Search

Revised 17/07/2023
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Search

The Search module allows users to search the database for items and people. Search also includes other functions beyond just searching the catalogue database.

Search can be opened either from the Main Menu, from Circulation or from the Search desktop icon. A Search only icon can be made available on other workstations, laptops and tables on the network.

Most other library systems use the term "Online Public Access Catalogue" or OPAC. Online refers to being on a computer, not necessarily on the Internet. Public Access means people other than library staff have access to the catalogue. Bookmark calls the OPAC simply Search. (The Wikipedia entry for OPAC contains a brief history.)

Note: Older versions of Bookmark used the terms Public Access or PAW. Many Bookmark users still fondly refer to Search as PAW. (Public Access for Windows)
The Search Process

1. Choose type of search – e.g Keyword, Title, Series, Subject, Author.

2. Type search term(s).

3. Optionally select either Words Anywhere or Begins With search strategies.

4. Optionally limit search based on Item Type, Location and/or, Lexile.

5. Start search.

6. If Series, Subject or Author, select series, subject or author from list displayed. Titles are then listed.

7. View titles.

8. Select individual title to view details if required.

Other activities include:-

- Save titles found by a search into a Bookbag
- Transfer contents of the Bookbag into a Resource List
- Print list of titles found
- Read reviews about an item
- Write a review of an item
- Reserve a title
- If the entry is a website or ebook or an electronic resource, open it directly from the search
- Perform a Power Search if a basic search is not accurate enough
- Look up your details – items on loan, in your history, reserved, your lists
- Read library news
- Look at Resource Lists
- View a list of PRC titles.
- List the most popular books in a category
Search Screens

Three different presentations for the Search menu screen are available.

Large Buttons Menu Style

Icons Menu Style

Radiobuttons Menu Style

The exact steps to perform a search vary slightly with each Style. The Icons Menu and Radiobuttons styles require fewer “screen layers” and is more “Google like” in the way it works.

As well, there are two search entry screens used for the Large button menu screen. These screens are not applicable to the Icons menu or Radiobuttons menu screen.
The second style presents "steps" users follow to perform a search. Experienced users may not require this. Again, users are not able to select the style. This is done by the librarian in Search Controls.
Results Screen Options
The *results screen* can be presented either in columns OR rows.

Titles listed in Row format

![Row format example](image)

Titles listed in Column format

![Column format example](image)

Row format can display book covers and more information, but Column format displays more titles and can be scrolled easily.

Users can switch between the formats. Either format can be set as default.
Item Details

The Item details screen shows some cataloguing information on a single item along with a list of all copies. From this screen Reviews can be read or written and the item reserved if that is allowed.

"More" reveals more cataloguing details.
Installation and Setup

The Search module is designed to be used on its own as well as from the Main Menu and Circulation.

If you are only using one computer, then just click on Search on the Main Menu.

Search can be set up with its own icon on as many workstations as your network allows. This is done by making an icon which links back to the "Bookmark host" computer (a server or the librarian's computer).

Details of this can be found in the Setup and Networking Guide.
Screen Options

Four screen layers are involved:

- **Menu**
- **Search Entry**
- **Results**
- **Item details**

All but the last layer offers three choices of layouts.

The Menu screen can have large buttons (followed by a search screen), or an icons type screen which melds both the Menu and Search Entry into one, or a radiobuttons type screen similar to the icons type.
The “radiobuttons” style is similar to the icon style.

Search Results (also known as the “Title list”) can be either Columns OR Rows. The default is predetermined in Search Controls, but can be changed on the results screen itself.
The details screen gives the cataloguing information on a single item.
The Menu Screen/s

By default, Search shows the standard *Large Buttons Menu.*

![Large Buttons Menu](Image)

This screen can be displayed either in Window mode or Full-screen mode.

**The Titlebar**

The Titlebar is the stripe across the top of the window. Most windows have a titlebar. In Search, this can be either visible or hidden. The colour of the titlebar varies with the version of Windows. For Windows XP, it is blue. Windows 7 shows silver/grey. Windows 10 and 11 show white. A Windows display control allows changing the colour of the titlebar. (Most of the examples shown in this document were generated from a Windows 10 system with the titlebar set to blue.)

Below is a Windows 7 titlebar.

![Windows 7 Titlebar](Image)

**Windows 10**

The left side shows the window’s icon and the title of the window. On the right hand side are minimize, full screen and exit controls.

In Search, the minimize and exit boxes work, but the full screen box is inactive. The full screen mode is set in the Search Controls and cannot be altered by the user.

The size of the Search window (not full screen) is set to just fit in a monitor display of 1,024 by 768 pixels. Many lower grade laptop computers are set to 1366 by 768 pixels.
The Icon Buttons

The smaller icon-style buttons displayed at the bottom of the Search menu can be individually shown or hidden.

Wizard Search offers an alternate way of entering a search.

Collections lists the collections or genres made available in Cataloguing > Authority Lists > Collections/Genres.

Most Popular shows the most frequently borrowed items in selected categories.

New Items lists the latest additions to the collection.

Power Search is intended for more complex searches using Boolean searching.

Your Details gives information about a borrower.

PRC Lists is an optional button. It displays the Premier’s Reading Challenge book lists.

News can be used for any general messages, to display an image or promote a book.

Bookbag is a temporary holding bay for lists of books. These lists can be turned into resource lists if required.

Resource Lists are lists of items made available as a special group.

