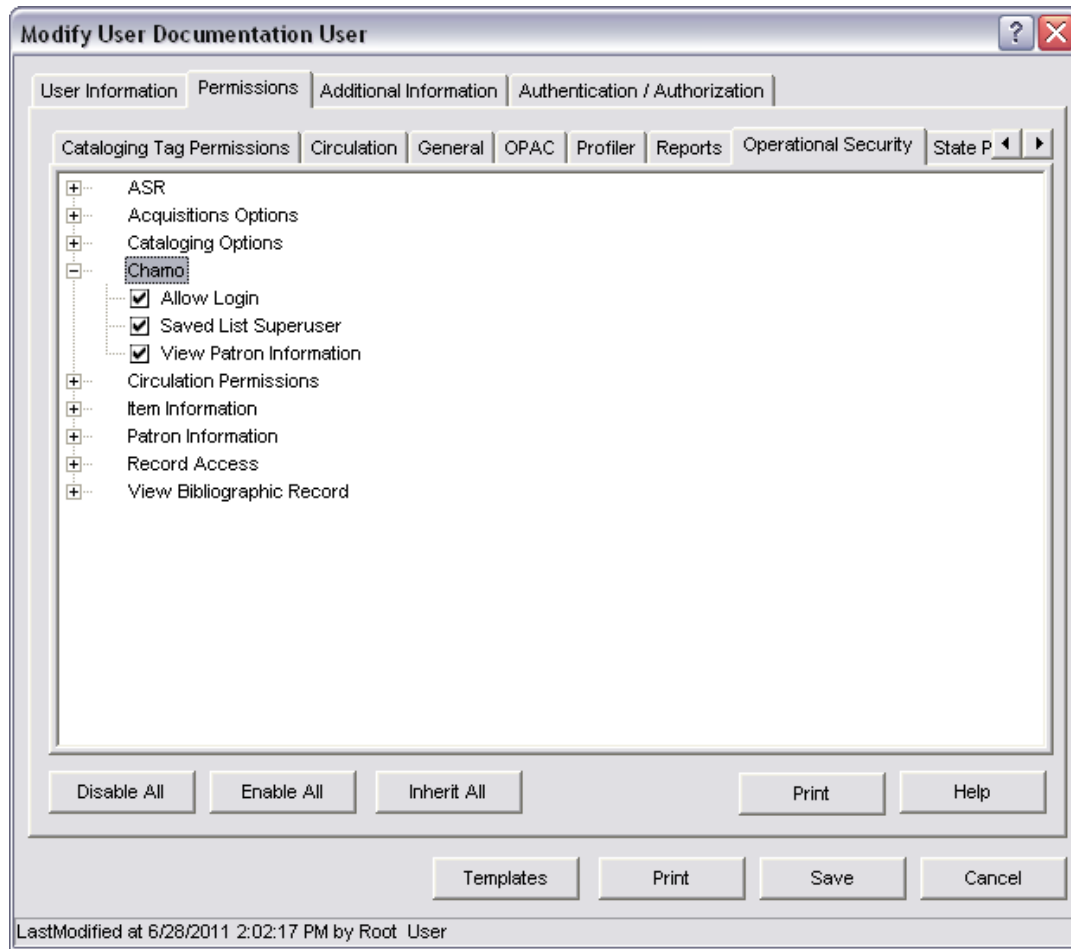
Figure 5-1. Chamo Operational Security Permissions
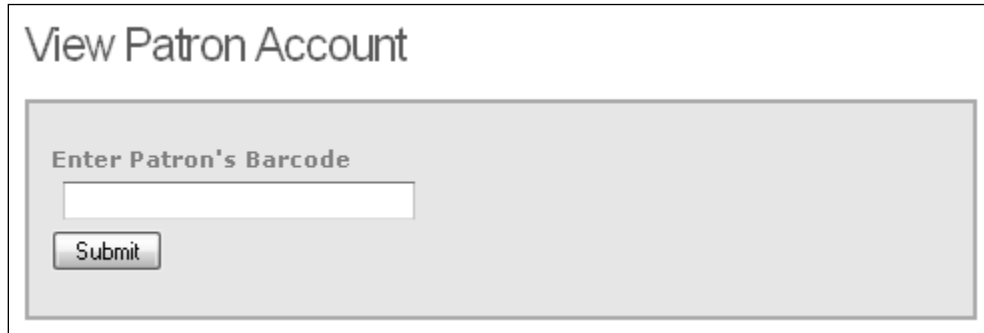
All operational security permissions can be configured for each user or for each group.

1. The Allow Login setting determines whether the specified user or group can log in to the Chamo interface using their staff login name and password.
2. The Saved List Superuser setting determines whether that user or group has certain privileges when managing saved lists. See the section "Managing Saved Lists" in this guide for details on these privileges.
3. The View Patron Information setting determines whether that user or group of users can look up and view patron information through the Chamo interface. See the section "Viewing Patron Accounts" for information on these functions.

For more information about setting Operational Security permissions, see the *Virtua Profiler/Global Settings User's Guide*.

5.2 Viewing Patron Accounts

The View Patron Account screen lets you look up and view a patron's account information, such as currently checked-out items and outstanding fines or fees. You can also add an image to a patron's account and create a message the patron can read the next time he or she logs in to Chamo.
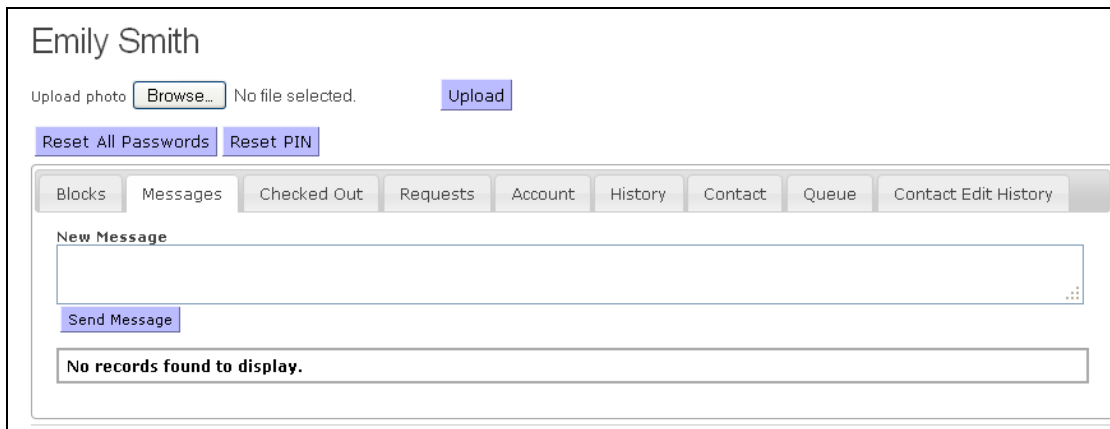
Figure 5-2. View Patron Account Screen

To view a patron's account information,

1. Type or scan the patron barcode in the text box.
2. Click the Submit button or press Enter.

The View Patron Account screen is refreshed to display the account information for that patron (*Figure 5-3*).

Figure 5-3. View Patron Account Screen

To view information about the patron's account, click the appropriate tab.

5.2.1 Managing Patron Passwords

To reset a patron's password . . .

- Click the Reset All Passwords button (*Figure 5-4*) to reset all of the passwords stored in the patron record.
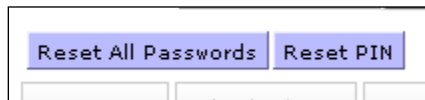
Figure 5-4. Reset Passwords Button on View Patron Account Screen

- Click the Reset PIN button to reset only the patron PIN (019 tag subfield $a).

When the patron password is reset, the patron will receive an e-mail with a new password. When the patron logs in to Chamo with that password, the patron will be prompted to create a new password.

5.2.2 Managing Patron Images

To add an image (such as a photo of the patron) to a patron's account,

1. Click the Browse... button, and locate the image to upload.
2. Click the Upload button.

The image can be of any image type, but the file size must be less than 1MB. Chamo may reduce the image dimensions to fit within the allotted space.

Once an image is uploaded for a patron, the image will appear on the Contact tab of the My Account or View Patron Account screen when viewed by the patron or the *staff* user.

To delete an image,

1. Click the Contact tab.
2. Click the Delete button beneath the image (*Figure 5-5*).
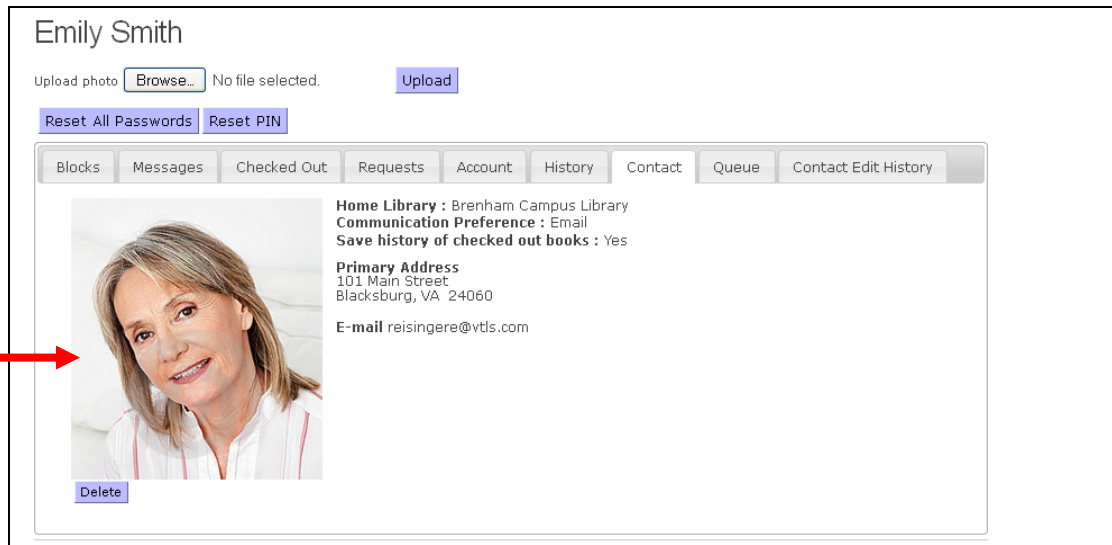
Figure 5-5. View Patron Account Screen - Contact Tab

5.2.3 Managing Patron Messages

To send a message to the patron,

1. Type a message of up to 1,000 characters in the New Message text box (*Figure 5-3*).
2. Click the Send Message button.

