vtls-chamo
discovery

Chamo

WORKFLOW-BASED REFERENCE GUIDE
Chamo

2017

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Introduction to Chamo

This workflow-based reference guide is to assist new users when they first learn about the Chamo product. This guide includes the same information that you can find by using the help in Chamo.

Social OPAC-Chamo's embedded search options allow you to simplify the way your patrons search. This software allows users to create personal lists, tag and rate items, enter comments or reviews and link to social sites like Facebook and Twitter- all from their PC or their mobile device. A robust search engine allows patrons to find the information they seek wherever it resides. Search filters, facets, and sorting options allow users to view the results they desire, in whatever order they prefer. Patrons may subscribe to RSS 'feed' of frequently changing content in Chamo; they will receive updates when the content changes. All of the social OPAC features of Chamo are extended to cover all content- even remote content.

There is a full user guide for Chamo System Administration and this is available in the Global Support Repository.

Please contact Innovative Customer Support for more information or if you would like to see a Chamo training video.

Email: info@iii.com

Note: As of version 1.122, Chamo runs on Java 7. Customers should update to Java 7.

Note: Chamo requires the **chamo.db.virtuaRelease** parameter to be set to a valid Virtua release.

Search Results

Chamo provides the user with visual tools to search for items and to expand or narrow searches conveniently. The home page is the **Search Results** screen. Search results from the library catalog appear on the home page immediately to encourage users to browse the collection.

Guest Features include **Cart**, **Heading Search**, **Reserves Search**, **Advanced Search**, **Request for Purchase**, and **Clear Session.** As a Guest User no login is required to use the guest user features.

Note: Patron Users, who are logged-in, may use all Guest Features, except Clear Session.

Search Results Screen

From the **Search Results** screen, users can:

Sort results, navigate search results, refine or broaden a search, perform a new search, an advanced search, a heading search, or reserves search, view more information about an item, add items to the Cart, subscribe to an RSS feed, create social media links, and clear the search history.

Sorting Search Results

To sort the search results, choose a sort criterion using the **Sort by** drop-down list box.
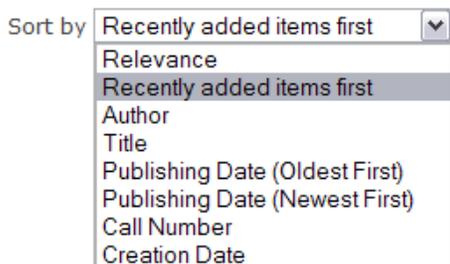
Navigating Search Results

When a search results include more than 10 results, navigation links to other pages of results appear as hyperlinked numbers and as **Previous** and **Next** links on the bottom of the **Search Results** screen. Click these links to go to the **Previous** or **Next** page of results or to jump to a numbered page of results. (Each page of results contains 10 entries by default.)

Refining a Search

The list of search facets on the left side of the **Search Results** screen can help refine a search. These search facets are hyperlinks that help narrow, or filter, search results according to different categories of information such as author, subject, and location. The numbers next to each facet indicate the number of items in the search results that match that search facet.

To refine a search, click on a search facet.

The results list will be refined to include only those items in both the original search results AND the selected search facet categories. Search facets change as search parameters change.

Current Search: brontë ❌   Brontë, Charlotte, 1816-1855 ❌

Adding a Term

Another way to refine a search is to type an additional search term in the **Additional Terms** search box and click the **Add** button. This performs a search that contains all of the previous search terms, filters, and facets as well as the new search term.

Refine your search

Additional Terms
jane eyre   Add

Broadening a Search

When additional search terms or search filters are used, a small X button ❌ will appear next to each search parameter used and display in the **Current Search**

Current Search: brontë ❌   jane eyre ❌   Brontë, Charlotte, 1816-1855 ❌

To broaden a search, remove a search term by clicking the X button ❌ next to it. Chamo will perform a new search that includes all of the search terms except the search term that was removed.

Current Search: brontë ❌   jane eyre ❌

Navigate Themes

When two or more themes are configured on the **Theme Links** *admin* screen a **Current theme** drop-down list is displayed in the patron interface at the top of the screen. A user can switch themes by selecting a theme from the drop-down list.

Current theme Default ▼
Default
Kids
ekodemo
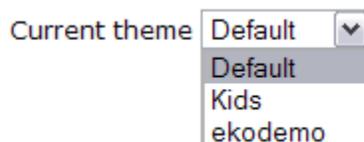
Perform a New Search

Quick Search

To perform a **Quick Search**, type a search term(s) into the **Search** box at the top of the **Search Results** screen and click the **Search** button. This default keyword search will perform a search of all of the indexed fields of the items in Chamo.

Note: Not every word of every item record is searchable. If an initial search is unsuccessful, use a new search term.

Search [shakespeare] [Search]

Current Search: **shakespeare** ❌

To perform a new search for items by a specific author click the author's name under an item's title.
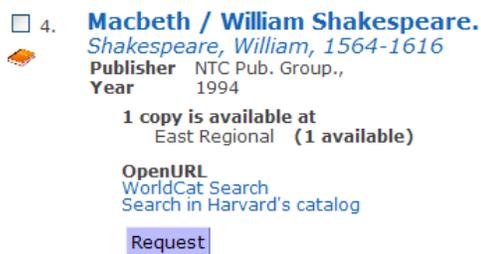
☐ 4. **Macbeth / William Shakespeare.**
Shakespeare, William, 1564-1616
Publisher NTC Pub. Group.,
Year 1994
  1 copy is available at
    East Regional **(1 available)**

OpenURL
WorldCat Search
Search in Harvard's catalog
[Request]

Current Search: **Shakespeare, William, 1564-1616.** ❌

Performing an Advanced Search

To perform a more detailed search than a **Quick Search** click on the **Advanced Search** link next to the main search box. The **Advanced Search** is a keyword search.

Search [   ] [Search] Advanced Search

The **Advanced Search** screen allows a user to search for terms in specific categories such as Author, Title, Subject, ISBN, ISSN, LCCN, UPC, Bib ID, Call Number, and Control Number.

Note: Search fields are selected by each library and are configured by the *Administrator.*

A total of four search categories, search syntax, and search strings can be combined and used for each advanced search.

To perform an **Advanced Search**:

Select the **search field** in the first drop-down list box.

Choose the **search syntax** from the second drop-down list box.

Type in a **search term** in the third text box.

Click **Search**.

Enter search terms below.		
Any Field	has all of these words:	
Any Field	has this exact phrase:	
Any Field	has at least one of these words:	
Any Field	has none of these words:	
	Search Reset	

Search Filters

Users have the option to filter their search results using various search filters, for example, Language, Location, Place of Publication, or Format.

Note: Search filters are selected by each library and are configured by the *Administrator.*

You may also limit the results using the filters below.	
Language	**Location**
Afrikaans Albanian Algonquian (Other) Amharic Arabic	Headquarters Headquarters - Reference Headquarters - Juvenile Reference Headquarters - Paperback Collection Headquarters - Teen Paperback
Place of Publication	**Format**
Alabama Alaska Albania Alberta Algeria	Audio Book Blu Ray Book CD Cassette

Users may narrow their search results by selecting one or more filters. To select multiple filters in a list, hold down the CTRL key on the keyboard and click the filter selections with the mouse. To de-select a filter, hold down the CTRL key and click on the selected filter.

Note: The Locations and Format filters are hierarchical. Selecting the top layer of the hierarchy means that Chamo will include all the subordinate filters.

Performing a Heading Search

The **Heading Search** is a heading keyword search.

Use the **Heading Search** link to search by Author, Subject, Title, Journal Title, User Defined, Authority ID, or LCCN.

In the text box type the search terms and click the **Search** button.

Note: The **Heading Search** will display cross-references if they exist for the search term.

Results 1 to 10 of 48

Hit Count Heading
Attracting butterflies
  See
   view authority 0 Butterfly attracting

view authority   30 Butterflies
  See Also
   view authority 0 Papilionidae
   view authority 12 Caterpillars

view authority   1 Butterflies as pets

view authority   2 Butterflies as pets -- Juvenile literature.

view authority   1 Butterflies -- Behavior.

view authority   1 Butterflies -- Canada, Eastern.

view authority   1 Butterflies -- Color -- Juvenile literature.

view authority   1 Butterflies -- Comic books, strips, etc.

  Butterflies -- Cultures and culture media
  See
   view authority 1 Butterfly farming

view authority   1 Butterflies -- Development -- Juvenile literature.

The search results are displayed as hyperlinks to access the **Search Results** screen. If cross-references are in the library catalog they display in the results as **See** or **See Also**. Hits associated with the heading search are hyperlinks to access the **Search Results** screen. If no hits are associated with the search a **(0)** displays at the end of the heading, which indicates a blind reference or no record is attached, it is a valid heading in the search but has no bibliographic record associated with the search term in the database.

Consortia Only: Heading search results (including hit counts) are filtered by the institution associated with the current theme. If a heading search is performed while using a consortium institutional theme, only headings that have bibliographic records at that institution will be displayed in the search results.

View Authority Records

If enabled by the *administrator* the **Heading Search** results display links to view authority records. Click **view authority** to see the authority record.

View Authority Record

```
              00228nz a2200097o 4500
001           vtls000072504
003           VRT
005           20111028120603.0
008           111028 | acn||bab| n a|a d
100           $a Cats $v Juvenile literature.
999           $a VIRTUA20 y
```

Add To Cart

To add an authority record to the cart click **Add to Cart**.

✅ Your cart has been updated.

View Authority Record

```
              00228nz a2200097o 4500
001           vtls000072504
003           VRT
005           20111028120621.0
008           111028 | acn||bab| n a|a d
100           $a Cats $v Juvenile literature.
999           $a VIRTUA20 y
```

This record is in your cart.

The authority records displays as a link on the **Authority Records** tab in your cart.

| Bibliographic Records | Authority Records | |

☐ Calico cats Juvenile fiction.
☐ Cats

Select All | Clear All | Remove | Export As... | ISO 2709 ▼

Authority records may be exported to **ISO 2709** format or **MARCXML** format.

Note: When an authority record is exported only one file is created and contains all authorities that are exported.

Export Authority Records to ISO 2709 Format

The .rec file contains bibliographic information and can be viewed and imported via the Virtua client. Items that cannot be exported are marked with an asterisk in the file.

To save the exported cart item(s) in **ISO 2709** format (.rec file):

Select the item(s) by placing a check in the check box.

Select **ISO 2709** from the export as drop-down list box.

Click Export As...

Select either the **Open with** or **Save File** radio button and click **OK**.

Export Authority Records to MARCXML Format

The .xml file contains MARC 21 information in a XML format.

To open or save the exported cart item(s) in **MARCXML** format (.xml file):

Select the item(s) by placing a check in the check box.

Select **MARCXML** from the export as drop-down list box.

Click Export As...

Select either the **Open with** or **Save File** radio button and click **OK**.
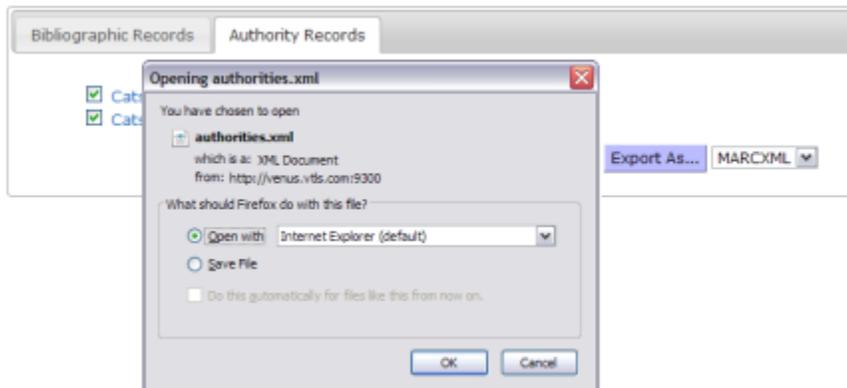
Performing a Reserves Search

Use the **Reserves Search** link to search for a reserve list by Course ID, Course Name, Instructor Name or Title. The **Reserves Search** screen is used to search for materials on reserve.

To perform a Reserves Search:

Click on the **Reserves Search** link.

Select a search category from the drop-down list box.

Type a search term in the text box.

Click **Search** to display a list of results.

Course ID	Course Name	Section	Instructors
LIS 105	Intro to Librarianship	1	Harrill, Michaela E

Search History

Users may click on the **Search History** link to view current searches.

Search History

Time	Search	Type	Refined By	Sorted By	Filtered By	Results
May 9, 2011	cupcakes	Keyword		Relevance		24
May 9, 2011	poetry	Keyword		Relevance		3567
May 9, 2011	agatha christie	Keyword		Relevance		347
May 9, 2011	poe	Keyword		Relevance		225
May 9, 2011	Viewing all records	Keyword		Recently added items first		282515

To clear the current search history and contents of the Cart, click the **Clear Session** link.

Clicking **Clear Session** will return the user to the **Search Results** screen.

VTLS Chamo

Login	Cart	Heading Search	Reserves Search	Search History	Clear Session

Search [   ] Search Advanced Search

Current Search: **Viewing all records**

Note: The **Clear Session** link is only available to users who are not logged-in (guest users). Logged-in patron users may clear their recent search history and contents of the **Cart** by clicking the **Logout** link.

Items Details Screen

To view more information about an item, click on the item's title. The **Item Details** screen will display.

The item information includes: author, publisher, physical description, list of copies, and the location and availability of the copies.

To perform a search for more items by that author click the author's name from the **Item Details** screen.

Chamo will then display a **Search Results** screen showing all the library's works by that author you selected.

☐ 1. **Complete stories and poems of Edgar Allan Poe.**
Poe, Edgar Allan, 1809-1849
Call Number   F POE
Publisher   Doubleday,
Year   1966
    8 copies are available at
       Headquarters   (4 available)
       Bordeaux   (2 available)
       Hope Mills   (1 available)
          Show more...

    OpenURL
    WorldCat Search
    Search in Harvard's catalog
    [Request]

☐ 2. **The raven / Edgar Allan Poe ; with illustrations by Ryan Price.**
Poe, Edgar Allan, 1809-1849
Publisher   KCP Poetry,
Year   2006
    4 copies are available at
       Headquarters   (1 available)
       Cliffdale   (1 available)
       Hope Mills   (1 available)
          Show more...

    OpenURL
    WorldCat Search
    Search in Harvard's catalog
    [Request]

Viewing More Information

The tabs at the bottom of the **Item Details** screen allow users to view more specific information about an item.

The **Copies** tab shows information about each copy of the item at branch library locations.

To **sort** copies on the **Item Details** screen by item status click on the **Status** column header, the status sort will be:

Available
Non-circulating
Special statuses (sorted by the status name defined in the *Virtua Profiler*)
Checked out (regular)
Checked out (in-house)
Checked out (reserve)

| Copies | MARC Record | Reviews | Details | Additional Information |

Filter copies for specific issues: Volume [   ] - [   ] Year [   ] - [   ] [Filter]

Location	Call Number	Units	Copy Number	Barcode	Status	Collection Code	
Headquarters - Paperback Collection	MYSTERY CHRISTIE		0	31781040770099	Available		Request
Cliffdale	F CHRISTIE		0	31781003078191	Available		
Hope Mills	F CHRISTIE		0	31781040920272	Available		
Headquarters	F CHRISTIE		0		In Processing		
East Regional - Adult Paperbacks	MYSTERY CHRISTIE		0	31781019773116	Requested		Request
Headquarters	F CHRISTIE		0	31781049120502	Due September 8, 2009		

To **filter** copies by location use the **Location** drop-down list on the **Copies** tab.

Copies	Details

Location [_____] ▾ [Filter]

Showing 1 to 10 of 11   << < 1 2 > >>

Location	Call Number	Units	Copy Number	Barcode	Status	
City Hall (*301000000)	[Fic]		1	2010082113	Available	Request
Hong Kong Central (*1000000)	[Fic]		2	2010082311	Available	Request
Hong Kong Central (*1000000)	[Fic]		1	2010082112	Available	Request
Hong Kong Central (*1000000)	[Fic]		1	20110216a	Available	Request
Hung Hom (705000000)	[Fic]		1	2010082116	Available	Request
Hung Hom (705000000)	[Fic]		1	2011013101	Non-Circulating	Request
Kowloon (302000000)	[Fic]		2	2010082114	Available	Request
Kowloon (302000000)	[Fic]		2	2011013102	Non-Circulating	Request
Kowloon (302000000)	[Fic]		3	2011013103	Non-Circulating	Request
Kowloon (302000000)	[Fic]		0	2011013104	Non-Circulating	Request

Select a location from the drop-down list and click **Filter**.

Copies	MARC Record	Reviews	Details

Location [Kowloon (302000000)] ▾ [Filter]

Location	Call Number	Units	Copy Number	Barcode	Status	
Kowloon (302000000)	[Fic]		2	2010082114	Available	Request
Kowloon (302000000)	[Fic]		2	2011013102	Non-Circulating	Request
Kowloon (302000000)	[Fic]		3	2011013103	Non-Circulating	Request
Kowloon (302000000)	[Fic]		0	2011013104	Non-Circulating	Request

Only copies from the selected location display.

The **MARC Record** tab shows the information for the item in MARC format. This format is of most interest to librarians. **Note:** This tab is optional to the library.

Copies	MARC Record	Reviews	Details	Additional Information

```
         01011cam a22003258a 4500
001      vtls000183760
003      NcFayC
005      20070115194100.0
008      920320s1992 nyu b 000 1 eng
010      $a 92-52933 //r94
020      $a 0679417400 : $c $26.00
035      $a (OCoLC)ocm25675918
039  9   $a 200701151941 $b VLOAD $y 200406232036 $z load
040      $a DLC $c DLC $d HQB
049      $a HQBA
082  0  0 $a 813/.3 $2 20
099      $a F $a POE
100  1   $a Poe, Edgar Allan, $d 1809-1849.
240  1  0 $a Tales. $f 1992
245  1  4 $a The complete stories / $c Edgar Allan Poe.
260      $a New York : $b Knopf : $b Distributed by Random House, $c 1992.
300      $a xxxv, 955 p. ; $c 21 cm.
440  0   $a Everyman's library
500      $a "First included in Everyman's library, 1906"--T.p. verso.
501      $a MARCIVE 03/01/06
504      $a Includes bibliographical references (p. ).
650  0   $a Detective and mystery stories, American.
650  0   $a Horror tales, American.
913  0  0 $a POECSTO99000
999      $a VIRTUA50
```

The **Reviews** tab shows all library patron reviews submitted for the item.

The **Details** tab shows added details about the item.

The **Additional Information** tab contains links to additional information about the item, such as reviews and summaries.

The **Issues** tab contains information about specific holdings at branch library locations and information about the issues available for items such as journals and magazine subscriptions.

Note: Issues may appear in a tree format, with the most recent issues at the top. To view the levels in the tree, click on the arrow next to each level.

Compressed serial holdings information displays on the **Item Details** screen as:

vol. no. - vol. no.
YYYYMMM – YYYYMMM

A 863 tag with:
\8 1.2 \a 87-88 \b 21-6 \i 1962-1963 \j Dec-Mar \w g

Displays in Chamo as:
v. 87 no. 21 - v. 88 no. 6 1962 Dec - 1963 Mar

The Cart

Adding Items to the Cart

To add bibliographic records to the cart:

Place a check in the check box located beside the title on the **Search Results** screen.

Select the **Add to Cart** button at the top *or* bottom of the screen.

A message displays:
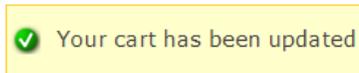
Note: Once items are in the cart they remain there until the browser refreshes or the session times out.

To view the items in the cart click on the **Cart** link to display all the items listed in the cart during the current Chamo session.

Cart

When the '**Perform operations on'** drop-down list box is available on the **Cart** screen the **Cart** buttons will operate either on all records in the **Cart** or only on selected records in the **Cart** depending on which option is selected.

- **Selected records** - The buttons operate *only* on the records that are checked.

- **All records** - The buttons operate on *all* records in the cart.

Email Items from the Cart

To send the cart items via email:

Place a check in the check box next to the items to send and click **Email**.

Enter the sender's e-mail and the recipient's email address.

Note: The entered **Sender's email** is used to transmit the e-mail. Users may email items from the cart to only *one* recipient at a time.

Complete the CAPTCHA verification and click **Submit**.

A message displays:
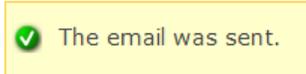
Export an Item from the Cart

To export bibliographic information about items in the cart place a check in the check box beside each item, select an export format, and click **Export As...**

Items may be exported to **Full View** format, **CSV** format, **EndNote** format, **MARC** format **ISO 2709** format, or **MARCXML** format.

Export Item to Full View Format

The .txt file contains bibliographic information displayed on the **Item Details** screen.

To open or save the exported cart item(s) in **Full View** format (.txt file):

Select the item(s) by placing a check in the check box.

Select **Full View** from the export as drop-down list box.

Click **Export As...**

Select either the **Open with** or **Save File** radio button and click **OK**.
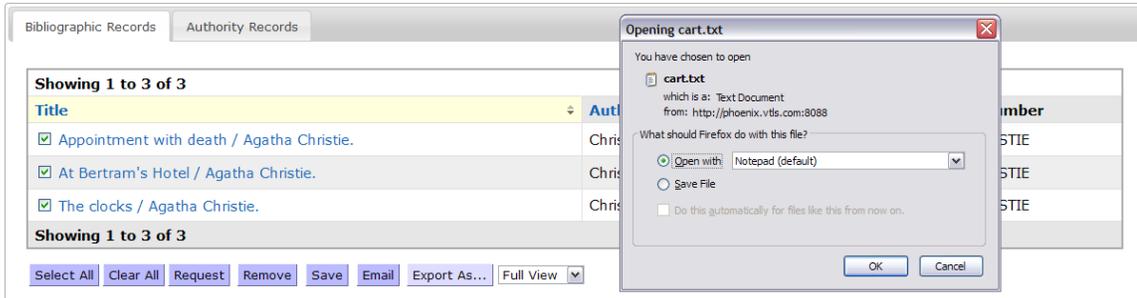
Export Item to CSV Format

The .csv file contains bibliographic information about the items.

To open or save the exported cart item(s) in **CSV** format (.csv file):

Select the item(s) by placing a check in the check box.

Select **CSV** from the export as drop-down list box.

Click Export As…

Select either the **Open with** or **Save File** radio button and click **OK**.
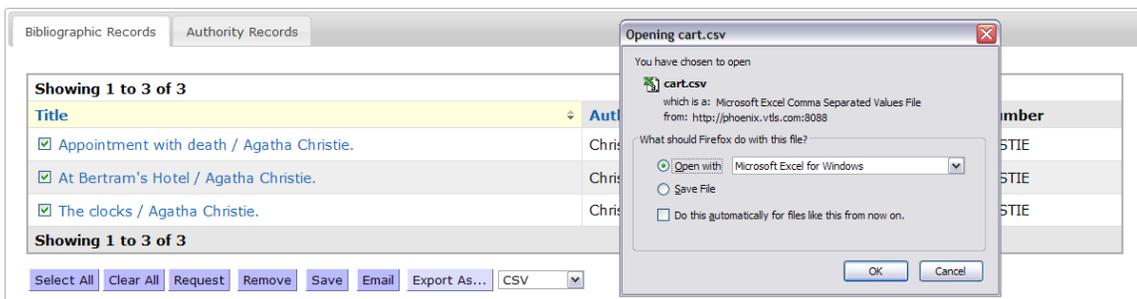
Export Item to EndNote Format

The .txt file contains bibliographic information about the items.

To open or save the exported cart item(s) in **EndNote** format (.txt file):

Select the item(s) by placing a check in the check box.

Select **EndNote** from the export as drop-down list box.

Click **Export As…**

Select either the **Open with** or **Save File** radio button and click **OK**.
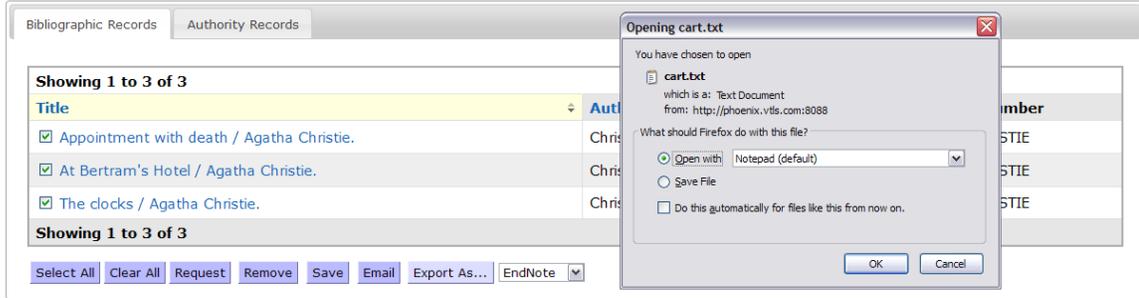
Export Item to MARC Format

The .txt file contains bibliographic information from the MARC record. Items that cannot be exported are marked with an asterisk in the file.

To open or save the exported cart item(s) in **MARC** format (.txt file):

Select the item(s) by placing a check in the check box.

Select **MARC** from the export as drop-down list box.

Click **Export As...**

Select either the **Open with** or **Save File** radio button and click **OK**.
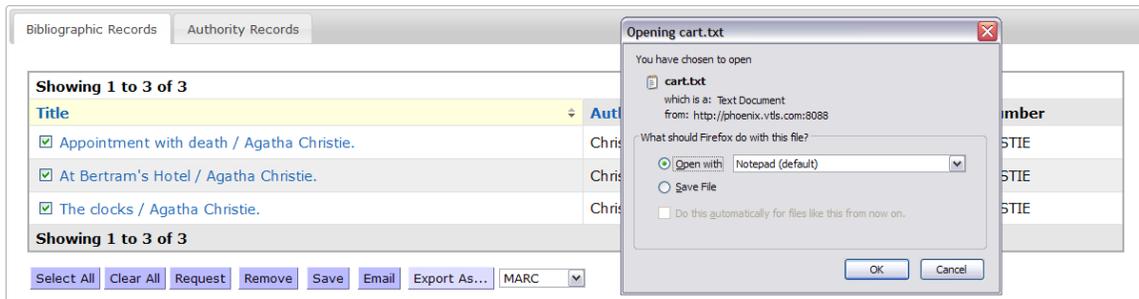
Export Item to ISO 2709 Format

The .rec file contains bibliographic information and can be viewed and imported via the Virtua client. Items that cannot be exported are marked with an asterisk in the file.

