AGent
Version 3.3

User Guide

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AGent User Guide

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INTRODUCTION

Overview

This User Guide is designed to provide a working understanding of the features and functions of Auto-Graphics' AGent. AGent is a powerful and versatile cross-platform search application that allows *simultaneous* searching of multiple selected databases (Auto-Graphics' *Impact* databases, Z39.50 databases, XML databases, etc.). Accessed using a standard Web browser, AGent's user-friendly graphical interface provides flexibility that enables the knowledge and needs of individual users to be met appropriately.

Using AGent, you can:

- Select and simultaneously search multiple databases using AGent's powerful search features (Keyword Search, Advanced Search, Alpha Browse)

- Use Search Qualifiers to narrow the scope of your search

- View "hit lists" (Title Lists, Term Lists) and Full Record Displays of search results

- Submit interlibrary loan requests and track in-process requests

- Set default values for AGent's user-selectable options and parameters for your Agent account

The Web Interface

AGent's graphical interface is designed to provide a logical and efficient means of performing search functions. The screens are structured to assist workflow, and contain navigational links and menus to provide "single-click" access to AGent's features and functions.

Patron Menu – Provides access to AGent's "My Account", ILL and ILL Tracking features (for library patrons *only*).

Staff Menu – Provides access to AGent's "My Account" feature, and provides access to AGent's administrative module (for library staff *only*).

Search Tabs – Allows selection of the desired search type; either **Keyword Search**, **Browse**, or **Advanced Search**.

Display Area – Displays search entry and search results screens.

Resources Menu – Allows selection of *multiple* databases for simultaneous searching.

AGent Web Interface

The Toolbar

The Toolbar is shown on Term Lists, Cross Reference Lists, Title Lists and Full Record Displays in the AGent Search Interface. By default, the Toolbar contains a series of "text-based" buttons used to navigate the Search Interface, and to access system features and functions. Alternately, you can use the **My Preferences** feature to replace the "text-based" Toolbar with an "icon-based" Toolbar. The following table describes the features and functions that can be accessed via the Toolbar.

Depending on your login mode and specific patron or staff privileges, and the type of screen you are currently viewing, some buttons may not be available.

Button		Function
Text	**Icon**	**Function**
Title List		Returns to the previous Title List.
Request This Item		Displays the ILL Request Form.
		This function is available with ILL privileges *only*.
Blank Request		Displays the Blank ILL Request Form.
		This function is available with ILL privileges *only*.
Translate		Translation functionality is not currently implemented.
Authorize		Matches/validates applicable headings in a currently displayed bibliographic record against headings in an authority record, according to your Authority Control hierarchy.
		This function is available with Agent Authority Control *only*.
Add to Cart		When used from a Title List, adds the *selected* records to your "shopping cart" (Download List) for subsequent download to a local workstation. When used from a Full Record Display, adds the *currently displayed* record to your "shopping cart" (Download List) for subsequent download to a local workstation.
		This function is available with CAT Administration *only*.
View Cart		Displays the contents of your "shopping cart" (Download List).
		This function is available with CAT Administration *only*.
Add to Bibliography		Adds brief bibliographic data from an open Full Record Display to your Bibliography.
		This function is available only if your library has enabled authorization.
View Bibliography		Displays the contents of your Bibliography. Saved records can then be viewed, printed, or downloaded in one of several formats.
		This function is available only if your library has enabled authorization.
Add to Merge List		When used from a Title List, adds the *selected* records to your Merge List for subsequent merging and deduplication. When used from a Full Record Display, adds the *currently displayed* record to your Merge List for subsequent merging and deduplication.
		This function is available with UDMM Administration *only*.
View Merge List		Displays the contents of your Merge List.
		This function is available with UDMM Administration *only*.

| Button | | Function |
Text	Icon	
Print	🖨	Displays a "printer-friendly" version of the current Term List, Cross-Reference List, Number List, Title List or Full Record Display in a "popup" window for subsequent printing.
Help	❓	Displays AGent's online context-sensitive Help file.

The Patron Menu

The **Patron Menu** provides access to features and functions related to your user account, and to ILL management tools.

To access the Patron Menu:

1. Click the **Patron Menu** button on *any* screen in the AGent Search interface.

    • The Patron Menu screen displays.

2. The **Patron Menu** provides access to the following options:

    • **Sign Out** - Lets you log out of AGent.

The Patron Menu

    • **My Account** - Displays the "My Account" menu. The "My Account" menu lets you set your personal preferences for AGent's user-configurable features and functions (see *My Account* on page **5-3** for details).

    • **Blank Request Form** - Displays the Blank ILL Request Form, allowing you to submit an Interlibrary Loan request (see *Using the Blank Request Form* on page **4-1** for details).

    > This feature is available *only* if your library has set the authorization.

    • **ILL Request Tracking** - Lets you track the progress of in-process ILL requests you have submitted (see *ILL Request Tracking* on page **4-8** for details).

    > This feature is available *only* if your library has set the authorization.

    • **Search Library Information** - Lets you view lending policies and reference information for any library within your library's consortium or collective (see *Searching Library Information* on page **5-11** for details).

    > This feature is available *only* if your library has set the authorization.

    • **Suggest For Purchase** - Lets you submit a suggestion to your library to purchase a copy of a title (see *Suggest For Purchase* on page **5-13** for details).

    > This feature is available *only* if your library has enabled the *optional* Buy / Borrow / Suggest functionality.

3. Click the **Keyword Search**, **Browse** or **Advanced Search** button to return to the AGent Search interface.

The Staff Menu

The **Staff Menu** provides access to features and functions related to your user account, and to ILL management tools.

> Depending on the configuration of AGent for your library or consortium, and on the *specific* staff privileges assigned to your account, some features and function may not be available.

To access the Staff Menu:

1. Click the **Staff Menu** button on *any* screen in the AGent Search interface.

   - The staff screen for your *default* staff mode displays.

2. If necessary, click the **Staff Menu** button to display the Staff menu for your account.

3. The **Staff Menu** provides access to the following options:

The Staff Menu

   - **Sign Out** - Lets you log out of AGent.

   - **My Account** - Displays the "My Account" menu. The "My Account" menu lets you set your personal preferences for AGent's user-configurable features and functions (see *My Account* on page **5-3** for details).

   - **URL Submission Form** - Lets you submit a Uniform Resource Locator for inclusion in Auto-Graphics AGURL database.

     > This feature is available *only* if your library has purchased the *optional* AGURL database functionality.

   - **Search Library Information** - Lets you view lending policies and reference information for any library within your library's consortium or collective (see *Searching Library Information* on page **5-11** for details).

   - **About AGent** - Lets you view reference information and the current software version number for your library's AGent system.

   - **AGent News** - Displays the AGent "News" page.

   - **Documentation** - displays the AGent "Documentation Download" page.

   - **Application Guide** - Displays the AGent online "Application Guide", which provides information related to *optional* features and functions available for AGent, guidelines for *customizing* features and functions within AGent, and *additional* technical information.

4. Click the **Return to Searching** button to return to the AGent Search interface.

Organization of the User Guide

This User Guide is designed to provide the step-by-step instructions necessary to use Agent. Procedures are provided to select the desired search database(s), search the selected database(s) using the available search options, and view search results.

Chapter 1 – GETTING STARTED. This chapter explains how to prepare to use AGent. The chapter includes hardware/software requirements, system availability, and patron/guest Login and Logoff procedures.

Chapter 2 – SEARCHING. This chapter provides the procedures to select the search database(s), enter search criteria and search the selected database(s).

Chapter 3 – VIEWING SEARCH RESULTS. This chapter provides the procedures for viewing and navigating AGent's search results screens.

Chapter 4 – INTERLIBRARY LOAN. This chapter provides the procedures for requesting Interlibrary Loans, and for tracking in-process loan requests.

Chapter 5 - FOR AUTHENTICATED USERS. This chapter provides instructions for using the features and functions available to users of AGent systems employing AGent's User Authentication module.

Optional Features

AGent is modular in design, and offers libraries a high degree of flexibility in configuring the system to suit the specific needs of their patrons and staff members. The "basic" AGent search module can be enhanced by adding staff-level functionality to support System Administration and user authentication, PAC Administration, Cataloging, Statistics, Union Database Management, Splash Page Administration, and/or ILL Administration. Additionally, a number of *optional* features and functions are available within each AGent module.

This manual provides instructions covering *all* features and functions available through AGent Search. Depending on the *specific* configuration of AGent for *your* library, some features and functions may not be available to you. For information on enabling optional features and functions for your library, contact Auto-Graphics Sales and Marketing.

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Chapter 1. GETTING STARTED

This chapter identifies the hardware and software necessary to access and operate AGent, where to get help, and procedures for system Login and Logoff.

Hardware/Software Requirements

AGent can be accessed by a Web-capable PC (486 minimum) or Macintosh using a conventional Internet account and a Java-enabled Web browser such as Microsoft Internet Explorer (version 5.5 *minimum*), Netscape (version 6.2 *minimum*), or Firefox (version 1.0.7 *minimum*). No stringent hardware requirements are necessary to support AGent.

System Availability

AGent is available 24 hours daily.

Getting Help

If you need help using AGent, contact Auto-Graphics' Help Desk by one of the following means:

voice: (800) 852-8686 5am ~ 5pm Pacific Time
email: HelpDesk@auto-graphics.com
fax: (909) 595-5190

Before calling the Help Desk, consider referencing one of the following sources of information:

- **Online Help**. AGent's HTML-based Help displays in a separate browser window that you can view concurrently with your online session.

- The AGent News page (available from Staff menus) is intended to be a source for helpful information and documentation. From this link you can view Release Bulletins, Product Information Bulletins and News Items.

Configuring Your Browser for AGent

When a browser is installed on your workstation, it is configured with a *default* set of preferences. Some of these preferences must be modified to configure the browser for use with AGent. You must verify the browser is properly configured to ensure full access to all features and functions available through AGent. Refer to *Product Information Bulletin AGent-009, Configuration Recommendations for Browsers and Firewalls* for more information.

Configuring Your Popup Blocker

AGent uses "popup" windows to display search results, "Help" files and other information screens. "Popup" blockers may prevent the display of these screens. In order to access all features and functions available through AGent, you must configure your popup blocker for operation with AGent. Refer to *Product Information Bulletin AGent -010, Using AGent with 'Popup' Blockers* for more information.

Logging In

Staff access and authenticated patron access to AGent is password-protected. You *must* provide a valid **Username or Barcode** and **Password or PIN** to log into AGent with staff privileges.

Some workstations *within your library* may be configured to provide "generic" patron access to AGent based on the IP address of the workstation. If your library utilizes "IP authentication" for "generic" patron login, and your workstation falls within the specified IP range, the "IP Authenticated" screen displays when you first access AGent. Click the **My AGent** button to display the Login screen (click the **Begin** button to access AGent as a "generic" patron).

"IP Authenticated" Screen

> If your library has enabled the *optional* "Suppress 'My AGent' Login" feature, the **My AGent** button *is not* shown on the "IP Authenticated" login screen. You *cannot* perform an authenticated login to AGent from this workstation.

Some AGent systems may be configured to provide authentication via a "cookie" saved to your workstation. If you wish to save a "cookie" containing your login information to your workstation for future logins, select the **Remember me** checkbox on the login screen, then submit your login request.