The next time the patron logs in to Chamo, the patron will see an alert notifying them that they have a message. They can then view and delete the message from the My Account screen.

To delete a message sent to a patron,

*   Click the Delete button next to the message you want to delete.

5.2.4 Managing Patron Queues

Both *staff* users and patron users can add items to a patron's queue. The queue can be used as a list of items to send to homebound patrons.

To manage patron queues,

Click on the Queue tab of the View Patron Account screen. The patron's queue appears (*Figure 5-6*).
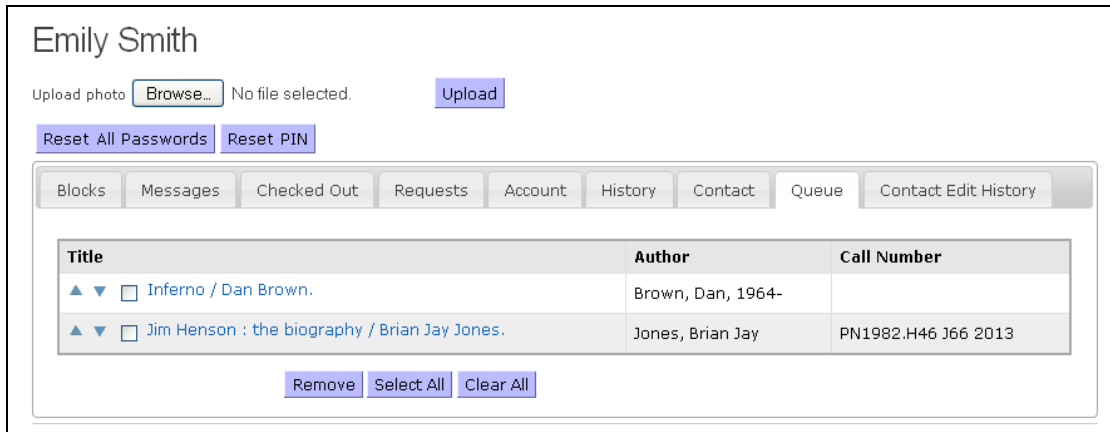
Figure 5-6. Patron Queue Screen - Staff View

- To change the priority of items in the queue, use the up and down arrows to move the items to your desired position.

- To remove items from the queue, select the check box next to the items you want to remove, and click the Remove button.

Note: For information on adding items to a patron's queue, see the section "Adding Items to a Patron Queue."

5.3 Using the Staff Cart, Saved Lists, and Patron Queues

The *staff* user can use the Cart, Saved lists, and patron queues to keep track of items for reading lists, special exhibits, or on behalf of patrons.

- The Cart lets the *staff* user keep track of items for the duration of the current Chamo session. Items must be added to the Cart before they can be added to a patron queue.

- Saved lists let the *staff* user create a list (or multiple lists) of items, bibliographic records, or patrons that are available for the *staff* user any time they log in to Chamo or Virtua. You can use these lists to keep track of reading lists or books for special exhibitions.

> **Note:** The availability of Saved lists is controlled by the *Enable Lists* setting on the List and Cart Configuration screen.

- Patron queues let both the patron and the *staff* user keep a list of items of interest to the patron. Since the queue is visible to both patrons and *staff* users (unlike patron lists or Saved lists), the patron queue is useful for keeping track of items for *staff* users to send to homebound patrons.

5.3.1 Adding Items to the Cart

To add items to the Cart,

1. On the Search Results screen, click the check box next to each item that you want to save to the Cart.

2. At the top or bottom of the Search Results screen, click the Add To Cart button (*Figure 5-7*).

Figure 5-7. Search Results Screen - Selecting Items to add to Cart

-OR-

Click the Add To Cart button on the Item Details screen (*Figure 5-8*).

Figure 5-8. Item Details Screen - Add To Cart Button

Your selection is stored in the temporary Cart, which you can access by clicking the Cart link at the top of the screen. Items in the Cart are deleted when you log out or when your Chamo session expires.

To save the items in your Cart to a Saved list accessible to *staff* users, click the Cart link at the top of the Chamo screen.

You will be taken to the Cart screen.

5.3.2 Adding Items to a Saved List

To add bibliographic records in the Cart to a Saved list,

1. Click on the Cart link at the top of the Chamo screen to see the Cart.

2. Select the items you want to add to a Saved list (*Figure 5-9*).
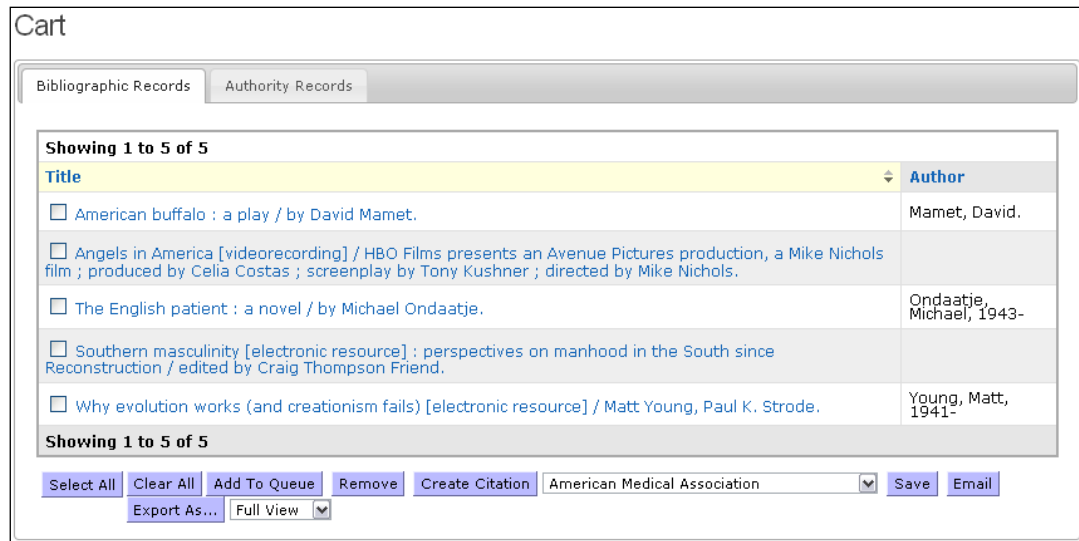
Figure 5-9. Staff Cart - Saving to a Saved List

3. Click the Save button. A new screen appears where you can choose a new or existing Saved list to which to save the items (*Figure 5-10*).

Figure 5-10. Adding Cart Items to a Saved List

- To create a new list, select the Create New List check box, type a list name, and click the Save button.

- To add items to an existing list, de-select the Create New List check box, choose a list from the drop-down list box, and click the Save button.

The items are saved to the Global list you select. You must click on the Global Lists link at the top of the screen to view the list.

5.3.3 Adding Items to a Patron Queue

You can add items to a patron queue from either the Cart.

To add items to a patron queue,

1. Select items in the Cart to add to a patron's queue.

2. Click the Add To Queue button (*Figure 5-11*).
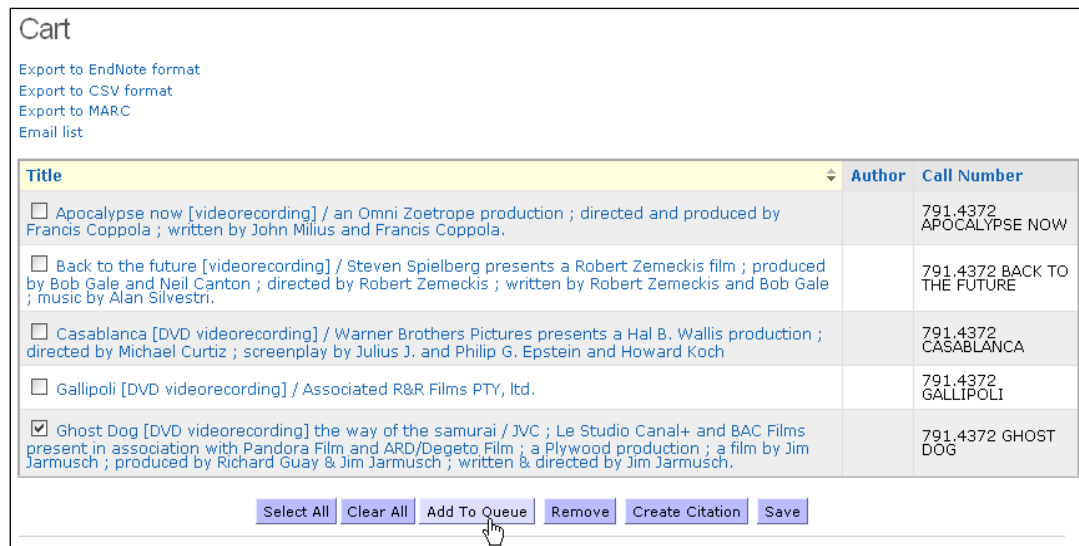
Figure 5-11. Cart Screen - Staff View

You will be prompted for a patron account number (*Figure 5-12*).