To save the exported cart item(s) in **ISO 2709** format (.rec file):

Select the item(s) by placing a check in the check box.

Select **ISO 2709** from the export as drop-down list box.

Click **Export As...**

Select either the **Open with** or **Save File** radio button and click **OK**.
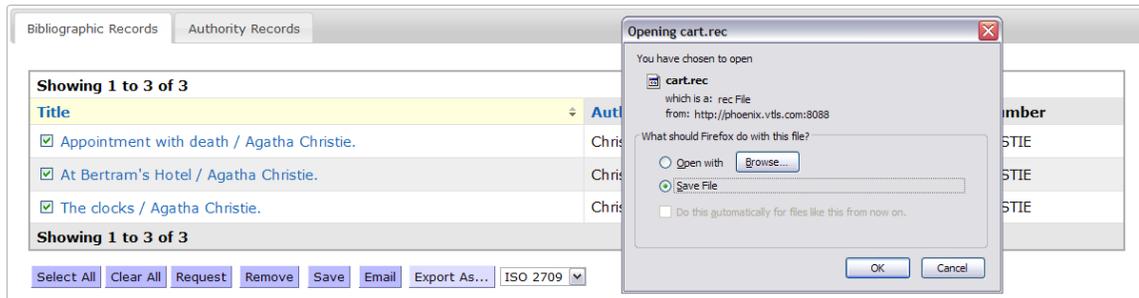
Export Item to MARCXML Format

The .xml file contains MARC 21 information in a XML format.

To open or save the exported cart item(s) in **MARCXML** format (.xml file):

Select the item(s) by placing a check in the check box.

Select **MARCXML** from the export as drop-down list box.

Click **Export As...**

Select either the **Open with** or **Save File** radio button and click **OK**.
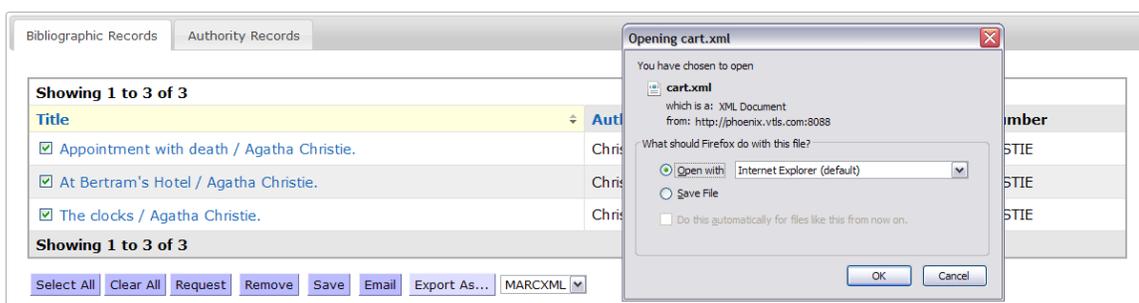
Subscribe to a RSS Feed

To subscribe to a RSS feed of frequently run searches:

Click the 📶 icon at the top of the **Search Results** screen. Clicking this icon opens the web browser's RSS subscription page to select how to subscribe to the feed.

Select a method to subscribe to the feed using options in the drop-down list box, for example, Live Bookmarks.

Subscribe to this feed using 📶 Live Bookmarks

☐ Always use Live Bookmarks to subscribe to feeds.
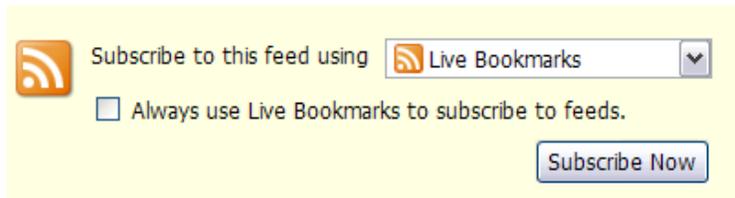
Subscribe Now

Click **Subscribe Now** to open the **Subscribe with Live Bookmark** window.

Subscribe with Live Bookmark

Name: Chamo Syndication Feed

Folder: 🔖 Bookmarks Toolbar

Subscribe   Cancel
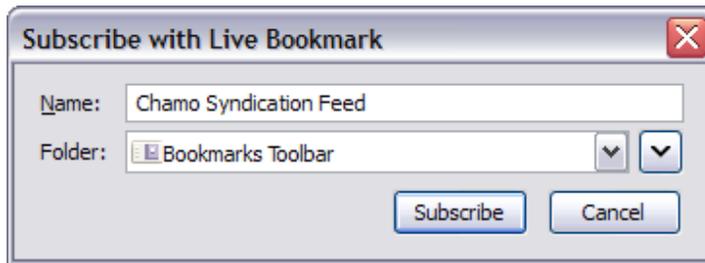
Enter a **Name** in the text box, select **Folder** information from the drop-down list box, and click **Subscribe**.

Note: To subscribe to a feed a **feed reader** is required.

Create Social Media Links

As soon as a search is performed the search and results can be shared with others using the **AddThis™** link . The **AddThis™** application helps create a link on a chosen social media site to the current **Search Results** screen.

To share search results click on the **AddThis™** link, select a social media site, login to the site, and post the information.
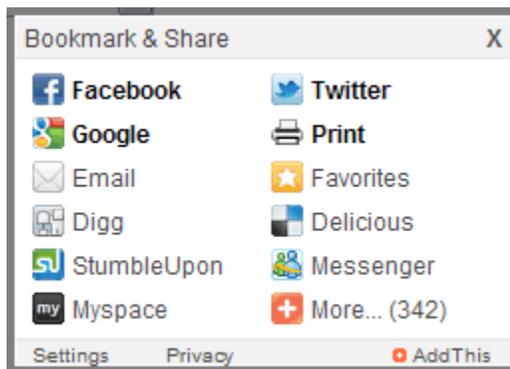
Once the process is complete a message displays:
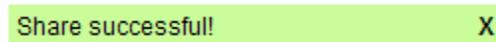
Also, use the **AddThis™** link to send an email or to print the results page.

Purchase Request

To request that the library purchase an item:

Select the Request for Purchase link.

Reserves Search	Search History	Request For Purchase	Clear Session

Search   Advanced Search   Search Other Content

Click the **Library policy regarding purchase requests** link. Read the policy and select the check box to indicate acceptance of the policy.

Request for purchase

Library policy regarding purchase requests

☐ I understand and will comply with the library policies regarding purchase requests.

Edit as many fields as possible on the **Request for Purchase** screen. The fields marked with an asterisk (*) are required fields. The **Notes** field should contain the reason for requesting the title.

Click the **Submit** button.

Note: If a user selects the *Please notify me by e-mail if this item is purchased* check box, and the library has a valid e-mail address on file, the user will receive an e-mail message when the library orders the requested item.

Profiler Tip: The Source of Selection parameter in the *Virtua Profiler/Acquisitions Parameters* lets you define source of selection values that can be assigned to purchase order line items in the client. See *Working with the Source of Selection Parameter* in the *Virtua Profiler/Acquisitions Parameters User's Guide* for more information.

Request for purchase

Library policy regarding purchase requests

☐ I understand and will comply with the library policies regarding purchase requests.

Author

[   ]

Title*

[   ]

ISBN

[   ]

ISSN

[   ]

Material Type*

[Choose One ▾]

Place of Publication

[   ]

Year of Publication

[   ]

Publisher Name

[   ]

Music Publication Number

[   ]

Most Frequently Visited Branch*

[Choose One ▾]

Where did you learn of this item?

[Choose One ▾]

Notes*

[   ]

Your Contact Information

Title (Mr., Ms., Miss, etc.)

[   ]

Name

[   ]

Address

[   ]
[   ]
[   ]

Telephone Number

[   ]

E-mail Address

[   ]

☐ Please notify me by e-mail if this item is purchased

[Submit] [Reset]

Patron Account

Patron Features include My Account, My Lists, My Tags, Logout, and Save as My Search. A Username and Password are required to login and use the patron features. Patrons may also use the following Guest Features: Cart, Heading Search, Reserves Search, Advanced Search, Request for Purchase, and Search History.

Create a Patron Account

Self-Registration and Patron Login Validation

To register for a new account with the library and create a valid patron login:

Click on the **Login** link.

Click the **Create a new account link**.
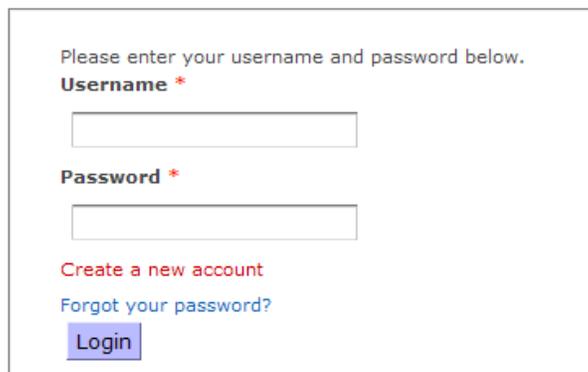
Please enter your username and password below.
Username *

Password *

Create a new account
Forgot your password?
Login

To accept the registration policy and create an account click **Accept**.

Registration Policy

Accept   Cancel

Complete the registration form. The fields marked with an asterisk (*) are required fields.

Patrons will only be able to select a main location as their home library when registering via Chamo or updating their contact information.

Personal Information

*Username

*E-mail

Prefix

*First Name

Middle Name

*Last Name

Suffix

*Birth Date [   ] 📅

Gender
[Choose One ▾]

Home Library
[Choose One ▾]

*Communication Preference
[Paper ▾]

Language
[Choose One ▾]

Save history of checked out books ☐

Primary Address

*Street

*City

*State

Country

*Postal Code

County

Telephone

Cell Phone

Fax

Attention Of

Note: The **Register** screen will only accept numbers in the telephone number fields.

Note: If a CAPTCHA image is displayed at the bottom of the registration screen, patrons are required to complete this element before their registration information can be accepted. (This feature is enabled by *admin* and may not be used by all libraries.) If a user refreshes the **Register** screen, the CAPTCHA image at the bottom of the screen is refreshed.

Click **Register** at the bottom of the screen.

After a user submits a self-registration a librarian reviews the information. Once the library issues the patron a library card and password the user can log in as a patron.

Note: When patrons register through the Chamo interface, Chamo automatically sets the patron's Registering Library (248 tag subfield $b) to the default location of the current theme.

Valid E-mail Address

In order for a patron to create a new account or to edit his/her contact information a valid email address must be used. If the e-mail address is found not to match the standard format, an error message displays: **'email name' is not a valid email address** and the patron information is not submitted successfully. The patron account is not created until a valid email address is entered and submitted.

Register

Personal Information

*Username

vtls416

'oconnelle@vtls' is not a valid email address.
*E-mail

oconnelle@vtls

Prefix

First Name

Elizabeth

Middle Name

*Last Name

O'Connell

Suffix

*Birth Date 1988-04-16

Gender

Choose One

Home Library

Bellefonte

*Communication Preference

Paper

Language

Save history of checked out books ☐

Primary Address

*Street

1701 Kraft

*City

Blacksburg

County

Montgomery

*State

VA

Country

USA

*Postal Code

24060

Telephone

557-1200

Cell Phone

Fax

'oconnellt@vtls' is not a valid email address.
E-mail

oconnellt@vtls

Attention Of

After a valid email address is entered and submitted a confirmation message displays:

✅ Your contact information has been updated.
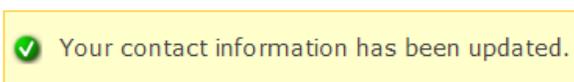
Login

Patron Login

To login as a patron a username and password are required. There are two ways to login to Chamo as a patron: The **Login** link or the **Account Login** section on the **Search Results** screen.

To login:

Select the **Show Username** check box to display the characters in the patron's username as they are entered in the **Username** field. If the check box is NOT selected, the characters in the patron's username are masked and do not display when they are entered.

Enter your library barcode in the **Username** field and your password in the **Password** field.

Click **Login**.

After you have logged into your account the **Search Results** screen displays various patron links such as: **My Account**, **My Lists**, **My Tags**, **Cart**, **Heading Search**, **Reserves Search**, **Search History**, **Request for Purchase**, and **Logout**.

In addition, if a patron has any messages they display on the **Search Results** screen upon login *and* on the **My Account** screen.

Forgot your password? Link

Request a New Password

To request a new password:

Click on the **Forgot your password?** link on the **Login** screen to open the **Reset Password** screen.
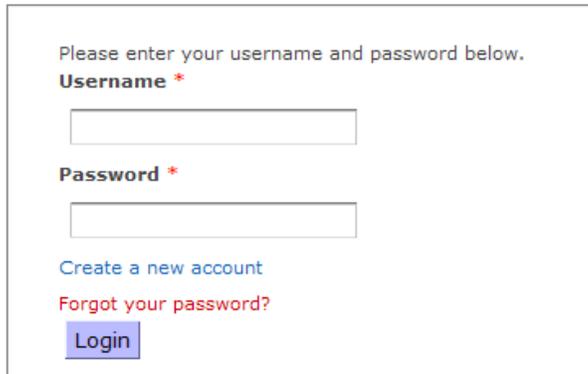
Enter the patron barcode and email address in the text boxes.

Click **Reset Password**.

An email is sent to the patron with a new password. A message displays:
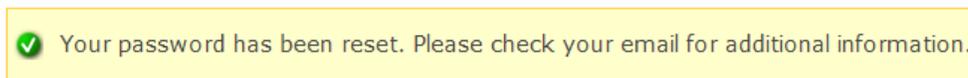
When a request is made for a new password Chamo resets the password and sends the new password to the patron via email. The patron uses this new password to login. Once logged into Chamo the patron has the option to change the password.

To change a password:

Login with the *system generated password* from the email.

Please enter your username and password below.
Username *

Password *

Create a new account

Forgot your password?

Login

Note: The first time the patron logs into Chamo he/she will be prompted to change the password. The **Change Password** screen automatically opens.

✅ A password change is required before continuing.

Change Password

Change Password

* **Current Password**

* **New Password**

* **Confirm Password**

Save

Enter the Current Password, New Password, and Confirm Password.

Click **Save**.

✅ Your password has been successfully updated.

Changing Passwords or PINs

There may be times when a patron wants to change a password or PIN for personal reasons. If the *admin* user has enabled this feature, patrons may change passwords or PINs on the **Contact** tab of the **My Account** screen.

To change a password through the **Contact** tab:

Click on the **My Account** link and then the **Contact** tab.

Click on the **Change Password** link to open the **Reset Password** screen.

Enter the Current Password, New Password, and Confirm Password.

Click **Save**.

Note: When a patron changes his/her password using the **Change Password** link on the **Contact** tab he/she will receive a confirmation e-mail *only* if there is a valid e-mail address in the patron record AND the patron's communication preference is set to **E-mail** or **Text and E-Mail**. Otherwise, a message displays:

To change the PIN, a patron may click the **Change PIN** link and follow a similar workflow.

Billed Patron Note

When a patron has a billed note, the note is displayed at the top of the screen when the patron is logged in. **Note:** The note remains until a staff member removes the note.

On the **Search Results** screen:

On the **My Account** screen:

My Account

The **My Account** screen shows a patron's username and a section with various tabs: **Blocks**, **Messages**, **Checked Out**, **Requests**, **Account**, **History**, **Contact**, **Queue**, and **Notes**.

Note: Tabs are item/issue specific and may not appear for every user.

Depending on the library's settings, there may be an **I lost my card** button beneath the patron's name. If the patron lost his/her library card, he/she can click this button to have the library card deactivated so that no one else can use it.

Blocks Tab

The **Blocks** tab displays blocks against the patron account. **Note:** Patrons can only view blocks; they cannot remove blocks. In most cases, a librarian has to remove blocks.
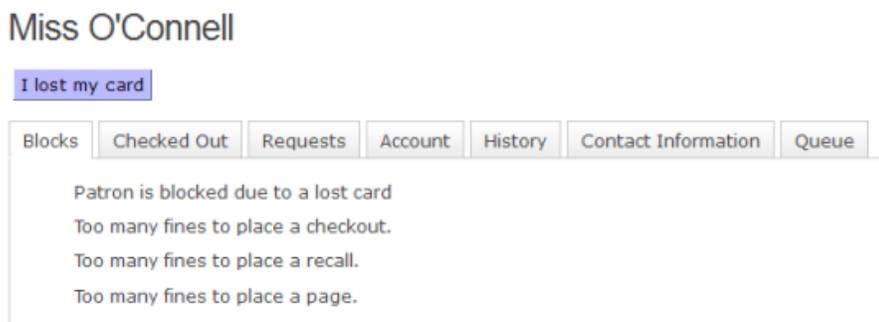
Messages Tab

If a patron has a message a notification displays on the **Search Results** screen. To view the message either click on the **You have a message** link or on the **My Account** link. Both options open the **My Account** screen and defaults to the **Messages** tab.

New messages display in bold on the Messages tab of the **My Account** screen. To mark a message a read, click the **Mark as read** button.

To delete a message, click the **Delete** button associated with the message.

Checked Out Tab

The **Checked Out** tab lists items currently checked out and lets a patron renew eligible items or save a CSV file of checked out items.

To renew eligible items click the check box next to each item in the **select for renewal** column or use the **Select All** button and then click the **Renew** button.

A confirmation message displays:

Renewal Results

1 items were successfully renewed.

Note: If an item is not eligible for renewal, the **select for renewal** column displays a message instead of a check box.

When a patron has a group of items checked out, the patron is able to renew the entire group of items even if a *single item* incurs a fine that would otherwise block the renewal of other items.

Any fine assessment is displayed to the patron *after* the group of items is renewed.

When a patron has multiple items checked out, the **Page size** drop-down list on the **Checked Out** tab may be used to limit the number of items shown on one page (10, 20, 30, 40, 50). This setting *is* persistent.

Requests Tab

The **Requests** tab displays patron requests and shows the place in the request queue for that item. Requests are sorted by status. Patrons can **Modify**, **Deactivate**, or **Cancel** requests from the **Requests** tab. Note that patrons cannot cancel, modify, activate, or deactivate a request once an item has been trapped to satisfy it.

To modify a request, click the **Modify** button associated with the item. The **Request Details** screen opens to change the **Main Location**, **Pick-up Location** or the **Last Needed Date** (optional). Click **Save** after changes are made.

Request

Pick-up Location*
Lamoni-Book Collection

Last Needed Date
2012-11-03

Continue   Cancel

To postpone a request, click the **Deactivate** button associated with the item.

Deactivating a request means that the request is postponed and permits others in the request queue to temporarily move above the patron above them in the queue until the patron reactivates the request.

A message appears near the top of the screen, notifying a patron that the request has been deactivated.

✅ Your request has been deactivated.
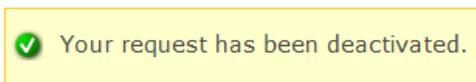
Once a request is deactivated an **Activate** appears next to the item.

Checked Out	Requests	Account	Contact						

Showing 1 to 2 of 2

Title	Units	Date Placed	Last Needed Date	Pick-up Location	Request Type	Status	Place in Queue	Notice Sent			
Literature and film.		September 4, 2012	September 11, 2012	Lamoni-Book Collection	Recall	Available for pick-up		Yes			
Just kids / Patti Smith.		September 4, 2012	November 3, 2012	Lamoni-Book Collection	Hold	Pending	1	No	Modify	Activate	Cancel

Showing 1 to 2 of 2

Click **Activate** to make the request current. A message appears near the top of the screen, notifying a patron that the request has been activated.

✅ Your request has been activated.
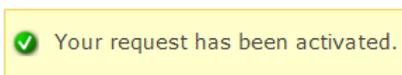
To remove a request permanently from the queue, click the **Cancel** button associated with the requested item. The selected item is removed and a message displays:

✅ Your request has been canceled.
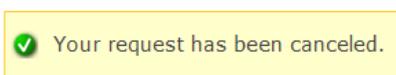
Account Tab

The **Account** tab shows any outstanding fees charged to a patron account. Some fees have a *View Note* link in the **Note** column.

Note: Lost/Damaged Items notes are available on the **Account** tab via a Note link.

Miss Hannah O'Connell

I lost my card

| Blocks | Checked Out | Requests | Account | History | Contact Information | Queue |

Total Balance: $ 11.72

Showing 1 to 2 of 2

Title	Fee Type	Date Posted	Fee Amount	Balance	Note
Tom's Book for Train	Item Price Fee	July 27, 2010	$ 5.10	$ 3.60	
Graphic classics : Edgar Allan Poe / edited by Tom Pomplun.	Lost/Damaged Item Replacement Fee	April 29, 2011	$ 8.12	$ 8.12	View Note

Showing 1 to 2 of 2

To view the note, click the **View Note** link.

Mozilla Firefox

http://phoenix.vtls.com:8082/?wicket:interface=:15::::&theme=sam

```
Lamination Cost: $ .00
Binding Cost: $ .00
Surcharge: $ .00
Depreciated Unit Price: $ 8.12
Total Replacement Cost: $ 8.12
```
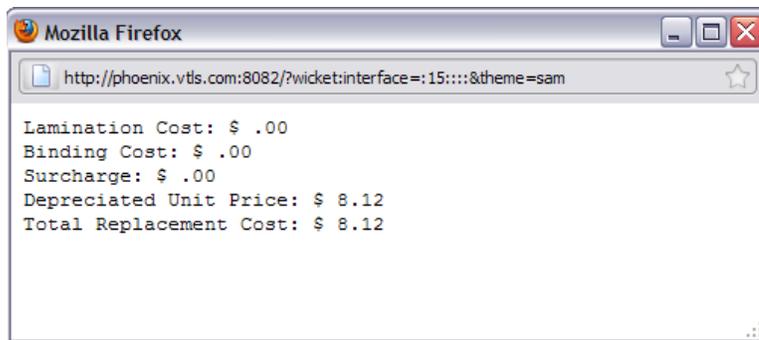
History Tab

The **History** tab displays patron transaction information for checkouts and check-ins.

| Checked Out | Requests | Account | History | Contact Information | Notes |

Showing 1 to 2 of 2

Title	Check-out Date	Check-in Date
The Brooklyn follies / Paul Auster.	September 20, 2011	September 26, 2011
Appointment with death / Agatha Christie.	September 26, 2011	

Showing 1 to 2 of 2

Note: The **History** tab on the **My Account** screen only displays if a patron has selected to save a history of his/her checked out items AND the **History** tab is one of the Enabled Account Tabs as specified on the **Patron Features** administrative screen.

To display the **History** tab:

On the **My Account** screen click the **Contact** tab. Select Edit .

Check or uncheck the **Save history of checked out books** box and click **Save**.

Note: When a patron chooses to not keep a search history, the **History** tab no longer appears on the **My Account** screen.

Contact Tab

The **Contact** tab displays patron information, for example, the patron's name, birth date, address, telephone number, email, etc. Depending on the library's settings patrons may be able to edit their personal information or change their password or PIN.

To edit personal information and address click the **Edit** link to display the **Contact Information** screen.

Note: The **Register** screen will only accept numbers in the telephone number fields.

The value must contain numbers only.
Telephone

(540) 557-1201

Cell Phone

5405571201

Note: Patrons *cannot* change their communication preference to **Email** or **Text and Email** unless they have a valid email address **OR** remove their email address unless their communication preference is set to **Paper** or **Text Message**.

Contact Information

Personal Information

* Birth Date 2010-02-22

Home Library

Bordeaux

* Communication Preference

Email

* Language

Save history of checked out books ☑

Primary Address

*Street

1701 Kraft Drive

*City

Blacksburg

*County

*State

VA

*Country

*Postal Code

24060

*Telephone

557-1200

*Cell Phone

Fax

E-mail

oconnellt@vfls.com

Attention Of

Save Cancel

Click the **Save** button at the bottom of the screen after changes are made.

Queue Tab

The **Queue** tab shows items that a patron has placed in a queue from a search.

To change the priority of items in the queue, use the up and down arrows in the **Title** column to move the items to the desired position. To remove items from the queue, select the check box next to the item(s) to remove and click **Remove**.

To place items in the queue select items from the **Cart** or **My Lists** and click **Add to Queue**.
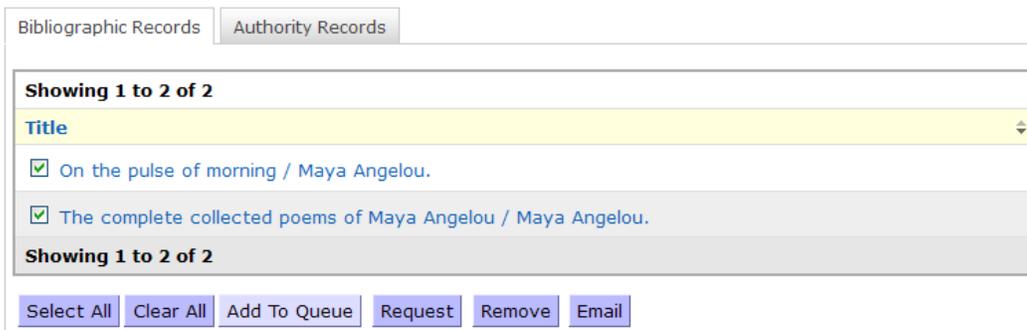
After items have been added a message displays:
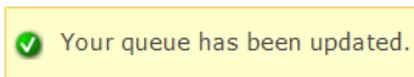
Notes Tab

The **Notes** tab displays all notes associated with the patron account.

Note: The contents of the 500 tag of a patron record only display on the **Notes** tab *if* the second indicator of the 500 tag is 0 or 1.

Lost Card

When a patron loses a card Chamo informs the patron that either their card has been reported as lost or their lost card is now disabled depending on the *admin* setting for lost cards. (See **Admin Features**.)

To report a lost card:

Click on the **I lost my card** button.

If the admin setting **add a 'lost card' block to the patron** is enabled a warning message displays:

Click **OK**.