- A *checkmark* ☑ indicates a "cookie" *will* be saved to your workstation.
- An *empty checkbox* ☐ indicates a "cookie" *will not* be saved to your workstation.
- Clicking the checkbox will toggle it on and off.

> If your workstation is used by *more than one* person, to prevent unauthorized access to AGent staff features and functions, it is recommended that you *do not* save your login information to a "cookie".

Once your login information has been saved to a "cookie" on your workstation, the Authenticated User Login screen will display each time you access AGent. Click the **Begin** button to login using the saved login data.

> If you choose to login as a *different* user, the "cookie" containing your current login data will be *overwritten* with the new login data.

To login to AGent:

1. On the Login screen, enter your library name in the **Library** text box, as necessary.

   - By default, the system will prefill the library name for your library.

   > If desired, you may use the **Lookup** feature to locate the code for the library to which you wish to login (see *Using Library Code Lookup* on page **1-4** for details).

"IP Authenticated" Login Screen
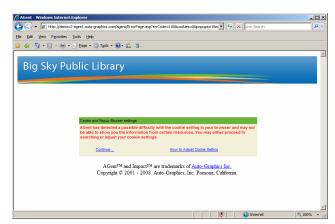
2. Enter your user name in the **Username or Barcode** text box.

3. Enter your password in the **Password or PIN** text box.

- Your password will display on the screen as a series of asterisks.

> In some cases, libraries may assign the default password "USERPASS" or "STAFFPASS" when creating an account for a new user (library patron or staff member). When you log into AGent for the *first time* using the default password "USERPASS" or 'STAFFPASS", you are prompted to provide a *permanent password* to complete the login process (see *Entering Your Permanent Password* on page **1-5** for details).

> On systems configured with the *optional* multiple-language display feature, the **Select your Language** menu is used *only* for "guest" logins to AGent. You can use the **My Preferences** function to set the desired *default* display language for your account (see *My Preferences* on page **5-9** for details).

4. Click the **Go** button to submit your Login request.

- If your library provides access to third-party databases that require cookies for authentication, and your browser's Privacy/Security settings are not sufficient to accept cookies from third-party databases, an advisory "Cookie Settings" message displays.

  - If you wish to ensure access to third-party databases that require cookies for authentication, adjust your browser's Privacy/Security settings, as needed (see *Configuring Your Browser for AGent* on page **1-1** for details), then click the **Continue** link to complete your login.
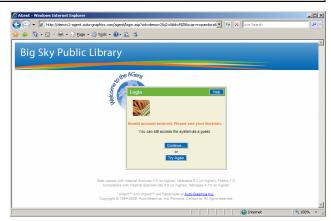
Cookie Settings Message

  - If you *do not* wish to change your browser's Privacy/Security settings, click the **Continue** link to complete your login.

  > If you choose *not* to adjust your browser's Privacy/Security settings, searches of *any* databases utilizing "cookie authentication" will fail.

- If your Login request is *unsuccessful*:

  - If you enter an *invalid* **Username or Barcode**, the message "Invalid account entered. Please see your librarian." displays. Click the **Continue** button to login to AGent as a "guest", or click the **Try Again** button to return to the staff login screen. Check the **Library** name, **Username or Barcode** and **Password or PIN**. Make any necessary corrections, then click the **Go** button to resubmit the form.

"Invalid Account Entered" Screen

○ If you enter an *invalid* **Password or PIN** with a *valid* **Username or Barcode**, the message "Invalid Password Entered" displays. Click the **Email my reminder question** link to receive an email copy of your password reminder question and return to the staff login screen. Make any necessary corrections to the **Library** name, **Username or Barcode** and **Password or PIN**, then click the **Go** button to resubmit the form.

"Invalid Password Entered" Screen

> If an email address *is not* included in your user profile, or if you do not wish to receive an mail copy of your password reminder message, click the **Try Again** button to return to the staff login screen. Check the **Library** name, **Username or Barcode** and **Password or PIN**. Make any necessary corrections, then click the **Go** button to resubmit the form.

- If your Staff Login request is *successful*:
  - ○ AGent enters the *default* mode for your user account.

Using Library Code Lookup

If you are not sure of the **Library** code for your library, or if you wish to login to a *different* library, you can use the library code **Lookup** feature to locate the desired library code.

To use Library Code Lookup:

1. Click the **Lookup** button on the Login screen.

   - The Library Code Lookup screen displays in an *additional* browser window. This list shows the **Library Code** and **Library Name** for *all* libraries in your consortium or collective.

   - Click the **Sort by Library Code** button to sort the list alphabetically by **Library Code**.

   - Click the **Sort by Library Name** button to sort the list alphabetically by library name.

2. Click the **Library Code** for the library to which you wish to login.

   - The Library Code Lookup screen closes, and the selected library code is entered in the **Library** text box on the Login screen *automatically*.

Library Code Lookup Screen

Entering Your Permanent Password

When you log into AGent for the *first time* using the default password "USERPASS" or 'STAFFPASS", the Permanent Password screen displays.

You *must* provide a permanent password to complete the login process. Select a password that you will remember. Your password may be a *maximum* of 20 characters in length, with *no spaces*. Your password may have *any combination* of alphabetic and numeric characters, and the underscore "_" character. Your password *is not* case-sensitive.

Permanent Password Screen

To enter your permanent password:

1. Enter the password you have chosen in the **New Password** and **Verify Password** text boxes.

Enter the password in *exactly* the same way in *both* text boxes.

2. Click the **Go** button to save your permanent password and complete the login process.

- If you enter an invalid password, an error dialog displays the message "Passwords do not match."

    ○ Make sure there are *no spaces* in your password.

    ○ Make sure you enter your password in *exactly* the same way in both the **New Password** and **Verify Password** text boxes.

- Re-enter your password in the **New Password** and **Verify Password** text boxes, then click the **Go** button.

REMEMBER TO KEEP YOUR PASSWORD SECURE. **DO NOT** tell your personal password to anyone. **DO NOT** write your password down. You will use your new password for all future logins, so remember it! If you think your password may be compromised, you can change it at any time using the **My Account** feature (see *My Account* on page **5-3** for details). If you forget your password, notify your Library or System Administrator.

Logging Off

To prevent unauthorized access to staff features and functions, you must exit *and* log off from AGent.

To exit AGent:

- Click the **Sign Out** button on *any* AGent screen.

    ○ The AGent Login screen displays.

If your library has enabled the "Display Browser Home Page on Sign Out" option, the "Home page" for the browser from which you accessed AGent displays when you sign out of AGent.

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Chapter 2. SEARCHING

Overview

AGent offers three distinct search options. The choice of search option depends on the objective of your search. This chapter provides the procedures to:

- Select the desired search databases
- Perform a Keyword Search of the selected databases
- Perform a Browse search of the selected databases
- Perform an Advanced Search of the selected databases
- Add search qualifiers to an Advanced Search
- Perform a Reading Level Search of your library's *default* bibliographic database

Search screens are displayed by selecting the desired search tab, located below the library banner (see *The Web Interface* on page **1** for details).

> Your library may use different names for the three available search types, but their function remains the same as described in the following paragraphs.

The Resources Menu

All databases available to you for the *currently selected* search method are listed in the **Resources** menu. The **Resources** menu displays at the bottom of each AGent search screen.

> The **Resources** menu shown on the **Browse** screen (see *Browse* on page **2-9**) shows *only* your library's Union catalog, and Z39.50 sites that support browse searching. All databases that *do not* support scan browse are suppressed (hidden).

> Depending on the configuration of the **Resources** menu for your library, the **Resources** menu may be "displayed" or "hidden" by default.

- To *display* a "hidden" **Resources** menu, click the **Display the Resources of (*library name*)** link on the Search screen. The screen refreshes with the **Resources** menu displayed.

> If desired, you can use the **My Preferences** feature to set the desired *default* mode for the **Resources** menu for your account to either "displayed" or "hidden" (see *My Preferences* on page **5-9** for details).

Databases are organized under *source headings* (category groupings) such as **My Library**, **Union Libraries**, **Web Resources**, etc. Source headings are shown in **bold** type, and are indicated by a 📁 icon. You may simultaneously search *multiple* individual databases, from *one or more* categories, at a time. The *maximum* number of databases that can be selected for any single search is determined by the *specific* configuration of AGent for your library.

> For certain libraries with a *single* searchable database *only*, display of the **Resources** menu may be suppressed. In these cases, the database is selected *automatically*.

Database Types

The **Resources** menu may include a number of different types of databases:

- **Union Databases/Library Catalogs** include your library's catalog and the catalogs for other libraries within a consortium or collective. These databases generally contain bibliographic records for all items located at the associated library.

- **Z39.50 Databases** include catalogs for *other* libraries that *may* or *may not* be members of your library's consortium or collective.

- **Web Databases** include web resources and search engines, such as "Google!™" and "Yahoo®".

- **Reference Databases** include public and subscription databases containing full text articles on a variety of subjects.

- **Web Links** are *direct* links to an online resource, database, or other informational page. Web Links *cannot* be included in *any* search, but are instead accessed by clicking the name of the Web Link.

In some cases, your library may attach "resource notes" to databases to provide information about the type and contents of the database (see *Database Descriptions and Resource Notes* on page **2-2** for details). These notes can be useful in determining whether or not you wish to select the database for a given search.

Database Descriptions and Resource Notes

Some databases in the **Resources** menu may have "database descriptions" and/or "resource notes" attached.

To view a database description and/or resource note:

- If a resource note is included for a database, a 🛈 icon is shown preceding the database name.

- If a database description is included for a database, it may be displayed below the database name or as "mouseover" text when the cursor is positioned over the 🛈 icon.

- Click the 🛈 icon next to the name of the database for which you wish to view the resource note.

  - The resource note displays in an *additional* browser window.

- The resource note includes the **Full Name** of the associated database, a **URL** for the database (or the associated institution; such as a library's Home Page), and **Note Text** (additional information about the associated database).

  - Click the **URL** link to open the associated page in an *additional* browser window.

- Click the **Close** button to close the resource note and return to the previous search screen.

Typical Resource Note

If a **URL** is included in the Resource Note, the name of the Resource displays as a hyperlink in the **Resources** menu. Clicking the Resource name opens the associated page in an *additional* browser window.
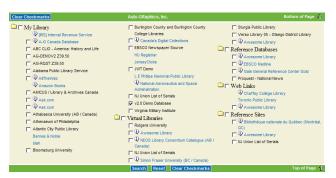
Database Selection

One or more databases may be selected *automatically* by default. You *must* select the proper database(s) to search in order to retrieve the desired results. Once selected, databases remain active for *all subsequent searches* during your current logic, until you change the database selections.

> Depending on the configuration of the **Resources** menu for your library, the **Resource** headings may display in the "expanded" or "collapsed" format by default. If desired, you can use the **My Preferences** feature to set the desired *default* display mode for **Resources** headings for your account to either "expanded" or "collapsed" (see *My Preferences* on page **5-9** for details).

To select the search database(s):

- For "collapsed" **Resources** menus, click the 📁 icon for a "collapsed" source heading to expand the heading; click the 📂 icon for an "expanded" source heading to collapse the heading.