Figure 5-12. Enter Patron Barcode - After Clicking Add To Queue Button

3. Type a patron barcode, and click the Save button.

The Cart screen appears with a message that the item was successfully added to the patron's queue (*Figure 5-13*). You must view the patron's account to see the patron queue (see the section "Viewing Patron Accounts").

Figure 5-13. Patron Queue Updated Message

5.4 Working with Saved Lists

Saved Lists are available to *staff* users to keep track of items for events such as book exhibitions or reading programs.

The Virtua client can use saved lists to print CD Inserts, Spine labels, and patron address labels. Some saved lists can also be used to keep track of items for withdrawal. This may be useful in cases where certain books have gone missing, or the library wants to withdraw the items because they are out-of-date or have not circulated within a defined period of time.

There are three kinds of saved lists in Chamo: Copy, Bibliographic item, and Patron. In Chamo you can perform the following actions with saved lists:

- Add items to a list
- Remove items from a list
- Re-order items on a list

- Assign a workflow to a list of items to keep track of items being withdrawn or sent for binding or lamination
- Freeze a list to keep non-superusers from modifying it.
- Merge one list with another
- Update the status of Copy lists
- Export the contents of the list into a **.csv** file.
- Create a report of the entries on the list in PDF or HTML format
- Import a file of items on the list
- Receive items on a list (useful for lists of items that had been sent for binding, for example) and change the status of the list to a new status

Information about Saved Lists can also be accessed via the following Ad Hoc views:
Patron_Saved_List_v
Bib_Saved_List_v
Copy_List_v
Bib_Saved_List_Entry_v
Patron_Saved_List_entry_v
Copy_Saved_List_Entry_v

5.4.1 Creating a new Saved List

To create a saved list,

1. Type the name of the list in the Name field.

Figure 5-14. Create Saved List Staff Screen

2. (*Optional*) Type a description for the list in the Description field.

3. (*Optional*) Type a group name for the list in the Group field.

4. Select the type of list as bibliographic, patron, or copy.
    o   Select *Bibliographic* to create a list of bibliographic records.
    o   Select *Patron* to create a list of patron records.
    o   Select *Copy* to create a list of specific copies of items.

Note: If you choose to create a *Copy* saved list, you can also select a Workflow for the list. The workflow designation will be stored as part of the data for the list, and you can use the workflow for filtering when searching saved lists.

Important: Once a workflow is assigned to a list, there are significant restraints on how the list can be modified. Only select a workflow if you are certain that you want to send the items on the list for binding or lamination (LOLM) or that you want to withdraw the items on a list (Withdrawal), and that the manager of the list is a TPU user (see the Saved List Configuration screen for more information).

- If you choose the Withdrawal workflow, then you can also choose a Withdrawal Type, Withdrawal Quarter, and Withdrawal Year. Items MUST have one of the following statuses to be added to a list with a withdrawal workflow:

  o None (No status on item)
  o Shelving (system status 5720)
  o Any status flagged as unserviceable
  o Long overdue (system status 4600)
  o Lost & Paid (defined in Status Displays parameter in Profiler)
  o Lost (system status 4715)
  o Missing (system status 4700)

- The Withdrawal Type specifies why the items are being withdrawn. Choose a withdrawal reason from the drop-down list.
- The Withdrawal Quarter specifies the quarter of the year the item is to be withdrawn.
- The Withdrawal Year specifies the year the items are to be withdrawn. By selecting a Withdrawal Quarter and Withdrawal Year, you are telling Virtua to delete the barcodes of the items on the list on the selected date.

5. Click the Create button.

A list is created with the parameters you specified.

Note: Depending on your user permissions, you may also have a *Location* drop-down list, which lets you choose the location to which the list belongs. If you do not have this drop-down list, the list belongs to your log-in location.

5.4.2 Searching for Saved Lists

The Saved List Management screen (list view) shows the saved lists and an area for you to type search/filter terms to find the list(s) you are looking for.

Figure 5-15. Saved List Management - Lists View

To view a saved list,

- Click on the name of a saved list. If there are more than 50 lists, you can navigate through the lists using the page links at the upper right, and you can reorder the lists by clicking on a column heading.

-OR-

- Use one or all of the following criteria to filter the lists:

  o Select the Type of list you want to view.
  o Select the Location to which the list belongs.
  o If you are searching for a Copy list, you can select the type of Workflow designated for the list.
  o If applicable, select the Withdrawal Type for the list.
  o Type all or part of the Name or Description of the list.
  o Type all or part of the Group to which the list belongs.
  o Type all or part of a patron or item Barcode. This will find patron barcodes in patron lists, item barcodes in copy lists, and item barcodes that belong to entries on bibliographic lists.
  o Type or select a Created on or after date for the list.
  o Type or select a Created on or before date for the list.

o Type or select a Modified on or after date for the most recent modification of the list.
o Type or select a Modified on or before date for the most recent modification of the list.

Click the filter button.

The list(s) that meet your criteria appear. You must click on the name of a list to view the contents of the list.

5.4.3 Managing Saved Lists

On the Saved List Management screen (detail view), you can view and sort saved lists. Note that except for certain users with advanced permissions, you will only be able to affect lists that are saved to locations to which you have access. You do NOT have access to locations automatically if you are configured to have access to only one or more sublocations of the listed location.

Figure 5-16. Manage Saved Lists - Detail View

If you are viewing a list that belongs to one of your log-in locations, you can also:

- **Edit** the Name, Authority, Group, or Description of the list.

- **Delete records** from the list
- **Delete the list**

> **Note:** Only Saved List Superusers can delete lists.

- **Upload** a file of records to the list
- **Scan barcodes** to add entries to the list

> **Note:** You can scan barcodes to add entries to saved lists of patrons or copies at your log-in location ONLY; you cannot scan barcodes to add entries to a saved list of bibliographic records, or to a list of patrons or copies at a location to which you don't have access.

- **Export** the contents of the list in CSV format
- **Copy** the contents of the list to a new list
- **Merge** the contents of the list to another list
- **Change the order** of the items on the list
- **Navigate** to a specific page of the list
- **Create a report** of receiving or binding status
- **Freeze or unfreeze** a list

> **Note:** Only Saved List Superusers can freeze or unfreeze lists.

To **sort** a saved list, click on a column header.

To **edit the name, group, authority, or description** of a list, click the *edit* link next to the field you want to edit. A new window opens that lets you type a new value.

To **delete a record** from a saved list *(at your log-in locations only)*, click the Delete button for that record.

To **delete a list** *(at your log-in locations only)*, click the Delete List button.

To **upload a file of records** to the current list *(at your log-in locations only)*,

1. Click the Browse button to select a line-delimited text file of records to upload. The file must consist of bibliographic IDs, primary patron barcodes, or item barcodes.
2. Select a Location from the drop-down list to assign to the records on the imported list.
3. Click the Import button.

The records in the file are added to the saved list. A message window appears letting you know how many items were successfully imported. A Save button on this message window lets you save a file that contains a list of the entries that were not successfully imported.

To **scan barcodes to add entries** to a saved list *(at your log-in locations only)*,

1. Click the Scan Barcodes button. A pop-up window appears.
2. Scan your barcode.
3. Type the number of labels you would like to print for that item.***** This option only appears for Copy lists.
4. Click the Add button after each scanned barcode.
5. Click the X in the upper right-hand corner of the pop-up window to close it.

The barcodes you scan appear on the Saved List Management screen.

To **export the contents of the list** in CSV format, click the Export button.

To **copy the contents of a list** to a new list, click the Copy button. A new window opens.

1. Type a name for the new list.
2. (*Optional*) Type a Description for the new list.
3. If you are copying a Copy list, you must choose a Type for the new list. The new list type can be Bibliographic Record or Copy.
4. Choose a Location for the new list.
5. Click the Copy button.

To **merge the contents of one list to another list**, click the Merge Entries Into... button. You will be brought to a window where you can choose from any other list of the same type to which you have access. Once you merge the contents of a list into another list, the original list will be deleted.

To **change the order** of the items on a list, you can click on a column header to sort the items by that category,

-OR-

1. Select the check boxes next to the item(s) you want to move
2. In the *Move the selected X entries after record number* check box, type the number of the item under which you would like to move the selected item(s)
3. Click the Move button.

To **navigate to a specific page** of the list, type a number in the *Go to page* text box, and click the Go button. The window refreshes to the page of the list you specified.

Note: Only lists with more than 50 entries have a *Go to page* text box for navigation.

To **create a report** of items that are still outstanding or should be returned to the bindery,

1. Select a report format from the drop-down list.
2. Click the Outstanding Items or the Items to Return button. Depending on your browser settings, a new window will open with the results of the report, or you will be prompted to save the report output to your workstation.

Note: These reports apply only to lists of copies at specific statuses; these report options will not appear for most lists.

To **freeze a list**, click the Freeze button. The Freeze button only appears if you are logged in as a saved list superuser. Once you click the Freeze button, the list cannot be modified until you or another saved list superuser unfreezes the list. The Unfreeze button appears to saved list superusers on the **Saved List Management** screen when a list is frozen.

