SOME DEFINITIONS

A scope = locally-defined subset of records in the catalog
- scopes can be based on:
  - Location
  - Values in BCODE1, BCODE2, BCODE3
- records can belong to multiple scopes
- Each record type (bib, item, checkin, authority, resource, course) is scoped independently

If a record type is not scoped, then (by default) all records of that type would belong to any scope.
WEBPAC SCOPING DISPLAY OPTIONS

LOCATION-based Scopes
- When a patron selects a location-based scope and views an individual record, your library has the option to display item information from only the attached records that fall within the scope or from all attached records. Contact Innovative to configure your system for your preferred display settings.

BCODE-based Scopes
- For scopes based on a BCODE field in the bibliographic record, when an individual record is viewed, information from all attached records appears in the WebPAC.

Mixed BCODE and LOCATION-based scopes
- When a library has a mix of BCODE and LOCATION-based scopes, the system displays all attached records (scoped or not). Otherwise, a search within a BCODE scope would not display any attached records.
JOB SECURITY FOR DATABASE MAINTENANCE

Why would a scoped search display a bibliographic record properly, but not its attached item (.i) or checkin/holdings (.c) records?

“A disparity in scope settings between a bibliographic record and its attached records can lead to record display behavior in scoped searches that is initially difficult to understand. You can synchronize the location code data in the bibliographic record with the item records using the Maintain Record Links (105069) utility.”
ACTUAL SCOPING IN OUR CATALOG NOW
LIMITS VS. SCOPES

What is the difference between a scoped search, and a search using Limit by Location?

- A scoped search finds all eligible records satisfying the chosen scope rule, which can encompass a range of location values and record types. Each of the scopes in a drop-down menu represents a many-to-one relationship between the scope rule and the matching bibliographic, item, or checkin/holdings records.

- By contrast, the Limit by Location menu represents a one-to-one relationship between the location code for the limit option and the location code in the bibliographic record. When the limit is applied the system will look in a search result set for only records that have that bibliographic record location code.
SCOPE PERSISTENCE IN THE WEBPAC

WWWoptions

- **RESET_SCOPE**
  - T = resets scopes at start over button/link

- **ICON_RESETSCOPE**
  - Can define the button that users see to reset their scope
  - Can define different icons per scope
    - e.g., for Law could be “search all collections,” for CB could be “search entire UA collection”

- **LOCKSCOPE**
  - Don’t think we would use
  - Locks users into the scope for their login location

-Manual Page # 106932
WEBPAC CUSTOMIZABLE FORMS / PAGES

Custom pages can be created for each scope by adding the scope number to the page name, e.g. srchhelp_X_s#.html

The following are the customizable pages:

Type example
- Any search page: srchhelp_T_s#.html
- Any search link: /search?T=S#
- Patron login forms: pverify_web_s#.html
- Bibliographic and browse displays bib_display_s#.html
- Top and bottom menus topologo#.html

We could, for instance, create a custom start page for CB that starts those users in their own scope, with a different look and feel than the rest of the catalog.

- Manual Page # 106941

MILLENNIUM LOGINS

Staff Logins can be scoped by default.
This is done in the Login Manager.
But not sure why....

- Manual Page # 106351
MORE WORK FOR DATABASE MAINTENANCE

Two frequent problem calls:
1. A staff member tries to edit a newly-created record and receives the message: "Record outside of Scope".
2. When users limit a WebPAC search to a specific scope, items in a recently-added location aren't found.

http://csdirect.iii.com/documentation/trouble_scoping.shtml

“RECORD OUTSIDE OF SCOPE”

Cause: The record was created with no location code ('none'), an invalid location code, or with a location code that is not part of the staff member's scope.

Resolution:
- Log into the system using the login with no scope assigned.
- If the record belongs to an accounting or serial unit (order, checkin), enter the user initials of the staff member who created the unscoped record or your administrative "troubleshooting" user initials to set the correct unit.
- Add the correct location code and save the change. The record should now be correctly scoped and available to the staff member.
- To prevent the problem from occurring in future, be sure that every record creation template contains a valid scoped location or prompts the user to enter a location code. Make sure that staff workflow includes inputting a valid location during manual record creation and inputting a valid location code for downloaded records.
RECENTLY-ADDED LOCATION NOT FOUND

**Cause:** Link Maintenance has not yet run and no bibliographic records have yet been updated to reflect attached records with the new location code.

**Resolution:**

When Link Maintenance runs next, the bibliographic records will be updated and the records will be found when users limit to the scope.

IMPLEMENTATION

- Check default search screens
- Determine if III needs to tweak CB and Law scopes (add Internet locations?)
- Determine rules for persistence
- Determine rules (if any) for staff scoping
- Revise technical services procedures for new location codes
- Work with Law webmaster on catalog links to set scope
- Work with CB on links as well as (eventually) customized pages and wwwwoptions