- The number of resource headings that can be "expanded" at a given time is determined by the configuration of AGent for your library.

  ○ **If only *one* source heading may be expanded at any given time**: Clicking the 📁 icon for a "collapsed" source heading *collapses* the currently expanded heading and *expands* the selected heading.

  ○ **If *multiple* source headings may be expanded *simultaneously***: Clicking the 📁 icon for a "collapsed" source heading *expands* the selected heading. When the number of "expanded" source headings reaches the limit set for your library, clicking the 📁 icon for a "collapsed" source heading *collapses* the *most recently* expanded heading and *expands* the selected heading. To "collapse" *all* currently "expanded" source headings, click the **Close Folders** button at the top of the **Resources** menu.

- Use the database checkboxes to select the database(s) you wish to search.

  ○ A *checkmark* ☑ indicates the associated database is *selected* (will be included in the search).

  ○ An *empty checkbox* ☐ indicates the associated database is *not selected* (will not be included in the search).

  ○ Clicking a checkbox repeatedly will toggle it on and off.

- To select an *individual database*, select the checkbox ☐ for the desired database.

- To select *all databases* within a source heading, select the checkbox ☐ for the desired source heading. The checkboxes for *all databases* under the source heading are selected *automatically*.

Resources Menu (Expanded Format)

Resources Menu (Collapsed Format)

> The checkbox ☐ *is not* displayed for Web links or for source headings that contain Web links *only*.

- To clear *all* currently selected databases, click the **Clear Checkmarks** button.

- To return resource selections to their *default* values, click the **Reset** button.

> If you select *more* than the *maximum* number of databases set for your library, an error dialog displays. Click the **OK** button to close the dialog. The *last* database you selected is *automatically* unselected.

Keyword Search

Standard Keyword Search is the *broadest* of the available search methods. Standard Keyword Search searches the Title, Author/Creator, Subject and Notes indexes to locate materials based on the keyword(s) you enter (see *Entering Search Terms* on page **2-7** for details). Enhanced Keyword Search lets you search a *single* selected index for matches to your search term. You can search using one or more keywords in your search term.

> The Enhanced Keyword Search feature is *optional*, and may not be enabled for all libraries.

Standard Keyword Search

To perform a standard Keyword Search:

1. Click the **Keyword Search** tab.

   - The Keyword Search screen displays.

2. Select the database(s) you wish to search from the **Resources** menu (see *Database Selection* on page **2-3** for details).

   > If you select a database that requires *user authentication*, be sure you have entered your personal username and password for the database using the **Enter My Passwords** function (see *Maintaining Passwords for Reference Databases* on page **5-8** for details).

3. Enter your keyword(s) (search term) in the **Search For** text box. You can use one or more keywords in your search term (see *Entering Search Terms* on page **2-7** for details).

4. Click the **Search** button to begin the search.

Keyword Search Screen

> To reset the search form to its initial conditions and re-enter your search criteria, click the **Reset** button *before* submitting your search.

> If you have not entered a search term, a warning dialog displays the message "Please enter a valid search term!" Click the **OK** button to close the dialog, and enter a search term in the **Search For** text box.

> If you have not selected *at least one* database, a warning dialog displays the message "Please select one or more databases and try again." Click the **OK** button to close the dialog, and select the desired database(s).

5. The Search Summary screen displays when the search is submitted (see *Chapter 3, Viewing Search Results* for more information).

Enhanced Keyword Search

To perform an Enhanced Keyword Search:

1. Click the **Keyword Search** tab.

- The Keyword Search screen displays.

2. Select the database(s) you wish to search from the **Resources** menu.

> If you select a database that requires *user authentication*, be sure you have entered your personal username and password for the database using the **Enter My Passwords** function (see *Maintaining Passwords for Reference Databases* on page **5-8** for details).

Enhanced Keyword Search Screen

3. Enter your keyword(s) (search term) in the **Search For** text box. You can use one or more keywords in your search term.

4. Choose the heading you wish to search from the **in** menu:

- **All Headings:** Searches terms that appears in any of the Title, Author/Creator, Subject or Notes headings.

- **Author/Creator:** Searches by the author's name (personal or corporate).

- **Title:** Searches terms that appear in the publication title.

- **Title Begins With:** Searches for titles that *begin with* the specified term.

- **Title Exact:** Searches for titles that are an *exact match* to the specified term.

- **Subject:** Searches terms that appear in particular subjects.

- **Subject Begins With:** Searches for subjects that *begin with* the specified term.

- **Subject Exact:** Searches for subjects that are an *exact match* to the specified term.

- **Journal Title**: Searches terms that appear in Journal title.

- **ISBN:** Searches terms that appear in International Standard Book Number. Enter a complete (9, 10 or 13 digit) ISBN *without* the hyphens.

- **Material Description**: Searches terms that appear in general material designator (electronic resource, video, recording, etc.).

- **Notes:** Searches terms that appear in record notes.

- **ISSN:** Searches terms that appear in International Standard Serial Number. Enter a complete (7 or 8 digit) ISSN; hyphens are *optional*. If you omit the hyphen, close up the number and *do not* use spaces. For example, if you omit the hyphen for ISSN 1068-2554, enter the number as 10682554.

- **LCCN:** Searches terms that appear in Library of Congress Catalog Number. Enter a complete (8, 10 or 12 digit) or partial LCCN.
  - If you enter a *complete* LCCN, the hyphen is *optional*. If you omit the hyphen, close up the number and *do not* use spaces. For example, if you omit the hyphen for LCCN 95-123456, enter the number as 95123456.

○ If you enter a *partial* LCCN, you *must* include the hyphen between the *second* and *third* digits. For example, 95-123.

- **OCLC Number:** Searches terms that appear in Online Computer Library Center Number. Enter a complete OCLC number.

- For Government Printing Office (GPO) numbers, you may enter either a *complete* or a *partial* number. When using partial GPO numbers, *do not* omit or delete numbers within a related group of digits.

> These options are available *only* if your library has set the authorization.

  ○ **GPO SuDoc Number:** Enter a complete or partial SuDoc number. It *is not* necessary to enter spaced and/or punctuation marks when entering the SuDoc number. If desired, you may use the "*****" wildcard character to replace *multiple characters* in the SuDoc number (see ***Using Wildcards*** on page **2-8** for details).

  ○ **GPO Item Number:** Enter a complete or partial Item Number for Depository Library items, including spaces and punctuation marks.

  ○ **GPO Order Number:** Enter a complete or partial Stock number, including spaces and punctuation marks, assigned to publications by the Superintendent of Publications.

  ○ **GPO Report Number:** Enter a complete or partial Report number, including spaces and punctuation marks, assigned to certain series designated as technical reports.

  ○ **GPO Monthly Cat. Number:** Enter a complete or partial Monthly Catalog Entry Number, including spaces and punctuation marks.

  ○ **GPO Ship List Number:** Enter a complete or partial Ship List Number, including spaces and punctuation marks.

- **Original Control Number:** This *optional* feature searches for records using other system number(s) located in the 035 tag. Enter a complete or partial number.

- **A-G Control Number:** The A-G Control Number is the Auto-Graphics assigned accession number (system number). Enter the complete A-G Control Number.

- **Publisher Number:** Enter a complete publisher number assigned to sound recordings, video recordings, printed music and other music-related material.

- **Dewey Call Number**: Lists terms by Dewey Decimal Classification Number.

- **LC Call Number**: Lists terms by Library of Congress Call Number.

- **Other Standard Identifier**

- **Barcode:** Lists terms by item barcode.

- **Related Resource:** Provides for *full text* searching of items "linked" to bibliographic records in an AG database. For each record that includes a link to an electronic resource, AGent retrieves and indexes the *full text content* of the "linked" resource.

> The **Related Resources** feature is *optional*, and may not be enabled for all systems.

> The **Related Resources** feature *does not* support "phrase" searching.

5. Click the **Search** button to begin the search.

> To reset the search form to its initial conditions and re-enter your search criteria, click the **Reset** button *before* submitting your search.

> If you have not entered a search term, a warning dialog displays the message "Please enter a valid search term!" Click the **OK** button to close the dialog, and enter a search term in the **Search For** text box.

> If you have not selected at least one database, a warning dialog displays the message "Please select one or more databases and try again." Click the **OK** button to close the dialog, and select the desired database(s).

6. The Search Summary screen displays when the search is submitted (see *Chapter 3, Viewing Search Results* for more information).

Entering Search Terms

You can use single- or multiple-word search terms in Keyword Search and Advanced Search. You may also use the wildcard characters "**?**" and "*****" (see *Using Wildcards* on page **2-8** for details) or the Boolean operators "And", "Or" and "Not" (*see Using Boolean Operators in Search Terms* on page **2-8** for details) to broaden or narrow the scope of your search.

> Search terms *are not* case-sensitive.

> Diacritics are acceptable within search terms.

To use a *single-word* search term:

- Enter the *single word* you wish to search for in the **Search For** text box.

To use a *multiple-word* search term:

- Enter *two or more words* you wish to search for in the **Search For** text box. When multiple words are used in a search term, AGent searches for records that contain *all* the words.

- Multiple words may be entered in *any order*. The Boolean operator '**And**' is *automatically* assumed between all words in a search term. For example, the search term **king stephen** will return the same results as **stephen king**.

    EXCEPTIONS

    ○ When searching by **Title Begins With** or **Subject Begins With**, multiple words *must* be entered in the *exact* order in which they appear in the title or subject. *ALWAYS* begin with the *first word* of the title or subject. *DO NOT* skip words.

    ○ When searching by **Title Exact** or **Subject Exact**, you *must* enter a *complete* title or subject. *DO NOT* omit words.

- Some third party, reference and subscription databases support the use of quotation marks **" "** to indicate a phrase search. In these cases, the search term **"king stephen"** (*with* the quotation marks) will return only those results that contain the words **king stephen** in that order.

> For most databases, the following words are optional: 'a', 'an', 'and', 'at', 'by', 'etc.', 'for', 'from', 'in', 'of', 'on', 'the', 'to' and 'with'. These words are *ignored* when included in your search term. For example, you could search for *Gone With The Wind* by typing the full title or by typing just *Gone Wind*. Both combinations will retrieve the same results.
>
> For some databases, however, *including* or *excluding* these words may affect your search by returning *inappropriate* results or by returning *no* results. In these cases, you may wish to repeat your search and either *add* the appropriate optional words *to* or *remove* all optional words *from* your search term, as necessary.

- When you perform an Advanced Search of an AG database by **Title**, *and* select **Relevancy** as the sort order, titles that are an *exact match* to your search term are shown at the beginning of the search results list.

You can use Browse or Advanced Search to locate items by *standard number* (ISBN, ISSN, LCCN, etc.).

To use a *single standard number* as a search term:

- Enter the standard number you wish to search for in the **Search For** text box.

To use *multiple standard numbers* as a search term:

Searching by *multiple standard numbers* is supported by Advanced Search *only*.

- Enter the standard numbers you wish to search for in the **Search For** text box. You may enter *up to 10* standard numbers in each **Search For** text box. When using *multiple* standard numbers in your search term, separate numbers using the Boolean "OR" operator (i.e., "0198203640 OR 0140714782").