To **print labels** for the copies or patrons on a list,

1. In the Virtua client, choose the label type you would like to print from the Cataloging menu. A new window opens.
2. Type the saved list name.
3. Click the OK button.

The Virtua client will print labels for the copies on that list, and will print the number of labels you specify for each entry on the list.

5.5 Viewing Deleted Items

The View Deleted Item screen (*Figure 5-17*) lets you enter a barcode for a deleted item and view information about that item.

Figure 5-17. View Deleted Item Staff Window

Type or scan the item barcode in the text box, and click the Search button. Information about that deleted item appears.

Note: If the item is not found, a message banner appears at the top of the screen.
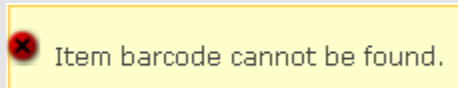
Figure 5-18. Deleted Item Not Found Message

5.6 Viewing and Managing Recent Tags

The Recent Tags screen (*Figure 5-19*) lets *staff* users view and ban recent tags.

Figure 5-19. Recent Tags Staff Screen

- To view user tags, enter the number of days' worth of tags you would like to see, and click the Refresh button. A list appears with the tags written within your selected timeframe, along with the patron(s) who added the tag.
- To ban a tag, select the check box next to the tag you would like to ban, and click the Ban button at the bottom of the screen. You can also ban tags from the Tagging screen.
- To view a tag on the Item Details page, click the tag name. Chamo performs a search for all items to which that tag has been added. Click on the title of an item to see the Item Details page for that item. The most recent tag appears at the top of the list of tags.
- To view the patron account of a patron who has added a tag, click the patron's name. The View Patron Account screen for that patron appears.

6. Appendix A - Providing SSL on the Chamo Web Server

This appendix describes the configuration necessary for your Chamo server to use the secure HTTP protocol (HTTPS) for web pages.

6.1 Prerequisites

- Chamo must be installed.
- Ensure that JAVA_HOME/bin is in the path.
- Have a certificate ready and prepared in a PKCS12, PKCS11, or JKS keystore. This certificate must be accessible to the Chamo user. You should be comfortable with this process if you are configuring Chamo for SSL.

6.2 Configuration

1. Log in as the Chamo user.

2. Edit the **conf/server.xml** file, and find the section of the file with the following text:

```
<!--
  <Connector acceptCount="${chamo.connect.acceptCount}"
     executor="tomcatThreadPool" port="${chamo.ssl.port}"
     protocol="HTTP/1.1" SSLEnabled="true" scheme="https"
     secure="true" clientAuth="false" sslProtocol="TLS"
     URIEncoding="UTF-8" />
-->
```

3. Remove the comment marks from the beginning and end of this section (**<!--** and **-->**).

4. Add the attribute **keystoreType="xxxx"** where **xxxx** is PKCS12, PKCS11, or JKS.

5. Add the attribute **keystorePass="yyyy"** where **yyyy** is the keystore file's password.

> **Note:**
> - Chamo assumes that the keystore file is named **.keystore** and that it exists in the Chamo home directory. If this is not the case, add a **keystoreFile** attribute with the full path to the file.
> - If you are using an SSL port other than 8443, be sure to change all instances of 8443 in the **server.xml** file AND in the **Chamo.ini** file, described below.

6. Open the **CHAMO_HOME/Chamo.ini** file in your file editor.

7. Change the following lines:

```
chamo.ssl.port=[port]
chamo.ssl.enabled=true
```

8. Modify the Chamo Base URL setting on the General Configuration screen to have the secure site that you configured; e.g., **https://www.server.library.org:8443/**. However, do NOT use the SSL port or URL for the Solr configuration. Use the same URL you would normally use for unencrypted Chamo, so that the Chamo software is able to connect to Solr.

9. To ensure that users to use the secured version of the site, you should block the regular startup port (default 8080) with the site firewall. You CANNOT shut off this port or block it on the local machine, because Chamo must still use the startup port to communicate with its Solr server. However the port should be firewalled to prevent users from accidentally using unsecured http links.

6.3 Troubleshooting

The most common causes of errors are:

- **Invalid keystore format** - The **keystoreType** attribute you set in **server.xml** does not match your file. Make sure you are using a keystore and NOT a normal certificate file, and that the type matches your configuration.
- **Invalid keystore password** - The password you set doesn't match the password on the keystore file.

7. Appendix B - Quick Reference for Customization

While this guide provides references for modify any part of the Chamo interface, it may be useful to use the following checklist when you are customizing your interface. This section does not provide any information that is not presented in more detail elsewhere in the guide.

Pay special attention to which elements are theme-specific, as discussed in the "Theme Settings" section of this guide.

Color - Within the Admin interface, you can change the color of the elements in the interface using the Appearance Configuration screen.

Facets - You can change which facets appear on the Search Results screen via the Facet Configuration screen.

Default View - You can control which results appear by default on the Search Results screen, as well as how many, using the Search Settings screen.

Further customization can be accomplished by modifying Chamo's CSS files.

7.1 Working with Chamo CSS Files

The best way to apply stylesheet changes is to add or modify the existing **theme-override.css** file. This lets you override style elements in the stylesheets for each theme with whatever styles you choose. Note that changes to these files WILL NOT be preserved when you upgrade Chamo. To maintain these customizations, you must make backups of the files and preserve these backups when you upgrade Chamo.

Adding a User-defined Search Facet - You can add a search facet based on a user-defined facet from the Virtua Profiler (see the *Virtua Profiler/Cataloging Parameters User's Guide*). These user-defined facets can be of any MARC tag and subfield you desire.

On the Index Configuration screen, select the Facet check box for the index you want to be a facet. Be sure to click the Save button to save your changes.

1. If you don't want to use the default name of the keyword index, download the language file for your language(s) from the Language String Management screen,

find the name of the user-defined search you added, add a translated string (this will be the name of the facet in that language), and upload the altered language file.

2. Go to the Facet Configuration screen, select the theme to which you want to add your custom search facet. In the list box on the left, select your user-defined themes, and click the Add button. The theme should appear in the list box on the right.

3. Finally, on the Field Placement Configuration screen, choose which screens the facets should appear on. In the list box on the left, select your user-defined themes, and click the Add button. In the list box on the right, use the Up and Down buttons to move the facet to your desired position.

8. Appendix C – Chamo Scripts

The following scripts may be of use to Chamo Admin users. For more information on the scripts Virtua provides, see the *Virtua System Management Reference Guide*.

8.1 Resetting the Password for the Chamo Admin User

Innovative provides a script **ResetChamoAdminPassword.sh**, which resets the password for the Chamo Admin user to the default value of *admin*. If the current password is lost or forgotten, you can run this script to allow access to the Chamo Administrative interface.

For all other changes to the Chamo Admin password, you must use the Change Password feature within the Chamo Administrative interface.

To reset the password for the Chamo Admin user,

1. Log in to your server as the **dbadmin** user.
2. Navigate to the directory where the scripts reside.
3. Type: **ResetChamoAdminPassword.sh**
4. Press Enter.

    The old password will be flushed from Chamo's internal cache, and the password will be reset. You must wait five minutes before logging into Chamo.

8.2 Changing Passwords for Innovative-created Oracle Users

Innovative provides a script **ChangeOracleUserPassword.sh**, which you can run to change the password for any Innovative-created Oracle user. This script must be run on the host database server. It can be used to change the password of any Oracle user (for example, *dbadmin*, *profiler*, *reporter*, *syscli*, *iportal*, and *chamo*).

To change the password for an Innovative-created Oracle user,

1. Log in to your server as the **dbadmin** user.

2. Type:
   ChangeOracleUserPassword.sh <Oracle user> <new password>

3. Press Enter.

   The password for the specified Oracle user is changed.

8.3 Displaying Active Database Connections

Virtua provides a script **DisplayActiveDBConnections.sh**, which you can run to display a list of all Virtua components and other external programs currently connected to the database.

To display active database connections,

1. Log in to your server as the **dbadmin** user.

2. Type:
   DisplayActiveDBConnections.sh

3. Press Enter.

   The script prints to the screen a list of active database connections.

Note: All Chamo connections will display as JDBC Thin Client running on port 1234. Chamo uses a Java connection pool to establish connections with the database. To identify and kill off Chamo/Java processes issue the command **ps -ef|grep java** to obtain the main Java process ID.

8.4 Populating the Index Queue with a File of Bib IDs

Virtua provides a script **PopulateChamoIndexQueue.sh**, which allows you to populate Chamo's index queue with a file of Bib IDs.

To populate the index queue with a file of Bib IDs,

1. Log in to your server as the **dbadmin** user.

2. Type:
   PopulateChamoIndexQueue.sh BibIdFile

3. Press Enter.

   The script populates Chamos index queue with the file of Bib IDs, which will trigger a Solr re-index for each Bib ID provided in the file.

Note: If a full Solr re-index of all bibliographic records is required, use the Indexing Control Admin screen.

8.5 Working with the Request Slip System

Settings on the Request Slip Printer Configuration and Request Slip Email Configuration screens determine whether Chamo generates a request slip or a request slip e-mail when a patron places a page request. If you enable request slips or request slip e-mails, you need to configure the Request Slip System. To do this, complete the following steps:

- Set request slip-related parameters on the Request Slip Printer Configuration and Request Slip Email Configuration screens.
- Configure the request slip and request slip e-mail template files. The **request-slip.ftl** and **request-slip-email.ftl** templates are available in the following directory: **webapps/ROOT/WEB-INF/templates**
- Set up the directory hierarchy.
- Run the Request Slip Daemon.