Help offers information on searching.

Exit will leave the program as will the white X in the red box in the top right hand corner of the title bar. If Exit button and the titlebar are hidden, then pressing the ALT and the F4 keys at the same time will exit the program.

For the large button style window, there are two types of search entry screens: a straightforward data entry screen or a labelled step-by-step data entry screen. These appear after clicking on a button to select the field (area) to search – keyword, title, subject, etc.

The Advance Search Limiters can be used to filter the search to a specific item type, location, collection/genre, lexile or level range.

Type of search offers two search strategies: Words anywhere or Begins with.

Menu goes back to the search screen menu.
The Icon style search entry display integrates entering a search and choosing the area and limiters.
Results in Row Format:

Left of each row may appear a book cover graphic, if available.

Left of the title is an icon indicating the Item Type. Click on the cover image or on Details or on the title to view the item’s details.

Beneath the title is call number, author, and publishing details. If there are any reservations, holds or reviews, these may appear also. Controls also allow showing the lexile or level.

On the right hand side, the item type, location status and item number are listed. Sublocation can be included.

Items can be added to the Bookbag by pressing Add to bookbag. Once pressed, this changes the item type icon.

Buttons along the bottom:

Print prints a list of all items found by the search. Book cover images are included in the printouts so many pages may result from a large search.

Columns allows the look of the screen to be changed into column format, which shows more titles per page but not book covers.

Sort allows the order to be changed.

Bookbag button shows how many items are in the bookbag and allows access to it.
The oval arrow keys will page previous and page next and go to the first or last page. 

**Search** and closing the screen returns to the previous page. (Large button menu option only).

**Menu** returns to the main menu screen.

### Results in Column Format

- **Columns** format shows the item type icon, the barcode number, the title, the call number, the item type or location, and the status.
- Clicking on the labels at the top of each column changes the sort order.
- **Details** shows the item details screen of the highlighted entry. Double clicking a title does this, too.
- **Print** will print the list.
- **Rows** will change the look of the screen to Row display format.
- **Bookbag** shows how many items in it, and pressing it opens the bookbag.
- **Search** returns to the previous page. (Large button menu option only)
- **Menu** returns to the main menu screen.

<table>
<thead>
<tr>
<th>Item</th>
<th>Title</th>
<th>Call number</th>
<th>Location</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>31798</td>
<td>100 Deadliest Things on the Planet</td>
<td>030.2 Cla</td>
<td>Library</td>
<td>11/05/2015</td>
</tr>
<tr>
<td>32905</td>
<td>101 Animal Records</td>
<td>591 Ber</td>
<td>Library</td>
<td>Available</td>
</tr>
<tr>
<td>28405</td>
<td>17 kings and 42 elephants</td>
<td>PF Mah</td>
<td>Library</td>
<td>Available</td>
</tr>
<tr>
<td>9437</td>
<td>Akombo and the Elephants</td>
<td>F McCo</td>
<td>Library</td>
<td>Available</td>
</tr>
<tr>
<td>38034</td>
<td><em>The animal book: a visual encyclopedia of life on Earth</em></td>
<td>590.3 Bur</td>
<td>Library</td>
<td>Available</td>
</tr>
<tr>
<td>32217</td>
<td>Animal Heroes</td>
<td>355.424 Bin</td>
<td>Library</td>
<td>Available</td>
</tr>
<tr>
<td>31277</td>
<td>Animal Record Breakers</td>
<td>590 Par</td>
<td>Library</td>
<td>Available</td>
</tr>
<tr>
<td>31418</td>
<td>Animals at the EDGE: saving the world's rarest creatures</td>
<td>591.88 Bai</td>
<td>Library</td>
<td>Available</td>
</tr>
<tr>
<td>22097</td>
<td>Animals in Danger</td>
<td>J591 68 Fau</td>
<td>Library</td>
<td>Available</td>
</tr>
<tr>
<td>31369</td>
<td>Are You Ready to Play Outside?</td>
<td>PF Wil</td>
<td>Library</td>
<td>Available</td>
</tr>
<tr>
<td>38330</td>
<td>Art projects from around the world; Grades 1-3</td>
<td>TR 707 Eva</td>
<td>Library Admin</td>
<td>Processing</td>
</tr>
<tr>
<td>29258</td>
<td>Babar's World Tour</td>
<td>JF Bru</td>
<td>Library</td>
<td>Available</td>
</tr>
<tr>
<td>34132</td>
<td>Bigl</td>
<td>PF Hop</td>
<td>Library</td>
<td>Available</td>
</tr>
<tr>
<td>34059</td>
<td>Bone collection: Animals</td>
<td>596.0471 Col</td>
<td>Library</td>
<td>Available</td>
</tr>
<tr>
<td>30123</td>
<td>Borneo Pygmy Elephant - Critically Endangered [chart]</td>
<td>PIC 599.675 Bor</td>
<td>Library Admin</td>
<td>Available</td>
</tr>
<tr>
<td>34111</td>
<td>Bubble and Squeak</td>
<td>JF May</td>
<td>Library</td>
<td>Available</td>
</tr>
<tr>
<td>34141</td>
<td>Can You Lick Your Own Elbow? and other questions...</td>
<td>J612 Mas</td>
<td>Library</td>
<td>Available</td>
</tr>
<tr>
<td>33191</td>
<td>Car-sized crabs and Other Animal Giants</td>
<td>590 Cla &quot;</td>
<td>Library</td>
<td>Available</td>
</tr>
<tr>
<td>36410</td>
<td>The child's elephant</td>
<td>F Cam</td>
<td>Library</td>
<td>Available</td>
</tr>
<tr>
<td>34109</td>
<td>Could a Walrus play the Saxophone? and other quest...</td>
<td>J590.2 Mas</td>
<td>Library</td>
<td>Available</td>
</tr>
<tr>
<td>33206</td>
<td>Dangerous Animals</td>
<td>J591.85 Dan</td>
<td>Library</td>
<td>Available</td>
</tr>
<tr>
<td>35099</td>
<td>The day no one was angry</td>
<td>QF Tel</td>
<td>Library</td>
<td>Covering</td>
</tr>
<tr>
<td>22338</td>
<td>The Day of the Elephant</td>
<td>JF Wil</td>
<td>Library</td>
<td>Available</td>
</tr>
</tbody>
</table>
Item Details Screen