Using Wildcards

You can use the wildcard characters "**?**" and "*****" to *broaden* the scope of your search.

Wildcards are *not* supported by all databases. In cases where wildcards are not supported, the Search Summary screen will display an error status message and/or "**0**" results for these databases.

- Use the '**?**' wildcard to replace a *single character* in a word. For example, the search term **gr?y** will return records containing the words *gray* or *grey*.

  ○ You can use the '**?**' wildcard *more than once* in a single word. For example, the search term **st??n** will return records containing the words *stien* or *stein*.

- Use the '*****' wildcard to replace *multiple characters* in a word. For example, the search term **comput*** will return records containing the words *compute*, *computer*, *computers* or *computing*.

You may use the wildcard characters in *any or all* words in your search term. You *may not* use the wildcard as the first character in *any* word in your search term.

Using Boolean Operators in Search Terms

You can use the Boolean operators "**AND**", "**OR**" and "**NOT**" to *broaden* or *narrow* the scope of your search.

The following applications of Boolean operators apply to Auto-Graphics *AGent* databases *only*. Other third-party, reference or subscription databases may process Boolean operators differently, may require that Boolean queries be formatted differently, or may not support the use of Boolean operators at all.

- Use the Boolean operator "**AND**" to *narrow* the scope of your search. This function retrieves all occurrences of 1st Word **AND** 2nd Word. For example, the search term "**cats *AND* dogs**" will return records containing the word "cats" *and* the word "dogs".

- Use the Boolean operator "**OR**" to *broaden* the scope of your search. This function retrieves all occurrences of 1st Word **OR** 2nd Word. For example, the search term "**cats *OR* dogs**" will return records containing the word "cats" or the word "dogs".

- Use the Boolean operator "**NOT**" to *narrow* the scope of your search. This function retrieves all occurrences of 1st Word **NOT** 2nd Word. For example, the search term "**cats *NOT* dogs**" will return records containing the word "cats" but not the word "dogs".

DO NOT use a Boolean operator as the *first* word of your search term.

Browse

Browse lets you locate materials by author/creator, title, subject, or all three headings, based on the term you enter. You can use one or more words in your search term. No matter how many or how few characters you use, you will always get results closest to the term you entered.
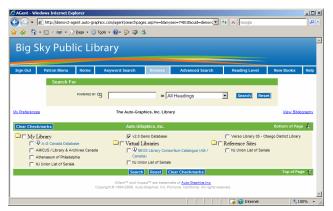
You can also search for titles using any of the standard numbers that uniquely identify a publication, such as the International Standard Book Number (ISBN), International Standard Serial Number (ISSN), Library of Congress Catalog Number (LCCN) or System Number. If your library has set the authorization, you may also be able to search for titles using several of the numbering systems in use by the United States Government Printing Office.

Browse differs from Keyword Search and Advanced Search in the way AGent reads alphabetic search terms and in the results returned. When using Browse, AGent reads the word(s) in your search term as a string of characters (rather than as separate words), reading each character from left to right, to position you in the database closest to what you typed. For example, if you entered the search term 'cats', AGent uses the letter 'C' as the starting point in the database, then it uses the letter 'A' to find the first term using the 'CA'. Next, the letter 'T' is used to match the first term using 'CAT'. When the search is completed, AGent generates an alphabetical browse list (or lists, when searching multiple databases) of index *terms*, beginning with the term which most closely matches your search term. From the browse list(s), you may choose to view the Title List, Cross Reference List or Full Record Display, as appropriate, for any listed term.

> Browse is *not* supported by all databases. In cases where Browse is not supported, the Search Summary screen will display an error status message and/or "**0**" results for these databases.

To perform a Browse:

1. Click the **Browse** tab.

- The Browse screen displays.

2. Select the database(s) you wish to search from the **Resources** menu (see *The Resources Menu* on page **2-1** for details).

3. Enter your search term in the **Search For** text box. You can use one or more words in your search term.

- When browsing by author/creator, use the author's *last* name as the *first* word in the search term.

Browse Screen

> *Remember:* When you use more than one word in a search term, AGent will recognize the term as a string of characters, *not* as separate words.

4. Choose the heading you wish to search from the **in** menu:

- **All Headings:** Searching term that appears in any of the Title, Author/Creator, Subject or Notes headings

- **Author/Creator:** Searches by the author's name (personal or corporate)

- **Title:** Searches terms that appear in publication title

- **Subject:** Searches terms that appear in particular subjects

- **Journal Title**: Searches terms that appear in Journal title.

- **ISBN:** Searches terms that appear in International Standard Book Number. Enter a complete (9, 10 or 13 digit) ISBN *without* the hyphens.

- **GMD**: Searches terms that appear in general material designator (electronic resource, video, recording, etc.).

- **ISSN:** Searches terms that appear in International Standard Serial Number. Enter a complete (7 or 8 digit) ISSN; hyphens are *optional*. If you omit the hyphen, close up the number and *do not* use spaces. For example, if you omit the hyphen for ISSN 1068-2554, enter the number as 10682554.

- **LCCN:** Searches terms that appear in Library of Congress Catalog Number. Enter a complete (8, 10 or 12 digit) or partial LCCN.

  ○ If you enter a *complete* LCCN, the hyphen is *optional*. If you omit the hyphen, close up the number and *do not* use spaces. For example, if you omit the hyphen for LCCN 95-123456, enter the number as 95123456.

  ○ If you enter a *partial* LCCN, you *must* include the hyphen between the *second* and *third* digits. For example, 95-123.

- **OCLC Number:** Searches terms that appear in Online Computer Library Center Number. Enter a complete OCLC number.

- For Government Printing Office (GPO) numbers, you may enter either a *complete* or a *partial* number. When using partial GPO numbers, *do not* omit or delete numbers within a related group of digits.

  > These options are available *only* if your library has set the authorization.

  ○ **GPO SuDoc Number:** Enter a complete or partial SuDoc number, including spaces and punctuation marks.

  ○ **GPO Item Number:** Enter a complete or partial Item Number for Depository Library items, including spaces and punctuation marks.

  ○ **GPO Order Number:** Enter a complete or partial Stock number, including spaces and punctuation marks, assigned to publications by the Superintendent of Publications.

  ○ **GPO Report Number:** Enter a complete or partial Report number, including spaces and punctuation marks, assigned to certain series designated as technical reports.

  ○ **GPO Monthly Cat. Number:** Enter a complete or partial Monthly Catalog Entry Number, including spaces and punctuation marks.

  ○ **GPO Ship List Number:** Enter a complete or partial Ship List Number, including spaces and punctuation marks.

- **Original Control Number:** This *optional* feature searches for records using other system number(s) located in the 035 tag. Enter a complete or partial number.

- **A-G Control Number:** The A-G Control Number is the Auto-Graphics assigned accession number (system number). Enter the complete A-G Control Number.

- **Publisher Number:** Enter a complete publisher number assigned to sound recordings, video recordings, printed music and other music-related material.

- **Dewey Call Number**: Lists terms by Dewey Decimal Classification Number.

- **LC Call Number**: Lists terms by Library of Congress Call Number.

- **Other Standard Identifier**

- **Related Resource:** Provides for *full text* searching of items "linked" to bibliographic records in an AG database. For each record that includes a link to an electronic resource, AGent retrieves and indexes the *full text content* of the "linked" resource.

> The **Related Resources** feature is *optional*, and may not be enabled for all systems.

> The **Related Resources** feature *does not* support "phrase" searching.

5. Click the **Search** button to begin the search.

> To reset the search form to its initial conditions and re-enter your search criteria, click the **Reset** button *before* submitting your search.

> If you have not entered a search term, a warning dialog displays the message "Please enter a valid search term!" Click the **OK** button to close the dialog, and enter a search term in the **Search For** text box.

> If you have not selected *at least one* database, a warning dialog displays the message "Please select one or more databases and try again." Click the **OK** button to close the dialog, and select the desired database(s).

6. The Search Summary screen displays when the search is submitted (see *Chapter 3, Viewing Search Results* for more information).

Advanced Search

Advanced Search lets you create "search queries" using the logical (Boolean) functions '**And**', '**Or**', and '**Not**', with up to three keyword combinations, across multiple search headings. You can use Advanced Search to locate materials by author, title, subject, notes, or all four headings, based on the keyword(s) you enter and the logical operators you select. Multiple keywords can be entered into any text box, in any order. AGent assumes the logical operator '**And**' for multiple keywords in any given text box. Additionally, you can use Boolean operators in *any* search term (see *Using Boolean Operators in Search Terms* on page **2-8** for details).

You can also search for titles using any of the standard numbers that uniquely identify a publication, such as the International Standard Book Number (ISBN), International Standard Serial Number (ISSN), Library of Congress Catalog Number (LCCN), or System Number. If your library has set the authorization, you may also be able to search for titles using several of the numbering systems in use by the United States Government Printing Office.

The functions of the logical (Boolean) operators are:

And - This function retrieves all occurrences of 1st Term **And** 2nd term. For example, to locate materials about psychiatry written by Sigmund Freud, you would enter <**Subject**> psychiatry - **And** - <**Author/Creator**> sigmund freud.

Or - This function retrieves all occurrences of 1st Term **Or** 2nd term. For example, to locate materials about China or Japan, you would enter <**Subject**> china - **Or** - <**Subject**> japan.

Not - This function is used to exclude a term from a search; 1st Term **Not** 2nd term. For example, to locate books with Dracula in the title, but not written by Bram Stoker, you would enter <**Title**> dracula - **Not** - <**Author/Creator**> bram stoker.

Advanced Search is the most powerful search function that AGent offers, but using it does require planning in advance. To obtain the best results, the Boolean operators (and their associated keyword combinations) in your search query *must* be organized in the proper sequence. In most cases, this sequence is **Or - And - Not**. For example, if you want to find all the materials written by Ray Bradbury about Mars or Martians, other than *The Martian Chronicles*, you might organize your search query as:

<Title> Mars or Martian - **And** - **<Author/Creator>** Ray Bradbury - **Not** - **<Title>** Chronicles
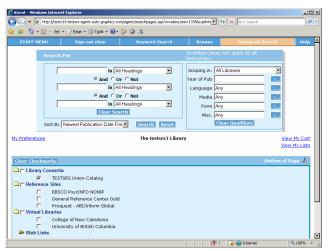
AGent User Guide

Depending on the configuration of AGent for your library or consortium, the system will display either the *basic* Advanced Search screen, or the *enhanced* Advanced Search screen when you select **Advanced Search**.

Basic Advanced Search

To perform an Advanced Search:

1. Click the **Advanced Search** tab.

   - The Advanced Search screen displays.

2. Select the database(s) you wish to search from the **Resources** menu (see *The Resources Menu* on page **2-1** for details).

3. Enter the *first* term of your "search query":

   - Enter the keyword(s) (search term) in the *first* **Search For** text box (see *Entering Search Terms* on page **2-7** for details).

Basic Advanced Search Screen

- Click the **And**, **Or** or **Not** radio button to set the logical function between the *first* **Search For** text box and the *second* **Search For** text box.

- Choose the heading you wish to search from the *first* **in** menu:

- **All Headings:** Searches terms that appears in any of the Title, Author/Creator, Subject or Notes headings.