Once you complete this configuration and enable request slips, Chamo will generate a file for each page request. This file is written to a location on your server where the Request Slip Daemon opens and prints or e-mails the contents of this file.

This chapter covers the following topics:

⇒ Setting Up a Directory Hierarchy
⇒ Working with the Request Slip Daemon

8.5.1 Setting Up a Directory Hierarchy

To create the directory hierarchy for the Request Slip System,

1. Log in to your Virtua server as **dbadmin**.

2. Go to the directory that you want to use as the base directory for your Request Slip System hierarchy.

    > **Note:** Since request slip files are not automatically deleted after they are printed or e-mailed, it is important that you ensure that your server does not run out of disk space on the partition. We recommend that you allocate a sufficient amount of disk space for the number of requests you process. You should also regularly purge old request slip files from the **archive** directory.

3. At the prompt, type: `SetUpRequestsDirectories.ksh`

    The server asks: "No base directory passed in. Do you wish to create the directory hierarchy off the current directory (y/n)?"

4. Type `Y`
5. Press the Enter key to create the directory hierarchy in the current directory.

SetUpRequestsDirectories.ksh creates the following directories:

*   **archive** - Stores files that the Request Slip Daemon has already processed.
*   **active** - Contains files that the Request Slip Daemon has not yet processed. The Web requests module writes request information to this directory.
*   **log** - Stores a log of the Request Slip Daemon's activity. The log file records any error messages generated by the Request Slip Daemon.
*   **temp** - Contains temporary files used during the process.

8.5.2 Working with the Request Slip Daemon

The Request Slip Daemon is a program (**RequestDaemon.sh**) installed with the standard Virtua server installation that prints or e-mails files placed in a specified folder. When you start this daemon, it prints or e-mails files written to a "watched" folder.

> **Important:** The daemon and Chamo *must* run on the same UNIX server that runs the **psdriver.exe** program.

8.5.2.1 Running the Request Slip Daemon

To run the Request Slip Daemon,

1. Log in to the server as the **dbadmin** user.

2. Type the following string:

   ```
   nohup RequestDaemon.sh [Parameter 1] [Parameter 2] >/dev/null &
   ```

   where **Parameter 1** is the base directory in which you store Request Slip files, and **Parameter 2** is the code for the output map you want to use. For a list of output maps and their associated codes, see the *System Management Reference Guide*.

Below is an example of a valid command to initialize the Request Slip Daemon.

```
nohup RequestDaemon.sh /usr/vtls/clas99 12 >/dev/null &
```

This string initializes the Request Slip Daemon and tells it to watch the **active** directory in the **/usr/vtls/clas99** base directory and to print or e-mail the files that it finds using Europa3 character mapping.

> **Hint:** The above command runs **RequestDaemon.sh** as a background process. To ensure maximum performance, you will need to restart the process periodically. You may want to setup a cron job to refresh the process automatically at regular intervals. For details on setting up cron jobs, see the *Virtua System Management Reference Guide*.

8.5.2.2 Maintaining the Request Slip System

When running the Request Slip System, you need to purge the **log**, **temp**, and **archive** directories periodically to prevent them from consuming too much disk space. We provide a script that you can use to safely perform this maintenance.

> **Note:** Do NOT run this script while running **RequestDaemon.sh**. You must kill the **RequestDaemon.sh** process before you can run the script.

To purge the log file and archive directory,

1. Log in to the Virtua server as **dbadmin**.
2. Type the following string:

    `CleanUpRequestDirectories.ksh [Request Slip Base Directory]`

    . . . where **[Request Slip Base Directory]** is the path to the directory in which
    you set up the Request Slip System hierarchy. For example, if your Request slip
    hierarchy is in the directory **/usr/vtls/clas99**, then you would type:

    `CleanUpRequestDirectories.ksh /usr/vtls/clas99`

    The server asks if you want to purge the current directory.

3. Type **Y** if you want to purge the current directory, and press Enter.

    The **log**, **temp**, and **archive** directories are purged of all files.

9. Appendix D – Creating a Google Books Access Key

In order to enable Google Books functionality in Chamo, you must provide a Google Books access key on the External Data Configuration admin screen.

To create a Google Books access key,

1. In your browser window, navigate to the Google APIs Console screen (*Figure 9-1*) at the following address: **https://code.google.com/apis/console**.
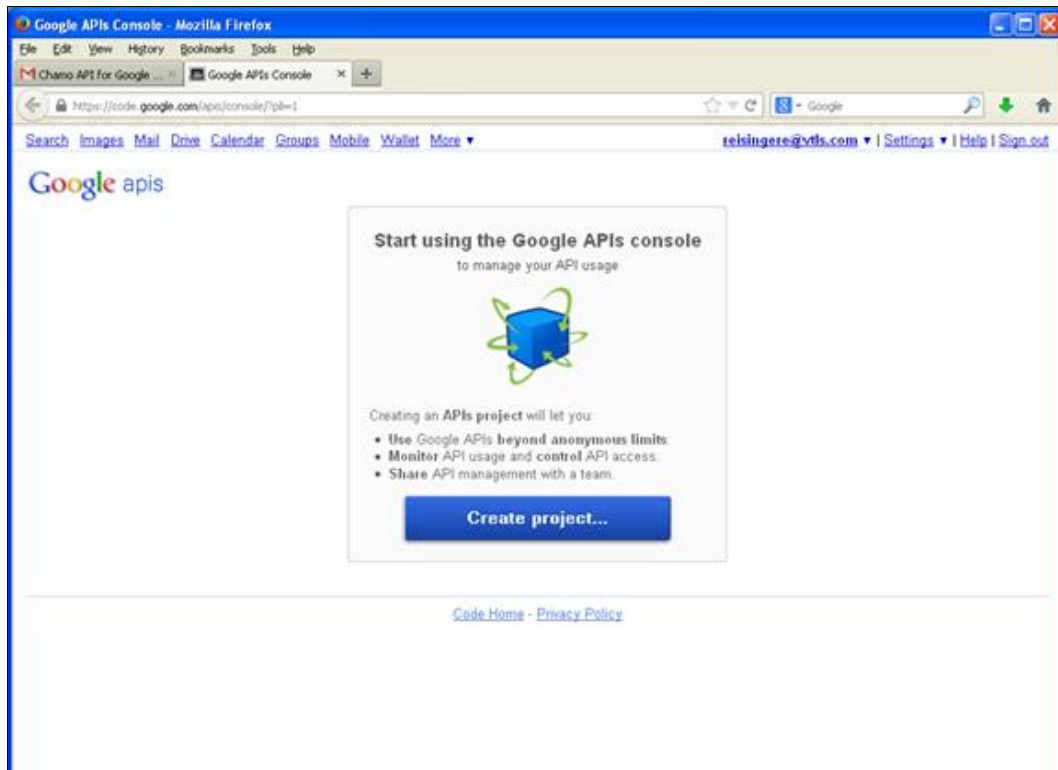
Figure 9-1. Google APIs Console Screen

2. Click the Create Project button.

   The Overview tab (*Figure 9-2*) is displayed.
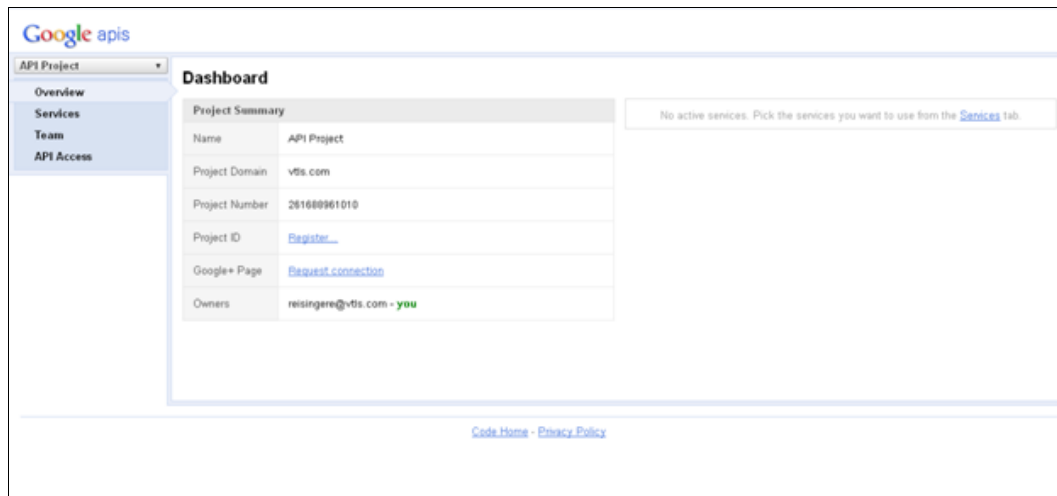
Figure 9-2. Google APIs Console Screen, Overview Tab