A confirmation message displays:

Card has been reported as lost.

Note: After a card is reported lost patrons will be able to login to their accounts but circulation privileges are denied until the block is removed.

If the admin setting **disable the lost barcode** is enabled, select the lost library barcode from the drop-down list and click the **OK** button.

Report A Lost Card

Select the card you lost from the list below

Library Card vtls214

OK   Cancel

A warning message displays:

Reporting a card as lost will disable the card. You will not be able to use the card number to log into your account. Do you want to report this card as lost?

OK   Cancel
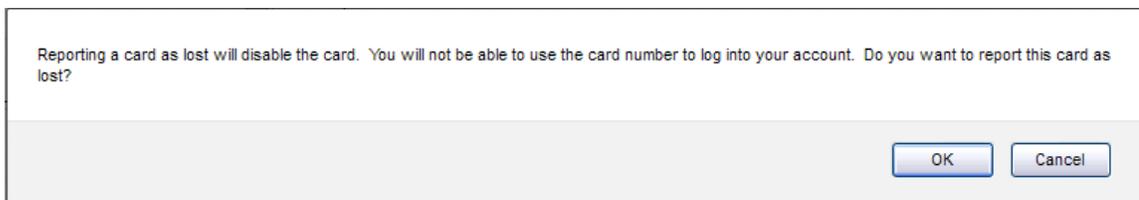
Click **OK**.

A confirmation message displays:

✔ Your lost card is now disabled.

When a patron reports a card as lost, *that* card will be disabled, and the patron will not be able to use that card or card number for any library services. When a patron tries to login with the disabled ID a message displays:

✖ Your card has been reported lost.

Requests

Requesting an Item

Requests can be made from either the **Search Results** screen or **Item Details** screen.

To place a request on an item on the **Search Results** screen:

Click the **Request** button associated with the item's title.

Note: The number and location of available copies are listed beneath the item's title.

To place a request on an item on the **Item Details** screen:

Click the **Request** button associated with the item's title,

-OR-

On the **Copies** tab, click the **Request** button next to the specific *copy* of the item.

Any method opens the **Place a Request** screen.

To place a request:

Select a Pick-up Location and Last Needed Date (optional).

Note: Patrons cannot select the current date as the **Last Needed Date** for requests placed through Chamo.

Click **Request**.

The **Item Details** screen appears for the item requested and a message describing the status of the request appears at the top of the screen.

If a patron attempts to place requests on more than one item at once and doing so would exceed the patron's request limit, *none* of the requests are placed.

Note: When a patron request has expired, the **Requests** tab on the **My Account** screen will show a status of **Expired**.

| Checked Out | Requests | Account | Contact Information | Notes |

Showing 1 to 2 of 2

Title	Units	Date Placed	Last Needed Date	Pick-up Location	Status	Place in Queue
Appointment with death / Agatha Christie.		September 26, 2011	October 11, 2011	Bellefonte	Pending	3
The clocks / Agatha Christie.		September 26, 2011	September 26, 2011	Bellefonte	Expired	3

Showing 1 to 2 of 2

Circulation Group Requests

When one or more items in a **circulation group** are unavailable for request, Chamo warns the user that only the primary item can be requested and asks the user if they would like to continue.

| Copies | MARC Record | Reviews | Details |

Location	Call Number	Units	Copy Number	Barcode	Status	
Hong Kong Central (*1000000)	821/.914		1	53535353535306	Available	Request
Hong Kong Central (*1000000)	821/.914		1	62626262626606	Due November 27, 2011	Request
Hong Kong Central (*1000000)	821/.914		1	2nd1	Due November 27, 2011	
Hong Kong Central (*1000000)	821/.914		1	2nd2	Available	

Request

Items are part of a group

Some items in the group are unavailable. Only the primary item will be requested.

Instructions / Neil Gaiman ; [illustrated by] Charles Vess.

[Accept] [Cancel]

Volume Level Requests: Serials

The system allows multiple requests to be placed based on a bibliographic record *only* if the requests are made on *different* volumes.

To place multiple volume-level requests against a single bibliographic record:

Click the title of the item to navigate to the **Item Details** screen.

On the Item Details screen **Copies** tab click the **Request** button associated with the specific volume to open the **Place a Request** screen.

Location	Call Number	Issues	Status	Barcode	Item Class	eResource	
Headquarters	2008/10	vol. 9 no. 10 October 2008	Available	31781048910150	Magazines		Request
Headquarters	2008/11	vol. 9 no. 11 Nov. 2008	Available	31781048913964	Magazines		Request
Headquarters	2008/12	vol. 9 no. 12 Dec. 2008	Available	31781049277187	Magazines		Request
Headquarters	2009/01	vol. 10 no. 1 Jan. 2009	Available	31781049317835	Magazines		Request
Headquarters	2009/02	vol. 10 no. 2 Feb. 2009	Available	31781049319203	Magazines		Request
Headquarters	2009/03	vol. 10 no. 3 Mar. 2009	Available	31781048822447	Magazines		Request
Headquarters	2009/04	vol. 10 no. 4 Apr. 2009	Due August 19, 2009	31781049362484	Magazines		Request
Headquarters	2009/05	vol. 10 no. 5 May 2009	Available	31781048466476	Magazines		Request
Headquarters	2009/06	vol. 10 no. 6 June 2009	Available	31781048561094	Magazines		Request
Headquarters	2009/07	vol. 10 no. 7 July 2009	Due August 18, 2009	31781043578002	Magazines		Request

Showing 11 to 20 of 81 << < 1 2 3 4 5 6 7 8 9 > >>

Select Main Location, Pick-up Location and Last Needed Date (optional).

Note: Patrons cannot select the current date as the **Last Needed Date** for requests placed through Chamo.

Click **Request**.

A message displays:

Your request has been submitted for "O : the Oprah magazine.".

The **Requests** tab on the **My Account** screen displays a **Units** column. This column is populated with the volume number for volume-level requests.

Note: Patrons will not be able to place multiple volume-level requests against items of the same volume attached to a bibliographic record. If a patron selects an item that they have already requested, the request will not be placed successfully.

When a multiple volume-level request for the same volume is requested a message displays:

Volume Level Requests: Non-Serial Items

Volume-level requests for non-serial items placed through Chamo can be satisfied by any item of the requested volume.

When performing an auto request in Chamo for an item that has no units, an item-level request will be created.

Note: If Chamo's request settings force a request for an item with no units to be a volume-level request, the item will not qualify and the request will fail.

Unit-Level Page Request

Patrons may place unit-level page requests for material that is not associated with any item record. When a patron places a unit-level request in the patron interface, Chamo displays a question that prompts the patron to identify the item he/she wishes to request. The patron's answer to the question is displayed on the confirmation page and the request slip.

Note: A unit-level request made through Chamo only creates requests slips and does not place any pending requests on a patron's account.

My Lists

Create a List

After items have been added to the cart, click on the **My Cart** link and place a check in the check box next to each item to save to a permanent list.

Click **Save** to open the **Your Lists** screen.

Select either **Create New List** (assign a new name) or **Add to Existing List** (select an existing list from the drop-down list box).

Your Lists

⊙ **Create New List**
List Name

[   ]

○ **Add to Existing List**

[Choose One   ▾]

[Save] [Cancel]

Click **Save**.

View a List

Click the **My Lists** link. The **Your Lists** screen shows any lists a patron has created during the current Chamo session and lists from previous Chamo sessions.

Your Lists

Showing 1 to 2 of 2	
List Name ⇕	**Items**
☐ Cupcakes	4
☐ Poe Project	3
Showing 1 to 2 of 2	

[Select All] [Clear All] [Delete] [Merge]

To **view** a list, click on the **List Name** to open the **List Details** screen. To view an item in the list, click the **Title**.

Poe Project

Showing 1 to 2 of 2		
Title ⬍	Author	Call Number
☐ Complete stories and poems of Edgar Allan Poe.	Poe, Edgar Allan, 1809-1849	F POE
☐ Poems and prose / Poe.	Poe, Edgar Allan, 1809-1849	J811.3 P
Showing 1 to 2 of 2		

[ ] [Add Tag]

Select All | Clear All | Add To Queue | Request | Remove | Create Citation | Email | Export As... | CSV ▾

Delete a List

To **delete** a *list* from an account click the check box next to the list to delete and click the **Delete** button.

Your Lists

Showing 1 to 2 of 2	
List Name ⬍	Items
☐ Cupcakes	4
☑ Poe Project	1
Showing 1 to 2 of 2	

Select All | Clear All | Delete | Merge

To **remove** an *item* from the list, click on the list name, click the check box next to the *item* to delete, and then click the **Remove** button.

Poe Project

Showing 1 to 2 of 2		
Title ⬍	Author	Call Number
☑ Complete stories and poems of Edgar Allan Poe.	Poe, Edgar Allan, 1809-1849	F POE
☐ Poems and prose / Poe.	Poe, Edgar Allan, 1809-1849	J811.3 P
Showing 1 to 2 of 2		

[ ] [Add Tag]

Select All | Clear All | Add To Queue | Request | Remove | Create Citation | Email | Export As... | CSV ▾

Merge Lists

To merge two or more lists into one single list:

Select the check boxes next to the lists to merge and click **Merge**.

A new screen opens with two options for naming the merged lists: **Create New List** (assign a new name) or **Add to Existing List** (merge the selected lists into an existing list).

Click on the **Merge** button to merge the lists into a new list.

Note: Only non-duplicate titles are merged. If an item exists on more than one of the selected lists after the merge only one of the titles displays in the list.

Note: Once the lists are merged, the old lists are deleted.

Request an Item from a List

To **request** one or more items on the list:

Click the check box next to the item(s) to request and then click the **Request** button.

Select Main Location, Pick-up Location and Last Needed Date (optional).

Request

Main Location Filter
Choose One

Pick-up Location
Headquarters

Last Needed Date

Request Cancel

Click **Request**.

Email a List

To send the list via email:

Place a check in the check box next to the items to send and click **Email**.

Poe Project

Title	Author	Call Number
Showing 1 to 4 of 4		
☐ Complete stories and poems of Edgar Allan Poe.	Poe, Edgar Allan, 1809-1849	F POE
☑ The poems of Edgar Allan Poe / edited with an introduction, variant readings and textual noted by Floyd Stovall.	Poe, Edgar Allan, 1809-1849	
☑ Poems and prose / Poe.	Poe, Edgar Allan, 1809-1849	J811.3 P
☐ The collected tales and poems of Edgar Allan Poe.	Poe, Edgar Allan, 1809-1849	F POE
Showing 1 to 4 of 4		

Add Tag

Select All Clear All Add To Queue Request Remove Create Citation Email Export As... CSV

Enter the sender's e-mail and the recipient's email address.

Note: The entered **Sender's email** is used to transmit the e-mail.

Complete the CAPTCHA verification and click **Submit**.

Email list:

Sender's e-mail

Recipient's e-mail

Verification

d2g7a

Enter the words from the box above

Submit

A confirmation message appears:

✓ The email was sent.
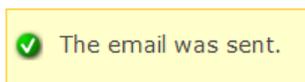
Note: Users may email items from a list to only *one* recipient at a time.

Export a List

To export a list, click on the List name, and then place a check in the check box next to each item to export. Items may be exported to Full View format, CSV format, EndNote format, MARC format, ISO 2709 Format, or MARCXML format.

Murder Mysteries

Showing 1 to 3 of 3

Title	Author	Call Number
☑ Appointment with death / Agatha Christie.	Christie, Agatha, 1890-1976	F CHRISTIE
☑ At Bertram's Hotel / Agatha Christie.	Christie, Agatha, 1890-1976	F CHRISTIE
☑ The clocks / Agatha Christie.	Christie, Agatha, 1890-1976	F CHRISTIE

Showing 1 to 3 of 3

Select All   Clear All   Request   Remove   Email   Export As...   Full View ▾

Export List to Full View Format

The .txt file contains bibliographic information displayed on the **Item Details** screen.

To export a list in **Full View** format (.txt file):

Select the item(s) by placing a check in the check box.

Select **Full View** from the export as drop-down list box.

Click **Export As...**

Select either the **Open with** or **Save File** radio button and click **OK**.
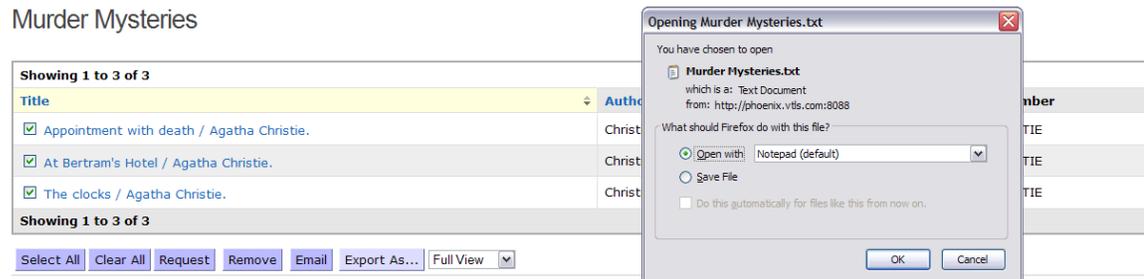
Export List to CSV format

The .csv file contains bibliographic information about the items.

To export a list in **CSV** format (.csv file):

Select the item(s) by placing a check in the check box.

Select **CSV** from the export as drop-down list box.

Click **Export As...**

Select either the **Open with** or **Save File** radio button and click **OK**.
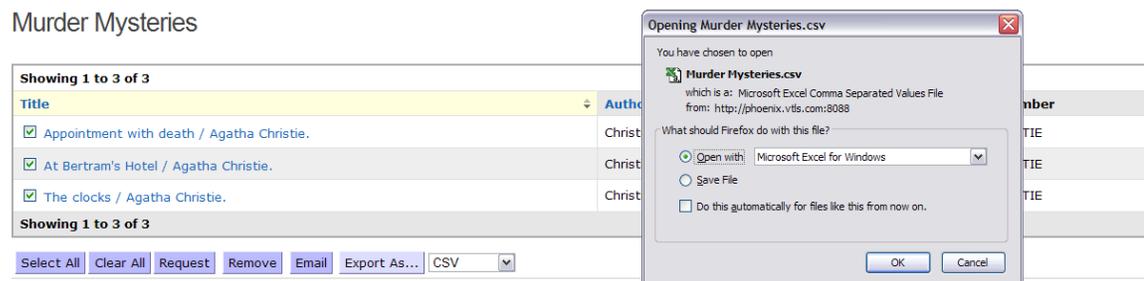
Export List to EndNote format

The .txt file contains bibliographic information about the items.

To export a list in **EndNote** format (.txt file):

Select the item(s) by placing a check in the check box.

Select **EndNote** from the export as drop-down list box.

Click **Export As...**

Select either the **Open with** or **Save File** radio button and click **OK**.
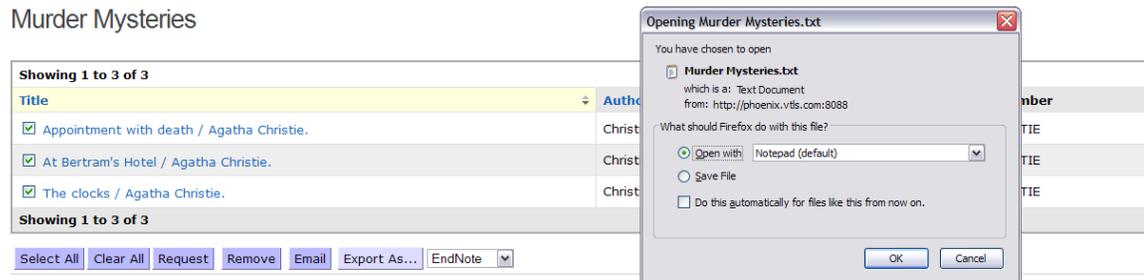
Export List to MARC

The .txt file contains bibliographic information from the MARC record. Items that cannot be exported are marked with an asterisk in the file.

To export a list in **MARC** format (.txt file):

Select the item(s) by placing a check in the check box.

Select **MARC** from the export as drop-down list box.

Click **Export As...**

Select either the **Open with** or **Save File** radio button and click **OK**.
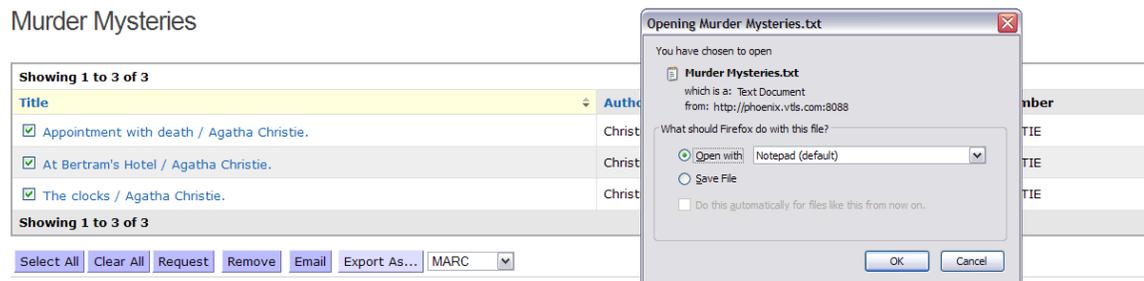
Export List to ISO 2709 Format

The .rec file contains bibliographic information and can be viewed and imported via the Virtua client. Items that cannot be exported are marked with an asterisk in the file.

To export a list in **ISO 2709** format (.rec file):

Select the item(s) by placing a check in the check box.

Select **ISO 2709** from the export as drop-down list box.

Click **Export As...**

Select either the **Open with** or **Save File** radio button and click **OK**.

Murder Mysteries

Showing 1 to 3 of 3		
Title	**Auth**	**nber**
☑ Appointment with death / Agatha Christie.	Christ	TIE
☑ At Bertram's Hotel / Agatha Christie.	Christ	TIE
☑ The clocks / Agatha Christie.	Christ	TIE
Showing 1 to 3 of 3		

Select All   Clear All   Request   Remove   Email   Export As...   ISO 2709 ⌄

Opening Murder Mysteries.rec

You have chosen to open
🗎 Murder Mysteries.rec
    which is a: rec File
    from: http://phoenix.vtls.com:8088

What should Firefox do with this file?

○ Open with   Browse...
◉ Save File

☐ Do this automatically for files like this from now on.

OK   Cancel
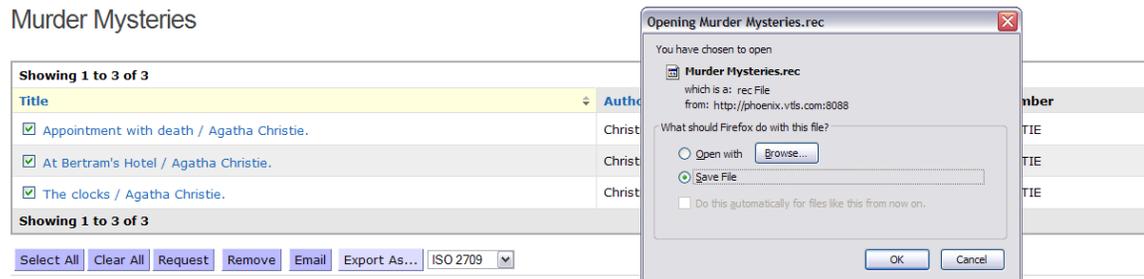
Export List to MARCXML Format

The .xml file contains MARC 21 information in a XML format.

To export a list in **MARCXML** format (.xml file):

Select the item(s) by placing a check in the check box.

Select **MARCXML** from the export as drop-down list box.

Click **Export As...**

Select either the **Open with** or **Save File** radio button and click **OK**.

Murder Mysteries

Showing 1 to 3 of 3		
Title	**Auth**	**nber**
☑ Appointment with death / Agatha Christie.	Christ	TIE
☑ At Bertram's Hotel / Agatha Christie.	Christ	TIE
☑ The clocks / Agatha Christie.	Christ	TIE
Showing 1 to 3 of 3		

Select All   Clear All   Request   Remove   Email   Export As...   MARCXML ⌄

Opening Murder Mysteries.xml

You have chosen to open
🗎 Murder Mysteries.xml
    which is a: XML Document
    from: http://phoenix.vtls.com:8088

What should Firefox do with this file?

◉ Open with   Internet Explorer (default)   ⌄
○ Save File

☐ Do this automatically for files like this from now on.

OK   Cancel
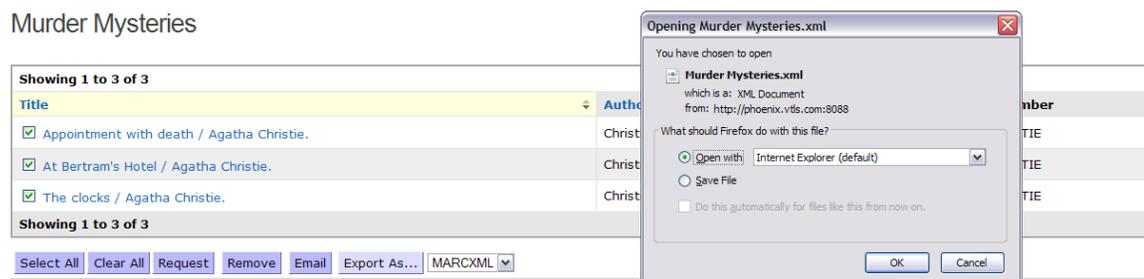
My Tags

View Tags

The **View Tags** screen shows the tags a patron has added to item records.

To view items tagged with a certain tag, click on the tag's name. A **Search Results** screen then appears with all items that have been tagged with that tag.

Add a Tag

To add a tag to an item on the **Item Details** screen:

Edit the **My Tags** text box and click **Add Tag**.

Note: Tags display on each tagged item's **Item Details** screen and are accessible to **all** Chamo users.

Delete a Tag

To remove a tag from the **View Tags** screen:

Click the check box next to the tag and click **Delete**.

Scary stories was successfully removed

To remove a specific *item* from a tag:

Click the box ❌ next to the tag on the **Item Details** screen.

My Tags
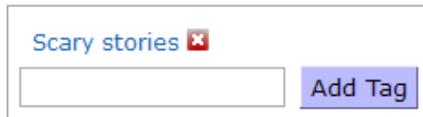
Scary stories ❌

Add Tag

Note: Only the patron who created the tag can modify or delete the tag.

Rating Items

Patrons may rate an item using a five-star rating system on the **Item Details** screen.

To rate an item:

Click the number of stars that best rates the item. Once an item is rated the **Average Rating** may change and the **Total Ratings** increases.

Note: Patrons may only rate an item once. A patron may rate an item again or change a rating but it will *not* count in the **Average Rating**. The change will only be effective for the **Your Rating** scale since the system will not let a patron rate an item more than once.

The complete stories / Edgar Allan Poe.

Poe, Edgar Allan, 1809-1849
Record 3 of 64
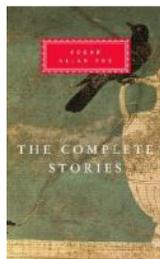
Call Number	F POE
Publication	New York : Knopf : Distributed by Random House, 1992.
Physical Description	xxxv, 955 p. ; 21 cm.
Subject	Detective and mystery stories, American.
	Horror tales, American.

OpenURL
WorldCat Search
Search in Harvard's catalog

Request

Add To Cart
My Tags

Add Tag

Average Rating: ⭐⭐⭐☆ Total Ratings: 1
Your Rating: ⭐⭐⭐☆

Reviews

Write A Review

To create a review for an item:

Click the **Write a Review** link on the **Item Details** screen.

Complete stories and poems of Edgar Allan Poe.

Poe, Edgar Allan, 1809-1849
Record 2 of 64
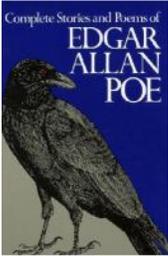
Call Number	F POE
Publication	Garden City, N.Y. : Doubleday, c1966.
Physical Description	ix, 821 p. ; 22 cm.

OpenURL
WorldCat Search
Search in Harvard's catalog

Request

Add To Cart
My Tags

Add Tag

Total Ratings: 0
Rate this book: ☆☆☆☆☆
Write A Review

The **Create A Review** screen opens.

Write the review in the text box and click the **Submit Review**.

Create A Review

Submit Review   Cancel

After the review is submitted you will be prompted back to the **Item Details** screen and the review will be displayed.

Hide <<

Excellent compilation of Poe at his best!

Edit Your Review | Delete Your Review

Created: *May 21, 2011*

Copies | MARC Record | Reviews | Additional Information

No Reviews to Display

Note: After *Admin* approval reviews are available to *all* library users on the **Reviews** tab.

Copies | MARC Record | Reviews | Additional Information

May 21, 2011

Excellent compilation of Poe at his best!

See All Reviews

Edit a Review

To edit a review:

Click on the **Edit Your Review** link

Hide <<

Excellent compilation of Poe at his best!

Edit Your Review | Delete Your Review

Created: *May 9, 2011*

Edit the review in the textbox and click **Submit Review.**

Edit A Review

```
Wonderful compilation of Poe at his best!
```

Submit Review   Cancel

Note: If the **Reviews are moderated** setting is enabled then modified reviews must be approved by the *admin* user before they will appear on the **Item Detail** screen. When a review is modified, the review appears at the top of the **Reviews** tab of the **Item Details** screen.

Delete a Review

To delete a review click the **Delete Your Review** button.
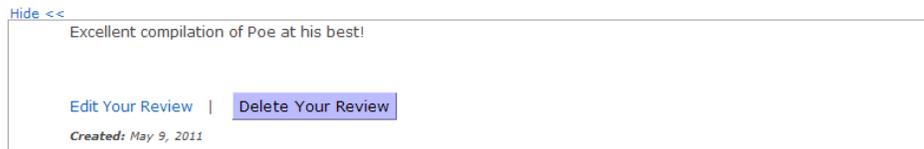
Note: Only the patron who created the review can modify or delete the review.

Save a Search as a Default Search

Patrons may save a search as their default search. Once the search is saved, the results for that search will be displayed the next time the patron logs in.