- **Author/Creator:** Searches by the author's name (personal or corporate).

- **Title:** Searches terms that appear in publication title.

- **Title Begins With:** Searches for titles that *begin with* the specified term.

- **Title Exact:** Searches for titles that are an *exact match* to the specified term.

- **Subject:** Searches terms that appear in particular subjects.

- **Subject Begins With:** Searches for subjects that *begin with* the specified term.

- **Subject Exact:** Searches for subjects that are an *exact match* to the specified term.

- **Journal Title**: Searches terms that appear in Journal title.

- **ISBN:** Searches terms that appear in International Standard Book Number. Enter a complete (9, 10 or 13 digit) ISBN *without* the hyphens.

- **Material Description**: Searches terms that appear in general material designator (electronic resource, video, recording, etc.).

- **Notes:** Searches terms that appear in record notes.

- **ISSN:** Searches terms that appear in International Standard Serial Number. Enter a complete (7 or 8 digit) ISSN; hyphens are *optional*. If you omit the hyphen, close up the number and *do not* use spaces. For example, if you omit the hyphen for ISSN 1068-2554, enter the number as 10682554.

- **LCCN:** Searches terms that appear in Library of Congress Catalog Number. Enter a complete (8, 10 or 12 digit) or partial LCCN.

  ○ If you enter a *complete* LCCN, the hyphen is *optional*. If you omit the hyphen, close up the number and *do not* use spaces. For example, if you omit the hyphen for LCCN 95-123456, enter the number as 95123456.

  ○ If you enter a *partial* LCCN, you *must* include the hyphen between the *second* and *third* digits. For example, 95-123.

- **OCLC Number:** Searches terms that appear in Online Computer Library Center Number. Enter a complete OCLC number.

- For Government Printing Office (GPO) numbers, you may enter either a *complete* or a *partial* number. When using partial GPO numbers, *do not* omit or delete numbers within a related group of digits.

  > These options are available *only* if your library has set the authorization.

  ○ **GPO SuDoc Number:** Enter a complete or partial SuDoc number, including spaces and punctuation marks.

  ○ **GPO Item Number:** Enter a complete or partial Item Number for Depository Library items, including spaces and punctuation marks.

  ○ **GPO Order Number:** Enter a complete or partial Stock number, including spaces and punctuation marks, assigned to publications by the Superintendent of Publications.

  ○ **GPO Report Number:** Enter a complete or partial Report number, including spaces and punctuation marks, assigned to certain series designated as technical reports.

  ○ **GPO Monthly Cat. Number:** Enter a complete or partial Monthly Catalog Entry Number, including spaces and punctuation marks.

  ○ **GPO Ship List Number:** Enter a complete or partial Ship List Number, including spaces and punctuation marks.

- **Original Control Number:** This *optional* feature searches for records using other system number(s) located in the 035 tag. Enter a complete or partial number.

- **A-G Control Number:** The A-G Control Number is the Auto-Graphics assigned accession number (system number). Enter the complete A-G Control Number.

- **Publisher Number:** Enter a complete publisher number assigned to sound recordings, video recordings, printed music and other music-related material.

- **Dewey Call Number**: Lists terms by Dewey Decimal Classification Number.

- **LC Call Number**: Lists terms by Library of Congress Call Number.

- **Other Standard Identifier**

- **Barcode:** Lists terms by item barcode.

- **Related Resource:** Provides for *full text* searching of items "linked" to bibliographic records in an AG database. For each record that includes a link to an electronic resource, AGent retrieves and indexes the *full text content* of the "linked" resource.

  > The **Related Resources** feature is *optional*, and may not be enabled for all systems.

  > The **Related Resources** feature *does not* support "phrase" searching.

4. Enter the *second* and *third* terms of your "search query", as appropriate, using the procedures described in step **3**, above.

5. If you wish, you can use the **Qualifiers** options to narrow the scope of your search (see ***Using Search Qualifiers*** on page **2-18** for details):

> Search Qualifiers are applied to your library's Union catalog and Z39.50 databases *only* (see ***Using Search Qualifiers with Z39.50 Databases*** on page **2-27** for details). Search Qualifiers do not affect *any* other selected database.

- **Sort By:** Determines the order in which your search results will be sorted.

  ○ When you perform a search of an AG database by **Title**, *and* select **Relevancy** as the sort order, titles that are an *exact match* to your search term are shown at the beginning of the search results list.

  > If desired, you can use the **My Preferences** function to set a *default* sort order for your account (see ***My Preferences*** on page **5-9** for details). However, the **Sort By** selection will *override* your default sort order selection. Additionally, once a sort order has been selected from the **Sort By** menu, the *new* sort order will be used for all Keyword Searches and Advanced Searches until a new sort order is selected, or until you log out.

- **Scoping in:** Limits your search to a *specific* library grouping (subset of libraries) within your library's consortium or collective.

  > This feature is not available on all systems.

- **Year of Pub:** Limits your search results to materials that were published during a specific year (or range of years).

- **Language:** Limits your search results to materials that are available in a specific language.

- **Media:** Limits your search results to materials that are available in a specific media format (such as books, manuscripts, music, or visual materials).

- **Form:** Limits your search results to materials that are available in a specific form (such as large print, Braille or microform).

- **Misc:** Limits your search results to materials that meet selected miscellaneous criteria.

6. Click the **Search** button to submit your search.

> To reset the search form to its initial conditions and re-enter your search criteria, click the **Reset** button *before* submitting your search.

> If you have not entered a search term, a warning dialog displays the message "Please enter a valid search term!" Click the **OK** button to close the dialog, and enter a search term in the **Search For** text box.

> If you have not selected *at least one* database, a warning dialog displays the message "Please select one or more databases and try again." Click the **OK** button to close the dialog, and select the desired database(s).

7. The Search Summary screen displays when the search is submitted (see ***Chapter 3, Viewing Search Results*** for more information).
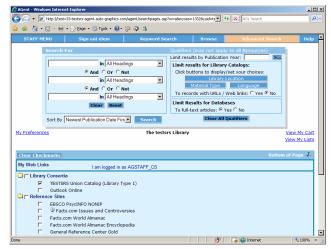
Enhanced Advanced Search

To perform an Advanced Search:

1. Click the **Advanced Search** tab.

- The Advanced Search screen displays.

2. Select the database(s) you wish to search from the Resources menu (see ***The Resources Menu*** on page **2-1** for details).

3. Enter the *first* term of your "search query":

- Enter the keyword(s) (search term) in the *first* **Search For** text box (see ***Entering Search Terms*** on page **2-7** for details).

- Click the **And**, **Or** or **Not** radio button to set the logical function between the *first* **Search For** text box and the *second* **Search For** text box.

Enhanced Advanced Search Screen

- Choose the heading you wish to search from the *first* **in** menu:

- **All Headings:** Searches terms that appears in any of the Title, Author/Creator, Subject or Notes headings.

- **Author/Creator:** Searches by the author's name (personal or corporate).

- **Title:** Searches terms that appear in publication title.

- **Title Exact:** Searches for titles that are an *exact match* to the specified term.

- **Title Begins With:** Searches for titles that *begin with* the specified term.

- **Subject:** Searches terms that appear in particular subjects

- **Subject Begins With:** Searches for subjects that *begin with* the specified term.

- **Subject Exact:** Searches for subjects that are an *exact match* to the specified term.

- **Journal Title**: Searches terms that appear in Journal title.

- **ISBN:** Searches terms that appear in International Standard Book Number. Enter a complete (9, 10 or 13 digit) ISBN *without* the hyphens.

- **Material Description**: Searches terms that appear in general material designator (electronic resource, video, recording, etc.).

- **Notes:** Searches terms that appear in record notes.

- **ISSN:** Searches terms that appear in International Standard Serial Number. Enter a complete (7 or 8 digit) ISSN; hyphens are *optional*. If you omit the hyphen, close up the number and *do not* use spaces. For example, if you omit the hyphen for ISSN 1068-2554, enter the number as 10682554.

- **LCCN:** Searches terms that appear in Library of Congress Catalog Number. Enter a complete (8, 10 or 12 digit) or partial LCCN.

  ○ If you enter a *complete* LCCN, the hyphen is *optional*. If you omit the hyphen, close up the number and *do not* use spaces. For example, if you omit the hyphen for LCCN 95-123456, enter the number as 95123456.

  ○ If you enter a *partial* LCCN, you *must* include the hyphen between the *second* and *third* digits. For example, 95-123.

- **OCLC Number:** Searches terms that appear in Online Computer Library Center Number. Enter a complete OCLC number.

- For Government Printing Office (GPO) numbers, you may enter either a *complete* or a *partial* number. When using partial GPO numbers, *do not* omit or delete numbers within a related group of digits.

  > These options are available *only* if your library has set the authorization.

  ○ **GPO SuDoc Number:** Enter a complete or partial SuDoc number, including spaces and punctuation marks.

  ○ **GPO Item Number:** Enter a complete or partial Item Number for Depository Library items, including spaces and punctuation marks.

  ○ **GPO Order Number:** Enter a complete or partial Stock number, including spaces and punctuation marks, assigned to publications by the Superintendent of Publications.

  ○ **GPO Report Number:** Enter a complete or partial Report number, including spaces and punctuation marks, assigned to certain series designated as technical reports.

  ○ **GPO Monthly Cat. Number:** Enter a complete or partial Monthly Catalog Entry Number, including spaces and punctuation marks.

  ○ **GPO Ship List Number:** Enter a complete or partial Ship List Number, including spaces and punctuation marks.

- **Original Control Number:** This *optional* feature searches for records using other system number(s) located in the 035 tag. Enter a complete or partial number.

- **A-G Control Number:** The A-G Control Number is the Auto-Graphics assigned accession number (system number). Enter the complete A-G Control Number.

- **Publisher Number:** Enter a complete publisher number assigned to sound recordings, video recordings, printed music and other music-related material.

- **Dewey Call Number**: Lists terms by Dewey Decimal Classification Number.

- **LC Call Number**: Lists terms by Library of Congress Call Number.

- **Other Standard Identifier**

- **Barcode:** Lists terms by item barcode.

- **Related Resource:** Provides for *full text* searching of items "linked" to bibliographic records in an AG database. For each record that includes a link to an electronic resource, AGent retrieves and indexes the *full text content* of the "linked" resource.

  > The **Related Resources** feature is *optional*, and may not be enabled for all systems.

  > The **Related Resources** feature *does not* support "phrase" searching.

4. Enter the *second* and *third* terms of your "search query", as appropriate, using the procedures described in step 3, above.

5. If you wish, you can use the Qualifiers options to narrow the scope of your search (see *Using Search Qualifiers* on page **2-18** for details):

> Search Qualifiers are applied to your library's Union catalog and Z39.50 databases *only* (see *Using Search Qualifiers with Z39.50 Databases* on page **2-27** for details). Search Qualifiers do not affect *any* other selected database.

- **Sort By:** Determines the order in which your search results will be sorted.

  ○ When you perform a search of an AG database by **Title**, *and* select **Relevancy** as the sort order, titles that are an *exact match* to your search term are shown at the beginning of the search results list.