This gives some cataloguing information about the item and a blurb or summary description. Full cataloguing details can be viewed by clicking on More.

The grid at the bottom lists all linked items. The borrower name can be hidden by default and only viewed via a password. Also, clicking on a line “jumps” to that item, showing the copy's details above.

Reserve on the bottom will allow reservations. This can be hidden, too.

Print can be used to print the item's details.

Add to bookbag puts the item into the bookbag and changes the item type icon on the results screen.

The current or previous borrower is only visible if allowed. If not, a button labelled Borrower will appear. It requires a password to view borrower details.

Close returns to the previous screen.
Search Controls

A large number of configuration options are available for Search. These are provided in a Search Controls section.

Open Bookmark. Click on Controls and enter the requested password.

Click on Search Controls.

All changes are automatically saved when the window is closed.
Search Setups

Like Circulation, Search can have up to 4 different configurations. This allows customized screens for different types of users. Some computers can be set up to work one way and show a completely different display to another. Staff computers can search areas restricted to student computers.

The lower left corner of the Controls window shows the current Search Setup. Setups are numbered from 0 to 3. Setup 0 is the default and applies where-ever it is used. Setups 1, 2 or 3 can be used to create unique configurations. Each setup saves settings into a different Search startup file.

To create a different Setup

Click on the down arrow key to the right of Default setup. Select the number of the setup. Adjust settings and save. This creates a "setup file". The next step is to tell Search to use it.

By default, Search always uses the Default setup (0).

Search can have its own desktop shortcut icon, separate to the normal Bookmark main menu icon. The setups can be related to the icon. The filename for the library catalogue search-only icon is BmSearch.exe.

To use a Setup other than the default, the desktop icon used to launch Search needs to be modified. This is done via the icon's properties window.

First, on the required workstation, create the desktop icon as detailed in the Networking Guide. Best approach: open File Explorer and open the Bookmark folder. Locate the file BmSearch.exe. Right-click on it to get a menu. Left-click on Send To then left-click on Desktop (create shortcut). This is a bulletproof method of creating a desktop icon to launch a networked application.

Next, right click on the icon then left click on Properties.

At the top of the Search Properties window, left click on the Shortcut tab at the top.

On the Target line, after the filename BMSEARCH.EXE, add a blank space and then the number of the Setup to use: 1, 2 or 3.

This tells the icon which Setup to use when Search is opened.

If no number is present the default setup is used.

Click on Apply then OK.
Window

Window and Full-screen modes

Search can be displayed either in "window mode" or "full-screen mode".

In addition, three menu styles are available: Large buttons, Icons menu and Radiobuttons.

Window mode

Full-screen mode

The window is optimized for display at a resolution of 1024 x 768 pixels or greater. (The example uses 1280 x 1024.) This window just fits within the 1366 x 768 pixel display still found on many lower-priced new laptops. The size of the window cannot be changed other than to full screen.

The Search window always opens in the centre of the main monitor, even if closed on a second monitor.

Display Titlebar on top of window
This checkbox displays a titlebar across the top of the first menu. Removing the tick removes the titlebar, thus fixing Search in place so users cannot minimize or close using the Windows Close Control (red box with white X).
Search can still be closed by clicking on the Exit button. If the Exit button is also hidden, the only way to close Search is by pressing ALT and F4 together.

**Menu style**
Large Buttons menu, Icons menu or Radiobuttons menu are the choice for a main menu screens.

*Large button menu style*

With this style, clicking on any of the large buttons opens another screen on which to enter a search. These buttons determine which field is to be searched.
This screen integrates both the menu and entering a search, thus reducing one layer.

The search is typed in then the field to be searched is selected by clicking on a button beneath. If Enter is pressed, a Keyword search is performed.

The Radiobuttons menu is similar but uses the “dot type” radiobuttons to select the field instead of icons.
Window colour

This sets the background colour for all screens in Search.

Click on the selected colour, then click OK.

Advanced offers the standard Windows colour selection dialog to design your own colour.
Visible Buttons

Ticking these checkboxes determines which smaller buttons will appear lower on the menu screen. Those not ticked are hidden.

Briefly:

*Your Details* gives borrower information such as items on loan, in history, reserved and in resource lists. This can be password protected for privacy. Removing the tick hides this button so borrower searches cannot be made.

*New items* shows a list of items deemed "new" to the collection based on a criteria.

*Bookbag* is used for collecting items by multiple searches. The bookbag list can be printed or saved or used in a resource list.