To save a search as a default search, click the **Save as My Search** button at the top right of the **Search Results** screen.
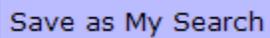
Save as My Search

The saved search remains the default search until the patron changes it. To reset the search screen to default settings click the **Clear My Search** button.
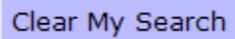
Clear My Search

Setting Results per Page

By default, Chamo displays 10 results per page. To change the number of results that display on the **Search Results** screen use the **Results per page** drop-down list box at the bottom of the screen and select 20, 30, 40 or 50.

Results per page	10		1 | 2 | 3 | 4 | Next >
	10		
	20		
	30		© 2008-2011 VTLS
	40		
	50		

Logout

To logout from an account click the **Logout** link.

Clicking **Logout** clears the patron's current search history and contents of the cart and returns the user to the **Search Results** screen:

Staff Features

Login

To login as staff both a username and password are required. The staff username and password need to be setup in the *Profiler* under User Profiles. Staff may share a common username and password, share a group username and have individual passwords, or have individual usernames and passwords.

To login, click on the **Login** link on the Chamo Home page and enter a username in the **Username** field, a password in the **Password** field, and click the **Login** button.

After staff members have logged in they can access the Chamo Homepage and staff features.

Accounts

Staff may send and delete patron messages and view patron information such as currently checked-out items, outstanding fines or fees, requests, and edited contact history.

Note: Staff users are able to view patron records in the Chamo interface *if* the Chamo > View Patron Information Operational Security permission is enabled for that user in the *Virtua Profiler*.

View Patron Account

To access a patron account click on the **Accounts** link to open the **View Patron Account –Patron Lookup** screen.

View Patron Account

Enter Patron's Barcode

[   ]

Submit

To view a patron account type or scan a patron barcode in the text box and click the **Submit** button to open the **View Patron Account** screen.

To view information about the patron's account, click the various tabs associated with the account: **Messages**, **Checked Out**, **Requests**, **Account**, **Contact**, **Queue,** or **Contact Edit History.**

Ms. O'Connell

Upload photo [   ] Browse… Upload

Reset All Passwords Reset PIN

| Messages | Checked Out | Requests | Account | Contact Information | Queue | Contact Edit History |

New Message

[   ]

Send Message

No records found to display.

To send a message to a patron, click the **Messages** tab and type a message of up to 1000 characters in the **New Message** text box and click **Send Message**.

| Messages | Checked Out | Requests | Account | Contact Information | Queue | Contact Edit History |

New Message

Your library card was found and returned to the circulation desk.

Send Message

Staff may also delete a message from the patron's account. To delete a message, click the **Delete** button associated with the message.

Showing 1 to 1 of 1		
Message	**Date Sent**	
Your library card was found and returned to the circulation desk.	May 13, 2011	Delete
Showing 1 to 1 of 1		

Note: To purge deleted patrons messages and export the deleted messages to a log file use the **PurgePatronMessages.sh** script.

When a patron has multiple items checked out, the **Page size** drop-down list on the **Checked Out** tab may be used to limit the number of items shown on one page (10, 20, 30, 40, 50). This setting *is not* persistent.

Generate a New Password for a Patron

To reset a patron's password or PIN upon request:

Login to a patron's account and click **Reset All Passwords** or **Reset PIN**.

Chamo will generate a new password or generate a new PIN and do the following:

Send an email to the email address in the patron record that contains a new password or a new PIN.

Delete the old password or PIN from the patron account and replace it with the newly generated password or PIN.

Prompt the user to change their password or PIN the first time they log into their account using the system-generated password or PIN.

Note: Chamo will not allow a staff user to reset a patron's password or PIN unless the patron has a valid email address (MARC tag 271 with a first indicator of '1') and the patron's **Communication Preference** is set to **Email**; otherwise, passwords need to be reset manually.

100		\a Kowalska \d 19250825 \h Maria
245		\a Student
247		\a AGRICULTURE & APPLIED ARTS-BRENHAM \b 10051
270	1	\a 1701 Kraft Drive \b Blacksburg \d VA \e 24060
271	1	\a oconnelle@vtls.com

* Communication Preference

Email

Logging Edits to the Patron Account

The **Contact Edit History** tab of the Patron Account displays changes made to a patron's contact information. When a patron edits the contact information tab of their Patron Account, Chamo places a time/date stamp and the field(s) that was modified on the **Contact Edit History** tab.

To view a patron's contact information history:

Login to a patron's account.

Click on the **Contact Edit History** tab.

To sort the entries in the column click on the **Field Edited** or **Date Edited** links.

| Messages | Checked Out | Requests | Account | Contact Information | Queue | Contact Edit History |

Showing 1 to 3 of 3

Field Edited	Date Edited
Prefix	2011-06-07 10:46:46
Maintain Checkout History	2011-06-07 10:46:46
Home Library	2011-06-07 10:46:46

Showing 1 to 3 of 3

Managing the Queue

The **Queue** is associated with homebound services that a library may provide. If a library keeps track of materials of homebound patrons, staff can manage the patron's queue.

To manage a patron's queue:

Select items from the Cart and click **Add to Queue**.

Cart

Showing 1 to 2 of 2
Title
☑ The mirror crack'd / Agatha Christie.
☑ Miss Marple : the complete short stories / Agatha Christie.
Showing 1 to 2 of 2

Select All   Clear All   Add To Queue   Remove

When selected items are added to the queue, staff are prompted to enter the patron's barcode and click **Save**.

Enter Patron's Barcode

Enter Patron's Barcode

Save

✅ The patron's queue has been updated

To view/modify a patron's queue:

Login to a patron's account.

Click on the **Queue** tab.

To rearrange items in a patron's queue use the up/down arrows; to delete items in a patron's queue select items and click **Remove**.

Messages | Checked Out | Requests | Account | Contact Information | Queue | Contact Edit History

Showing 1 to 2 of 2		
Title	**Author**	**Call Number**
▲ ▼ ☐ Miss Marple : the complete short stories / Agatha Christie.	Christie, Agatha, 1890-1976	F CHRISTIE
▲ ▼ ☐ The mirror crack'd / Agatha Christie.	Christie, Agatha, 1890-1976	F CHRISTIE
Showing 1 to 2 of 2		

Remove   Select All   Clear All

Recent Tags

The **Recent Tags** screen allows staff users to view and ban user tags and to access links to tags and patron accounts.

To access the **Recent Tags** screen click the **Recent Tags** navigation menu item. To view user tags, enter the number of days in the *Show tags for last number of days* text box and click the **Refresh** button.

Recent Tags

Show tags for last number of days: 10   Refresh

A list appears with the tags written within the selected timeframe, along with the patron(s) who added the tag.

Recent Tags

Show tags for last number of days: 10   Refresh

☐ BIB
    Alyx Vance
    Alyx Vance
    Alyx Vance
    Show more...

☐ Jane Eyre Resources
    Elisa Dinkle
    Elisa Dinkle
    Elisa Dinkle
    Show more...

Ban

To ban a tag, select the check box next to the tag to ban, and click the **Ban** button at the bottom of the screen.

To view a tag on the **Item Details** page, click the tag name. A **Search Results** screen appears with all items that have been tagged with that tag. 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.

Note: Patron names on the **Recent Tags** *staff* screen *are* hyperlinked to patron accounts. Only staff users may link to a patron's account.

List Management

Staff may create and manage lists that are either shared or independent depending on the type of staff login. Staff with the same login password can create and manage shared lists; staff with individual login passwords can create and manage independent lists.

Most staff users have restricted permissions for saved lists (e.g. can only add items to lists at their log-in location) but the *Saved List Superuser* (as designated on the Operational Security tab on the Permissions window in the *Virtua Profiler*) can access and modify lists at any location.

Note: Only staff users can create lists. Saved list management features are *deactivated by default* for staff users. *Admin* must enable saved lists on the **Saved List Management** screen.

Creating a Saved List

To create a saved list:

Click on the **Create Saved List** link.

Type the name of the list in the **Name** field.

Type a description of the list in the **Description** field. (optional).

Type a group name in the **Group** field (optional).

Select the **Type** of list: Bibliographic Record, Patron, or Copy. Select **Bibliographic Record** to create a list of bibliographic records, **Patron** to create a list of patron records, or **Copy** to create a list of specific copies of item records.
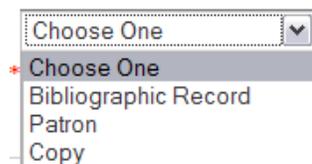
Select a **Location**. This is the location to which the list belongs; in most cases, this should be the staff user's login location.

Create Saved List

Name*

[   ]

Description

[   ]

Group

[   ]

Type*

[Choose One   ▼]

Workflow

[None   ▼]

Withdrawal Type

[Choose One   ▼]

Withdrawal Quarter

[Choose ▼]

Withdrawal Year

[   ]

Location*

[Brenham Campus Librar ▼]

[Create]

Click **Create** to create a list with the specified parameters.

After the list is created the **Saved List Management** screen opens to display the contents of the saved list.

edit **Name**   Suspense Novels
    Id   58
    Type   Copy
    Location   Islamabad
edit **Group**
    Date Created   September 27, 2011
    Creator   staff
    Frozen   No
    Workflow   None
    Last Modified   September 27, 2011
    Last Modified By   staff
edit **Description**   Agatha Christie

List Import
Import File [   ] [Browse...] [Import]
Location
[Use the owning location of the copy ▼]

[Freeze] [Export] [Copy] [Scan barcodes] [Merge Entries Into...] [Delete List]

Move the selected 0 entries after record number [   ] [Move] [Select All] [Clear All]

No records found to display.

Creating a Saved List with a Workflow

Staff can create a **Copy** saved list with a designated workflow for the list. The workflow designation will be stored as part of the data for the list and can be used for filtering when searching saved lists.

To create a **Copy** saved list with a designated workflow:

Select **Copy** as the list type and **LOLM** (Lamination of Library Materials) or **Withdrawal** for the workflow.

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 *admin* **Saved List Configuration** screen for more information).

Copying Saved Lists

Saved Lists may be copied to create a new saved list. List types that can be copied are:

Bibliographic Record copied to Bibliographic Record
Patron copied to Patron
Copy copied to Copy or Bibliographic Record

Note: Copy Saved Lists with Workflows *cannot* be copied.

To make a copy of a Saved List:

Click on the **Saved List Management** link.

Select a saved list to copy. Click on the title to open the saved list.

```
edit Name          Suspense Novels
     Id            58
     Type          Copy
     Location      Islamabad
edit Group
     Date Created  September 27, 2011
     Creator       staff
     Frozen        No
     Workflow      None
     Last Modified September 27, 2011
     Last Modified By staff
edit Description   Agatha Christie
```

Freeze	Export	Copy	Scan barcodes	Merge Entries Into...	Delete List

Move the selected 0 entries after record number [＿＿＿] | Move | Select All | Clear All

Click the **Copy** button to open a dialogue box.

Enter the Name, Description (optional), Type (for **Copy** saved lists only), and Location.

Name*

[＿＿＿＿＿＿＿＿＿＿＿]

Description

[＿＿＿＿＿＿＿＿＿＿＿]

Location*

[Choose One   ▼]

[Copy]

Name*

[＿＿＿＿＿＿＿＿＿＿＿]

Description

[＿＿＿＿＿＿＿＿＿＿＿]

Type*

[Copy   ▼]

Location*

[Choose One   ▼]

[Copy]

Click **Copy**.

A message displays:

Adding Items to a Saved List

There are several options to add items to a saved list: **Scan Barcodes** or **Import Files**.

Note: Barcodes can be scanned to add entries to **Patron** or **Copy** saved lists ONLY; barcodes <u>cannot</u> be scanned to add entries to **Bibliographic Record** saved lists OR to **Patron** or **Copy** saved lists at a *different location*.

Scan Barcodes

To add entries to a saved list *(at log-in location only)*:

Click **Scan barcodes**.

A pop-up window appears.

Scan the barcodes.

Type the number of labels to print for that item. **Note:** This option only appears for **Copy** lists.

Select **Location** (optional). This option is only available for **Patron** saved lists, **Copy** saved lists without workflow, and **Copy** saved lists with LOLM workflow.

Click **Add** after each barcode is scanned.

Click the **X** in the upper right-hand corner to close the window.

The item is added to the list and appears on the **Saved List Management** screen.

edit **Name** Poetry Collection
    Id 58
    Type Copy
    Location Islamabad
edit **Group**
    Date Created September 27, 2011
    Creator staff
    Frozen No
    Workflow None
    Last Modified September 27, 2011
    Last Modified By staff
edit **Description** Haiku

	List Import	
Import File		Browse.. Import
Location		
Use the owning location of the copy		

Freeze	Export	Copy	Scan barcodes	Merge Entries Into...	Delete List

Move the selected 0 entries after record number [ ] Move   Select All   Clear All

Showing 1 to 1 of 1

	Order ⇕		Barcode	Title	Units	Call Number	AV Accession Number	Status	Collection Code	Item Class	Owning Location	Shelf Location	Bib ID	Author	Place of Publication
☐	1	Delete	31781000497386	An introduction to haiku; an anthology of poems and poets from Bashō to Shiki.		895.6 H		Available		Book	Bordeaux	Bordeaux	116531	Henderson, Harold Gould	Garden City, N.Y.,

Showing 1 to 1 of 1

Note: When a barcode is scanned to a saved list that already has that barcode a message displays:

The record specified is already present on the saved list.

Barcode: 1000173901
Title: Poetry : an introduction / John Strachan and Richard Terry.
Units:
Owning Location: BRENHAM STACKS
Call Number: 808.1 St81p 2001

The record specified is already present on the saved list.
Barcode*
[ ]

Label Count*
[1]

Location
[Use the owning location of the copy]

[Add]

Note: If an item does not qualify to be added to the list a message displays:

Barcode: 1000133289
Title: Edgar Allan Poe, the principal works: the Black cat [videorecording] / Independent Film Production Corporation in association with the Long Island Video Project ; produced by Christopher Cooke ; directed by Bruce Nalepinski.
Units: 105
Owning Location: HUMANITIES-BRENHAM
Call Number: VT 813.3 Ed33a

The copy must have a status that matches the withdrawal type.
Barcode*
[ ]

Label Count*
[1]

[Add]

Import Files

To upload a file of records to a current list *(at log-in location only)*:

Click **Browse…** on the **List Import** box to select a line-delimited text file of records to upload. The file must consist of bibliographic IDs, patron IDs, or item IDs, depending on the type of saved list.

Select a **Location** from the drop-down list to assign to the records on the imported list.

Click **Import**. The records in the file are added to the saved list.

A message window showing how many records were successfully imported and how many were not imported.
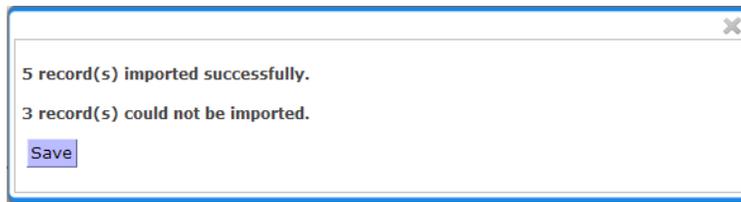
The **Save** button on this window lets staff view and/or download a text file that lists the entries in the import file that were not imported.
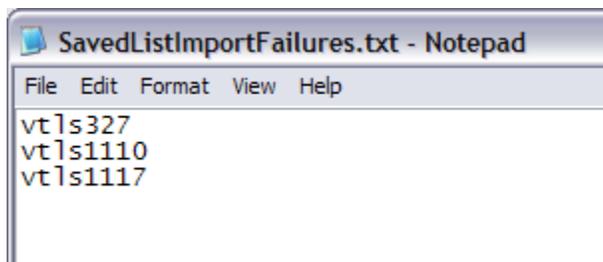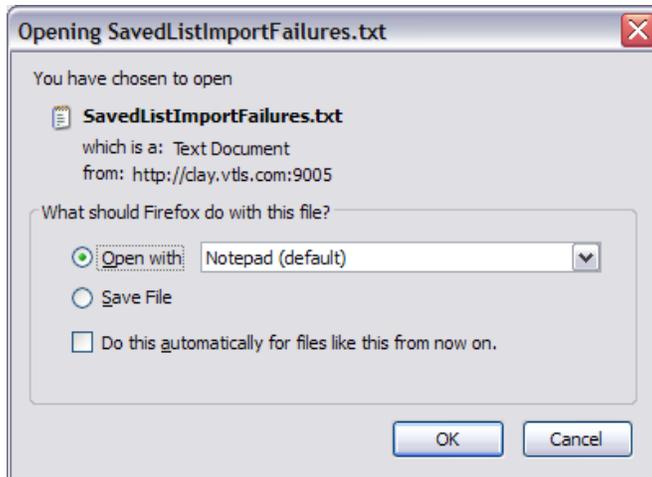
Note: Any invalid barcodes in an imported file will be ignored.

Note: Barcodes can be imported from a file to a **Patron** or **Copy** saved list only.

Adding Items to a Bibliographic Record Saved List

In addition to importing files to a **Bibliographic Record** saved list, another option to add items to a saved list is through a Chamo search.

To add items to a **Bibliographic Record** saved list:

Search for related items and add the items to the **Cart**. On the **Cart** tab select the items to save to the list and click **Save**, which opens the **Add Records to a Saved List** screen.

Select the list name from the **Available Saved Lists** drop-down list box and the **Location**.

Click **Add**. A message displays: The records were successfully added to your saved list.

Note: When a barcode is manually added to a list that already has that barcode a message displays:

Viewing a Saved List

To **view** a saved list:

Click on the **Saved List Management** link.

Click on the name of the saved list.

The information for each list shows the list Name, ID, list type, location, date of creation, creator, workflow, last modified date, last modified staff name, and description:

edit **Name** Agatha Christie
    Id 60
    Type Copy
    Location Islamabad
edit **Group** Suspense Mysteries
    Date Created September 27, 2011
    Creator staff
    Frozen No
    Workflow None
    Last Modified September 27, 2011
    Last Modified By staff
edit **Description** Poirot

| Freeze | Export | Copy | Scan barcodes | Merge Entries Into... | Delete List |

Move the selected 0 entries after record number [   ] | Move | Select All | Clear All

And the contents of the list:

Showing 1 to 2 of 2

	Order ⇕		Barcode	Title	Units	Call Number	AV Accession Number	Status	Collection Code	Item Class	Owning Location	Shelf Location	Bib ID	Author
☐	1	Delete	31781003078191	Death on the Nile / Agatha Christie.		F CHRISTIE		Available		Book	Cliffdale	Cliffdale	69952	Christie, Agatha, 1890-1976
☐	2	Delete	31781003078639	The mysterious affair at Styles / Agatha Christie.		F CHRISTIE		Available		Book	Cliffdale	Cliffdale	70079	Christie, Agatha, 1890-1976

Showing 1 to 2 of 2

To **sort** a saved list and **change the order** of the items:

Showing 1 to 2 of 2

	Order ⇕		Barcode	Title	Units	Call Number
☐	1	Delete	31781003078191	Death on the Nile / Agatha Christie.		F CHRISTIE
☐	2	Delete	31781003078639	The mysterious affair at Styles / Agatha Christie.		F CHRISTIE

Showing 1 to 2 of 2

Click on any column header and use the up/down arrows to sort the items by that category.

Showing 1 to 2 of 2

	Order ⇕		Barcode	Title	Units	Call Number
☐	2	Delete	31781003078639	The mysterious affair at Styles / Agatha Christie.		F CHRISTIE
☐	1	Delete	31781003078191	Death on the Nile / Agatha Christie.		F CHRISTIE

Showing 1 to 2 of 2

-OR-

Select the check boxes next to the item(s) to move.

In the *Move the selected 1 entries after record number* check box, type the number of the item under which you would like to move the selected item(s). Click the **Move** button.

The **Select All** and **Clear All** buttons are used in *selecting entries to re-order*. Click the **Select All** button to select all items for reordering; click the **Clear All** button to clear all selected items.

To **sort** a **Copy** saved list by *item status* click on the **Status** column header, the status sort will be:

Available
Non-circulating
Special statuses (sorted by the status name defined in the *Virtua Profiler*)
Checked out (regular)
Checked out (in-house)
Checked out (reserve)

When a saved list has multiple pages (i.e., more than 50 entries), a **Go to page** text box appears on the **Saved List Management** screen. 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 specified.

Note: Only lists with *more* than 50 entries have a **Go to page** text box for navigation.

A **Patron** saved list displays *all* patron notes in the **Note** column on the **Saved List Management** screen (regardless of the indicators or flags associated with the note field in the patron record).

Name	Title	Patron Type	Outstanding Balance	Registered Library	Date Added	Note
Mary Elizabeth Holm		Adult	$ 0.00	Headquarters	01-07-2013	General note for patron The second note
Hannah O'Connell		Adult	$ 0.00	Headquarters	04-23-2013	Library card was found.
Tom O'Connell		Adult	$ 0.00	Headquarters	04-23-2013	1st book request.

Note: All patron notes are included in the CSV file when the contents of a Patron saved list are exported.

Filtering Saved Lists

To filter saved lists:

Click on the **Saved List Management** link.

Use one or all of the following criteria to filter the lists: Type, Location, Name/Description, Group, Barcode, Date Created, Dated Modified, Workflow, or Withdrawal Type.

Note: In order to search for a saved list that has *not* been modified since its creation the **Last Modified Date** of newly created saved lists is considered to be the creation date.

Click **Filter**.

The list(s) that meet the specified criteria appear. Click on the name of a list to view the contents of the list.

Searching for Deleted Items for Archive Purposes

To search for deleted barcodes:

Select the **View Deleted Item** link to navigate to the **View Deleted Item** screen.

The **View Deleted Item** screen lets the staff user enter a barcode for a deleted item and view information about that item.

Type or scan the item barcode in the text box.

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.
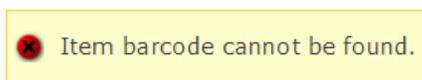
Viewing Bibliographic Record Saved Lists

Public OPAC URLs are generated for each bibliographic record saved list and are displayed on staff list pages. These public saved list pages can be seen by public users, show details about the lists, and link to the item details page for each bibliographic record within.

To see a *view* of a bibliographic record saved list copy and paste the URL into a new browser, save the link as a bookmark, or copy and paste the URL onto a new page and click the link.

Note: The URL leads to a *view* of the list that is accessible to all users. This *view* of the saved lists contains hyperlinks to the **Item Details** screen for each item, but *does not* offer any list management features.

Modifying a Saved List

To edit the **Name** and/or **Description** of a saved list:

Click on the **Saved List Management** link.

Select a list to modify and click on the name of the saved list.

Click the **edit** link next to the list name, group or description.

edit **Name**   Cupcakes:
     Id   24
     Type   Copy
     Location   Islamabad
edit **Group**
     Date Created   September 2, 2011
     Creator   staff
     Frozen   No
     Workflow   LOLM
     Last Modified   September 26, 2011
     Last Modified By staff
edit **Description**

| Freeze | Export | Scan barcodes | Update status | Receive | Merge Entries Into... |

Move the selected 0 entries after record number [   ] | Move | Select All | Clear All |

A dialog box pops up:

Name*

[   ]

| Save |

OR

Group

[   ]

| Save |

OR

Description

[   ]

| Save |

Modify the list name, group or description and click **Save.**

The list name or description updates as well as the **Last Modified** and **Last Modified By** fields.

edit **Name**   Cupcakes
      Id   24
      Type   Copy
      Location   Islamabad
edit **Group**
      Date Created September 2, 2011
      Creator   staff
      Frozen   No
      Workflow   LOLM
      Last Modified September 27, 2011
      Last Modified By staff
edit **Description**   Dairy-free recipes

Freeze Export Scan barcodes Update status Receive Merge Entries Into...

Move the selected 0 entries after record number [   ] Move Select All Clear All

Merging a Saved List

Two saved lists of the *same type* may be merged to create a new list.

Note: Regular staff cannot merge lists from other locations than their default login location but **Super Users** can merge lists at any location.

To merge the contents of one saved list to another saved list:

> Click on the **Saved List Management** link.

> Select a list to modify and click on the name of the saved list.

> Click the **Merge Entries Into...** button.

edit **Name**   Mystery
      Id   16
      Type   Copy
      Location   Bellefonte
edit **Group**
      Date Created August 15, 2011
      Creator   staff
      Frozen   No
      Workflow   None
      Last Modified August 17, 2011
      Last Modified By staff
edit **Description**   Agatha Christie

Freeze Export Copy Scan barcodes Merge Entries Into... Delete List

Move the selected 0 entries after record number [   ] Move Select All Clear All

A new window opens and displays other lists of the *same type* to merge with the original list.

Showing 1 to 2 of 2

	Id	Name	Type	Location	Group	Workflow	Withdrawal Type	Description	Last Modified	State	Entries
	16	Mystery	copy	Bellefonte		None		Agatha Christie	August 17, 2011	Unfrozen	1
Merge	17	Murder Mysteries	copy	Bellefonte		None		Poirot	August 17, 2011	Unfrozen	1

Showing 1 to 2 of 2

> Select a saved list and click the **Merge** button associated with the list.

A message displays:

The lists have been successfully merged.

Note: Once the contents of a list are merged into another list, duplicate entries are ignored and the *original list* is deleted.

Id	Name	Type	Location	Group	Workflow	Withdrawal Type	Description
17	Murder Mysteries	copy	Bellefonte		None		Poirot
15	Shakespeare	bib	Bellefonte	Plays	None		Tragedies
14	Bib list	copy	Headquarters		None		lisa's

Showing 1 to 10 of 10

Deleting a Saved List

To delete a saved *list:* (Only *Saved List Superusers* can delete lists.)

Open a saved list click on the **Saved List Management** screen.

Click on the name of a saved list.

Click **Delete List** to delete the saved list.

edit **Name**   Suspense Stories
     Id   59
     Type   Copy
     Location   Bellefonte
edit **Group**
     Date Created September 27, 2011
     Creator   staff
     Frozen   No
     Workflow   None
     Last Modified September 28, 2011
     Last Modified By staff
edit **Description**

Freeze   Export   Copy   Scan barcodes   Merge Entries Into...   Delete List

Move the selected 0 entries after record number [   ]   Move   Select All   Clear All

A confirmation message appears:

Are you sure you wish to delete this saved list?

OK   Cancel

Click **OK**.