  > If desired, you can use the **My Preferences** function to set a *default* sort order for your account (see *My Preferences* on page **5-9** for details). However, the **Sort By** selection will *override* your default sort order selection. Additionally, once a sort order has been selected from the **Sort By** menu, the *new* sort order will be used for all Keyword Searches and Advanced Searches until a new sort order is selected.

- **Publication Year:** Limits your search results to materials that were published during a specific year (or range of years).

- **Library Location and/or Distance:** Limits your search to a *specific* library grouping (subset of libraries) within your library's consortium or collective, or to libraries within a specified distance (in miles) from your library or other specified Zip Code.

- **Language:** Limits your search results to materials that are available in a specific language.

- **Material Type:** Limits your search results to materials that are available in a specific media format (such as books, manuscripts, music, or visual materials) or that are available in a specific form (such as large print, Braille or microform).

- **Records with URLs / Web links:** Limits your search of *Library Catalogs only* to records that contain URLs or web links to online resources.

- **Full Text Articles:** Limits your search of *Reference Databases only* to online full-text articles.

- **Peer-Reviewed Articles:** Limits your search of *Reference Databases only* to articles identified as "peer reviewed."

6. Click the **Search** button to submit your search.

> To reset the search form to its initial conditions and re-enter your search criteria, click the **Reset** button *before* submitting your search.

> If you have not entered a search term, a warning dialog displays the message "Please enter a valid search term!" Click the **OK** button to close the dialog, and enter a search term in the **Search For** text box.

> If you have not selected *at least one* database, a warning dialog displays the message "Please select one or more databases and try again." Click the **OK** button to close the dialog, and select the desired database(s).

7. The Search Summary screen displays when the search is submitted (see *Chapter 3, Viewing Search Results* for more information).

Searching Reference Databases

If you have selected a database that requires *user authentication*, you *must* have a valid username and password to view search results from the database. Use the **Enter My Passwords** feature (see ***Maintaining Passwords for Reference Databases*** on page **5-8** for details) to store your usernames and passwords for *user authenticated* reference databases. If you have selected a database that requires *user authentication* and you *do not* have a valid username and password for the database, AGent will either:

- Display a "hit" count of "0" for the database

- Display the "native" login page for the database when you select to view search results

Additionally, your library may configure some reference databases for *in-library authentication* or *barcode authentication*.

- Reference databases configured for *in-library authentication* can be searched *only* from workstations *within* your library.

- Reference databases configured for *barcode authentication* can be searched *only* if the barcode under which you logged in has been registered as "valid" by your library's User Administrator.

Using Search Qualifiers

When you use Advanced Search, AGent searches the *entire* database(s) you have selected for matching items. Qualifiers let you narrow the scope of your search to a selected subset of libraries within your consortium or collective, and/or allow you to limit search results to items available in a specified media, form, language and/or publication date. You can use *multiple* Qualifiers on any Advanced Search. The Search Qualifiers available to you depend on the type of Advanced Search in your library's AGent system; either Basic or Advanced.

> In general, Search Qualifiers *are not* available for Keyword Search or Browse. However, you can use the **My Preferences** function (see ***My Preferences*** on page **5-9** for details) to enable the **Scoping in** qualifier for *all* searches.

> All Search Qualifiers (*except* the "Peer Reviewed" qualifier) are applied to your library's Union catalog and Z39.50 databases *only* (see ***Using Search Qualifiers with Z39.50 Databases*** on page **2-27** for details). These Qualifiers do not affect *any* other selected database. The "Peer Reviewed" Qualifier is applied to Reference Databases and full text searches *only*.

> The **Qualifiers** available to you, and the means by which they are selected, depend on the Advanced Search screen used in your AGent system: either Basic Advanced Search (see ***Basic Advanced Search*** on page **2-12** for details) or Enhanced Advanced Search (see ***Enhanced Advanced Search*** on page **2-15** for details).

To clear all currently selected Search Qualifiers:

- Click the **Clear Qualifiers** button.

> The **Clear Qualifiers** button *does not* reset the **Sort By** qualifier to its default value.

Adding a Sort Qualifier (Basic / Enhanced)

The Sort Qualifier lets you determine the order in which your search results will be sorted.

> The Sort Qualifier is always applied to your library's Union catalog(s) and is applied to reference databases that support sorting. If a reference database does not support the selected sort order, results are displayed according to the default sort order.

To add a sort qualifier:

> If your search retrieves more than 1,000 hits, the search results will be *unsorted*.

- Select the order in which you wish search results to be sorted from the **Sort By** menu.
  - ○ You may select to sort search results by **Newest Publication Date First**, **Newest Publication Date Last**, **Newest Record First**, **Newest Record Last**, **Alphabetically by Title**, **Alphabetically by Author**, **Number of Locations/Title, LC Call Number/Title, Dewey Call Number/Title, Local Call Number/Title**, **URL** or **Relevancy**.
  - ○ When you perform a search of an AG database by **Title**, *and* select **Relevancy** as the sort order, titles that are an *exact match* to your search term are shown at the beginning of the search results list.

> If desired, you can use the **My Preferences** function to set a *default* sort order for your account (see ***My Preferences*** on page **5-9** for details). However, the **Sort By** selection will *override* your default sort order selection. Additionally, once a sort order has been selected from the **Sort By** menu, the *new* sort order will be used for all Keyword Searches and Advanced Searches until a new sort order is selected.

Adding a Scoping Qualifier (Basic)

The Scoping Qualifier lets you select to search a *subset* of libraries within your consortium or collective.

> The **Scoping** qualifier is applied to your library's Union catalog(s) *only*. This feature is *optional*, and may not be enabled for all systems.

> Depending on the configuration of AGent for your library or consortium, your library may provide access to *more than one* Union catalog. In this case, the *specific* options listed in the **Scoping in** menu may vary, depending on the currently selected database. When *more than one* Union catalog is selected for a single search, the **Scoping in** menu will show scoping levels for *one database only*. Scoping will be applied *only* to the database associated with the available scoping level. Scoping selection will be *ignored* for all other selected databases.

To add a scoping qualifier:

- Your library's staff determines which selections are available through the **Scoping In** menu. Up to nine library groupings may be listed.
- You can choose to search **All Libraries**, or narrow your search by choosing any other grouping listed.

Normally, scoping is applied *only* to Advanced Search. If desired, you can use the **My Preferences** function (see ***My Preferences*** on page **5-9** for details) to configure AGent to apply Scoping to *all searches* for your account.

To apply scoping to *all* searches:

1. Make sure the **Apply Scoping to All Searches** option in My Preferences is set to **Yes**.

2. Click the **Advanced Search** tab.

- The Advanced Search screen displays.

3. Select the desired database(s) from the **Resources** menu. Select the desired scoping level from the **Scoping in** menu.

4. Perform an Advanced Search (see *Advanced Search* on page **2-11** for details).

5. On the Search Summary screen, click the **Modify Search** link.

- The system returns to the Advanced Search screen.

You may now perform a Keyword Search or Browse with the currently selected scoping level applied.

Adding a Library Location and/or Distance Qualifier (Enhanced)

The Library Location and/or Distance Qualifier lets you select to search a *subset* of libraries within your consortium or collective, or to search only those libraries that are within a specified distance (in miles) from your library or other specified Zip Code.

> The **Library Location and/or Distance** qualifier is applied to your library's Union catalog(s) *only*.

Depending on the configuration of AGent for your library or consortium:

- Your library may provide access to *more than one* Union catalog. In this case, the *specific* options listed in the Library Location menu may vary, depending on the associated catalog.

- If your library provides access to *more than one* Union catalog, but *does not* support the **Distance** qualifier, the **My Postal Code is** and **Libraries within** fields are not displayed. You may qualify your search by library location *only*.

- If your library provides access to *only one* Union catalog and *does not* support the **Distance** qualifier, a **Scoping in** menu is shown in place of the **Library Location and/or Distance** button (see *Adding a Scoping Qualifier (Basic)* on page **2-19** for information on using the **Scoping in** menu).
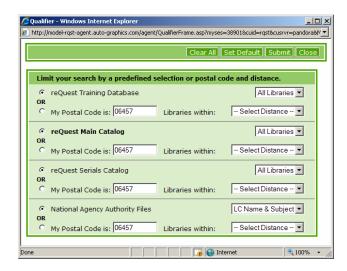
To add a Library Location qualifier:

Your library's staff determines which selections are available through the Library Location menu(s). Up to nine library groupings may be listed for each catalog. You can choose to search **All Libraries**, or narrow your search by choosing any other grouping listed.

1. Click the **Library Location** or **Library Location and/or Distance** button, as appropriate.

- The Library Location dialog opens in an *additional* browser window.

2. Select the radio button next to the name of the desired catalog(s).

3. Select the desired Library Location option from the associated drop-down menu(s).

4. When all desired selections have been made, click the **Submit** button to save your selections.

To add a Distance qualifier:

1. Click the **Library Location and/or Distance** button.

- The Library Location and/or Distance dialog opens in an *additional* browser

window.

2. Select the **My Postal Code is** radio button for the desired catalog(s), then enter the appropriate Zip Code in the **My Postal Code is** text box.

- By default, the **My Postal Code is** text box contains the Zip Code for the library under which you logged in.

3. Select the desired distance from the specified Zip Code for libraries you wish to search from the **Libraries within** menu; either **< 1 mile** (less than one mile) **2 miles**, **5 miles**, **10 miles**, **20 miles** or **> 20 miles** (more than 20 miles).

4. When all desired selections have been made, click the **Submit** button to save your selections.

To cancel a Library Location and/or Distance qualifier:

- On the Library Location and/or Distance dialog, click the **Set Default** button to return the selections to their *default* conditions, then click the **Submit** button.

Adding a Year of Publication Qualifier (Basic / Enhanced)

Use the **Year of Pub** Qualifier to narrow your search to materials published during a specific year, multiple selected years or a range of years.

To add a year of publication qualifier:

When entering the **Year of Pub** Qualifier, enter dates as four-digit years; (i.e. 1975).

1. To limit search results to a *single year* of publication, enter the desired year in the **Year of Pub** text box.

   Examples:

   - 1876

   - 1989

2. To limit search results to a *range of years*, enter the desired start and end year in the **Year of Pub** text box.

   Examples:

   - 1975 to 1977

   - 1975 - 1977

3. To limit search results to *multiple selected years*, enter the desired years in the **Year of Pub** text box.

   Examples:

   - 1975, 1977, 1979, 1988

   - 1975 1977 1979 1988

4. Use the wildcard character "?" to limit search results to items published during a specific decade or century.

   Examples:

   - 197? - retrieves results published from 1970 through 1979

- 19?? - retrieves results published from 1900 through 1999

5. Use the characters ">=" and "<=" to limit search results to items published before or after a specified year.

   Examples:

   - > = 1975 - retrieves items published during 1975 and *subsequent* years

   - < = 1975 - retrieves items published during 1975 and *previous* years

To cancel a year of publication qualifier:

If you decide *not* to add a year of publication qualifier, delete the date(s) from the **Year of Pub** text box.

Adding a Language Qualifier (Basic)

Use the **Language** Qualifier to narrow your search to materials available in a specified language.

To add a language qualifier:

1. Click the [▶...] button next to the **Language** text box.

   - The Language Qualifiers list opens in an *additional* browser window.

   - The Language Qualifier list shows *all* languages for which titles are available.