3.   Click the Services tab to display a list of all Google API services (*Figure 9-3*).
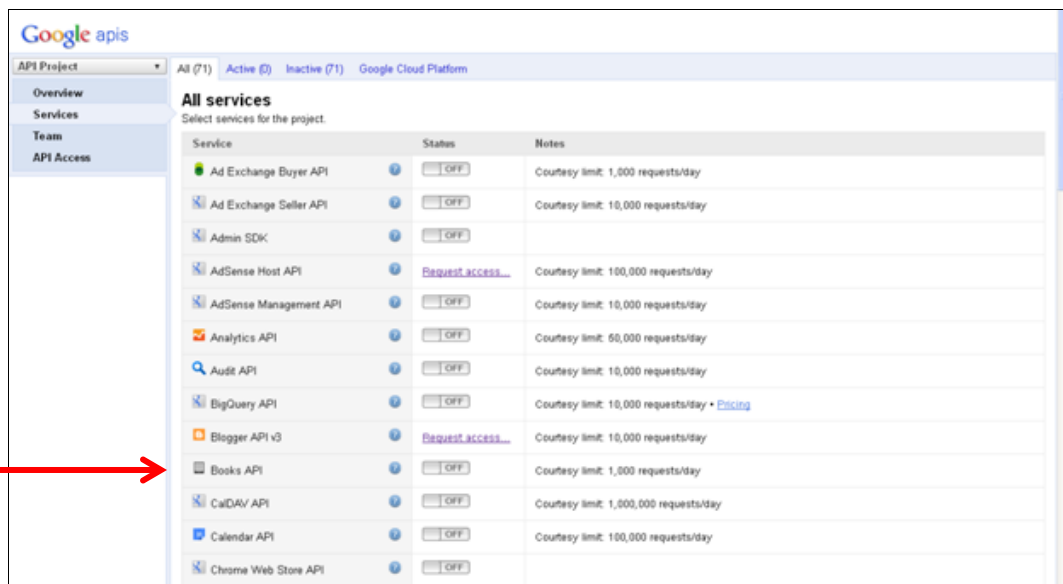
Figure 9-3. Google APIs Console Screen, Services Tab

4.   Locate the Books API service, and click the button in the Status column to toggle
     the Books API to a status of ON.

     The screen is refreshed and the Books API is marked as ON (*Figure 9-4*).
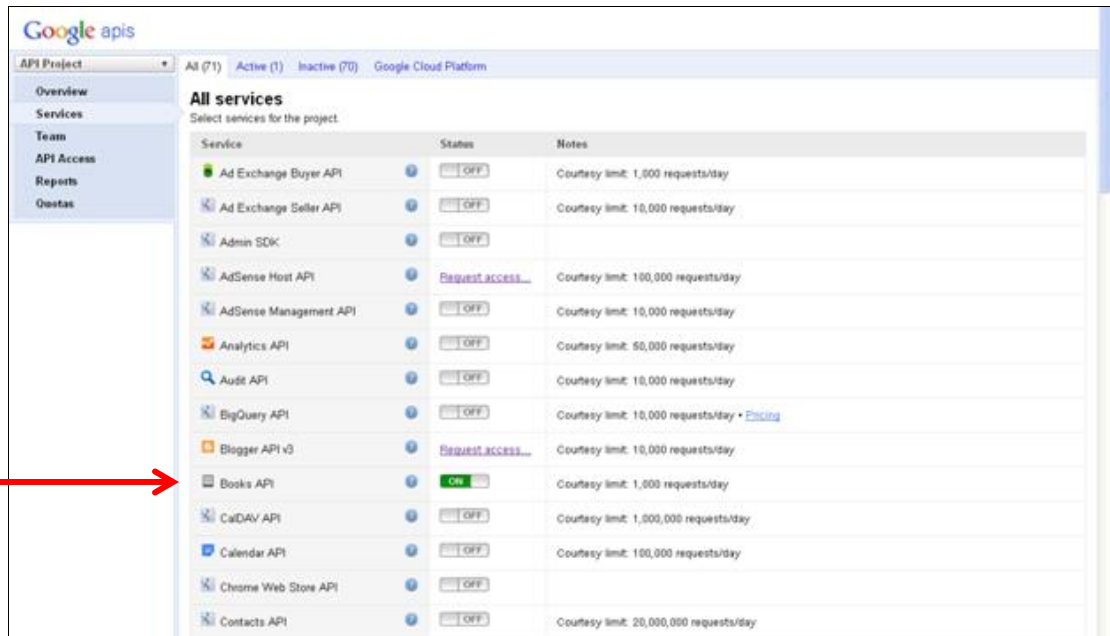
Figure 9-4. Google APIs Console Screen, Services Tab (2)

5.   Click the API Access tab (*Figure 9-5*).
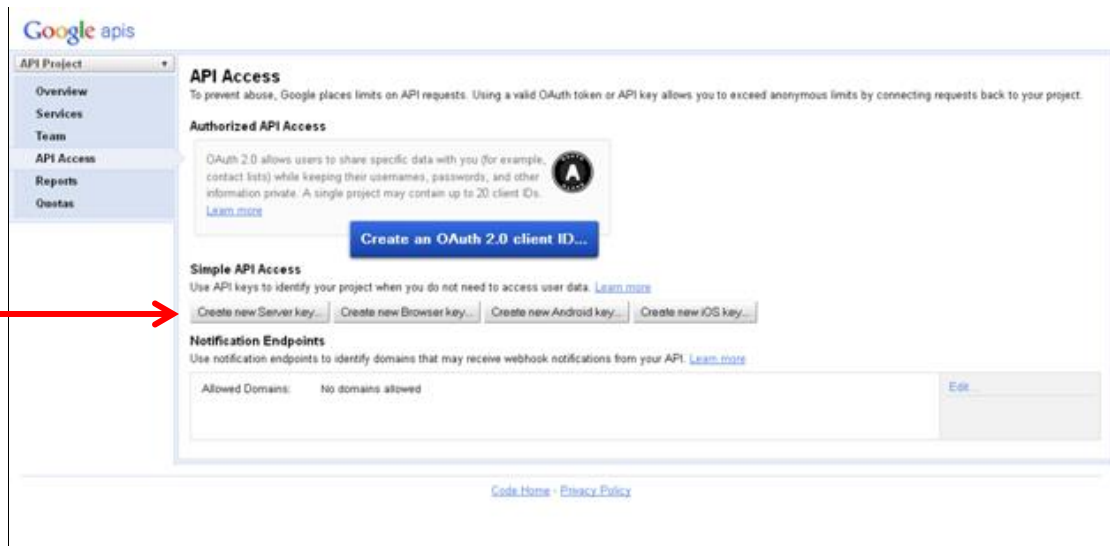
Figure 9-5. Google APIs Console Screen, API Access Tab

6.   On the API Access tab, click the Create New Server Key button.

A pop-up screen appears (*Figure 9-6*).
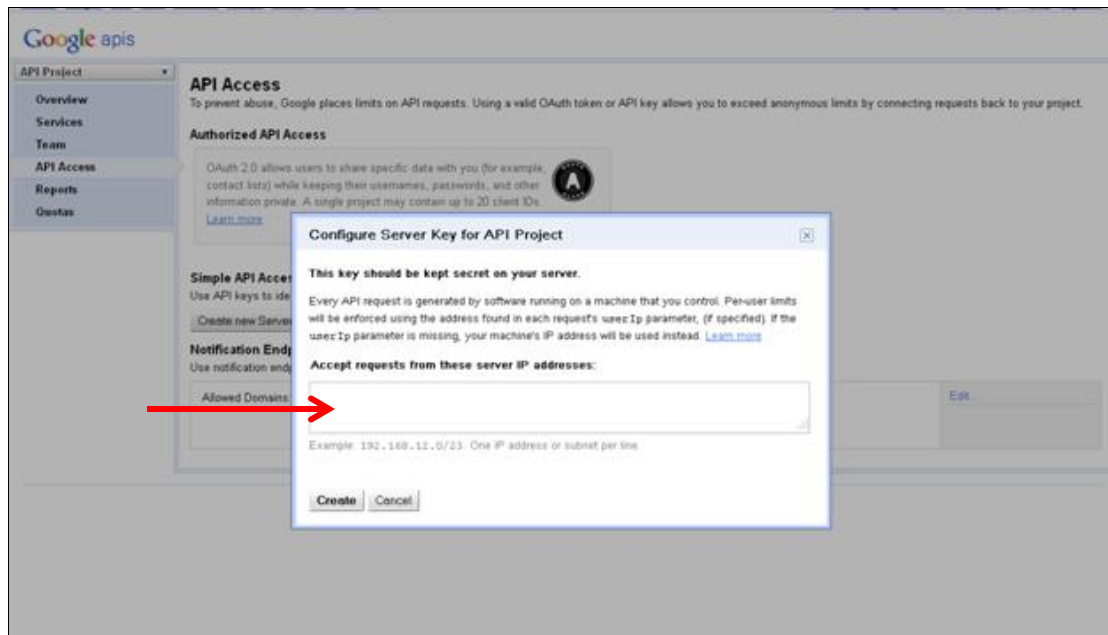
Figure 9-6. Configure Server Key for API Project Pop-up Screen

7. If you want to limit Google Books functionality to requests made from a particular
    IP address range, enter the IP address range in the *Accept requests from these server IP
    addresses* box.
    -OR-
    If you do not wish to restrict Google Books functionality, leave the *Accept requests
    from these server IP addresses* box blank.