Note: Copy saved lists with workflows (**Withdrawal** or **LOLM**) can only be deleted if there are no items in the list. The **Delete** button *will not* appear for populated lists.

```
edit Name                    Poetry
     Id                      22
     Type                    Copy
     Location                Bellefonte
edit Group
     Date Created            August 31, 2011
     Creator                 staff
     Frozen                  No
     Workflow                Withdrawal
     Withdrawal Type         (Missing)
edit Withdrawal Quarter      Q3 2011
edit Withdrawal Authority
     Last Modified           September 28, 2011
     Last Modified By        staff
edit Description
```

| Freeze | Export | Scan barcodes | Merge Entries Into... |

Move the selected 0 entries after record number [   ] | Move | | Select All | | Clear All |

Saved list information is retained and can be queried from the database after a saved list is deleted.

Note: Since deleted saved list names are retained in the database, no new saved lists can be created with these names. The deleted lists are available via Ad Hoc views.

Create Saved List

A saved list with this name already exists.

Name*

[Cupcakes]

To delete an *item* from a saved list:

Open a saved list click on the **Saved List Management** screen.

Click on the name of the saved list.

Click the **Delete** button associated with the item.

	Order ⬍		Barcode	Title	Call Number	Owning Location	Shelf Location	Status
Showing 1 to 1 of 1								
☐	1	Delete	1000165527	The runaway bunny. Pictures by Clement Hurd.	JUV B814r 1972	BRENHAM READING ROOM	BRENHAM READING ROOM	To be Ordered
Showing 1 to 1 of 1								

A confirmation message appears:

Are you sure you wish to remove this entry from the saved list?

OK   Cancel

Click **OK**.

Exporting a Saved List

To export the contents of a list in **CSV** format, click the **Export** button.

edit **Name**   Shakespeare Plays
Id   8
Type   Bibliographic Record
Location   Brenham Campus Library
edit **Group**
Date Created   July 27, 2011
Creator   staff
Frozen   No
Workflow   None
Last Modified
Last Modified By
edit **Description**   Tragedies

OPAC Link: http://clay.vtls.com:9005/lib/list?id=rGZq%2be1nkaiQa%2f38PDk2%2fA%3d%3d

Freeze   Export   Copy   Merge Entries Into...   Delete List

Move the selected 0 entries after record number [   ]   Move   Select All   Clear All

Click **OK** to display the list in spreadsheet form.

ID	URL	Title	Author	Pub. Date	Place of Publication	Publisher	Call Numb	Location	Date Added
117961	http://venus.vt ls.com:9800/li b/item?id=117 961	Merchant of Venice / dited by John P. Cutts.	Shakespeare, William, 1564- 1616	c1969.	Dubuque, Iowa,	W. C. Brown	822.33 Sh15m 1969	Brenham Campus Library	6/14/2011 10:40
117966	http://venus.vt ls.com:9800/li b/item?id=117 966	Romeo and Juliet / dited by Marvin Spevack.	Shakespeare, William, 1564- 1616	c1970.	Dubuque, Iowa,	W. C. Brown	822.33 Sh15r 1970	Brenham Campus Library	6/14/2011 10:40

Freezing a Saved List

All types of saved list may be frozen/unfrozen by *Saved List Superusers*. The **Freeze** button appears *only* when a staff is logged in as a *Saved List Superuser*.

To **freeze a list**, click the **Freeze** button.

When a list is frozen the **Unfreeze** button appears to *Saved List Superusers*. To unfreeze a list, click **Unfreeze**.

```
edit Name            Poetry Collection
     Id              58
     Type            Copy
     Location        Islamabad
edit Group
     Date Created    September 27, 2011
     Creator         staff
     Frozen          Yes
     Workflow        None
     Last Modified   September 29, 2011
     Last Modified By staff
edit Description     Haiku
```

`Unfreeze` `Export` `Copy`

Note: TPU *Saved List Superusers* can **freeze or unfreeze** Copy saved lists with the **LOLM** or **Withdrawal** workflow *at any* location. *All other lists* can only be frozen or unfrozen by *Saved List Superusers* with the *same login location as the list's location*. In addition, no items can be added to or deleted from a *frozen* list by *any user*.

List Management for Withdrawals

A **Withdrawal** saved list can be used to keep track of items that will be or have been withdrawn from the collection.

When creating a **Copy** saved list with a **Withdrawal** workflow staff can designate a **Withdrawal Type** and a **Withdrawal Date**.

The **Withdrawal Type** specifies why the items are being withdrawn. Choose a withdrawal reason from the drop-down list. There are four withdrawal types: **Unserviceable**, **Long Overdue**, **Lost and Paid**, and **Missing**.

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**, Virtua is told to delete the barcodes of the items on the list on the selected date.

Create a Withdrawal List

To create a **Copy** saved list with a **Withdrawal** workflow:

Type the name of the list in the **Name** field.

Type a description of the list in the **Description** field (optional).

Type a group name in the **Group** field (optional).

Select **Copy** as list Type.

Select **Withdrawal** as the Workflow.

Select a Withdrawal Type, Withdrawal Quarter, and Withdrawal Year.

Select a **Location**.

Create Saved List

Name*

Description

Group

Type*

Copy

Workflow

Withdrawal

Withdrawal Type

Missing

Withdrawal Quarter*

3

Withdrawal Year*

2011

Location*

Headquarters

Create

Click **Create** to create a list with the specified parameters.

Once a saved list is created the **Saved List Management** screen opens.

```
edit Name            Poetry
     Id              22
     Type            Copy
     Location        Bellefonte
edit Group
     Date Created    August 31, 2011
     Creator         staff
     Frozen          No
     Workflow        Withdrawal
     Withdrawal Type (Missing)
edit Withdrawal Quarter  Q3 2011
edit Withdrawal Authority
     Last Modified   September 23, 2011
     Last Modified By  staff
edit Description
```

```
                    List Import

Import File  [                ] [Browse..] [Import]

Location

[Use the owning location of the copy        ▼]
```

[Freeze] [Export] [Scan barcodes] [Merge Entries Into...] [Delete List]

Move the selected 0 entries after record number [   ] [Move] [Select All] [Clear All]

No records found to display.

Note: When a withdrawal list is created a blank **Withdrawal Authority** field is added. To edit this field click **edit**. The **edit** link opens a pop-up window where staff can define a value for the **Withdrawal Authority**. Click **Save**.

```
                                        ✕

Withdrawal Authority

[                                        ]

[Save]
```

To edit the **Withdrawal Quarter** click the **edit** link. The **edit** link opens a pop-up window where staff can define a value for the **Withdrawal Quarter**. Click **Save**.

```
                                        ✕

Withdrawal Quarter*
[ 3    ▼]
Withdrawal Year*
[2011    ]
[Save]
```

Adding Items to a Withdrawal List

To add items to a Copy saved list with a **Withdrawal** workflow the items MUST have one of the following statuses to correspond with the saved list configuration **Withdrawal Type**:

None (No status on item)
Shelving (system status 5720)
Any status flagged as unserviceable
Long overdue (system status 4600)
Lost & Paid (defined in Status Displays parameter in *Profiler*)
Lost (system status 4715)
Missing (system status 4700)

Note: An item cannot be added to a **Copy** saved list with the **Withdrawal** workflow when the list belongs to a location that is different from the item's owning location. Items can *only* be added to a **Withdrawal** saved list when *both* the item *and* the list location are the same.

The following example of a **Saved List Configuration** shows selected *item statuses* for each **Withdrawal Type**:

WD-Unserviceable*
Lost Processing

WD-Removed from Unserviceable*
Shelving

WD-Lost & Paid*
Withdrawn

WD-Removed from Lost & Paid*
In Processing

WD-Long Overdue*
Missing

WD-Removed from Long Overdue*
Disputed Item

WD-Missing*
Lost

WD-Removed from Missing*
On Reserve

Note: Withdrawal Type *item statuses* are library-specific and are configured by the *admin* on the Saved List Configuration screen.

Items added to a Copy saved list with a **Withdrawal** workflow and a **Missing** withdrawal type must have a *Missing* status assigned in the bibliographic record.

To add an item to a list with a **Withdrawal** workflow:

Login as staff and click the **Saved List Management** link.

Click on the name of the saved list.

Click **Scan barcodes** (or Import File). A dialogue box opens:

Scan barcodes and click **Add** after each entry.

Click the X in the upper right-hand corner when done.

Once an item is added to the saved list its status is changed to correspond with the *item status* of the **Withdrawal Type** *Missing*:

This status change occurs in the bibliographic record also:

When the item is *removed* from the saved list the status changes in the bibliographic record to correspond to the *item status* for the withdrawal type **Removed from Missing**.

Note: The **Batch Item Editor** in the Virtua client can be used to delete the items on a withdrawal list. If an item on a copy saved list with the

Withdrawal workflow has its status changed to an undeletable status, when the contents of the list are loaded into the **Batch Item Editor**, those items with undeletable statuses will not appear in the list for deletion and cannot be deleted using the **Batch Item Editor**.

List Management for Laminations

A **LOLM** (Lamination of Library Materials) saved list can be used to keep track of items that will be or have been sent for lamination or binding.

Create a Lamination List

To create a Copy saved list with a **LOLM** workflow:

Type the name of the list in the **Name** field.

Type a description of the list in the **Description** field. (optional).

Type a group name in the **Group** field (optional).

Select **Copy** as list Type.

Select **LOLM** as the Workflow.

Select a **Location**.

Create Saved List

Name*

Description

Group

Type*

Copy

Workflow

LOLM

Withdrawal Type

Choose One

Withdrawal Quarter

Choose

Withdrawal Year

Location*

Headquarters

Create

Click **Create** to create a list with the specified parameters.

Once a saved list is created the **Saved List Management** screen opens.

edit **Name**   Cupcakes
   Id   24
   Type   Copy
   Location   Islamabad
edit **Group**
   Date Created   September 2, 2011
   Creator   staff
   Frozen   No
   Workflow   LOLM
   Last Modified September 27, 2011
   Last Modified By staff
edit **Description**   Dairy-free recipes

List Import
Import File [   ] Browse… Import
Location
Use the owning location of the copy

List Reports
Report format
PDF
Outstanding Items   Items to Return

Freeze   Export   Scan barcodes   Update status   Receive   Merge Entries Into…

Move the selected 0 entries after record number [   ]   Move   Select All   Clear All

Adding Items to a Lamination List

To add items to a Copy saved list with a **LOLM** workflow the items MUST have a status of **In Process** (AR), **TPU to Lib**, **In Process** (PR), or **Temp Rec'd by TPU**.

The following *example* of a **Saved List Configuration** shows selected *item statuses* for each workflow status:

Note: Workflow *item statuses* are library-specific and are configured by the *admin*.

To be added to a **LOLM** saved list the assigned status in the bibliographic record must match the workflow *item status* in Chamo:

To add an item to a list with a **LOLM** workflow:

Login as staff and click the **Saved List Management** link.

Click on the name of the saved list.

24	Cupcakes		copy	Islamabad		LOLM

edit **Name**   Cupcakes
    Id   24
    Type   Copy
    Location   Islamabad
edit **Group**
    Date Created   September 2, 2011
    Creator   staff
    Frozen   No
    Workflow   LOLM
    Last Modified   September 27, 2011
    Last Modified By staff
edit **Description**   Dairy-free recipes

Freeze	Export	Scan barcodes	Update status	Receive	Merge Entries Into...

Move the selected 0 entries after record number [＿＿＿＿＿]   Move   Select All   Clear All

Click **Scan barcodes** (or Import File). A dialogue box opens:

Barcode:
Title:
Units:
Owning Location:
Call Number:

Barcode*
31781048399552

Label Count*
1

Location
Use the owning location of the copy ▼

Add

Scan barcodes and click **Add** after each entry.

Click the X in the upper right-hand corner when done.

Once the item is added to the saved list its status is changed to correspond with the **Awaiting Lamination** workflow *item status*:

This status change occurs in the bibliographic record also:

Note: When a **LOLM** saved list is associated with a non-TPU location only items belonging to that location can be added to the list.

Modifying List Items

Update Status

Staff users may modify the status of items on a **LOLM** list. To change the lamination status of *all* the items on a **LOLM** list click the **Update status** button. Select a corresponding radio button to change the status and click **Save**.

Note: The radio button options correspond to the configured *item statuses* of **Awaiting Lamination**, **At Binder**, or **TPU to Library** workflows.

Receive

Staff users may change the status of items on a **LOLM** list to receive laminated items. When an item is being received, only items with select statuses can be assigned other renewed statuses.

To change the status of an *individual* item on a **LOLM** list click the **Receive** button. Select a corresponding radio button to change the status, enter the item barcode, and click **Receive**.

Note: The radio button options correspond to the configured *item statuses* of **In Preparation**, **Temp Rec'd by TPU**, **Return to Binder**, or **Return to TPU** workflows.

Reports

To create a report of outstanding items or items that should be returned to the bindery:

Select a report format from the drop-down list (PDF or HTML).

Click the **Outstanding Items** or the **Items to Return** button.

Depending on the browser settings, a new window will open with the results of the report, or the user will be prompted to save the report output to your workstation.

edit **Name** Cupcakes
    Id 24
    Type Copy
    Location Islamabad
edit **Group**
    Date Created September 2, 2011
    Creator staff
    Frozen No
    Workflow LOLM
    Last Modified September 27, 2011
    Last Modified By staff
edit **Description** Dairy-free recipes

List Import

Import File [ ] Browse... Import

Location

Use the owning location of the copy

List Reports

Report format

PDF

Outstanding Items | Items to Return

Freeze | Export | Scan barcodes | Update status | Receive | Merge Entries Into...

Move the selected 0 entries after record number [ ] Move | Select All | Clear All

Note: These reports apply only to lists of copies at specific statuses; these report options *will not* appear for most lists.

Outstanding Items

List Name: Cupcakes
Description:
Total Items: 4
Outstanding: 4
Date Created: 02-Sep-2011 10:22 AM
Date Modified: 10-Sep-2011 10:06 AM
Report: 12-Sep-2011 09:05 AM

Item Barcode	Status	Collection Code	Call Number	Title	Agency
31781039028368	On Display		641.8653 B	Cupcakes from the cake mix doctor /	Bordeaux
31781042090181	On Display		641.8653 R	Hello, cupcake! / Karen Tack and Alan	Cliffdale
31781048399552	On Display		641.8653 S	Martha Stewart's cupcakes : 175	Headquarters
31781040714329	On Display		J641.865 C	Super-duper cupcakes : kids creations	Hope Mills

Items to Return

List Name: Cupcakes
Description:
Total Items: 4
Outstanding: 0
Date Created: 02-Sep-2011 10:22 AM
Date Modified: 10-Sep-2011 10:06 AM
Report: 12-Sep-2011 09:06 AM

Item Barcode	Status	Collection Code	Call Number	Title	Agency

Administrative Features

Most customization changes use the administration tool. To access the Administrative Features and open the **General Configuration** screen login to Chamo as *Administrator*.

General Configuration

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

Chamo Base URL
Base URL for secure (HTTPS) pages
Display Date Format
Display Timestamp Format
Input Date Format
Session Timeout (minutes)
Display Translation Codes
Require cookies for login
Index Cross References
Display Transaction Reference Number
Display reason an item cannot be renewed
Enable Move Trailers
Mask Bibliographic Record

See **General Configuration** Help for detailed information on these configuration settings.

General Configuration

* **Chamo Base URL**

http://paragon.vtls.com:8001

Base URL for secure (HTTPS) pages

[ ]

* **Display Date Format**

MM-dd-yyyy

* **Display Timestamp Format**

yyyy-MM-dd HH:mm:ss

* **Input Date Format**

yyyy-MM-dd

* **Session Timeout (minutes)**

30

☐ Display Translation Codes

☐ Require cookies for login

☐ Index Cross References

☐ Display Transaction Reference Number

☐ Display reason an item cannot be renewed

☐ Enable Movie Trailers

Trailer Customer ID

[ ]

Trailer API URL

[ ]

Mask Bibliographic Record When:

☐ Record has no items

☐ All items under record are masked

☐ All items under record are unserviceable

Save

After changes are made to the **General Configuration** settings, click the **Save** button.

Date Format

Display Date Format: This field lets *admin* determine the format of dates in the interface. This date format is used for dates that appear on the **My Account** screen. Any standard date format in this field may be used.

Display Timestamp Format: This field lets *admin* 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. Any standard date format may be used in this field.

Input Date Format: This field determines how dates must be entered in instances such as when a patron defines a **Last Needed Date for a Request**. Any standard date format in this field may be used.

Session Timeout (minutes)

This field lets *admin* define the number of minutes that pass before the *OPAC session* is reset, thus logging out any logged-in users and emptying the Cart. **Note:** For staff and admin users, a thirty minute session timeout period applies, regardless of the period specified in the **Session Timeout** setting.

Require Cookies for Login

The **Require cookies for login** setting may be used to require patrons' Web browsers to have cookies enabled before they can log in.

Automatically Mask Bibs

Chamo will not display bibliographic records in the search results when there are no items or when the items are masked or unserviceable. Enabling the **Mask Bibliographic** feature causes bibliographic records to be automatically masked from the OPAC user. **Note:** Staff users see masked records as determined by their user permissions.

Mask a bibliographic record when:

Record has no item: Chamo will not display a bibliographic record or include it 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 Page for bibliographic records to be masked.

All items under record are masked: Chamo will not display a bibliographic record or include it in search result counts in the patron interface when all of the attached items to the record are masked. **Note:** The bibliographic index MUST be reindexed via the Indexing Page for bibliographic records to be masked.

All items under record are unserviceable: Chamo will not display a bibliographic record or include it 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 Page for bibliographic records to be masked.

To Mask a Bibliographic Record:

Log into the Chamo as the *admin* user to access the **General Configuration** screen.

Under Mask Bibliographic Record When: place a check in the box beside the three parameters: Record has no items, All items under record are masked, or All items under record are unserviceable.
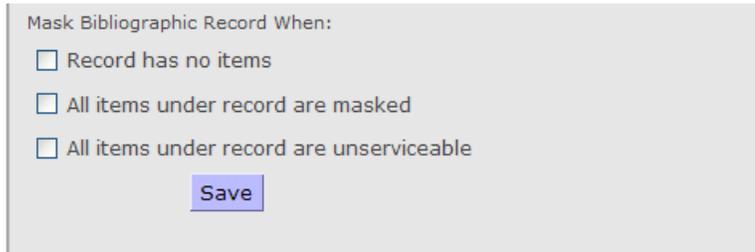
Click **Save**.

Theme Links

On the **Theme Links** screen, *admin* can choose which themes are available to users from the Current theme drop-down list in the patron interface.
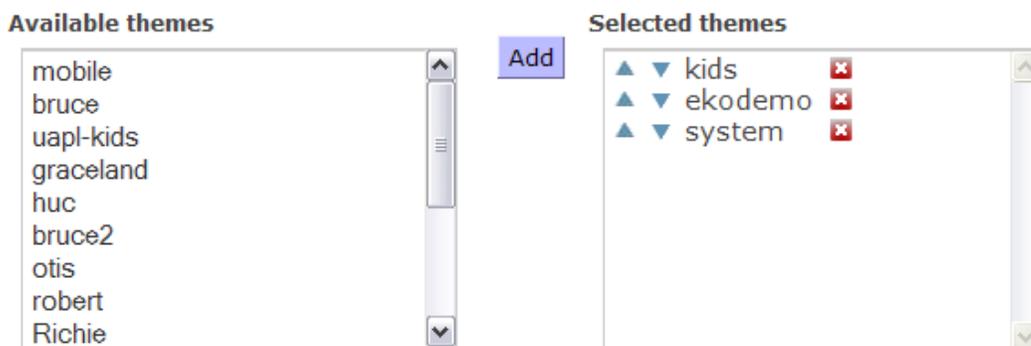
Note: For the **Current theme** drop-down list to be displayed, the **Selected themes** list must contain at least two themes.

When two or more themes are configured on the **Theme Links** screen a Current theme drop-down list is displayed in the patron interface at the top of the screen. A user can switch themes by selecting a theme from the drop-down list.
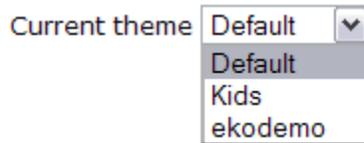
Index Configuration

The **Index Configuration** screen allows *admin* to configure all keyword indexes:

Assign a unique name to an index.
Specify an **XPath 2.0** expression for extracting the data from a MARCXML record.
Select the type of index (text, string, integer, date, Boolean).
Specify whether the data is single-valued.
Specify where the index is a facet.
Import indexing rules from Virtua (this overwrites the indexing rules configured on the **Index Configuration** screen).

Alert: Chamo's index configuration is completely separate from the Virtua configuration in the Profiler. When Chamo is started for the first time, the Virtua index configuration parameters are copied to Chamo, where they will be maintained *separately* and modified *as necessary* via the **Index Configuration** screen.

See **Index Configuration** Help for detailed information on these index configurations.

Index Configuration

Copy Virtua Configuration

Name*	Type	☐ Single-valued ☐ Facet	Add
	text ∨		

Expression*

a [Author]	Type	text ∨	☐ Single-valued ☐ Facet	Remove

Expression
/record/datafield[@tag='022']/string-join(subfield[@code=('a','z')],' '),
/record/datafield[@tag=('100','400','700','800')]/string-join(subfield[@code=('4','a','b','c','d','e','f','g','k','l','n','p','q','u')],' '),
/record/datafield[@tag=('110','410','710','810')]/string-join(subfield[@code=('4','a','b','c','d','e','f','g','j','k','n','p','u')],' '),
/record/datafield[@tag=('111','411','711','811')]/string-join(subfield[@code=('4','a','c','d','e','f','g','k','l','n','p','q','u')],' '),
/record/datafield[@tag=('440','999')]/string-join(subfield[@code='a'],' ')

ar [Archive]	Type	string ∨	☑ Single-valued ☑ Facet ☐ Multi-level **Map file** ...	Remove

Expression
/record/translate(substring(leader,9,1),' |','')

b [Biography]	Type	string ∨	☑ Single-valued ☑ Facet ☐ Multi-level **Map file** ...	Remove

Expression
/record[substring(leader,7,1)=('a','t') and substring(leader,8,1)=('a','c','d','m')]/controlfield[@tag='008']/translate(substring(.,35,1),' |','')

Save

Indexing rules are automatically imported to Chamo as part of a new installation migration. Indexing rules may also be imported at any time by using the **Copy Virtua Configuration** button on the **Index Configuration** screen (this overwrites indexing rules configured in Chamo).

> This will ovewrite the entire index configuration, including changes you have made since the previous copy from Virtua. Are you sure?
>
> OK   Cancel

Clicking the **Copy Virtua Configuration** button imports the indexing configuration from Virtua and also creates four indexes (**subject_form**, **subject_general**, **subject_ chronological**, and **subject_geographic**) that do *NOT* come from Virtua.

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.

To delete an index completely, press the **Remove** button.

Languages

The **Languages** screen allows *admin* to choose which languages are available to users in the language drop-down list box at the top of any Chamo screen and which languages patrons can specify as their preferred language. The default language as viewed by each user will match that user's browser locale settings, if translations for that language are available.

Note: The software does not come with translations for all available languages. To download a file of strings for translation, use the **Language String Management** tool.

The **Available Locale Language** settings controls which languages are available in the language drop-down list box at the top of the screen, which is used to determine the language of the web interface. Admin users should ensure that they have **Language Files** defined for each of the languages selected.

Enabled Languages

▲ ▼ Spanish ✖
▲ ▼ Catalan ✖
▲ ▼ English ✖
▲ ▼ French ✖

The enabled *locale languages* configured on the *admin* **Languages** screen display in the language drop-down list box for all users.

English ▼ ❓
Spanish
Catalan
English
French
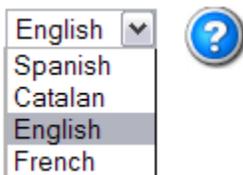
Note: Chamo uses the current session locale to determine which language to use for translated fields when the contents of the cart, a list, or the patron history are exported.

The **Available Patron Languages** settings controls 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 enabled *patron languages* configured on the *admin* **Languages** screen displays on the patron **Register** screen or **Contact Information** tab.
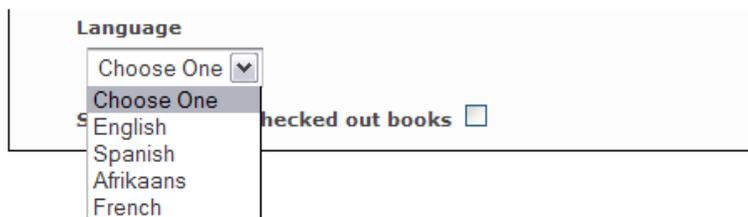
If a user views a *theme* that does not have a language defined, Chamo displays the web browser default language if that language is configured on the **Languages** screen. If the browser default language is not defined as a language in Chamo, then Chamo uses the first language defined on the **Languages** screen. If there are no languages defined, then Chamo defaults to English.
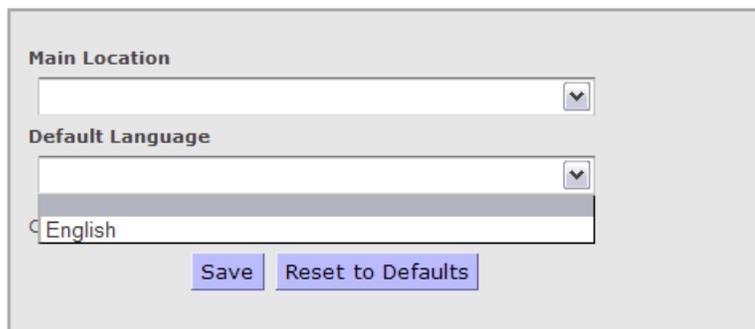
Note: There must be at least one language in the **Enabled Languages** list. If all languages are removed, English will automatically be added.

Enabled Languages

Add

Enabled Languages

▲ ▼ English   ✖

Enabled Languages

Add

Enabled Languages

Important: If there is only one language in the **Enabled Languages** text box, the language drop-down list box at the top of any Chamo screen *will not* appear.

Language File

The **Language String Management** screen allows *admin* to translate the strings in the interface. To translate language strings, first, download an XLS file (spreadsheet) of strings to translate and then upload the XLS file of the translated strings.