2. Select the checkbox(es) next to the language(s) by which you wish to qualify your search.

   > You may select one or more languages as qualifiers.

   - A *checkmark* ☑ indicates the associated language *is* selected as a qualifier.

   - An *empty checkbox* ☐ indicates the associated language *is not* selected as a qualifier.

   - Clicking a checkbox repeatedly will toggle it on and off.

   - Click the **Select All** button to select all the languages in the list (click the **Clear All** button to deselect all currently selected languages).

3. When all desired languages have been selected, click the **Submit** button on the Language Qualifiers list.

   - The Language Qualifiers list closes, and the selected languages are entered in the **Language** text box *automatically*.

To cancel a language qualifier:

If you decide *not* to add a language qualifier, delete the qualifier(s) from the **Language** text box.
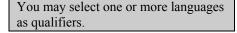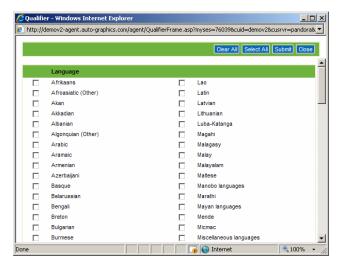
Adding a Language Qualifier (Enhanced)

Use the **Language** Qualifier to narrow your search to materials available in a specified language.

To add a language qualifier:

1. Click the **Language** button.

   - The Language Qualifiers list opens in an *additional* browser window.

   - The Language Qualifier list shows *all* languages for which titles are available.

2. Select the checkbox(es) next to the language(s) by which you wish to qualify your search.

   > You may select one or more languages as qualifiers.

   - A *checkmark* ☑ indicates the associated language *is* selected as a qualifier.

   - An *empty checkbox* ☐ indicates the associated language *is not* selected as a qualifier.

   - Clicking a checkbox repeatedly will toggle it on and off.

   - Click the **Select All** button to select all the languages in the list (click the **Clear All** button to deselect all currently selected languages).

3. When all desired languages have been selected, click the **Submit** button on the Language Qualifiers list to save your selections.

To cancel a language qualifier:

- On the Language Qualifiers list, click the **Clear All** button to return the selections to their *default* conditions, then click the **Submit** button.

Adding a Media Qualifier (Basic)

Use the **Media** Qualifier to narrow your search to materials available in a specified media format (Books, Visual Materials, etc.).

To add a media qualifier:

1. Click the ▶… button next to the **Media** text box.

   - The Media Qualifiers list opens in an *additional* browser window.

   - The Media Qualifier list shows *all* media types for which titles are available.

2. Select the checkbox(es) next to *each* media type by which you wish to qualify your search.

> You may select one or more media types as qualifiers.

- A *checkmark* ☑ indicates the associated media type *is* selected as a qualifier.

- An *empty checkbox* ☐ indicates the associated media type *is not* selected as a qualifier.

- Clicking a checkbox repeatedly will toggle it on and off.

- Click the **Select All** button to select all the media types in the list (click the **Clear All** button to deselect all currently selected media types).

3. When all desired media types have been selected, click the **Submit** button on the Media Qualifiers list.

- The Media Qualifiers list closes, and the selected media types are entered in the **Media** text box *automatically*.

To cancel a media qualifier:

If you decide *not* to add a media qualifier, delete the qualifier(s) from the **Media** text box.

Adding a Material Type Qualifier (Enhanced)
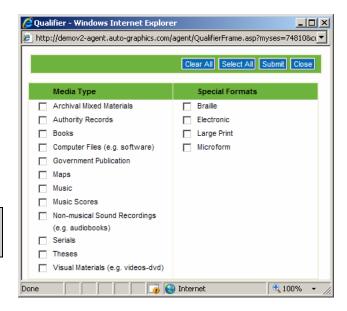
Use the **Material Type** Qualifier to narrow your search to materials available in a specified media format (Books, Visual Materials, etc.) or in a specified form (Large Print, Microform, etc.).

To add a material type qualifier:

1. Click the **Material Type** button.

- The Material Type Qualifiers list opens in an *additional* browser window.

- The Material Qualifier list shows *all* media types and special formats for which titles are available.

2. Select the checkbox(es) next to *each* material type and/or special format by which you wish to qualify your search.

> You may select one or more material types and/or special formats as qualifiers.

- A *checkmark* ☑ indicates the associated material type/special format *is* selected as a qualifier.

- An *empty checkbox* ☐ indicates the associated material type/special format *is not* selected as a qualifier.

- Clicking a checkbox repeatedly will toggle it on and off.

- Click the **Select All** button to select all the material types and special formats in the list (click the **Clear All** button to deselect all currently selected material types and special formats).

3. When all desired material types and/or special formats have been selected, click the **Submit** button on the Material Type Qualifiers list to save your selections.
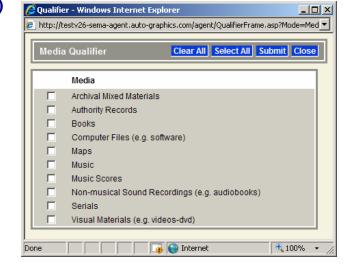
To cancel a media type qualifier:
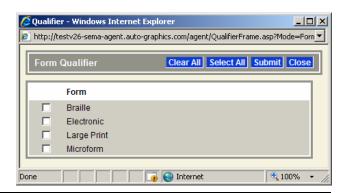
- On the Material Type Qualifiers list, click the **Clear All** button to return the selections to their *default* conditions, then click the **Submit** button.

Adding a Form Qualifier (Basic)

Use the **Form** Qualifier to narrow your search to materials available in a specified form (Large Print, Microform, etc.).

To add a form qualifier:

1. Click the ▶... button next to the **Form** text box.

   - The Form Qualifiers list opens in an *additional* browser window.

   - The Form Qualifier list shows *all* forms for which titles are available.

2. Select the checkbox(es) next to the form(s) by which you wish to qualify your search.

> You may select one or more forms as qualifiers.

- A *checkmark* ☑ indicates the associated form *is* selected as a qualifier.

- An *empty checkbox* ☐ indicates the associated form *is not* selected as a qualifier.

- Clicking a checkbox repeatedly will toggle it on and off.

- Click the **Select All** button to select all the form types in the list (click the **Clear All** button to deselect all currently selected form types).

3. When all desired forms have been selected, click the **Submit** button on the Form Qualifiers list.

   - The Form Qualifiers list closes, and the selected forms are entered in the **Form** text box *automatically*.

To cancel a form qualifier:

If you decide *not* to add a form qualifier, delete the qualifier(s) from the **Form** text box.

Adding a Miscellaneous Qualifier (Basic)

Use the **Misc.** Qualifier to narrow your search to materials that satisfy a specified miscellaneous criteria.

> The **Misc.** qualifier is applied to your library's Union catalog *only*.

To add a miscellaneous qualifier:

1. Click the ▶... button next to the **Misc.** text box.

* The Miscellaneous Qualifiers list opens in an *additional* browser window.

* The Miscellaneous Qualifier list shows *all* miscellaneous qualifiers for which titles are available.

2. Select the checkbox(es) next to the miscellaneous qualifier(s) by which you wish to qualify your search.

> You may select one or more miscellaneous qualifiers as qualifiers.

3. When all desired miscellaneous qualifiers have been selected, click the **Submit** button on the Miscellaneous Qualifiers list.

* The Miscellaneous Qualifiers list closes, and the selected miscellaneous qualifiers are entered in the **Misc.** text box *automatically*.

To cancel a miscellaneous qualifier:

If you decide *not* to add a miscellaneous qualifier, delete the qualifier(s) from the **Misc.** text box.

Adding a Records with URLs / Web Links Qualifier (Enhanced)

Use the **Records with URLs / Web links** Qualifier to limit your search results to records that contain URLs or web links to online resources.

> The **Records with URLs / Web links** Qualifier is applied to Union catalogs *only*.

To add a records with URLs / web links qualifier:

* Select the **To records with URLs / Web links - Yes** radio button.

To cancel a records with URLs / web links qualifier:

* Select the **To records with URLs / Web links - No** radio button.

Adding a Full Text Articles Qualifier (Enhanced)

Use the **Full Text Articles** Qualifier to limit your search results to online full-text articles.

> The **Full Text Articles** Qualifier is applied to Reference Databases *only*.

To add a full text articles qualifier:

* Select the **To full text articles - Yes** radio button.

To cancel a full text articles qualifier:

* Select the **To full text articles - No** radio button.

Adding a "Peer Reviewed" Qualifier (Enhanced)

Use the **Peer Reviewed Articles** Qualifier to limit your search results to articles identified as "peer reviewed."

> The **Peer Reviewed Articles** Qualifier is applied to Reference Databases *only*.

To add a "peer reviewed" qualifier:

- Select the **To peer reviewed articles - Yes** radio button.

To cancel a "peer reviewed" qualifier:

- Select the **To peer reviewed articles - No** radio button.

Using Search Qualifiers with Z39.50 Databases

You can use Search Qualifiers when searching Z39.50 databases to limit search results to items available in a specified media, form, language and/or publication date. Search Qualifiers *are not* supported by all Z39.50 databases. Some Z39.50 databases may not support all available Search Qualifiers; others may not support *any* Search Qualifiers. Additionally, some Search Qualifiers are intended for use with your library's Union catalog *only*.

The following Search Qualifiers are intended for use with your library's Union catalog *only*. These Search Qualifiers are *ignored* when searching Z39.50 databases.

- **Sort by**
- **Scoping In**
- **Misc.**

The following Search Qualifiers may be used when searching Z39.50 databases:

- **Year of Pub**
- **Language**
- **Media**
- **Form**

In cases where a selected Search Qualifier *is not* supported by a selected Z39.50 databases, one of the following results will occur:

- The system will return a **Qualifier is not supported by site** error, and *no results* will be retrieved from the site.
- The Search Qualifier will be *ignored*, and an *unqualified* results set will be retrieved from the site.

Reading Level Search

The **Reading Level** feature lets you search your library's *default* bibliographic database for reading-level appropriate material based on the **Accelerated Reader**, **Lexile** or **Reading Counts** reading study programs.

To search for titles based on reading level:

1. Click the **Reading Level** tab.

   - The Reading Level Search screen displays.

> The **Resources** menu is not shown on the Reading Level Search screen. Reading Level Search searches your library's *default* bibliographic database only. You cannot specify additional databases to search.

Reading Level Search Screen

2. Enter your keyword(s) (search term) in the **Search For** text box. You can use one or more keywords in your search term.

3. Choose the heading you wish to search from the **in** menu:

- **All Headings**: Searches terms that appear in any of the Author, Title or Subject headings

- **Author**: Searches by the author's name

- **Title**: Searches terms that appear in the publication title

- **Subject**: Searches terms that appear in particular subjects

4. Select the reading program you which to base you search on from the **Select Study Program** drop-down menu. You may choose **Accelerated Reader**, **Lexile** or **Reading Counts**.

- The screen refreshes to display the reading level parameter fields for the selected reading level. Enter or select the desired values for reading level parameters.

5. If you selected **Accelerated Reader**:

- Select your desired interest level from the **Select interest level** menu. Choose **All** to search by *all* interest levels, or select a *specific* interest level from those listed.