*Resource lists* presents users with lists of items established by teachers or library staff.

*Power Search* allows searching several fields at one time. It can be used when basic searching is insufficient.

*Collections or Genres* can list the available collection or genre lists.

*PRC* lists items in the PRC book lists.

*Wizard Search* opens a window in which entries are displayed as users type. Only title, series, author and subjects can be searched here.

*News* is library news, the same as can be displayed in Circulation. It can be edited Controls.

*Help* presents a simple help screen.

*Exit*. Closes Search. If unticked, the button will not appear, in which case, to get out of the program, press ALT and the F4 button at almost the same time. An optional password can be required to exit.

The book covers slider is also available as an option.
Item type icons

Search displays icons next to items found. These icons denote the Item Type. They are shown next to titles in both the Rows and Columns formats.

The item type icons are set in Cataloguing / Authority Lists / Item Types. See the Cataloguing manual for details of how to set and change the icons.

Main Menu Headings
The *Heading* line can be changed to show whatever you would like users to see on the Search menu.

*Font* can be used to change the font style and size.

*Colour* can be used to change the colour. Red is default.

## Passwords

<table>
<thead>
<tr>
<th>Passwords</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exit program:</td>
</tr>
<tr>
<td>Borrower info:</td>
</tr>
<tr>
<td>Reserve password:</td>
</tr>
<tr>
<td>Printing password:</td>
</tr>
<tr>
<td>Loan history password:</td>
</tr>
</tbody>
</table>

These passwords are used within Search only (not Webopac).

*Exit program* causes a password request when trying to close Search.

*Borrower info* can be given out on a need-to-know basis for certain staff. It can be used instead of a borrower's Privacy Code or the Main Password. It only works if the Borrower Privacy in Your Details switch is ticked. If blank, no password is requested to view borrower info.

*Reserve password* is also optional. If used, this password is requested when making a reservation.

The *Printing password* is requested when making a printout.

*Loan history password* restricts who is allowed to view borrower loan histories.
Search Results

Default search type:  ● Words anywhere
                   ○ Begins with

Default Search type is the default search strategy used by Title, Series, Author and Subjects searches.

Titles listed in:  ○ Column format
                   ○ Row format

The default list of titles found can be displayed either as columns or rows. Rows is the default.

Copies in title list:  ○ List all copies
                      ○ Show only one copy

Either all copies or first copy (just the title) only can be displayed. The "one copy" option does not display multiple (linked) copies of a title.

List all copies. The status of each copy is displayed on the right.

Alby and the Cat

Details
BF Day  DAVIDSON, Leanne ; DALE, Rae
Rowville, Vic.: Five Mile, 2009
Row format, *Show only one copy*. The number of copies is shown on the right and the number of copies available for borrowing is denoted in brackets.

*Show in column title list*:  
- Item type  
- Location

*Show in column title list* determines whether Item Type or Location appears on the columns results screen. It does not affect the Rows format, which always shows Location on the right and an item type icon on the left.

**Search Records**

- Record number of searches per month
- Keep a record of every search entered

Bookmark can keep track of the number of searches performed every month. These can be viewed in Reports / Search reports. The Search Records checkbox tells Bookmark to store this statistical information.

An optional log of every search entered can also be kept. Each log entry contains the date and time, the field being searched, the search query entered, the number of items found and the name of computer which was being used.

Also see Reports > Search Reports.

Note: a search performed on a workstation set to "read-only" cannot record this information.
Switches

The Switches checkboxes determine which actions can take place. Switches are useful to set policies as well as customize system behaviour.

A switch is OFF when there is no tick in the checkbox and ON when the tick is present. The tick can be toggled by clicking on the checkbox.

Unrestricted printouts. If ticked, anyone can print. If off, trying to print requests the Printing password.

Read Book Reviews. If this is ticked, users can read any reviews written.

Write Book Reviews. Tick this to allow users to write reviews. Note: if users only have "read only" access to Search, then even if this is on it will be ignored. The network administrator sets these permissions; they are related to user logon. Permission within the Bookmark program for various types of borrowers to write reviews is set in Reviews Controls in Controls. See the Controls documentation for more information.

Display last borrower in item details. If unticked, the most recent borrower’s name will not appear on the Item Details screen. It can be shown by clicking on a button and entering a password. This provides a degree of borrower information privacy.

Borrower privacy code required in Your Details. A privacy code is requested along with the borrower's barcode in Your Details. Users without codes do not need to enter the requested password. This function restricts who is allowed to look at a borrower's details to those who know the borrower's own privacy code or the library staff's borrower info password (see below).
Barcode only in Your Details (no name search) Unticked, a person can enter either their barcode or borrower number or any part of their name in Your Details to locate a borrower. If this is ticked, finding the borrower by name is disabled and only full barcodes can be used. This further restricts who is allowed to view borrower information.

Can make reservations. Ticked causes the Reserve button to appear at the bottom of the Item Details screen. If not ticked, this button is hidden and users cannot make reservations.

This button is also hidden if the user's computer logon only gives them permission to read Bookmark and not write to it. See also Reservation limiting.

Privacy code required to make a reservation If ticked, the user must enter their privacy code or correct password in order to make a reservation.

Can remove reservations in Your Details If checked, users can remove any reservations or holds they have in Your Details.
Allow Bookbag import/export  If data collected into a bookbag can be saved and lists of barcodes can be imported.