Language String Management

Select a language file to import.
Import file [   ] Browse…
Import

Select a language to export.
Arabic ▼ Excel ▼ Export

Arabic
Armenian
Azerbaijani
Catalan
Chinese (China)
Chinese (Taiwan)
Danish
Dutch
English
Finnish
French
French (Belgium)
French (Switzerland)
German
Greek
Hebrew
Hindi
Icelandic
Indonesian
Inuktitut

Note: Default native translations are provided in the **Language Files** for enumeration and chronology fields, which is intended to make translation of these fields easier.

To translate language strings:

> Download a file of 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.

> 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.

> When you are finished typing the translations for the strings, save the spreadsheet to your PC.

To **upload** a file of translated strings, click the **Browse** button to locate the file and then click the **Import** button. The translated strings will be available in the interface immediately.

Note: You may need to enable the language(s) you translate in the interface using the **Languages Configuration** screen.

The downloaded file of strings will have filenames in the format **LanguageStrings_xx.xls**, where **xx** is a language code.

For reference, a list of language codes and their languages appears below:

ar - Arabic	de - German	pa - Punjabi
hy - Armenian	el - Greek	pl - Polish
az - Azeri	iw - Hebrew	pt - Portuguese
bg - Bulgarian	hi - Hindi	ro - Romanian
ca - Catalan	hu - Hungarian	ru - Russian
zh_CN - Chinese (China)	is - Icelandic	sk - Slovak
zh_TW - Chinese (Taiwan)	id - Indonesian	sl - Slovenian
hr - Croatian	iu - Inuktitut	es - Spanish
cs - Czech	ga - Irish	sv - Swedish
da - Danish	it - Italian	zgh - Tamazight
nl - Dutch	ja - Japanese	th - Thai
en - English	ko - Korean	tr - Turkish
et - Estonian	lv - Latvian	uk - Ukrainian
fi - Finnish	lt - Lithuanian	ur - Urdu
fr - French	ms - Malay	vi - Vietnamese
fr_BE - French (Belgium)	mt - Maltese	cy - Welsh
fr_CH - French (Switzerland)	no - Norwegian	

LDAP Configuration

The **LDAP Configuration** screen is used to configure an LDAP server to use for patron authentication.

To use an LDAP server to authenticate patrons:

Select the **Enable LDAP authentication for patrons** check box.

Populate the **Server URL** text box with the URL of your LDAP server.

Specify the **Base DN** for LDAP authentication. (Optional)

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

Populate the **Barcode attribute** text box with an attribute *if* patrons will log in using an ID that is *not* their library barcode. (Optional)

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

LDAP Configuration

☐ Enable LDAP authentication for patrons

Server URL

[   ]

Base DN

[   ]

DN/search pattern

[   ]

Search bind DN

[   ]

Search bind password

[   ]

Barcode attribute

[   ]

[Save]

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.

List and Cart Configuration

Use the **List and Cart Configuration** screen to determine whether logged-in users are permitted to use the bibliographic Cart feature, the holdings Cart feature, and the copies Cart feature, to create and save lists of items, and to save all search results to the **Cart**. The List and Cart Configuration screen also allows admin to enable lists, set the maximum number of items in a cart or list, set the maximum number of lists per patron, set the number of days to keep idle lists, enable citation services, determine cart and list export options, and enable a CAPTCHA when sending email.

List and Cart Configuration

☐ Enable Cart

☐ Enable holdings cart

☐ Enable copies cart

☐ Allow user to save all results to cart

Maximum number of records in a cart*

[   ]

☐ Allow operations on entire list/cart

☐ Enable Lists

Maximum number of lists per patron*

[1000   ]

Maximum number of items in a list*

[1000   ]

Number of days to keep idle lists

[   ]

☐ Enable Vitation citation service

Vitation URL

[   ]

☐ Enable CSV export

☐ Enable End Note export

☐ Enable ISO 2709 export

☐ Enable MARCXML export

☐ Enable MARC export

☐ Enable Full View export

☐ Enable CAPTCHA when sending email

[Save]

Select **Enable Cart** to allow patrons and staff users to add items to the Cart. If the **Enable Cart** option *is not* selected, the **Cart** feature will not be available.

Select **Enable holdings cart** to allow patrons and staff users to be able to select an issue on the **Issues** tab of the **Item Details** screen and add it to the holdings cart. The contents of the holdings cart will be displayed on the **Holdings Records** tab of the **Cart** screen.

Select **Enable copies cart** to allow patrons and staff users to be able to select a copy on the **Copies** tab of the **Item Details** screen and add it to the copies cart. The contents of the copies cart will be displayed on the **Copies** tab of the **Cart** screen.

Select the **Allow user to save all results to cart** to allow patrons and staff to save all search results to the **Cart**. When this setting is enabled, an **Add All To Cart** button will appear on the search results screen. **Note**: If the number of search results exceeds the *Maximum number of records in a cart* value you have configured, the **Add All To Cart** button is not displayed.

Note: 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**.

To set a limit for the number of items permitted in the **Cart** enter the number in the **Maximum number of records in a cart** text box. The maximum number of records in a cart *cannot* exceed 500.

Select the **Allow operations on entire list/cart** check box to enable the 'Perform operations on' drop-down list at the bottom of the **Cart** and **List** screens.

Perform operations on: Selected records ⌄
Selected records
All records
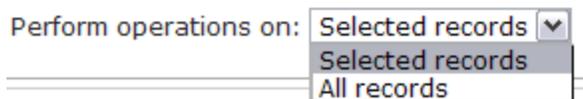
When the "All records" option is selected, the buttons on the **List** or **Cart** screen operate on all records in the list or cart. When the "Selected records" option is selected, the buttons on the **List** or **Cart** screen operate on only the records that are checked.

Select the **Enable Lists** check box to permit patrons and staff to create and save lists of items.

To set a limit on the number of lists allowed per patron, populate the **Maximum number of lists per patron** text box with the maximum number of lists you want to allow for each patron. When a user tries to create a list that would cause the number of lists to exceed the configured limit, an error message will appear, and the list will not be created.

To set a limit for the number of items permitted in the **List** enter the number in the **Maximum number of items in a list** text box. The maximum number of records in a list *cannot* exceed 1000.

Note: Even if you do not enable lists, this text box still puts a limit on the number of items that can be saved to the **Cart**. If a user tries to add items to the **Cart** or a list that would exceed the configured limit, an error message will appear, and none of the items will be added to the **Cart** or list. Leave this field blank if you want no limit on the number of items in the **Cart** and/or each list.

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 text box. 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 this setting is left blank, Chamo will not delete idle lists.

To enable access to the Vitation citation service and enable the **Create Citation** button on the **List** and **Cart** screens, select the **Enable Vitation citation service** check box and enter the **Vitation URL** in the text box.

To configure which export options are available for patrons to export items in the cart or on a list select the Enable CSV export, Enable EndNote export, Enable ISO 2709 export, Enable MARCXML export, Enable MARC export, or Enable Full View export check boxes.

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

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

Circulation

The **Circulation Settings** screen lets *admin* configure what circulation functions are available to patrons. **Note:** Settings in the Virtua *Profiler* determine whether a patron is allowed to place a request, renew an item, etc. For more information, see the *Virtua Profiler/Circulation Parameters User's Guide.*

The following settings are available on the **Circulation Settings** screen:

Transaction Location
Send email notifications for renewals
Allow patrons to renew overdue items
Enable requests
Allow patrons to specify request last needed date
Enable unit-level requests
Allow patrons to modify requests
Allow patrons to deactivate requests
Display bib-level request button
Display request counts
Item-level requests use pickup location
Display confirmation page for hold requests
Display confirmation page for loan requests
Display confirmation page for recall requests
Display confirmation page for page requests
Display confirmation page for unit requests
Send email notifications for placing requests
Item Status Availability
Library IP Addresses

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

Circulation Settings

Transaction Location*

[Bordeaux ▾]

☐ Send email notifications for renewals

☐ Allow patrons to renew overdue items

☐ Enable requests

☐ Allow patrons to specify request last needed date

☐ Enable unit-level requests

☐ Allow patrons to modify requests

☐ Allow patrons to deactivate requests

Display bib-level request button
- ⦿ always
- ◯ only if the record has copies
- ◯ never

Display request counts
- ◯ always
- ⦿ only if request button is visible
- ◯ never

Item-level requests use pickup location
- ◯ User Selected
- ⦿ Item's Owning Location
- ◯ Item's Shelving Location

☐ Display confirmation page for hold requests

☐ Display confirmation page for loan requests

☐ Display confirmation page for recall requests

☐ Display confirmation page for page requests

☐ Display confirmation page for unit requests

☐ Send email notifications for placing requests

Item Status Availability

Unavailable		Available
At Bindery At Photocopy Billed Bindery Ready Claim Entered Copies Ordered Damaged Processing Deposit Item Display Case -- Brenham End of Semester Hold	Add	

Library IP Addresses
[Add]

[Save]

Transaction Location

The **Circulation Settings** screen has a **Transaction Location** setting. This drop-down list box lets *admin* 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 OR the theme location will also be used if Virtua is configured to use the transaction location for calculating due dates. The theme location, when configured, *overrides* the **Transaction Location** setting.

Circulation Settings

Select an institution to configure

Default Institution

Transaction Location*

Headquarters

Send Email Notification for Renewals

The **Send email notifications for renewals** check box lets the *admin* user determine whether or not patrons will receive an email when they successfully renew an item through Chamo when the patron's communication preference is Email or Email and Text.

☑ 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.

Note: Renewals placed via email *do not* adhere to this setting and results will always be sent via email.

Allow Patrons to Renew Overdue Items

The **Allow patrons to renew overdue items** setting allows the *admin* user determine whether or not to permit renewal of overdue items via the Chamo interface.

☑ Allow patrons to renew overdue items

To enable **Allow patrons to renew overdue items** setting click the check box.

Enable Requests

The **Enable requests** setting lets the *admin* user enable or disable the appearance of the **Request** button to determine whether patrons can place requests in the Chamo interface.

Note: If requests are not enabled the **Request** button does not appear on the **Search Results** or **Item Details** screens.

☑ Enable requests

Allow Patrons to Specify Request Last Needed Date

The **Allow patrons to specify request last needed date** setting allows the *admin* user to determine whether patrons are prompted to specify a Last Needed Date when placing a request.

Enable Unit-Level Requests

The **Enable unit-level requests setting** allows the *admin user* to enable or disable unit-level requests.

☑ Enable unit-level requests

When a patron places a unit-level request in the patron interface, Chamo displays a question that prompts the patron to identify the item he or she wishes to request. **Note:** Unit-level page requests placed through Chamo create request slips but *do not* place any pending requests on a patron's account.

The **Enable unit-level requests** option enables the display of **Request** buttons next to holdings records listed on the **Issues** tab for a bibliographic record. **Note:** This **Request** button initiates a unit-level page request at the associated holdings record's location. The **Request** button *will not* appear for a holdings record if its location is not a paging location.

Allow Patrons to Modify Requests

The **Allow patrons to modify requests** setting allows the *admin* user to determine whether patrons can modify the requests they have placed.

Displaying Request Counts

The **Display request counts** setting allows the *admin* user to specify whether request counts are displayed on the search results and **Item**

Details screens. Three radio buttons are available: always, only if request button is visible, or never.

Display request counts
- ● always
- ○ only if request button is visible
- ○ never

Note: Request counts do not include trapped requests.

Displaying Request Confirmation Pages

Display confirmation page for requests: The five Display confirmation page for requests settings let you choose, for each request type (hold, loan, recall, page, 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.

- ☐ Display confirmation page for hold requests
- ☐ Display confirmation page for loan requests
- ☐ Display confirmation page for recall requests
- ☐ Display confirmation page for page requests
- ☐ Display confirmation page for unit requests

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.

Item Status Availability

The **Item Status Availability** setting allows the *admin* user to 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). To specify that an item that carries a particular status is counted as available, select an item status in the *Unavailable* list and click the *Add* button to move it to the *Available* list.

Library IP Addresses

The Library IP Addresses setting allows the admin user to define the IP range used by library terminals. When a circulation transaction is performed, Chamo logs the location linked to the IP address as the circulation location. If the IP address has no associated location configured, the location linked to the user's current Chamo theme is used. If no theme location is set, the

default circulation location (as specified by the Transaction Location setting on the **Circulation Settings** admin screen) is used.

Request Buttons

The **Request Buttons** screen allows *admin* to configure rules that determine when a **Request** button is displayed on the **Item Details** screen and what level and type of request is placed when a patron clicks the **Request** button.

To configure **Request Button** settings:

If a library has multiple institutions, select an institution for which to configure item request button settings. The settings configured will apply to items owned by this institution.

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.

Item Class: 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.

Status: 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.

Location: 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.

Checked Out: Select a radio button (Any, No, Yes) to determine whether items that are checked out are considered part of this sub-set.

Noncirculating: Select a radio button (Any, No, Yes) to determine whether noncirculating items are considered part of this sub-set.

Paging Location: Select a radio button (Any, No, Yes) to determine whether items shelved at a designated paging location are considered part of this sub-set.

Off-site: Select a radio button (Any, No, Yes) to determine whether off-site items are considered part of this sub-set.

Serial: Select a radio button (Any, No, Yes) to determine whether serial items are considered part of this sub-set and to specify the level and type of request that is placed for the serial item.

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.

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.

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.

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 screen and translate the button text by entering a translated string for the string code button.request.[Button Name].

Notes:

- Request button rules may be configured for multiple sub-sets and the up and down arrows used 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 no request button rules are configured, a **Request** button will be displayed on the **Item Details** screen for every item and the software will perform an auto request when it is clicked.
- To delete request button rules for a sub-set of items, click the ❌ 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.
- Use the **Save** button to save changes to the **Request Button** settings.

See **Request Buttons** Help for detailed information on the configuration settings.

Page Requests

The **Page Requests** screen allows admin to define page types, specify the number of page request questions for each page type, restrict item statuses for page types, and set page request restrictions.

Page Types

```
[                    ]  [ Add ]

        Type   Questions   Restricted Item Statuses
```

Page Restrictions

☐ Immediately reject requests for restricted pickup locations

Shelf Location*

```
[ Choose One                      ▼ ]  [ Add ]

     Shelf Location   Restricted Pickup Locations   Exempt Patron Types
```

To configure page types:

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

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

Click the **Add** button.

In the pop-up window, enter the number of page request questions to configure for the current page type.

To specify that the 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 **Allowed 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. Click the **Save** button.

To add or modify a page type, click the **edit** ink. Change the number of questions in the Questions list box.

To remove a page type, click the ❎ next to the page type entry to remove.

To configure page request restrictions:

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

Note: When this option is *not* enabled and a restricted pickup location is chosen, a message will be displayed to the patron and the patron will be prompted to select another pickup location from a list that no longer contains the restricted locations.

Select an item/holdings shelf location from the **Shelf Location** list.

Click the **Add** button.

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.

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.

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 string translations.

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

Navigate to the **Language String Management** configuration screen.

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.

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

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 strings:

request.page.type.thesisRequest [page type]

request.page.type.thesisRequest.q1 [page question 1]

request.page.type.thesisRequest.q2 [page question 2]

request.page.type.thesisRequest.q3 [page question 3]

request.page.type.thesisRequest.q4 [page question 4]

where [page type] is the string that represents the page type and [page question 1] is the string containing the text of the first page request question.

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

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.

Request Slip Printer Configuration

The **Request Slip Printer Configuration** screen enables and configures the printing of request slips. To enable the request slip printer:

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

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

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

To add additional printers click the **Add Printer** button. A dialog box opens to enter the **Location** and the **Printer Name**. **Note:** The location should be the shelving location of the items whose request slips need to be printed on the added printer.

Click the **Add** button to add the printer.

When a printer is added, the printer appears in the table. The **Printer table** shows the configured non-default printers. To remove a printer, click the ❎ button next to the printer to remove.

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

Request Slip Email Configuration

The **Request Slip Email Configuration** screen allows the admin user to enable and configure the e-mailing of request slips.

Request Slip Email Configuration

☐ Email request slips for page requests

Add Email

Remove	Location ID	Location Name	Email

Save

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

Click the **Add Email** button to add an email address for a paging location. In the dialog box select a location from a drop-down list of paging locations and enter the email address to which page request slips for items shelved at that location will be sent.

Click **Add**. The email address appears in the table. To remove an email address, click the ☒ button next to the address you want to remove.

Request Slip Email Configuration

☐ Email request slips for page requests

Add Email

Remove	Location ID	Location Name	Email
☒	20002	Independence-Restricted Reserve	oconnelle@vtls.com

Save

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

The request slip e-mail may be configured by editing the **request-slip.ftl** template file that appears in the **chamo-opac/src/main/webapp/WEB-INF/** directory.

Note: Consortium users may 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_UCL.ftl).

Reviews

The **Administrate Reviews** screen lets the *admin* user view, approve, and delete user reviews. To access the **Administrate Reviews** screen, login as *admin* to access the **General Configuration** screen and click the **Reviews** link.

To view user reviews:

Enter the number of days' worth of reviews to view and click **Refresh**.

A list appears with the reviews written within the selected timeframe.

To approve a review so that it appears for all users on the **Item Details** screen, click **Approve**.

To approve all displayed reviews at once click **Approve All.**

To **delete** a review, click the **Delete** button next to the review.

To view only those reviews that have not been approved, select the *Only show reviews needing approval* check box.

An alternate way to view a review is on the **Item Details** screen:

Search for a title on the **Search Results** screen.

Click the title to open the **Item Details** screen.

Click the **Reviews** tab.

The most recent review appears at the top of the list of reviews. To delete a review click **Delete**.
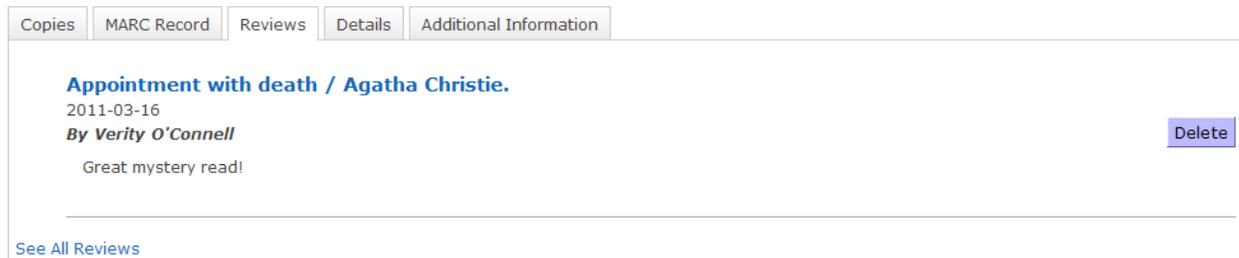
The **OPAC Settings** configure some aspects of what patrons can see and do in the interface. To access the **OPAC Settings** screen select **OPAC Settings** under **Theme Settings** on the **General Configuration** screen.

Note: Before any changes are made select the appropriate theme to modify from the **Select Theme** drop-down list box.
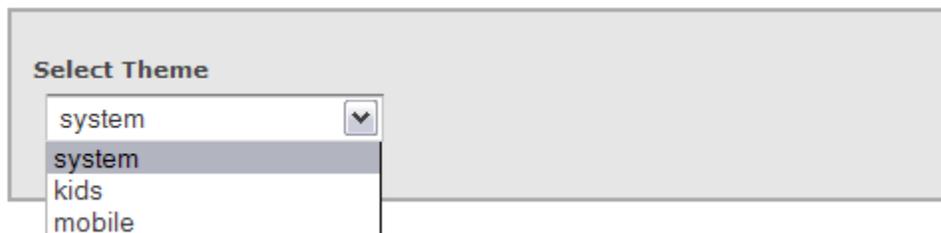
The **Enable Reviews** check box determines whether logged-in patrons will be permitted to write, save, edit, and delete their own reviews of items on the **Item Details** screen.

To enable patron reviews select the **Enable Reviews** check box and click **Save**.
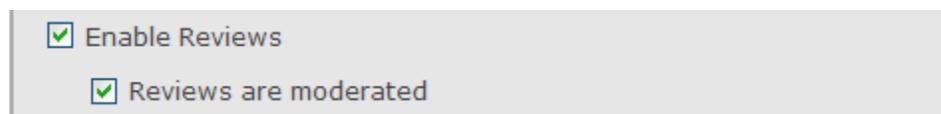
The **Reviews are moderated** check box determines whether a review is hidden from all patrons (except the author) until the *admin* user approves the review on the **Administrate Reviews** screen.

To enable reviews to be moderated select the **Reviews are moderated** check box and click **Save**.

Note: If the **Reviews are moderated** setting is enabled then modified reviews must be approved by the *admin* user before they will appear on the **Item Detail** screen. When a review is modified, the review appears at the top of the **Reviews** tab of the **Item Details** screen.

To return the **OPAC Settings** to the default setting click **Reset to Defaults**.

Note: Changes to the **OPAC Settings** take effect immediately.

Tag Management

To enable patron tagging, login as *admin* to access the **General Configuration** screen.

Click on the **Tagging** link to open the **Tagging** screen.

The **Tagging** screen is used to determine whether patrons are allowed to add tags to records. This screen also lets the admin user 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, and the tag will not be saved.

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 **Save**.

To add a **Banned Tag**:

Type the banned tag in the **Tag Name** text box and click **Ban**.

Note: If there are already instances in the database of a tag you add to the **Banned Tag List**, all instances of that tag will be hidden.

To **Un-Ban** a Tag:

Select the tag on the **Banned Tag List** you would like to un-ban and click **Unban**.

Tags that were added to records and then banned will reappear.

To **Upload a List** of tags to ban:

Click **Browse** to locate a .txt or .csv file of tags to ban and click **Import**.

Login Statistics Report

The **Login Statistics Report** screen lets the admin user create a report (PDF or HTML) of the number of successful patron logins during a given time period.

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

Log into the Chamo as *admin* to access the **General Configuration** screen.

Select the Reports - Login Statistics link. The Login Statistics Report screen opens.

Login Statistics Report

Report format

PDF

Start Date

End Date

Report Breakdown
Hourly   Daily   Monthly   Detail

Run

Select a **Report Format** from the drop-down list: PDF or HTML.

Note: The HTML format is recommended if the collection contains non-Latin characters.

Type a **Start Date** OR click the calendar icon to choose a start date. If a start date is not chosen, the report defaults to a **Start Date** of 01 January 2000. **Note:** When a date is typed it MUST use the **Input Date Format** as defined on the **General Configuration** screen.

Type an **End Date** OR click the calendar icon next to the text box to choose an ending date. If an end date is not chosen, the report defaults to an **End Date** of 31 December 2099. **Note:** When a date is typed it MUST use the **Input Date Format** as defined on the **General Configuration** screen.

Select the **Hourly**, **Daily**, **Monthly**, or **Detail** radio button to determine whether the report lists the number of patron logins each hour, each day or each month.

Click **Run**.

A report is produced containing a report of the number of patron logins.

Login Statistics Report (By Hour)

	20-Jun-2011	30-Jun-2011
Date	Total	
06-22-2011 09:00	1	
06-27-2011 14:00	1	
06-27-2011 15:00	1	
06-28-2011 14:00	1	
06-29-2011 08:00	1	
06-29-2011 09:00	2	
06-30-2011 11:00	1	

Login Statistics Report (By Day)

	20-Jun-2011	30-Jun-2011
Date	Total	
06-22-2011	1	
06-27-2011	2	
06-28-2011	1	
06-29-2011	3	
06-30-2011	1	

Login Statistics Report (By Month)

	20-Jun-2011	30-Jun-2011
Date	Total	
06-2011	8	

Login Statistics Report (Detail)

	20-Jun-2011	30-Jun-2011
Patron ID	Login Time	Logout Time
285670	2011-06-22 09:56	2011-06-22 10:22
285670	2011-06-27 14:42	2011-06-27 15:18
285653	2011-06-27 15:49	2011-06-27 16:10
285670	2011-06-28 14:15	2011-06-28 14:41
285715	2011-06-29 08:53	2011-06-29 08:58
285715	2011-06-29 09:05	2011-06-29 09:25
285653	2011-06-29 09:12	2011-06-29 09:33
285653	2011-06-30 11:13	2011-06-30 11:14

Patron Features

The **Patron Features** screen allows *admin* to choose which features are available to patron users.

The following settings are available on the **Patron Features** screen:

Allow Patrons to Log In
Allow Expired Patrons to Log In
    Warn patrons when expiration is within this many days
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
        Add a 'lost card' block to the patron
        Disable the lost barcode
Enable history CSV report
Enable history text report
Maximum age (days) of patron history
Account Tabs

See **Patron Features** Help for detailed information on these configuration settings.

Note: Consortium users can select an institution and configure **Patron Feature** settings for that institution that *override* the Global Patron Features settings.

Chamo uses the following rules to determine which **Patron Features** settings are used:

- Patron Features settings for the institution associated with a staff user's default login location are used.
- Patron Features settings for the institution selected by the patron when logging in are used.
- If a patron is not logged in, Patron Features for the institution associated with the current theme are used.
- In all other cases, the global Patron Features settings are used.
- If an institution has not configured institution-specific Patron Features, the global Patron Features settings are used.

Patron Features

☐ Allow Patrons to Log In

☐ Allow Expired Patrons to Log In

Warn patrons when expiration is within this many days

[   ]

☐ 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

Maximum age (days) of patron history

[   ]

Account Tabs		Enabled Account Tabs
E-books	Add	▲ ▼ Messages ❌
		▲ ▼ Checked Out ❌
		▲ ▼ Requests ❌
		▲ ▼ Account ❌
		▲ ▼ History ❌
		▲ ▼ Contact ❌
		▲ ▼ Queue ❌

Save

Click the **Save** button after you make changes to the **Patron Features** settings.

Login

The **Allow Patrons to Log In** setting determines whether patrons are allowed to log in to the web interface using the **Login** screen. If the setting *is* enabled, the **Login** screen is displayed in the patron interface. If the setting *is not* enabled, the **Login** screen is not displayed, preventing patrons from logging into Chamo.

The **Allow Expired Patrons to Log In** check box determines whether patrons with *expired* library cards are still able to log in to the web interface using the **Login** screen.