8. Click the Create button.

    The API Access tab is updated to display your API key (*Figure 9-7*).
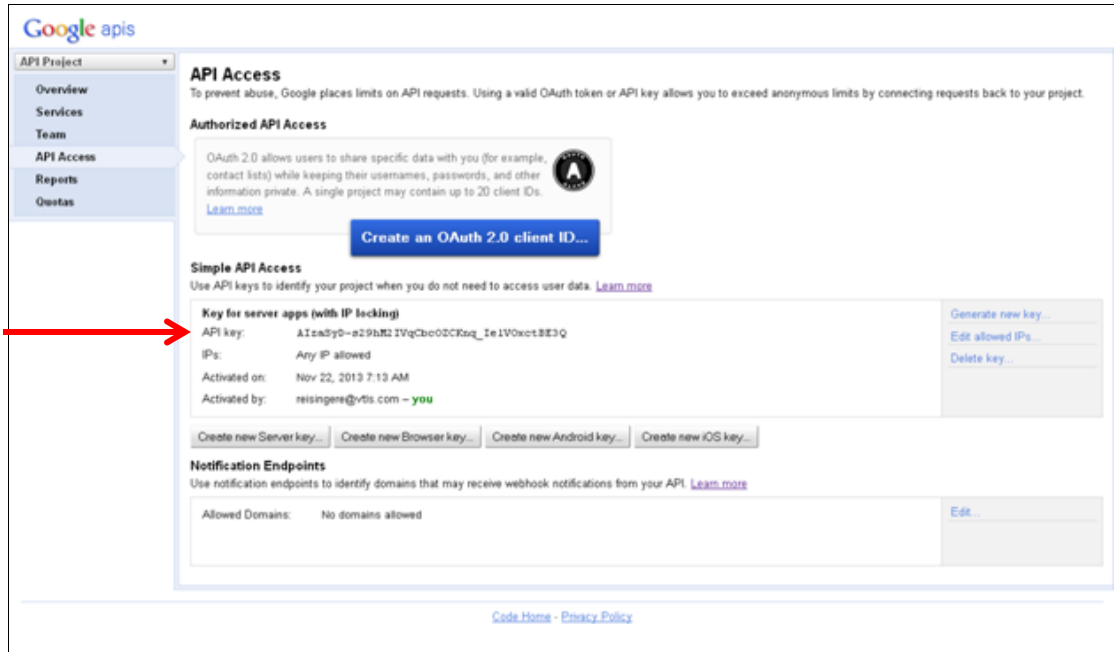
Figure 9-7. Google APIs Console Screen, API Access Tab (2)

9. Copy the API key and paste it into the Google Books API Key field on the External Data Configuration screen (*Figure 9-8*).
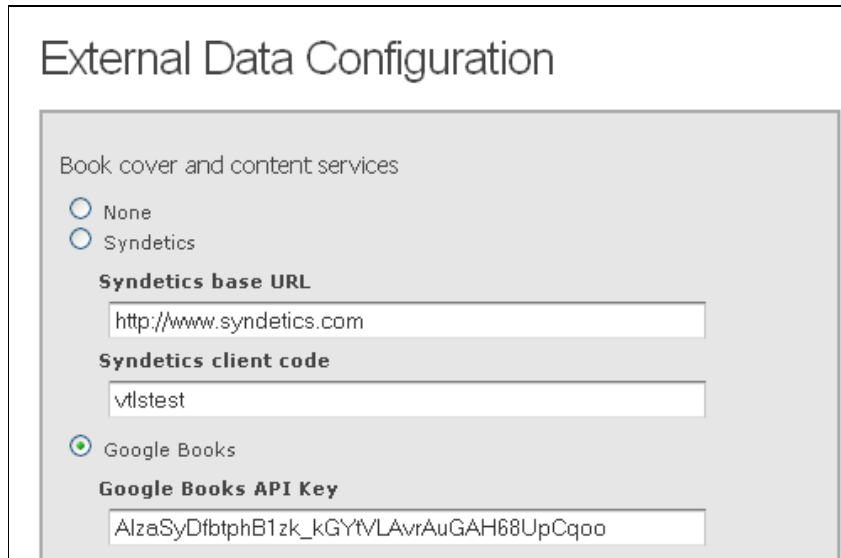
Figure 9-8. External Data Configuration Screen (detail)

10. Appendix E – Managing Languages and Translations in Chamo

Each language that is shipped for use in the Chamo interface is available for editing via an XLS spreadsheet. By exporting, or downloading, a language file from Chamo to your PC and saving it, you can edit/translate Chamo language strings using Microsoft® Excel or another spreadsheet-editing program. You simply need to type each string translation in the *Translated String* column of the spreadsheet. When you have finished translating the strings in a language file, you can save it and import, or upload, the file to the Chamo server, where the strings will reside in the database language table.

10.1 Initial Installation: Managing Language Files

When Chamo is first installed at your institution, follow these steps to set up your desired language(s) for the interface:

1. After the Chamo files are untarred on the server, find the **LanguageStrings.xls** file, which is the "native" string file, in the **/usr/vtls/chamo-1.1XX/language** directory.

2. Copy **LanguageStrings.xls** to the desktop on the PC where you will be importing and exporting language files for language setup. If your institution enables multiple languages in Chamo, also copy the Innovative-provided **LanguageStrings_xx.xls** file (where **xx** represents the language code) for each desired language.

    Note: We do not ship Chamo with an English strings file. This is because if Chamo does not find any translation for a string, it uses the native string in **LanguageStrings.xls**.

3. Complete the installation and initial test of Chamo per the instructions in the *Chamo Installation Guid*e.

4. Log in to Chamo's Administrative interface using the "admin" user and the default password.

5. Click the Language File link in the sidebar.

    The Language String Management page appears (*Figure 10-1*).

Figure 10-1. Language String Management Screen

6. In the Select a Language File to Import area, browse for **LanguageStrings.xls**, which you copied in step 2.

7. Click the Import button to import the **LanguageStrings.xls** into Chamo. The native file contains every string that the Chamo interface uses. Each native string is already "translated" into the native language, which is English.

8. Next, click the Import button to import each language file that you want to have available in the Chamo interface. Language files shipped with Chamo contain translations created by Innovative agents and offices. For instance, you might import **LanguageStrings_th.xls** (Thai) and **LanguageStrings_ms.xls** (Malay).

10.1.1 Editing/Translating Language Strings

Once you have imported the native string file and the desired language files into Chamo, you will want to review and, if needed, edit the language string translations to suit your institution.

Note: Do NOT edit the native string file **LanguageStrings.xls**.

To edit/translate the strings in a language file,

1. In Chamo's Administrative interface, display the Language String Management page.

2. In the Select a Language to Export area, export one of the language files you loaded and save it to your PC.

3. Using Excel or another spreadsheet-editing program, type new or edit current translations in the *Translated String* column of the spreadsheet.

   Note: If you are using English only in the Chamo interface, you do not need to translate or edit any strings unless you want to customize the wording of an English string. If you want to customize native English strings, do not edit the native **LanguageStrings.xls** file. Instead, generate a **LanguageStrings_en.xls** file, and do your customizations there.

4. Once you have edited and saved the desired language file on your PC, access the Language String Management page again, and using the Import feature, upload the language file back into Chamo.

5. Repeat steps 1-4 for each language Chamo will be using.

   Note: In addition to importing your desired languages, you will need to enable them in Chamo. To enable them and have them appear in the drop-down list of languages at the top of each Chamo screen, access the Languages configuration screen in the Administrative interface.

10.1.2 Maintaining Manually-created, Custom Language Strings

Chamo accommodates new, manually-created, custom language strings. For example, an institution may want to use custom strings in their language files—for example, additional user-defined searches or fixed fields—that are not in the Chamo native strings file. If your institution uses custom language strings, we highly recommend that

you save your custom strings in a separate spreadsheet and that you update it as needed for every upgrade. The separate spreadsheet will hold only your manually-created, custom strings, and it can contain the translated strings for all desired languages.

Here are some things to keep in mind about the custom spreadsheet:

- It needs to contain three columns, but only the first *String Code* column and the third *Translated String* column must be populated.
- It should not contain any blank rows.
- It can be named anything you want.
- It needs to be accessible to the PC from which it will be uploaded.
- It should be backed up.

We discuss how to utilize a custom spreadsheet in the next section.

Note: If you find that you create not only a number of manually-created custom strings but also a number of customized translations (i.e., translations that differ from those in the Innovative-provided language files), you may want to save those customized translations in the same spreadsheet as the manually-created custom strings. In this way, when it comes to upgrading your Chamo installation, you can take advantage of the Innovative-provided language files and still maintain your customized strings instead of having to re-translate them after each upgrade.

10.2 Upgrade Installation: Managing Language Files

When you upgrade to a new version of Chamo at your institution, you need to upgrade your language file(s) also. The steps for doing this are similar to those used for the initial Chamo installation.

To upgrade your desired language(s),

1. After the Chamo files are untarred on the server, find **LanguageStrings.xls**, which is the "native" string file, in the **/usr/vtls/chamo-1.1XX/language** directory.

2. Copy the file to the desktop on the PC from which you will be importing the file into Chamo.

3. Complete the installation and initial test of Chamo per the instructions in the *Chamo Installation Guide*.

4. Log in to Chamo's Administrative interface.

5. Click the Language File link in the sidebar to display the Language String Management page (*Figure 10-2*).

Language String Management

Select a language file to import.

Import file | Browse… | No file selected.

Import

Select a language to export.

Arabic | Excel | Export

Figure 10-2. Language String Management Screen

6. In the Select a Language File to Import area, browse for **LanguageStrings.xls**, which you copied in step 2.

7. Click the Import button to import the **LanguageStrings.xls** into Chamo. The native file contains every string that the Chamo interface uses and includes any new strings Innovative has added to the latest version of Chamo. Each native string is already "translated" into the native language, which is English.