Allow Resource list import/export  If items have been put into a resource list, ticking this allows users to both export (save) the list and import a list of barcodes or item numbers to add to the list.

Borrower photos visible  If ticked borrower photos will be displayed in Your Details.

Hide ‘Limit search by...’  Ticking any of the six 'Hide' functions hides the user's ability to limit a search based on that criteria. By default, item type and location are not hidden but lexile and level are.

Directly show ...  If these are ticked then titles are listed immediately from a Series, Subject or Author search without showing the intermediate list.

Show location in the title row list  The location is included on the right side in the titles found list.

Show Sublocation in title row list  The sublocation is included after the location. The “Show location” checkbox must be ticked for this to work.

Display Collection (Genres) instead of Location in titles. An item's location is normally shown in the list of titles found but ticking this switch causes the Collection field to be displayed instead. This is useful if Genres are used. It affects both Column and Row formats.

Show Cost in Item Details. Displays the cost of items on the Item Details display. If not ticked, the cost is not shown.

Show Loans History button in item details.  Adds a History button to Item Details so all previous borrowers can be listed.

Hide borrower numbers in Your Details. If ticked, hides the borrower numbers in Your Details.

Use helper wizard (title, subjects, authors, series only). The helper found in the Wizard search can be activated for use with Title, Subjects, Authors and Series searches. It does not function for keyword searches. When the third letter is entered, a dropdown list displays closest matches. The match depends on the search type – e.g. words anywhere or begins with.

Show barcode on title list  Displays the full barcode instead of item number.

Show genre instead of borrower in item details Displays an item’s genre/collection

The Word Anywhere helper can be slower to respond than the begins style and can be affected by network performance.

Show barcode on title list (row display only)  By default an item's number or barcode is displayed on the title list windows. This control allows the number or barcode to be hidden. It only affects the “row” style display. Column format always shows item numbers.
Search Limiting

1. Click the Search limiting tab to define the available default areas for including in the search.

Search limiting automatically hides certain items from search results. There are two ways to do this:
1. Every item has a "Visible in Search" checkbox which is seen in Cataloguing, Add/Edit Items. If it is not ticked, that particular item will not appear in Search results. This can be set in Add/Edit Items or via a Cataloguing Global change.

2. Ticking boxes on the Search Limiting dialog. Items which do not match the ticked Status types, Locations and Item Types are shown. Any ticked are not displayed. Leave blank any areas that can be visible. Clearing an entire list unrestricts that area.
Most Popular

The Most Popular tab provides a facility for users to see the most borrower or popular items. Several different "Top 10's" can be set up, each with its own special criteria.

The limit can be anywhere from 5 to 80.
Note: the Most Popular list displays only titles. Copies are not included, but the total number of loans for all copies is used. Items that are not available, on loan or on hold are not included in the list.

**Slider**

The Book Covers Slider gadget can be used to promote books or other items.

The images are part of a list that rotates to the left. The books can be from the New Items list or from a special list or from a most popular list.

This type of display is known as a “slider”.

The slider gadget is available in Circulation loans or returns, Windows Search and Webopac. It can appear in any one area or all three.

The Slider tab in Search Controls activates the slider gadget and allows controlling the titles displayed.
The top three buttons are used to set up a New Items list or a Special Items list.

*Automatic new items* can create a list of ‘new’ items based on the accession date – e.g. items catalogued the last 90 days. The items can be restricted to specific item types, locations and/or status types.

*Manual new items* allows entering a set of barcodes to list specific items. The manual list takes precedence over the automatic list. The items appear in both the New Items button in Search and Webopac and also the slider gadget. Note: the New Items button can be turned on or off.

*Special Slider List* is used to create a separate list of titles. Any barcodes entered here are displayed in only the covers slider gadget. The New Items list is not shown in the slider. The New Items list is still available, however, by clicking on the New Items icon buttons.

In addition, it is possible to setup a *Most Popular List* for the slider. See below.

Clicking on the image of any cover in the slider brings up the details about that particular item.

- **Slider Controls** allows changing the heading that appears at the top of the gadget. The default is “New Items!”. If you are showing something else, change the heading.

- The colour of the border and the colour of the text in the top bar can be changed from their default white-on-blue. Remember: contrast is important in readability.

- The time delay between "slides" is set to 2000 milliseconds. 1000 ms = 1 sec, so 2000 is 2 seconds. The value here can be changed. Value of 0 dis
The slider is specific to the setup being used. Sliders can be used in some and not in others.

**Most Popular list**

In addition to New Books or the Special List, the slider can also be used to show the most popular books. This is done by making up a Most Popular group called “Slider” and/or “Slider Circulation”. (Most Popular used to be called Top 10.)

The Most Popular list is created and managed in Search Controls, even though it appears in the slider and the Most Popular icon button in Webopac.

At the top, click on the Most Popular tab. (See above)

To make a list that appears in the slider gadget, enter the word *Slider*.

Set the limit (number of books), range of dates, and other criteria that defines the books which will be shown in the slider. In the example, the most borrowed fiction books kept in the library and borrowed in 2013 are listed, up to 30 titles max. Click OK to save.

The Most Popular slider category can later be edited or removed.

The Slider most popular category takes precedence over the other lists for all sliders. If the Slider list is removed, then the slider gadget then uses either the new items list or the special slider list if that has been created.
Searching

Search searches several fields in the catalogue at the same time. These are Title, Subjects, Authors, Series, Subtitle, Notes, Contents, Synopsis, Call number, Volume, ISBN, Lexile, Level and PRC level.