The **Warn patrons when expiration is within this many days** textbox is used to issue a warning to a patron before his or her account expires. A warning message is displayed on the **My Account** screen if a patron is within the configured number of days of the 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.

The **Display lost card reason for login failure** setting 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 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, instead of a generic login failure.

The **Display quick-login on search page** check box determines whether an Account Login panel will appear in the left sidebar of the **Search Results** screen when a patron is not logged in.

Passwords

The **Allow patron to change password** 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.

The **Notify patrons of a password change via email** check box determines whether a patron will receive an email message when the patron's password is changed. If the setting *is enabled,* email will be sent to the patron email address configured in the 271 tag, first indicator 1, subfield $a.

The **Enable Forgotten Password** check box determines whether the Forgot your password? link appears on the **Login** screen. If this check box is enabled patrons can click on the link and enter their username and email address to have a new password generated and sent to their email address.

The email address the patron enters must match the email address in the patron record. **Note:** The settings on the **Mail Server Settings** screen must be configured for email messages to be sent.

The **Change all patron's passwords at once** 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?
When this check box *is* selected any password in subfield $b of the 015, 016, 017, and 019 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: In a consortium environment only the passwords associated with the patron's log-in institution will be reset. If a staff user attempts to change passwords for a patron that does not have any passwords associated with the staff user's institution, an error message will be displayed.

Lost Card

The **Allow patron to report a lost card** 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.

The **When a card is reported lost** option 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. There are two radio button choices: **add a lost card block to the patron** or **disable the lost barcode**.

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. Although the patron will be unable to perform circulation transactions they will still be able to log in to the web interface using the lost barcode.

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.

Other Patron Features

The **Display account summary on search page** check box determines whether a patron's account summary (showing the number of items checked out, overdue, or ready for pickup and the total amount owed by the patron) will appear in the left sidebar of the **Search Results** screen.

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

The **Enable patron queue** 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.

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

The **Enable history CSV export** 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.

The **Enable history text export** 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.

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

The **Account Tabs/Enabled Account Tabs** setting allows *admin* to select and determine the order of the **My Account** tabs that will be displayed in the patron interface.

Patron Contact Configuration

The **Patron Contact Configuration** screen allows *admin* to determine whether certain account information and contact information fields appear on the patron **Contact Information** screen:

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.

In addition, the **Language for patron alternate name display** setting determines whether an alternate name for the patron will be displayed.

See **Patron Contact Configuration** Help for detailed information on these configuration settings.

To configure the **Display read-only** settings, select the check box next to each field to display on the patron **Contact** tab.

Display read-only

☐ Expiration date

☐ Patron type

☐ Primary barcode

☐ Alternate barcode

☐ Chamo username

External Data Configuration

The **External Data Configuration** screen allows *admin* to configure whether information from external data sources appear in the interface. External information consists of several elements:

Book Cover and Content Services (Syndetics and Google Books thumbnails)
NoveList (enriched data: book cover art, reading recommendations, etc.)
E-Book Services (access to OverDrive and 3M Cloud Library e-books)
AddThis Widget Feature (on the Search Results & Items Details screens)
HanWeb Support
Zotero Support

Note: To have NO information from external sources to appear, select the **None** radio button and deselect the **Enable Add This Widget** checkbox.

See **External Data Configuration** Help for detailed information on these configuration settings.

External Data Configuration

Book cover and content services

○ None
◉ Syndetics

Syndetics base URL

```
http://www.syndetics.com
```

Syndetics client code

```
vtlstest
```

○ Google Books

Google Books API Key

```
AIzaSyDUGsxh6eTAAhMeM93L9c9QHwkAx68cz4Y
```

NoveList

Profile

```
ns204652.main.novselcsc
```

Password

```
dGJyMOPmtUqwra5M
```

E-book services

OverDrive account ID

```
1572
```

3M Cloud library ID

```

```

Add This Widget

☑ Enable Add This Widget

☐ Customize Add This Widget

HTML code for add this widget

```
<div class="addthis_toolbox
addthis_default_style">    <a
class="addthis_button_email"></a>    <a
class="addthis_button_print"></a>    <a
class="addthis_button_twitter"></a>    <a
class="addthis_button_facebook"></a>    <a
class="addthis_button_myspace"></a>    <a
class="addthis_button_stumbleupon"></a>    <a
class="addthis_button_digg"></a>    <span
class="addthis_separator">|</span>    <a
class="addthis_button_expanded">More</a></div>
```

CSS code for add this widget

```
.addthis_toolbox {
  border: 1px solid;
}
```

HanWeb

☐ Enable HanWeb support

HanWeb URL

```

```

HanWeb IP Address

```

```

☑ Enable Zotero support

Save

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

To display external information from Syndetic Solutions™, select the Syndetics radio button, enter the base URL for Syndetics, and then enter the library's Syndetics client code. To display book cover thumbnails and links to Google® Books information, select the Google Books radio button and enter a Google Books API Key. **Note:** Only one data source (Syndetics **OR** Google Books) may be enabled.

To display book cover art, reading recommendations, 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 the OverDrive account ID. **Note:** The **Show e-book availability information for e-resources** setting on the **OPAC Settings** screen must be also enabled to use this e-book service functionality.

To enable the display of information about 3M Cloud Library e-books in the patron interface, enter the 3M Cloud Library ID. When this feature is enabled, Chamo displays a **Show button** next to a Cloud Library e-resource on the **Search Results** screen. **Note:** To enable the display of the **Show** button on the **Search Results** screen, the **Show e-book availability information for e-resources** setting on the **OPAC Settings** screen must also be enabled.

To enable and/or modify the AddThis widget on the **Search Results** and **Item Details** screens, select the **Enable Add This Widget** check box. 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. 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.

Subscription Services

The **Subscription Services** screen allows *admin* to set up links to external subscription services and federated search tools such as 360 Search.

The following settings are available:

Enable subscription services: Enable the feature.

Subscription service A-Z list URL: The URL to access the A-Z list - this is the real URL and not the proxy.

Subscription service URL (logged in user): The URL to access the subscription search (Federated searching) as an authenticated user. Do not use a proxy here.

Subscription service URL (anonymous user): The URL to access the subscription search anonymously. Do not use a proxy address.

Use EZProxy ticket authentication: Check this to use EZProxy to access the service URLs and fill in the other EZProxy settings below. Chamo will use EZProxy for all access, and will use ticket authentication to grant access to authenticated users. It will use anonymous access (no login) with EZProxy for unauthenticated users.

EZProxy base URL: The EZProxy base URL. Do not include the "/login" part of the URL.

EZProxy user: For authenticated users, the EZProxy username to use. Not used for anonymous access.

EZProxy SHA1 key: The SHA1 key shared with EZProxy's ticket setup. Not used for anonymous access.

EZProxy groups: The list of groups to use when authenticating, separated by spaces. Not used for anonymous access.
Edit disclaimer: Press this button to edit the disclaimer text shown to the user before accessing any resource. You may enter a disclaimer for each available language in Chamo.

Subscription Services

OpenURL Configuration

The **OpenURL Configuration** screen allows *admin* to add, change, and remove OpenURL resolvers. 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. When a user clicks this link, a new window opens with search results for that item.

To configure a new OpenURL server:

Click the **Add** button. A pop-up window opens.

Enter the **Name** and **URL** for the remote OpenURL server.

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

Select the version of OpenURL that the server supports.

Upload an icon and specify the icon filename. The icon can be used along with (or instead of) the OpenURL link. (To display only an icon, make the label string translation blank.)

To change the URL content, add a custom stylesheet. The stylesheet must conform to the XSLT 1.0 specification (with optional EXSLT extensions). The input to the stylesheet is an XML document containing the MARC record that will produce the URL:

<collection>
  <record>
    <leader...
    <controlfield...
  </record>
</collection>

Click the **Save** button.

The server that is 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 an OpenURL resolver is configured, a string must be added to the relevant language file on the **Language String Management** screen. The string in the String Code column 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.

See **OpenURL Configuration** Help for more information.

Purchase Request Configuration

The **Purchase Request Configuration** screen allows administrators to enable this feature for patrons or anonymous users, set a policy URL that will be linked to on the purchase request page, define the category to use for purchase requests made through Chamo, and define staff email addresses per main location for purchase request notifications. All of these admin settings can also be set separately for each institution.

When purchase requests are enabled, users will see a **Request for purchase** link. Following this link takes users to the **Request for Purchase** screen, which can be filled out to place a new request. **Note:** Once a purchase request is successful, it can be pulled up in the Virtua client.

> **Profiler Tip:** To enable confirmation e-mails, select the 'Allow E-mail' check box next to the purchase request status of 'Review' in the Purchase Request Statuses in the *Virtua Profiler*. When a purchase request is placed by a logged in patron, Chamo sends a confirmation e-mail to the e-mail address in the patron record. When a purchase request is placed by an anonymous user, Chamo sends a confirmation e-mail to the e-mail address provided by the user when the purchase request was placed.

Select an institution to configure: Use the drop-down list to choose an institution if the 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: Use this setting to configure a URL for the 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: Use the drop-down list to 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*.

> **Profiler Tip:** The Purchase Request Categories parameter lets your library set up "categories" for organizing the titles requested for purchase. On the **Add Purchase Request** window in the Virtua client, you are required to select a category from the Categories drop-down list. The categories you define in this parameter will appear in that list. See *Working with the Purchase Request Categories Parameter* in the *Virtua Profiler/Acquisitions Parameters User's Guide* for more information.

Branch Location and E-mail: This table lets *admin* 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 **Save** to save any changes.

Purchase Request Anonymous Fields

The **Purchase Request Anonymous Fields** screen allows *admin* to 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). There are three options in each drop-down list: Optional, Required, and Do not show.

Purchase Request Anonymous Fields

Request Fields

Optional ▼	Author
Optional ▼	ISBN
Optional ▼	ISSN
Optional ▼	Place of Publication
Optional ▼	Year of Publication
Optional ▼	Publisher Name
Optional ▼	Music Publication Number
Required ▼	Most Frequently Visited Branch
Optional ▼	Where did you learn of this item?
Required ▼	Notes
Do not show ▼	Needed By

Contact Information

Do not show ▼	Requester ID
Optional ▼	Title (Mr., Ms., Miss, etc.)
Optional ▼	Name
Optional ▼	Address
Optional ▼	Telephone Number
Optional ▼	E-mail Address

Save

Note: The E-mail field on the form for anonymous purchase requests *must* be enabled via the **Purchase Request Anonymous Fields** screen.

Purchase Request Patron Fields

The **Purchase Request Patron Fields** screen allows *admin* to configure the fields that appear on the **Request for Purchase** screen for patron purchase requests (purchase requests placed by users who are logged in). There are three options in each drop-down list: Optional, Required, and Do not show.

Purchase Request Patron Fields

Request Fields

Optional	Author
Optional	ISBN
Optional	ISSN
Optional	Place of Publication
Optional	Year of Publication
Optional	Publisher Name
Optional	Music Publication Number
Required	Most Frequently Visited Branch
Optional	Where did you learn of this item?
Required	Notes
Do not show	Needed By

Contact Information

Do not show	Requester ID
Do not show	Title (Mr., Ms., Miss, etc.)
Do not show	Name
Do not show	Address
Do not show	Telephone Number
Do not show	E-mail Address

Save

Saved List Configuration

Saved list management features are *deactivated by default* for staff users. To enable the **Create Saved List** and **Saved List Management** links on the Staff Access screen select the **Enable saved lists** check box.

☑ Enable saved lists

The *TPU Location* setting allows the *admin* user identify a central processing location. Users whose login 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** can be assigned to **Withdrawal** or **LOLM** copy saved lists.

For each workflow status listed on the **Saved List Configuration** screen the *admin* user can select an *item status* to correspond with that saved list workflow status. Each *item status* can be assigned to only *one* saved list workflow status.

Note: Item statuses in the drop-down lists correspond with the **Status Displays** settings in the *Virtua Profiler*.

To configure a workflow *item status*:

Select the *item status* from the drop-down list box to correspond with each saved list workflow status.

Click the **Save** button.

Saved List Fields

The **Saved List Fields** configuration screen allows *admin* to select a saved list type (Bibliographic Record, Patron, or Copy) and then configure the columns of data as well as the order in which the columns appear on the **Saved List Management** screen for lists of that type.

Manage Settings

The **Manage Settings** screen lets admin import and/or export administrative settings. This allows 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.

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 the 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

Theme Settings

Facets

Use the **Facet Configuration** screen to choose which search facets appear along the side of the **Search Results** screen, as well as the order in which the facets appear. Facets displayed are specifically tied to the theme. Facets are not globally set since different themes may require different facets that are more likely to be used by a particular group of users.

See **Facet Configuration** Help for detailed information on these configuration settings.

To configure facets for a theme, login as *admin* to access the **General Configuration** screen.

Note: Before any changes are made select the appropriate theme to modify from the **Select Theme** drop-down list box.

Facet Configuration

	Index		Sort by		
	Archive ⌄		hit count ⌄		Add
▲ ▼	Author		hit count ⌄		Remove
▲ ▼	Publication Year		value (desc) ⌄		Remove
▲ ▼	Genre		hit count ⌄		Remove
▲ ▼	Subject		hit count ⌄		Remove
▲ ▼	Format		hit count ⌄		Remove

Select Theme
system ⌄

Save

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

To **add a facet** to the **Search Results** screen, select the facet in the **Index** drop-down list box to add to the **Search Results** screen, and click the **Add** button. The facet chosen appears in the **Index** column list.

To **remove a facet** from the **Search Results** screen, click the **Remove** button next to the facet to remove. The facet chosen appears in the **Index** drop-down list box.

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

The **Sort by** drop-down list boxes allows admin to specify a sort order (hit count, value (descending), or value (ascending)) for each search facet category. When a search is performed, the search facets within each facet category in the *Refine your search* panel are sorted in the order specified.

Configuration changes take effect immediately.

Note: The LC Call Number, Set, and Source facets are available only to users in a consortium environment.

Collection Group Facet

The *Admin User* can add a **Collection Group** facet to display on the **Search Results** screen to refine search results by collection group. When the collection group facet is used to refine a search, the result set will contain all bibliographic records that have at least one item that belongs to the selected collection code group.

To add a Collection Group facet:

    Select **Collection Group** from the **Index** drop-down list and click **Add.**

Collection Codes

The translated collection group can be configured by the *admin* user to appear for each item on the **Copies** tab on the **Item Details** screen.

Note: A *Virtua Profiler* setting is required to define the Collection Codes.

    Profiler Tip: The Collection Code parameter is an optional parameter that can be used to help you keep track of items in your collection. A collection code can be used at any of your locations and with items of any type. The collection code descriptions you configure via this parameter will be available on the **Item Information** window and the **Batch Item Editor** window in the Virtua client, where you can assign existing collection codes to items. See *Configuring Collection Codes* in the *Virtua Profiler/ Cataloging Parameters User's Guide* for more information.

Location Facet

The **Location** facets configured on the **Facets** screen display unlimited locations and sub-locations alphabetically on the Chamo home page **Refine your search** section. Main locations are displayed according to name and sub-locations are displayed beneath each main location. Check boxes are used to indicate which locations are currently being used to limit a search. **Note:** Main locations and sub-locations may be translated by the *admin* user.

Filters / Facet Values

The **Filters** screen allows *admin* to choose **Location** and **Collection Group** filters for each theme. The **Location** filter allows *admin* to configure which locations appear as filters on the **Advanced Search** screen and optionally lets *admin* restrict search results to only those items in the selected locations. The **Collection Group** filter allows *admin* to limit search results by collection group.

The **Select Theme** area lets *admin* choose a theme to apply configuration changes. The themes in the 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 enabled, the selected location and collection group filters will also be applied to these resources. Therefore, serials without items and

electronic resources will NOT appear in any search results since they are not associated with a location or collection group.

Note: To *display* electronic resources in search results do **NOT** select this check box. When this setting *not* enabled, the filters will not be applied to these items, and these resources *will* appear in the search results if they meet other search criteria.

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 *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 *appear* in the Location facet.

To display the main locations in the Location search facet in order based on hit count select the **Sort main and sub-location facets by hit count** check box. When this setting is *NOT* enabled, Chamo displays main locations in alphabetical order.

To restrict searches to only the selected locations, select the **Restrict all searches to filtered locations** check box.

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 *appear* in the Collection Groups facet.

Changes take effect immediately.

Search Settings

The **Search Settings** screen lets *admin* configure some aspects of what patrons can see and do in the interface.

The following configuration settings are available on the **Search Settings** screen:

Maintain Search History
Auto-complete for QuickSearch
Additional Terms box display
Default page size (set the default number of results per page)
Term display size (required setting)
Default Sort for Bibliographic Search
Sort Options
Advanced Search Filters
Advanced Search Fields
Heading Searches
Untranslated/Translated Fields

See **Search Settings** Help for detailed information on these configuration settings.

Search Settings

Select Theme

system

☑ Maintain Search History

☑ Enable Auto-complete for QuickSearch

☑ Show 'Additional Search Terms' box above facets

Default page size

20

Term display size*

40

Default Sort for Bibliographic Search

Recently added items first

Available Sort Options   **Selected Sort Options**

Relevance

Add

- ▲ ▼ Recently added items first
- ▲ ▼ Title
- ▲ ▼ Author
- ▲ ▼ Call Number
- ▲ ▼ Creation Date
- ▲ ▼ Publishing Date (Newest First)
- ▲ ▼ Publishing Date (Oldest First)

Available Filters   **Selected Filters**

Archive
Author
Author (Corporate)
Average Rating
Bibliographic Level
Biography
Cartographic
Cataloging Source
Collection Group
Conf Publication

Add

Available Advanced Search Fields   **Selected Advanced Search Fields**

Bib Id
Call Number (BCM)
Call Number (DDC)
Call Number (LCM)
Call Number (LKC)
Item Barcode
Notes
Series Title
System Control Number
Tag

Add

- ▲ ▼ Any Field
- ▲ ▼ Author
- ▲ ▼ Title
- ▲ ▼ Subject
- ▲ ▼ ISBN
- ▲ ▼ ISSN
- ▲ ▼ LCCN

Available Heading Searches   **Selected Heading Searches**

User Defined

Add

- ▲ ▼ Author
- ▲ ▼ Subject
- ▲ ▼ Title
- ▲ ▼ Journal Title

Untranslated Fields   **Translated Fields**

control - Any Control Number
text - Any Field
ar - Archive
author - Author
author_corporate - Author (Corporate)
rating - Average Rating
recordId - Bib Id
bl - Bibliographic Level
b - Biography
call_number - Call Number

Add

a - Author
format - Format
item_class - Item Class
loc - Location
pp - Place of Publication
date - Publication Year
s - Subject

Save

The **Enable Auto-complete for QuickSearch** setting determines whether or not Chamo displays search suggestions as the user types a term in the quick Search box.

Default Sort for Bibliographic Search

To determine the default sort for the **Search Results** screen:

Select the theme to apply the changes using the **Select Theme** drop-down list box. This list is hard-coded.

Choose a sort criterion from the **Default Sort for Bibliographic Search** drop-down list box: Relevance, Recently added items first, Author, Title, Publishing Date (Oldest First), Publishing Date (Newest First), Call Number, or Creation Date.

Click **Save** to save configuration changes.

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

Available Sort Options

The **Available Sort Options** area allows *admin* to specify the sort options that are available in the "Sort by" drop-down list on the **Search Results** screen and the order in which they appear.

Collection Group Filter for Advanced Searches

The *Admin User* can add a **Collection Group** *filter* to display on the **Advanced Search** screen to refine search results by collection group. The filter will be populated with the collection groups that the library staff has defined in the *Virtua Profiler*. Users will be able to select one collection group or multiple collection groups, using the Control key on their keyboard. A bibliographic record may belong to multiple collection groups, as they may have items attached that belong to different collection groups.
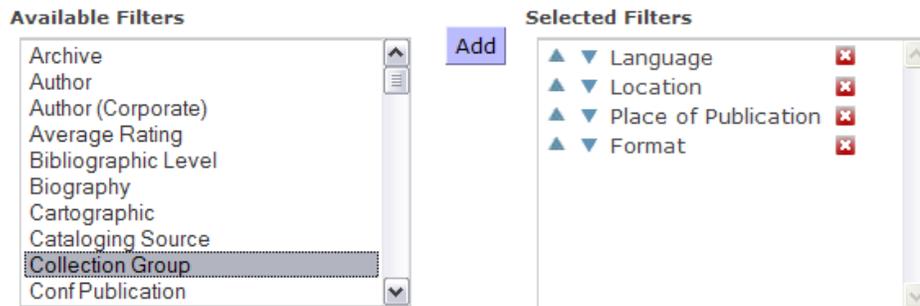
Profiler Tip: The Collection Code Groups parameter lets you define Collection Code Groups and specify which Collection Codes are part of each group. The Collection Code Groups can then be used for filtering search results by using the Collection Groups filter in the client, which is accessible via the **Collection Groups** button on the **Search** window. The *Collection Code Groups Parameter* is configured on the Cataloging Tab in the *Virtua Profiler*.

To add a **Collection Group** filter to the **Advanced Search** screen:

Log in to Chamo as the *admin* user.

Select the **Search Settings** link on the **General Configuration** screen to open the **Search Settings** screen.

Select **Collection Group** from the Available Filters and click **Add.**

Available Filters

Archive
Author
Author (Corporate)
Average Rating
Bibliographic Level
Biography
Cartographic
Cataloging Source
Collection Group
Conf Publication

Add

Selected Filters

▲ ▼ Language ✖
▲ ▼ Location ✖
▲ ▼ Place of Publication ✖
▲ ▼ Format ✖

Click **Save** to save the changes.

Heading Searches

The Available Heading Searches and Selected Heading Searches area allows *admin* to choose which heading search types are available in the 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** screen.

Available Heading Searches

User Defined

Add

Selected Heading Searches

▲ ▼ Author ✖
▲ ▼ Subject ✖
▲ ▼ Title ✖
▲ ▼ Journal Title ✖
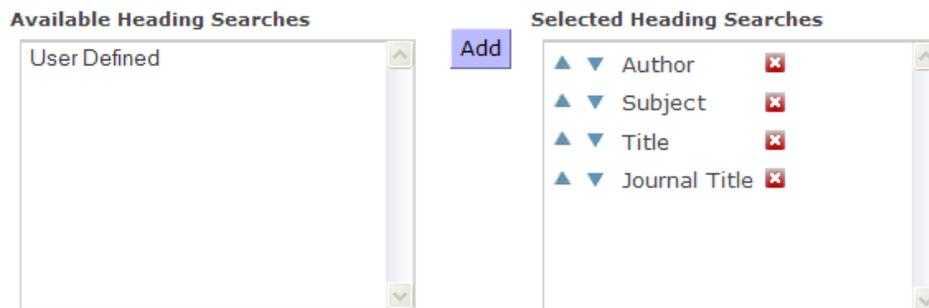
Untranslated/Translated Fields

The Untranslated Fields and Translated Fields area allows *admin* to specify which facets are translated when they are displayed in the *Refine your search* panel on the Search Results screen.

To specify that a facet label be translated:

Select an index in the Untranslated Fields list. (Select multiple indexes by holding down the CTRL key or the SHIFT key, or by dragging the selection with the mouse.)

Click **Add**. Your selection appears in the Translated Fields list.

Click **Save** to save your changes.

If an index is found in the Translated Fields list, Chamo attempts to look up its translation string (**search.field.[index name].[facet value]**) in the language strings file. For example, for the index '**bl**' Chamo might look up '**search.field.bl.m**'. If this fails (or if a facet is not found in the list of Translated Fields), Chamo simply displays the facet value (in this case, '**m**').

Facet translations apply to the list of facets in the *Refine your search* panel on the Search Results screen, as well as the search breadcrumbs.

OPAC Settings

The **OPAC Settings** screen lets *admin* configure some aspects of what patrons can see and do in the interface.

The following configuration settings are available on the **OPAC Settings** screen:

Select Theme
Copies page size
Use 'title' filed for main title display and record links
Use title field for main title display and record links
Show item availability counts
Enable Show All button
Show E-book availability information for e-resources
Enable MARC View on the 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

Reserve Room enabled
Enable Ratings
Enable Reviews
Enable RSS Feed
Enable Heading Search
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

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

☐ 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

☐ Reserve Room Enabled

☐ Enable Ratings

☐ Enable Reviews

    ☐ Reviews are moderated

☐ Enable RSS Feed

☐ Enable Heading Search

☐ Show Blind Authority Headings

☐ Enable View Authority

☐ Display thumbnails for multimedia links

☐ Open multimedia links in new window

Save

After changes are made to the **OPAC Settings**, click the **Save** button.

The **Copies page size** setting allows admin to specify the maximum number of copies that are shown on each page of the **Copies** tab on the **Item Details** screen.

Use 'title' field for main title display and record links setting allows *admin* to specify how Chamo determines the title data to display on the **Search Results** screen, the **Item Details** screen, and other screens that that display a title hyperlinked to a record.

> If this check box *is* selected, Chamo uses the 'title' view field (defined on the **Field Definitions** screen and linked to a MARC field via the **MARC Field Source Rules** settings) to generate the title displayed on the screens mentioned above.

> If this check box *is not* selected, Chamo uses heading data to display the title.

Show item availability counts determines whether item availability counts are displayed on the **Search Results** screen for titles that are not serials or e-resources.

> *If* the **for serials** check box is selected, availability counts are displayed on the **Search Results** screen for serials.

> *If* the **for e-resources** check box is selected, availability counts are displayed on the **Search Results** screen for e-resources.

> *If* the **even when none of the items are available** check box is selected, availability counts are displayed on the **Search Results** screen for locations that have no available items.

Enable Show All button determines whether a **Show All** link is displayed on the **Copies** tab of the **Item Details** screen. When the user clicks this link, Chamo 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.

Show e-book availability information for e-resources determines whether Chamo displays the following information when an e-resource is viewed on the Search Results of Items details screens: total number of e-books, number of available e-books, number of holds, and a Details link that launches an OverDrive page in the browser. **Note:** In addition to enabling this feature *admin* MUST enter an OverDrive account ID on the **External Data Configuration** screen.

Enable MARC view on Item Details screen determines whether the **Item Details** screen will have a tab for the MARC view of a bibliographic record.