8. For step 8, you have two choices:

    Choice #1

    a. Just as you did in the initial installation, copy and then import into Chamo each of the desired language files that Innovative ships with Chamo. The advantage to doing this is that each file will contain the latest (if any) Innovative-provided

translations. The downside to doing this is that the Innovative-provided translations will *overwrite* any strings you may have customized for your site. The Innovative-provided translations will not, however, delete any new custom strings that you have *added* to the language file.

b. After importing the latest language files, use the Export feature to export each language file to your PC. The export file will contain any brand new strings that have been added to the latest version of Chamo.

c. Using Excel or another spreadsheet-editing program, translate any new Chamo strings that may not already be translated and edit other strings as necessary.

d. Save the file and import it back into Chamo.

e. Finally, if you have a custom-string spreadsheet, import it into Chamo. Any customized strings will overwrite the corresponding strings in the database language table, and any manually-created, custom strings will be added to the database table.

Choice #2

a. Do not copy and import the latest language files shipped with Chamo. Instead, use the Export feature in Chamo to export each language file of your current installation to your PC. Because you have already loaded the native strings file to the Chamo language table, the exported file will contain any brand new strings that have been added to the latest version of Chamo. The advantage to doing this is that each language file will still contain your customized strings from the last installation. The downside to doing this is that you will not be able to take advantage of any new translations in the Innovative-provided language files.

b. Using Excel or another spreadsheet-editing program, translate the new Chamo strings on your PC and edit other strings as necessary.

c. Save the file and import it back into Chamo.

d. Finally, if you have made any changes to your custom-string spreadsheet, import it into Chamo.

11. Appendix F – Features Specific to the Hong Kong Public Library

In the following sections, we describe features that only appear in the Chamo interface for HKPL users.

11.1 Configuring Patron Payment Settings

On the Patron Payment Settings admin screen (*Figure 11-1*), HKPL *admin* users can enable or disable patron e-payments and configure settings that apply to patron e-payments. When e-payments are enabled, patrons have the ability to pay fines and fees via e-payments initiated from the Account tab of the My Account screen.

Figure 11-1. Patron Payment Settings Admin Screen (HKPL)

After you make changes to the Patron Payment Settings screen, click the Save button.
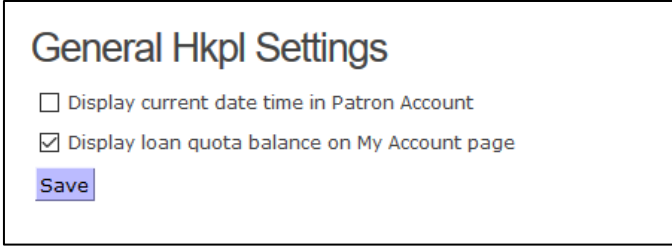
The following configuration settings are available on the Patron Payment Settings screen:

1. **Enable e-payment:** Select this check box if you want patrons to have the ability to pay fines and fees via e-payments initiated from the Account tab of the patron My Account screen.

2. **EGIS Configuration Check URL:** Enter the EGIS Configuration Check URL in this field.

3. **NGILS E-Payment Service URL:** Enter the NGILS E-Payment Service URL in this field.

4. **Service URL username:** Enter the NGLIS E-Payment Service URL username in this field.

5. **Service URL password:** Enter the password that corresponds to the NGLIS E-Payment Service URL username in this field.

6. **Minimum PPS payment amount:** This setting lets you specify the minimum payment amount allowed for an e-payment with a payment type of PPS. Enter a payment amount in this field.

7. **Allowed fines/Fines not allowed for e-payment:** This setting allows you to specify the types of fines that are allowed to be paid via e-payments. The *Allowed fines* and *Fines not allowed for e-payment* lists contain all of the types of fines configured in the Fine Codes parameter in the Profiler. To specify that a patron be prevented from paying a particular type of fine via e-payments, select a fine type in the *Allowed fines* list and click the Add button to move it to the *Fines not allowed for e-payment* list.

8. **Allowed patron blocks/Patron blocks that prevent e-payment:** This setting allows you to specify the patron block code definitions that will result in a patron being blocked from making e-payments. To specify that a patron be prevented from making e-payments if the patron carries a particular patron block, select a block code in the *Allowed patron blocks* list and click the Add button to move it to the *Patron blocks that prevent e-payment* list.

9. **Disabled payment methods/Enabled payment methods:** This setting allows you to specify the payment methods that are available to be selected when a patron makes an e-payment. To specify that a patron be prevented from using a particular payment method for e-payments, select the payment method in the *Enabled payment methods* list and click the Add button to move it to the *Disabled payment methods* list.

11.2 Configuring General HKPL Settings

HKPL administrative users can configure several settings on the General HKPL Setting screen (*Figure 11-2*).

Figure 11-2. General HKPL Settings Screen

The following configuration settings are available on the General HKPL Settings screen:

1. **Display current date time in Patron Account:** This setting allows you to enable or disable the display of the current date and time (from the server) on the patron My Account screen. The time is continuously updated, and Chamo uses the time and date format specified in the Display Timestamp Format setting on the General Configuration admin screen when displaying the server time.

2. **Display loan quota balance on My Account page:** This setting allows you to specify whether the Remaining Book Loan Quota is displayed on the patron My Account screen. The Remaining Book Loan Quota is a count of the number of "Book" items (items with an item class of "Book" or "BackIssues") that the patron can check out without exceeding his or her check-out limit.

11.3 Showing or Masking the Username on the Login Screen

A *Show username* check box setting appears on the Login screen (*Figure 11-3*) and Account Login panel in the patron interface for HKPL users.

Figure 11-3. Patron Login Screen (HKPL)

If the *Show username* check box is selected, the characters in the patron's username are shown when they are entered in the Username field. If the check box is NOT selected, the characters in the patron's username are masked when they are typed into the Username field.

11.4 Blocking Patrons From Accessing E-Resources

On the HKPL Patron Editor window in the Virtua client (*Figure 11-4*), staff users can specify whether or not an individual patron is permitted to access electronic resources in Chamo.

Figure 11-4. HKPL Patron Editor Window (Virtua Client)

To prevent a patron from accessing Chamo e-resources via the *A - Z Search* link or the *Federated Search* link on the Search Results screen, select the Block from E-Resource Access check box.

Note: The Block from E-Resource Access check box setting corresponds to the 008 tag position 18 in the 2709 patron format.

12. Appendix G – Changes in This Guide

12.1 Changes for 3.2

"API Configuration" - Updated to describe the new Disable license checking for Open Skies REST API setting.

"Zero-Hit Searches Report" - Updated to reflect that the report output for this report has been improved to include more information (time when search was performed, search index, etc.).

"Patron Features" - Updated to describe the following new settings: Prevent Patron From Login Brute Force Vulnerability, "Lock patron account after this many login attempts," and "Lock patron account for this many minutes."

"Configuring General HKPL Settings" - Added this section to describe the new Remaining Book Loan Quota for HKPL users.

12.2 Changes for 3.1 SP3

"Patron Registration Configuration" - Updated to describe the Enable Duplicate Checkouts setting, which is available on the Patron Registration Configuration administrative screen. This setting allows you to specify whether multiple check-outs are allowed for a patron who self-registers via Chamo. When this setting is enabled, Virtua will allow multiple check-outs of the same item to the patron.

"List and Cart Configuration" - Updated to describe the new "Enable cart sorting by call number for bibs" setting is now available on the List and Cart Configuration administrative screen. When this setting is enabled, you can click on the Call Number column to sort the titles in your cart by call number.

12.3 Changes for 3.1 SP2

"OPAC Settings" - Updated to describe the new "Display 856 $u as hyperlink and display the $z public note where present in authority record display" setting. This setting lets you specify how 856 tag data is displayed on the View Authority Record screen.

"OPAC Settings" - Updated to describe the new "Configured 505 to display hyperlinked $u" setting. This setting lets you specify how 505 tag data is displayed on the Item Details screen.

12.4 Changes for 3.1 SP1

"SSO Configuration" - Updated to note that Chamo supports single sign on (SSO) using SAML 2.0.

"Circulation Settings" - Updated to describe the new *Disallow patrons to modify/deactivate page requests* setting. This setting works in conjunction with the "Allow patrons to deactivate requests" setting. If you enable both the "Allow patrons to modify requests" and the "Disallow patrons to modify/deactivate page requests" settings, Chamo allows patrons to modify or deactivate hold, loan, and recall requests but prevents them from modifying or deactivating page requests.

"OPAC Settings" Updated to describe the *Enable PO Status view on Item Details screen* setting, which determines whether the PO Status tab appears on the Item Details screen.

12.5 Changes for 3.1

"Records Viewed Report" - Added to describe the new Records Viewed report, which allows you to generate reports on the bibliographic, authority, and patron records viewed by Chamo users.

12.6 Changes for 3.0 SP1

"MARC Field Source Configuration" - Updated to note that you can now configure different MARC field source rules for each theme your library uses.

12.7 Changes for 3.0

"Circulation Settings" - Updated to describe the new *Enable request deactivation date range* setting. This setting allows you to determine whether clicking the Deactivate request button on the Requests tab of the My Account screen prompts patrons to enter a deactivation Start and End date or if the deactivation request takes effect immediately.

Updated to describe the new *Allow patrons to cancel trapped request* setting. This setting allows you to determine whether clicking the Requests tab of the My Account screen displays a Cancel button for trapped requests.

"External Data Configuration" - Updated to describe the new *Book cover alignment* setting. This setting allows you to change the position of book cover images from the left side of the record description to the right side of the record description on the Search Results and Item Details screens.

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