How to enter a search

The exact steps to follow depends on the Menu Style.

The Large Buttons menu:

*With the Large Buttons style menu, users click on the search area (field) first – e.g. Key word, Title, etc. The next window is used to enter the search itself.*
The Icons style menu:

![Icons style menu diagram]

The Radiobuttons menu:

![Radiobuttons menu diagram]
The *Icon style* and Radiobuttons menus combine the first two screens from the Large Buttons menu into one screen.

Search words are entered into the white box. Clicking on an icon beneath determine which area is searched. If Enter is pressed, a Key Word search is performed.

For the Radiobuttons style, enter the search words, click on an area to place the dot then click on Search.

The same options are available using either style.

Several options can be hidden using Search Controls, allowing the menus to be customized for different situations.
Key Word Searches

Key word searches are the simplest type of search and they are powerful.

Key word searches are similar to the word-style search used by Google.

Items are found if the words appear anywhere within the Title, Series, Author, Subjects, Call number, Volume, Notes, Contents, Synopsis, ISBN, Lexile, Level or PRC fields.

Just type in the word or words to search for then press <Enter> or click on the Search button.

A list of titles found by the search is then displayed immediately.

Nearest Word Searching – "Fuzzy logic"

Bookmark automatically adjusts words behind-the-scenes so variations are included. Searching for Otters also finds Otter, Reading includes Read. It does not cover Mouse and Mice, however. To avoid confusion, Author names are not adjusted but searched for 'as is'.

Example: Searching for Cats returns the same results as Cat because "Cat" is the stem word for the plural "Cats". Bookmark uses the Potter Stemming algorithm to reduce plural words to their root.
Advanced Key Word Searching: Boolean Searching – And, Or

Search recognizes AND and OR as special commands rather than searchable words. If these appear *between* the other words, they alter how the words are treated by the search.

AND means that both words (on either side of AND) must both be present for an item to be found. The words do not have to be next to each other and they can even be in different fields – they just have to be present somewhere in the data of that record. AND is also the default if it is omitted between words. It *narrows* search results. Word order does not matter. Nor does upper/lower case. The search terms ENERGY AND SOLAR as well as SOLAR ENERGY both give the same results.

OR means *either or*. If *either* word is in an item's data, it is found by the search even if the other word is not present. Example: FOOTBALL OR CRICKET finds everything with either the word Football or the word Cricket present, even if only one of the words is there but not the other.

Advanced Key Word Searching: Truncated Word Searches

The special * (asterisk) character allows "truncated word searching". Words starting with the letters before the asterisk are found. STR* will find all entries having words starting with the letters STR.

Advanced Word Searching: Brackets

Brackets can be used to group words in searches. They are most useful with And or Or are mixed in the same search sentence.

Examples: dogs and (cats or rats)

Advanced Word Searching: Phrases

"Double quote marks" can be put around groups of words to identify a phrase. All cats without the quotes returns many items but "All cats" returns only items with those two words together in that order.

Search Limiting

Sometimes it is necessary to search for certain types of resources - e.g. videos or items in a particular location such as an office.

Searches may be limited by *Item Type* and/or *Location* and/or *Sublocation*.

In addition, Key Word searches can also be limited by Lexile range, Level and/or PRC.

Bookmark also has default search limiting. By default, searches automatically include everything from all item types and locations. However, searches can be *automatically restricted* to exclude certain types, locations and statuses. See *Search Limiting* in Controls / Search Controls.

Users may also have the option of limiting searches to certain item types or locations. The ability to do this can be turned on or off in Controls / Search Controls / Switches. By default, user search limiting is available User selected search limiting overrides the default restriction. If "teacher resources" is restricted (not normally searched) and it is selected from the Location droplist, then results will include items from that location.
A hidden command can also be used to search for everything regardless of automatic restrictions. Type a + symbol at the start of the search. +Space Travel will include all item types and locations even if they are automatically restricted. This hidden command can be offered to users on a need-to-know basis.
Lexile and Level Limiting

Key word searching can also be restricted by Lexile values and/or Levels. These are optional and can be hidden in Search Controls.

<table>
<thead>
<tr>
<th>Lexile range:</th>
<th>From</th>
<th>to</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level range:</td>
<td>From</td>
<td>to</td>
</tr>
</tbody>
</table>

Hiding items from Search in Cataloguing

When items are catalogued, they can be also "hidden" from the search system.

On the AddEdit Items window, remove the tick next to "Visible in Search". It will not be found by a search unless then + symbol is used to prefix the search terms. The item is not hidden from a barcode search.

Also, if the % symbol appears at the beginning of many fields, that data is not included in key word searches. This especially affects Notes, Contents and Synopsis. The contents of these fields, however, is still visible on the item details display.

The ! prefix symbol can be used to hide the contents of a field. If a note is not to be visible on the item details display, prefix it with a ! symbol.

Both % and ! can be together to make data in a cataloguing field both non-searchable and hidden from the display.
Title Searches

Searching based on titles only is similar to Key word but with one extra option: *Type of Search.*

The *Type of Search* option list allows searching by

- Words anywhere in the title
- Title begins with

*Type of Search* offers users two strategies.

The Words anywhere type search is identical to Key word in all aspects, including Boolean terms and stop words, but is restricted to examining the Title field only.