Use VTLSSORT tag to order fields on MARC view allows admin 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 this 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 setting allows *admin* to specify how Chamo determines the sort order on the Location column on the **Copies** tab of the **Item Details** screen.

> If this setting *is enabled*, copies are sorted according to location ID.

> If this setting *is not enabled*, copies are sorted by location name.

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.

> If this check box *is selected*, copies displayed on the **Copies** tab of the **Item Details** patron screen will be sorted by status and then by location.

> If this check box *is not selected*, copies displayed on the **Copies** tab will be sorted by status.

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.

> *If* this check box *is selected*, the **Items** tab will be displayed when a user first accesses the **Item Details** screen for a serials record.

> *If* select this check box *is not selected*, the **Copies** tab will be displayed when a user first accesses the **Item Details** screen for a serials record.

Reserve Room Enabled determines whether the **Reserve Search** is available. The **Reserve Search** lets patrons search for items on reserve by class, title, or instructor name.

Enable Ratings determines whether logged-in patrons will be permitted to rate items using a 1-5 star rating system.

Enable Reviews 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 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 determines whether an RSS feed icon appears on the **Search Results** screen.

Enable Heading Search determines whether heading searches are enabled or disabled.

Show Blind Authority Headings determines whether blind references are included in the results of a **Heading Search**. When this parameter is selected, authority headings in the database that have no corresponding headings in bibliographic records WILL be included in the result set of a heading search.

Note: When the box is checked, blind authority headings will be included in the result set when a heading search is performed and display as (0). Turning OFF the setting will prevent blind headings from being included in the result set when a heading search is performed.
http://en.wikipedia.org/wiki/Monsanto_Corporation

Enable View Authority 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.

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. When this setting is enabled and the URL in the 856 tag points to a jpg, jpeg, 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 determines whether clicking on a multimedia link opens the link in a new window. When this setting is enabled and a multimedia link is selected, the link is opened in a new browser window.

Hide empty tabs on Item Details screen

This check box determines whether certain tabs on the **Item Details** screen are hidden when there is no information to display on the tab. When this setting is enabled, the **Copies**, the **Additional Information**, and the **Ratings** tabs are only shown if there is information to be displayed on the tab.

See **OPAC Settings** Help for detailed information on these configuration settings.

Field Definition

The **Field Definition** screen lets admin add a 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; and choose to make a field a search hyperlink.

Configuration changes take effect immediately.

Note: Admin can define fields that correspond to data in a holdings MARC record and configure these fields to display on the **Issues** tab of the **Item Details** screen. The admin user can define holdings data fields on the **Field Definition** screen and then configure them to display via the **Holdings** view on the **Field Placement** screen.

Field Definition

Add

Showing 1 to 22 of 22					
Name	**Displayed Label**	**Search Field**	**Translatable**		
addedAuthor	Added Author		No	Edit	Delete
analyticalChildren	Analytical Children		No	Edit	Delete
analyticalParent	Analytical Parent		No	Edit	Delete
author	Author		No	Edit	Delete
callNumber	Call Number		No	Edit	Delete
contents	Contents		No	Edit	Delete
edition	Edition		No	Edit	Delete
filingTitle	Filing Title		No	Edit	Delete
mainEntry	Main Entry		No	Edit	Delete
material	Material		No	Edit	Delete
multimedia	Multimedia		No	Edit	Delete
newTitle	New Title		No	Edit	Delete
notes	Notes		No	Edit	Delete
physicalDescription	Physical Description		No	Edit	Delete
previousTitle	Previous Title		No	Edit	Delete
publication	Publication		No	Edit	Delete
publisher	Publisher		No	Edit	Delete
series	Series		No	Edit	Delete
subject	Subject		No	Edit	Delete
summary	Summary		No	Edit	Delete
title	Title		No	Edit	Delete
year	Year		No	Edit	Delete
Showing 1 to 22 of 22					

Note: To assign or change the MARC fields used for the field definitions, use the **MARC Field Source** screen.

See **Field Definition** Help for detailed information on these configuration settings.

MARC Field Source

On the **MARC Field Source Rules** screen, admin can choose which MARC 21 fields are used for the data elements that appear for each item. The default values for each **MARC Field Source** are taken from the library's View Bibliographic Record: Full Display Profiler view. For information on Profiler views, see the *Virtua Profiler/OPAC Parameters User's Guide.*

Note: After modifying these settings, use the **Field Placement** screen to determine *which* MARC elements display for each item on the **Search Results** and **Item Details** screens.

Note: Before making your initial configurations on this screen, use the **Formats** section at the bottom of the screen to determine which fields are available in the **Format** drop-down list at the top of the screen.

Click the **Add** button.

Enter the Name and Record Types (required) and Bib Levels and click **Save**.

To choose which tags are displayed for the **MARC 21** data elements click **Add Tag** or **Add Fixed/Subfield**.

With the **Add Tag** button, add Tag, Indicators, and Occurrence and click **S**ave. The tag you configured appears in a list.

With the **Add Fixed/Subfield** button, select the **Subfield** radio button and enter Leading Text, Code (required), Occurrence, Trailing Text, and Translation Prefix **OR** select the **Fixed Field** radio button and enter Leading Text, Starting Position (required), Ending Position (required), Trailing Text, and Translation Prefix, then click **Save**. The fixed field or subfield appears in the list.

When configuring an individual fixed/subfield, Admin can provide a translation for each field by entering a **Translation Prefix**. **Note:** When a **Translation Prefix** is entered on the **MARC Field Source Rules** screen a string needs to be added to the **Language File** using the format prefix.string.

To *modify* a tag or a data field click **edit**, make modifications, and then save the changes.

To specify which occurrences of **MARC 21** tags are displayed select one of the following 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.

To modify **880 tag** display rules select an option from the 880 Tag Selection drop-down list.

Select or deselect the *Display unlined 880* check box to show or hide unlinked 880 tag data.

To configure 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** area click the **edit** link to specify the MARC code for any linking field (001, 760-789) that has been designated as a search hyperlink.

To prevent some fields from appearing as search hyperlinks, select the indicator position to view to become a non-filing indicator: None, First indicator or Second indicator.


Note: The admin user can use the multimedia field on the **Marc Field Source Rules and Field Placement** screens to configure the appearance of hyperlinked information in 856 tags. By default, Chamo displays 856 subfields $a, $y, and $z on the **Search Results** and **Item Details** screens. If none of the configured subfields are present in the 856 tag, then subfield $u is displayed. Records with 856 tags that have a 2nd indicator of 8 will have their thumbnails shown if thumbnails are enabled. Fresh installs and migrations will ensure that a 'multimedia' field source is created and that it is configured for $a, $y, and $z.

See **MARC Field Source** Help for detailed information on these configuration settings.

Field Placement

The **Field Placement** screen allows *admin* to choose and change the order of the fields that are displayed on a given screen.
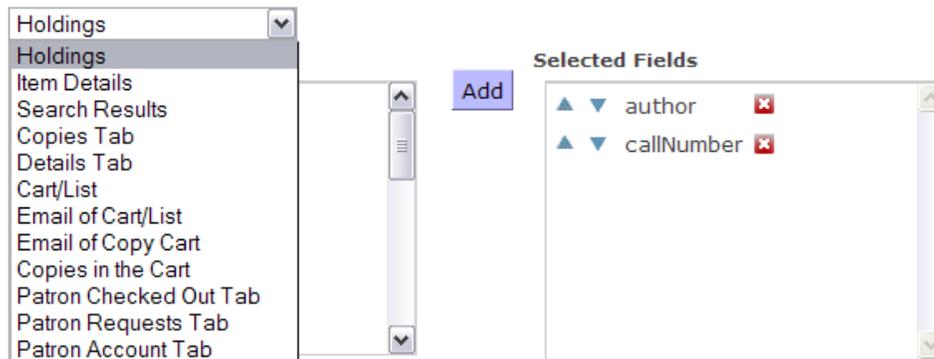
The **Field Placement** drop-down list box allows *admin* to choose whether to configure item display elements on the **Holdings**, **Item Details**, and **Search Results** screens, the **Copies** tab of the **Item Details** screen, the **Details** tab of the **Item Details** screen, the **Cart** and **List** screens, E-mail messages that are sent from the **Cart** and **List** screens, and the **Patron Checked Out**, **Patron Requests**, and **Patron Account** tabs of the **My Account** screen.

Configuration changes take effect immediately.

Note: The *holdings fields* you configure will be displayed on the **Issues** tab of the **Item** Details screen.

See **Field Placement** Help for detailed information on these configuration settings.

Library Members

The **Library Members** screen allows *admin* to configure links to libraries that have been defined as Library Members in the *Virtua Profiler*.

Library Members

Tag Display

	Symbol	Tag	Subfield	Offset	URL
▲ ▼ 950 ☑ edit	DR	035	a	0	
▲ ▼ 951 ☑ edit	NM	035	a	0	

On this screen, admin 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.

See **Library Members** Help for detailed information on these configuration settings.

Preserving E-mail Templates During Upgrades

Modifying Strings in E-mail Messages

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. 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 chamo-opac/src/main/webapp/WEB-INF/ 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)
- Request confirmation e-mail (for requests made through Chamo only)
- List email (when a list is e-mailed through Chamo only)

Important: The *admin* user can preserve customized e-mail template files when Chamo is upgraded to a new version. To do this, create a directory named "templates" in your Chamo home directory and copy any customized e-mail template files from **chamo-application/src/main/webapp/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.

Appendix A – Permalink Functionality

Overview of Permalink Functionality

Permalinks functionality can be purchased separately as an add-on to Virtua. Contact Innovative Customer Services for more information.

A **permalink** is a permanent web address (i.e., a URL) that points to specific content. A permalink remains unchanged indefinitely and continues to direct users to the specific content even if the physical location of the specific content is changed over time.

Innovative's permalink functionality allows libraries to create permanent links to bibliographic and authority record content stored in a library's database (or databases).

Note: In the future, Innovative may offer functionality that allows users to create permalinks to digital assets such as photographs, posters, articles, and other digital materials.

Libraries may wish to create permalinks that can be used. . .
- In citations within journal articles and other publications, to provide a permanent link to the referenced content.
- By databases to directly reference authority record and bibliographic record data in the database.
- By open access services to provide permanent links to aggregated content.
- In other similar services, such as VIAF (Virtual International Authority File).

A user that clicks on a permalink is directed to the Innovative permalink resolver, which resolves the URL and displays the digital content to the user in Chamo or in Innovative's Drupal interface.

Viewing Permalinks in the Chamo Interface

Your institution can use permalinks by saving digital content associated with a bibliographic or authority record in the permanent location of your choice, and then adding a permalink 024 tag to the bib or authority record in the Virtua client.

Note: For more information about adding permalink 024 tags to bibliographic or authority records, see the *Advanced Cataloging Workflow-Based Reference Guide*.

Permalink 024 tags that are cataloged properly in the bibliographic record are automatically displayed in Chamo.

In the example below, a permalink 024 tag has been added to the bibliographic record for the title *Oven to Table Cooking*.

In this example, the permalink 024 tag data is:

```
024 7# $a http://permalink.snl.ch/bib/OSC000003016 $2 permalink
```

'OSC' represents the code from the bibliographic record 003 tag, which identifies the database where the record is stored.

'000003016' represents the control number from the bibliographic record 001 tag, which identifies the record.

When you search for the title *Oven to Table Cooking* in Chamo, the permalink is displayed on the Item Details screen.

Clicking on the permalink URL directs you to the digital content at its permanent location.

Appendix B – Features of Interest to HKPL

Patron Features

Patron Registration

When a patron registers in Chamo, a PIN is generated for the patron using the last four digits of the patron's primary phone number.

Patron Login

When a patron logs in to Chamo, any alphabetic characters in their login ID will be converted to uppercase characters when the user clicks the **Login** button.

Example:

Assign barcode ABC123
Patron logs in as abc123

Chamo capitalizes all lowercase letters used in patron barcodes when a user logs into a database with the HKPL patron editor flag enabled. Both lowercase and uppercase letters will be allowed for patron barcodes with all uppercase letters (both ABC1122 and abc1122 will be allowed for a patron barcode of ABC1122).

Reporting Loss of ID Cards

Patrons may indicate they have lost multiple library cards. When a lost card is indicated the software automatically makes the lost card inactive.

Patrons can report a specific ID card missing and only that ID will be disabled via a lost card block (other IDs in the patron record will still be usable). If the ID reported missing is the HKID (017) then in addition to a lost card block put in that tag a value is also saved to subfield $o.

To report a lost card:

Log in to the Chamo as a patron and click the **I lost my card** button.

Tom O'Connell

I lost my card

| Checked Out | Requests | Account | Contact Information | Queue |

No checked out items to display.

Select an ID type from the drop-down menu and click **OK**.

Report A Lost Card

Select the card you lost from the list below
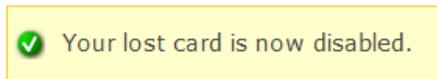
Library Card vtls704

OK Cancel

A warning message displays:

Reporting a card as lost will disable the card. You will not be able to use the card number to log into your account. Do you want to report this card as lost?

OK   Cancel

Click **OK**.

A confirmation message displays:

✅ Your lost card is now disabled.

Note: When a card is reported as lost, *that* card will be disabled and the patron *will not* be able to use that ID for any library services until the block is removed. The patron *will* be able to log in with other IDs they have registered with the library.

❌ Your card has been reported lost.
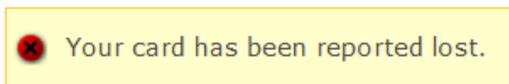
Charging Fees for Requests

When a patron places or cancels a request, Chamo warns the patron that a fee and/or block will be applied if they do so (according to what is configures in the *Profiler*), and applies the fee and/or block as appropriate.

Request

Placing this request will charge a request fee of HK$9.0000 to your account.
Your account may become blocked until fees are paid.
Do you wish to continue?

Accept   Cancel

✅ Transaction Reference Number: 675
✅ Your request has been submitted for "The mysterious affair at Styles / Agatha Christie.".

Confirm request cancellation

A cancellation fee of HK$2.5000 will be charged to your account.
Your account may become blocked until fees are paid.
Do you wish to continue?

Accept   Cancel

✅ Transaction Reference Number: 676
✅ Your request has been canceled.

Location Pickup for Requests

When a patron places a request he/she can chooses a main location and a pickup location. Selecting a main location limits the number of pickup locations in the drop-down list.

Request

Main Location Filter
Choose One

Pick-up Location
Bellefonte

Last Needed Date

Request   Cancel

Staff Features

Saved List Permissions

On the **Saved List Management** screen, staff users can view and sort saved lists. Except for certain users with advanced permissions, most users will only be able to affect lists that are saved to locations to which they have access. Staff users do NOT have access to locations automatically if they are configured to have access to only one or more sublocations of the listed location.

Normal and *Saved List Superusers* TPU users can freeze, unfreeze, and delete lists that have been assigned a **LOLM** workflow.

A **LOLM** saved list can only be frozen if *all items on the list* have the workflow status **At Binder** or **TPU to Lib**, but *any list* can be unfrozen by TPU *Saved List Superusers.*

Note: TPU *Saved List Superusers* are always able to unfreeze lists for which they have permission.

A TPU user may add items to a **LOLM** saved list when:

The list's location is TPU.
OR
The list's location matches the item's owning location.

Note: When a **LOLM** saved list is associated with a non-TPU location only items belonging to that location can be added to the list.

Non-TPU *Saved List Superusers* can only modify lists at their login location. Non-TPU *Superusers* can also freeze, unfreeze, and delete **Withdrawal** lists or lists with no workflow at their *login* location.
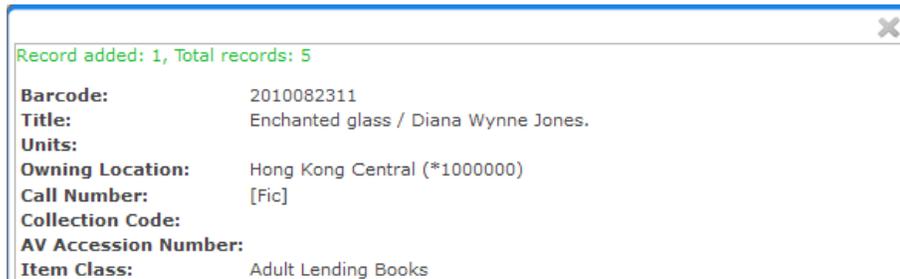
In addition, both non-TPU *Superusers* and normal users can only modify items on a list if they have access to that item's owning location as well as the list location.

Only TPU users may assign the **Temp Rec'd by TPU** status to saved lists. The **Temp Rec'd by TPU** receiving status is only available to TPU users and is *also* the first option for TPU users on the *receiving window*.

Note: Branch Normal Users are not allowed to select the status **Temp Rec'd by TPU** when performing **Receive** item from a **LOLM** saved list.

Running Total of Scanned Items

Chamo keeps a running total of the number of items scanned into a copy or patron saved list in a single session *and* the total number of the items on the list. These counts update each time a new and valid item barcode or patron ID is scanned.

Record added: 1, Total records: 5

Barcode:	2010082311
Title:	Enchanted glass / Diana Wynne Jones.
Units:	
Owning Location:	Hong Kong Central (*1000000)
Call Number:	[Fic]
Collection Code:	
AV Accession Number:	
Item Class:	Adult Lending Books

Withdrawal Quarter

For **Copy** saved lists with a **Withdrawal** workflow the **Withdrawal Quarter** displays in **YYYY QQ** format on the **Saved List Management** and **Deleted Item** screens.

edit	**Name**	Books
	Id	1
	Type	Copy
	Location	Hong Kong Central (*1000000)
edit	**Group**	
	Date Created	October 11, 2011
	Creator	staff
	Frozen	No
	Workflow	Withdrawal
	Withdrawal Type	(Missing)
edit	**Withdrawal Quarter**	2011 Q4
edit	**Withdrawal Authority**	
	Last Modified	
	Last Modified By	
edit	**Description**	

edit **Withdrawal Quarter** 2011 Q4

Invalid Barcode with LOLM Workflow

When an invalid barcode is scanned or entered for a **LOLM** saved list the **Receive Item** window displays an error message and Chamo plays an audio sound alert.

Admin Features

Languages

Chinese (Simplified) (zh_tw) and Chinese (Traditional) zh_cn are available on the **Languages** screen as languages to select for use in the Chamo interface.
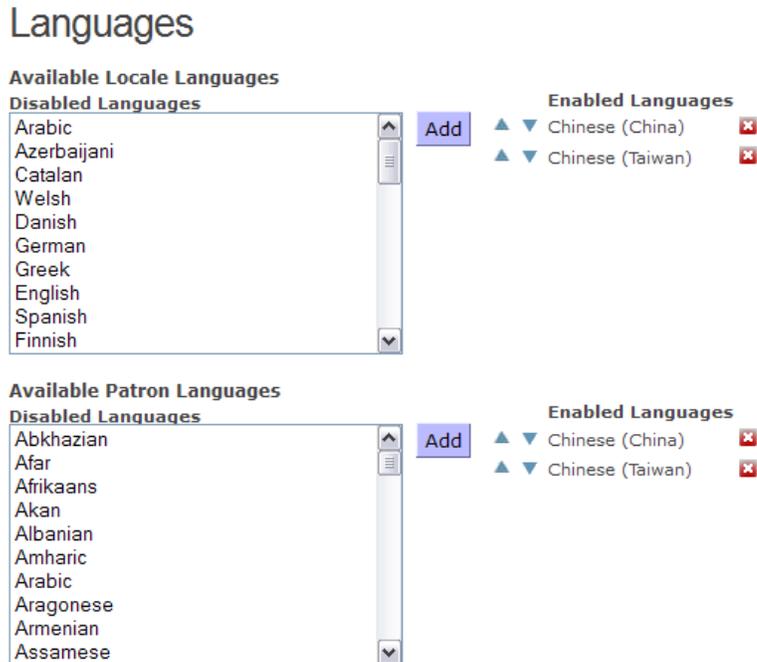
The default language as viewed by each user will match that user's browser locale settings, if translations for that language are available.

Note: The software does not come with translations for all available languages. To download a file of strings for translation, use the **Language String Management** tool.

Patron Contact Configuration

The **Patron Contact Configuration** screen lets admin determine whether certain contact information fields appear on the Contact Information screen. The patron accesses the **Contact Information** screen by clicking on the Edit link on the **Contact** tab of the **My Account** screen.
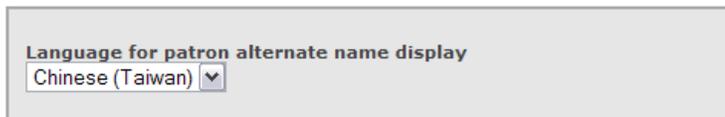
The **Language for patron alternate name display** setting on this screen determines whether an alternate name for the patron will be displayed. If an alternate patron name is stored in the 111 tag of the patron record, that name will be displayed when the patron views the interface in the language configured here. The languages available in this drop-down list correspond with the languages configured on the **Languages** screen.

Login as *admin* to access the **General Configuration** screen.

Select **Patron Contact Configuration** link.

Select a language from the **Language for patron alternate name display** drop-down list.

Click **Save** to save configuration changes.

Note: Patrons' other names will be shown on their account page when using the language that is configured to support other names, *HanWeb* included.

Enhancements to Call Number Indexes and Searches

A patron can search for any HKPL call number in Chamo using the Quick Search (i.e. the regular search text box).

Four HKPL call number indexes and searches are available as advanced search fields: LKM, BCM, LCM, and Dewey Decimal Classification scheme—to the current *keyword* search categories. Unlike the Virtua Client, Chamo will not use a call number *browse* search.
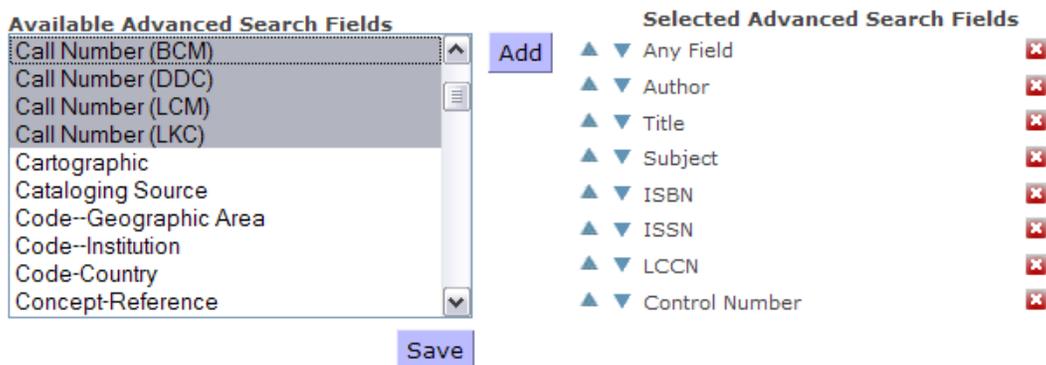
To add the call numbers select the desired search fields and click **Add**. Once the advanced search fields are added click **Save** to save the configuration changes.

The advanced search fields are available in the drop-down list box on the **Advanced Search** screen.

HanWeb Features

HanWeb is plug and play software application for translating languages among Traditional Chinese (TC), Simplified Chinese (SC), Unicode and Cantonese, etc. **Note:** Chamo's implementation will only be concerned with Traditional and Simplified Chinese.

To configure whether information from external data sources appear in the interface:

Login as the *admin* user.

On the **General Configuration** screen select the **External Data Configuration** link to configure HanWeb.

Place a checkmark in the box to **Enable HanWeb support**.

Type in the HanWeb URL and HanWeb IP Address.

Click **Save** to save configuration changes.

Supporting Multiple Identification Types

Chamo displays instructions on the login form to customize, download the language file, and add a translation for the xx.login.instructions string (where xx is the 2-letter language code).

Patrons will be able to use any of the defined ID types to log into their library account.

Changes are required to the Chamo login routine to allow the user to enter their user ID and password and also indicate what type of ID they are entering.

The Chamo Login Page will also be changed to include the types of IDs accepted by the library. These will be configured by the *admin* user of Chamo.

Library Card
HKID*

*For readers who have applied for using their smart ID cards to enjoy library services only.

The Chamo *admin* user will configure which identification types are accepted on the **General Configuration** screen.

Selecting the ID type will cause that ID type to be listed in the Account Login areas illustrated above.

Set Identification Types:

Chamo Login   014
Library Card Number   015
Alternate Card Number   016
HKID   017

Saved List Configuration

The **TPU Location** setting lets *admin* identify a central processing location. Users whose login 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.

To configure whether users are TPU users based on location:

Login as the *admin* user.

On the **General Configuration** screen select the **Saved List Configuration** link.

Select a **TPU Location** from the drop-down menu.

Click **Save** to save configuration changes.

The **Unserviceable** drop-down lets *admin* configure which status items *must* have *before* they can be added to a list with the **Withdrawal** workflow.

To configure the saved list workflow status of **Unserviceable** select an item status from the drop-down list box. Click **Save**. **Note:** An item is required to have the *corresponding item status* before it can be added to an **Unserviceable Withdrawal** saved list.

LOLM Saved Lists

Items that have a status of **Awaiting Lamination** or **At Bindery** *cannot* be **received** on a **LOLM** saved list.

Items with the status configured for the **At Binder** *workflow status* can be received on **LOLM** saved lists for the *workflow statuses* of **In Preparation**, **Return to Binder**, or **Temp Recvd by TPU**.

Note: Any qualified user can receive items on a **LOLM** list when the *item* has a status of **At Binder**. TPU users can only use the workflow status of **Temp Recvd by TPU**.

API Configuration

The **API Configuration** screen lets *admin* enable SOAP APIs for Chamo. This lets *admin* enable certain circulation transactions without a patron login.

To enable SOAP APIs, select the **Enable the SOAP APIs** check box. When this check box is selected, admin MUST also provide a **Username** and **Password**.

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

Note: The patron barcode type, disabled reason, disabled date, and barcode status are included in the Patron Record API. Patron barcodes are ordered by type and then by disabled reason, which places enabled barcodes *before* disabled barcodes.

Appendix C – Changes in this Guide

Changes for Version 3.2

No changes were made.