A *Begins with* search returns items that have terms in which the field *starts with what is entered.* Entering SPA returns items in which titles begin with the letters SPA. The asterisk or ? wild card symbols are not used for Begins searches (they are ignored), only word for style.

If the search terms are not found, entries starting with the *nearest matching three beginning letters* are displayed. Begins searches are therefore more tolerant of misspelling than Word style searches. SPAX, for example, returns everything starting with SPA.

A dropdown list in Search Controls is used to set which Type of Search is the default. It is usually Words anywhere.

Lexiles are special. Entering one or a range of lexile values limits the results to that range. To see all titles that have a particular lexile value, enter the value or range and put a * for the title search. All titles in that range are listed. Using a range like 1 to 5000 will list all items with lexiles.
Subject, Author and Series Searches

Searches made for subject, series and author all operate identically. The same rules and strategies used for Title searches apply as well, however these searches are restricted to just the subjects, or authors or series fields.

The main difference is that these searches first return a list of subject, author or series entries before showing titles.
One or more of those is then selected to view the items.

Clicking on one entry highlights it. *List Titles* will then list that entry’s items.

To view items which have more than one entry, tick boxes.

**Cross References: SEE and SEE ALSO**

Authority-based searches also offer cross-references, if these are present in the authority list. These are shown above in red and green and contain the words SEE or SEE ALSO.

SEE references direct users to more correct terms. (Green)

SEE ALSO references direct users to related entries. (Red)

In both cases, if selected, the heading which appears after SEE or SEE ALSO is used instead of the heading on the left side.

“Space flight SEE ALSO Astronomy” lists titles with the heading Astronomy.

"Space flight to the Moon SEE Space flight" redirects users to the correct term Space Flight.
Titles Found by Searches

Items found by the search are listed on the “Search Summary” screen.

There are two different presentations available: Columns or Rows. Either can be set as the default in Search Controls and users can switch between.

Column Style Presentation

The icon to the left is related to the item type. Item Type Controls is used to match icons with item types. This can be found in Controls and elsewhere.

Each row of items can be highlighted by clicking on it. A double click or highlighting and clicking on the Details button displays details about the item. (See below.)

Clicking on the heading of the column – e.g. Item, Title, Call number, Item type or Status, changes the sorted order of the list. By default the list is sorted alphabetically by title. Click again to reverse the order.

Multiple lines can be highlighted by holding down Shift or Ctrl and clicking. All highlighted items can be added to the bookbag with one click.

Click on the Search button at the bottom to go back to the search entry screen.

Click on the Menu button at the bottom to go back to the start menu.

Click on the Rows button to change to the Row display format.
The Row style presentation shows more details about each item – including a graphic image of its cover if available – but no more than 6 or 9 items can be displayed on a screen (depending on screen size). There are also a few more action options, too.

Clicking on the title or cover image opens details about the item.

Click on the oval arrows at the bottom to go to the next page or previous page, or the start or end of the entire list.

Columns changes to the Column style presentation.

Bookbag accesses the Bookbag feature. (See below.)

The Add to Bookbag link adds the item to the Bookbag.

Sort opens a window which allows the order of the list to be changed.
Special hot key – F10.

For both the Column and Rows display, the F10 key provides a function that allows library staff to generate a list of the items found showing selected fields. This is the same list as found in Reports / Catalogue Reports / Choose Fields.

![Choose fields window](image1.png)

Click on left-side entries to indicate fields to be shown in the report. Each field appears as a column.

![List of Cats items showing lexies](image2.png)

The window acts exactly like the Reports windows. Even double-clicking on a row opens an AddEdit items screen.
Item Details

Selecting an item from the list opens a popup window showing all the cataloguing and copy information about the item.

The top section shows the cataloguing details of the item selected. It changes depending on whether the item has a Synopsis or not. If it does, that is displayed along with abbreviated cataloguing details.

Click on More to see all details in a popup window.

If a book cover image is displayed, click on it to open a window showing an enlargement.
A scrollable list of all copies of the title is displayed at the bottom. The current or previous borrower is not displayed if the *Display the last borrower in Item Details* switch in Search Controls is not ticked. If this information is hidden and needs to be viewed, click on the Borrower button at the bottom and enter the borrower info password or the main password.

*Reserve* allows making a reservation against the title.

Note: reservations are only allowed if Search is running in a “writable state”. It automatically detects this. If it is read-only the Reserve button is not displayed.

The *Reviews* button opens the book reviews window. See the *Book Reviews* section later in this manual for more details.
A Power Search can be used for more advanced searches. It allows up to four different fields to be tested at the same time.

Power Search also provides other fields to be searched.

Items are found containing the data entered in the specified fields.

A "link" must be used to connect each search. This can be \textit{and}, \textit{or} or \textit{but not}. 

\textit{Search}
Wizard Search

A Wizard Search can make some searches easier.

As each letter is typed, a list of available entries is displayed beneath. A minimum of 3 letters must be entered to see a list.

Click on an entry then Search.

Note: Wizard searches are also available for Title, Series, Author and Subject searches if the Switches checkbox "Use helper wizard" is ticked.
Websites, Weblinks and Shortcuts

Bookmark allows cataloguing electronic resources such as websites, weblinks, ebooks, documents and other resources available on the local network or Internet.

See the Cataloguing document for details on how to catalogue these resources.

Search allows users to link directly to catalogued websites and electronic resources. Correct item types and icons help users identify these.

If an item has a yellow W icon next to it, it is a website.

To link to the website or electronic resource, click on the title and view Details first.

To open the website or weblink, click on the Open Website button. This opens the computer’s browser and links directly to the website.
If the item is a shortcut, such as an ebook, click on the Open Shortcut button.

A shortcut can be any electronic resource available to the computer. It can be an ebook, a word document, a spreadsheet, a powerpoint presentation, a CD or DVD, an animation, any executable file.
If the item's URL contains the term "goodreds", it is assumed to be a link to a Goodreads entry for the book. The button at the bottom then says "Goodreads" instead of Website.

Further, if the author has a website and it has been entered into the Author Authority List in Cataloguing, the button "Author website" appears offering a link to that website.

A Genre icon can appear in this display beneath the cover image.
Book Reviews

Two settings in Search Controls Switches allow the Book Reviews feature to be available or inactive. Note: Review Controls information can be found in the Controls document.

- ✔ Read Book Reviews
- ✔ Write Book Reviews

The first allows users to read reviews but not write any. The second allows writing of reviews as well.

Note: writing reviews also depends on the user’s computer logon permissions. If the user has read-only access, then writing reviews is automatically blocked even if this switch is set. Read-write access is required to write reviews, make reservations and any other activity involving saving data.

When a search is performed, any items that already have a review are marked. In the Row presentation format, the link **Review** appears to the left of the title.

Click on the **Review** link to read.
In *Column* format, a review is identified by a * symbol next to the item number.

Open an item’s details window to access Book Reviews.

To read a review, click on the *Reviews* button.
If there are other reviews, use the oval arrows to scroll through.

Note: only reviews that are approved can be viewed. See Review Controls later.

Click on the Write button to create a new review.
Enter the borrower's number or barcode. If the borrower is not allowed to write a review, the following appears:

If the borrower is permitted, the window changes to allow writing the review.

Note: if the user’s computer is set to *read only* mode, reviews cannot be written, only read.

Click on *OK* to save the review.
Bookbag and Resource lists

The Bookbag is a temporary list of items collected by a user from their searches.

A Resource List is a more permanent list and is created from the Bookbag.

Using the Bookbag

Items found in searches can be placed into a Bookbag. In Row format, this is done by clicking on the Add to Bookbag link next to each title. In Column format, an item’s details must be displayed before Add to Bookbag can be used.

Items from different searches can be collected into a single Bookbag.

To view what has been collected, click on the Bookbag icon on the Search menu or the Bookbag button on the bottom of the titles list screen.

The Bookbag is restricted to the computer on which it is made. Shifting to another computer will not list the same Bookbag contents. The list is volatile and will disappear after 20 minutes if there has been no activity on it. It will also disappear if the user closes Search.

The Bookbag can be hidden by making the menu button invisible in Search Controls. Controls also switches on or off Bookmark import and export.

The bookbag can be sorted by clicking on the field heading at the top of the grid.

To see an item’s details, double click or highlight and click on the Details button.
Remove entry can be used to remove a highlighted entry from the list.

*Clear all* empties the entire Bookbag.

*Print* prints out the contents of the grid.

*Export* saves the list as a tab-delimited text file suitable for loading into Word or Excel. The file can be saved anywhere – e.g. a USB flash drive.

*Import* a list to the bookbag will add to anything already listed on the screen based on the item numbers or barcodes in a text file. If there is other information, it is ignored. This file can be a list of scanned barcodes or exported from another Bookbag or elsewhere in Bookmark.

**Resource lists**

Resource Lists are a more permanent type of Bookmark. Borrowers may have one or more resource list.

Items collected into a Bookmark can be transferred into a Resource List. To do this, click on *Create/Edit Resource List* inside the Bookbag.

*Note: this option only appears if the Resource Lists buttons ticked as visible in Search Controls.*

A new Resource List can be created or an existing list can be accessed.

To open an existing list, use the dropdown list.

To create a new list, type in a name that will appear in the dropdlist, not the name which may be displayed publically. It is also the name which appears in Manage Resource Lists in Search Controls. The name always appears as upper case. Consider it a “filling name”.

*Note: Resource Lists can also be created in Controls / Resource Lists using a different procedure without requiring a Bookbag.*
Click on Yes to create the new list.

Next, enter the user's barcode or number and then a password which will be used to access the list in future.

If the password is ever forgotten, the librarian can use Bookmark’s main password to access the list to find the password or change it to a new one in Manage Resource lists in Search Controls.

IMPORTANT! Contents of the Bookbag are not automatically transferred into the opened Booklist. Click on the Add from Bookbag button to do this.
Editing Resource Lists

Go to the Bookbag and open an existing list. The correct borrower number/barcode and password must be entered in order to access the list unless it is an Open list.

There are three types of resource lists:

**Private**
Private lists are the default type. They require a borrower number or barcode and password to be accessed. Private lists are not visible in the public Resource Lists button on the Search menu.

**Public**
A public list is available for others to view via the Resource Lists button on the Search menu.

To make a list public, give it a title then save.

A public list cannot be changed by anyone other than its owner.

**Open**
The Open Resource List is one which must be created by an authorized borrower but once created can be viewed and amended by anyone from a Bookbag containing items. Items can only be deleted by the originator of the list or the librarian in Manage resource lists in Search Controls but anyone can add to the list.

Open Lists do not require a password.

Open lists can only be added to. Removing entries must be done in Manage Resource Lists.