- Select your desired reading level from the **Select reading level** menu, or enter a reading level range in the **Enter reading level range** text boxes.

  - When selecting a reading level from the **Select reading level** menu, you may choose **All** to search by *all* reading levels, or select a *specific* reading level from those listed.

  - When entering a reading level range in the **Enter reading level range** text boxes, enter the reading levels using the format **#.#**. You may enter any value from **0.9** to **11.9**.

- Select your desired point level from the **Select point level** menu, or enter a point level range in the **Enter point level** text boxes.

Accelerated Reader Search Parameters

  - When selecting a point level from the **Select point level** menu, you may choose **All** to search by *all* point levels, or select a *specific* point level from those listed.

  - When entering a point level range in the **Enter point level** text boxes, enter the point levels using the format **#.#**. You may enter any value from **0.5** to **19.0**.

6. If you selected **Lexile**:

- Select your Lexile point level from the **Select LEXILE level** menu, or enter a Lexile level range in the **Enter LEXILE level range** text boxes.

○ When selecting a Lexile level from the **Select LEXILE level** menu, you may choose **All** to search by *all* Lexile levels, or select a *specific* Lexile level from those listed.

○ When entering a Lexile level range in the **Enter LEXILE level range** text boxes, *be sure* to enter a *valid* Lexile level in *each* text box.

7. If you selected **Reading Counts**:

• Select your desired reading level from the **Select reading level** menu, or enter a reading level range in the **Enter reading level range** text boxes.

○ When selecting a reading level from the **Select reading level** menu, you may choose **All** to search by *all* reading levels, or select a *specific* reading level from those listed.

○ When entering a reading level range in the **Enter reading level range** text boxes, *be sure* to enter a *valid* reading level in *each* text box.

• Select your desired point level from the **Select point level** menu, or enter a point level range in the **Enter point level** text boxes.

○ When selecting a point level from the **Select point level** menu, you may choose **All** to search by *all* point levels, or select a *specific* point level from those listed.

○ When entering a point level range in the **Enter point level** text boxes, *be sure* to enter a *valid* point level in *each* text box.

8. Click the **Search** button to submit your search.

• The Search Summary screen displays when the search is submitted.

Reading Counts Search Parameters

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Chapter 3. VIEWING SEARCH RESULTS

Viewing the Search Summary

The Search Summary screen is the initial results display screen shown following any search (Keyword Search, Browse, Advanced Search). The Search Summary screen is configured as a "two-pane" display. The right pane shows AGent's Continuous Brief Browse (CBB) display (see *Using Continuous Brief Browse (CBB)* on page **3-2** for details). The left pane contains **Search Details**, including the Resource Summary, and provides several tools to facilitate "single-click" follow-on searching from a variety of search options (see *Using Search Details* on page **3-1** for details).

Search Summary Screen

Using Search Details

Search Details show a summary of your search criteria and the resources searched, and provide *additional* options for performing follow-on searching.

> Your library determines the *specific* features and functions available through **Search Details**. Some features and functions *may not* be enabled for all libraries.

To use Search Details:

You can "show" or "hide" **Search Details** using the 📂 **Open Search Details** or 📂 **Close Search Details** links respectively. To show or hide **Search Details** components use the ▶ and ▼ buttons. Click the ▶ button to *show* the associated item, click the ▼ button to *hide* the associated item. **Search Details** may include *some or all* of the following components:

- **Your Search** - provides a summary of search terms and other parameters specified when the search was submitted. Included are the keyword(s) entered on the search form, the selected sort order for Title Lists, the name of your library, and a list of search **Qualifiers** (**Language**, **Media**, **Scoping**, etc.) applied to the search.

- **Resource Summary** - Displays a "sortable" list of all Resources included in the search, along with the number of "hits" retrieved from each Resource. Clicking a Resource name scrolls the Continuous Brief Browse list to the selected Resource. Clicking a "hit" count displays a Title List for the Resource (see *Title List* on page **3-23** for more information). Selecting an option from the **Resource Summary** menu sorts the Resources list by **Group** (Resource Heading), **Alphabetical**, **Most Hits on Top** or **Least Hits on Top**.
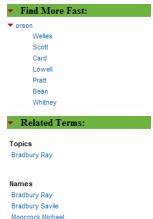
- **Find More Fast** - lets you refocus the current search by adding *additional* terms from a hierarchical list of keywords. Each search submitted generates a list of *additional* keywords for *each word* included in the search term. Selecting a keyword from **Find More Fast** resubmits the search with the selected keyword "ANDed" to the associated term, and generates a *new* keyword list for the "ANDed" term.

- **Related Terms** - lists of related terms (**Topics** and **Names** are *automatically* generated each time a search is submitted to allow for "follow on" searching. The **Related Terms** field contains *up to 100* related terms based on the initial search term(s) entered.

- **Search History** - **Search History** shows your five most recent searches, and allows for easy execution or modification of a prior search. The number of searches saved in **Search History** is determined by your **Searches to save in History** setting in **My Preferences**. Click an **Execute** link to *automatically* resubmit the prior search. Click a **Modify** link to open a search screen with the prior search parameters entered *automatically*. Click the **older>>** and **<<newer** buttons to view other searches in your **Search History**.

- **RSS Feeds** - displays current news items or other information from one or more syndicated (RSS) news feeds based on the search term(s) entered. AGent uses the search term(s) you entered to retrieve relevant items from each source. Select an item link to display the item in an *additional* browser window.

- **Did you mean** - When a search is submitted, AGent's Spell Checker checks the search term for misspelled words. In the event the Spell Checker detects a potential misspelling in the search term, the Search Summary screen includes a **Did you mean** field that shows a modified search term, with the suggested replacement(s) for the misspelled word(s) in the original search term shown in bold type. Click the modified search term to resubmit the search, using the suggested corrections to the term.

Using Continuous Brief Browse (CBB)

The Continuous Brief Browse (CBB) display shows "brief browse" (title or term) lists for *all* resources included in your search. Each "brief browse" list shown on the display can be viewed and scrolled independently. Additionally, you can:

- Set the display format for "brief browse" lists; either "list format" or "thumbnail format"

- Print, save or email selected records from the *currently displayed* page of *one or more* "brief browse" lists

- Combine (deduplicate) search results from the *currently displayed* pages of *all* "brief browse" lists and sort by title, author or publication date

- Display a "standalone" title list for *any* resource included in your search

> Authenticated users can use the **My Preferences** feature to set the default display format for the CBB display (see *My Preferences* on page **5-9** for details).

To view the CBB display:

- A *separate* "brief browse" list is shown following the Search Summary for *each resource* included in the search. The title bar for each "brief browse" list shows the name of the resource and the total number of titles in the "brief browse" list.

> If your library has enabled the "auto deduplication" feature, the CBB display shows a *single, combined* Brief Browse list, sorted by either title, author or date. You can resort the list or view separate Brief Browse lists for each selected database/resource using the **Results Display Mode** menu (see *Combining Search Results* on page **3-6** for details).

> The results set for some reference resources can be *only* be displayed in the *native* interface for the resource. In these cases, a "brief browse" list is not shown for the database. Click the **Click here to view results** link to view the results set for the associated resource.
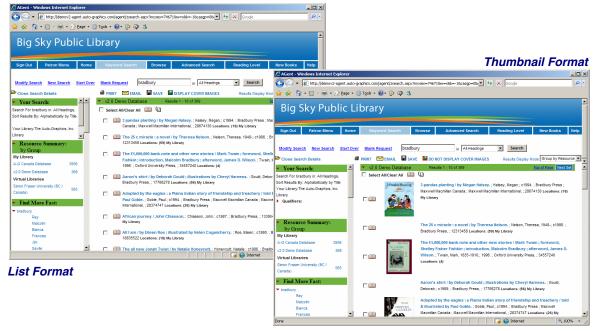
- The CBB Toolbar (shown immediately before the *first* "brief browse" list) provides the tools necessary to access CBB features and functions. The following table describes the features and functions that can be accessed from the CBB Toolbar.

Tool	Icon	Function
PRINT button	🖨	Displays a "printer-friendly" version of records selected from the *currently displayed* page of *one or more* "brief browse" lists in a "popup" window for subsequent printing.
EMAIL button	✉	Opens the Email Results screen that lets you email selected "brief" records to yourself or another party (shown *only* for Keyword Search and Advanced Search results sets).
SAVE button	💾	Opens the Save Records dialog that lets you save records selected from the *currently displayed* page of *one or more* "brief browse" lists to a file on your local workstation (shown *only* for Keyword Search and Advanced Search results sets).
DISPLAY COVER IMAGES button	🖼	Sets the format for the CBB display to "thumbnail format" (shown *only* for Keyword Search and Advanced Search results sets).
DO NOT DISPLAY COVER IMAGES button	🖼	Sets the format for the CBB display to "list format" (shown *only* for Keyword Search and Advanced Search results sets).
Results Display Mode menu		Provides options for combining similar items (deduplicating) from the *currently displayed* pages of *all* "brief browse" lists, and sorting the combined list by title, author or publication date (*not* shown for Keyword or Advanced searches of a *single* Union catalog (Auto-Graphics database) for which *less than* 1,000 hits are returned).
Sort By		For Keyword Search and Advanced Search results sets when searching a *single* Union catalog (Auto-Graphics database), this option replaces the **Results Display Mode** menu, and can be used to determine the order in which search results are sorted. This feature is available *only* when *less than 1000* results are returned.

- To scroll the CBB display to the "brief browse" list for a *selected* resource, click the desired Resource name link in the **Resource Summary** section of the **Using Search Details** (see *Using Search Details* on page **3-1** for more information).

- To view a Title List for a *selected* resource, click the "hit count" link for the desired Resource in the **Resource Summary** section of the **Search Details** (see *Using Search Details* on page **3-1** for more information). The Title List for the selected resource displays in an *additional* browser window.

- The CBB display may be viewed in one of two formats:
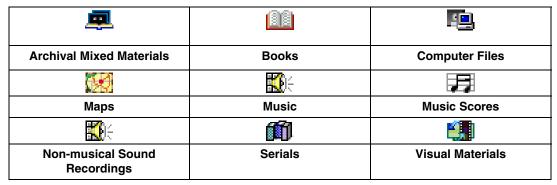
Continuous Brief Browse Display Formats

- ○ **List Format:** Shown when the **DO NOT DISPLAY COVER IMAGES** button is selected. Displays bibliographic information as a single line, with small icons indicating the media type for the associated item.

> Media type icons are shown for your library's Union catalog *only*.

- ○ **Thumbnail Format:** Shown when the **DISPLAY COVER IMAGES** button is selected. Displays bibliographic information as a single line, with a "cover image" added (as available) for each title.

- When "brief browse" lists are shown in List Format, the "Media Type" icon at the beginning of each entry in the "brief browse" list indicates the media in which the associated title is available.

Archival Mixed Materials	**Books**	**Computer Files**
Maps	**Music**	**Music Scores**
Non-musical Sound Recordings	**Serials**	**Visual Materials**

- Click the **DISPLAY COVER IMAGES** button in the CBB Toolbar to set the CBB display to "thumbnail" format. (The **DISPLAY COVER IMAGES** button is available *only* when the CBB display is currently set to "list" format.)

- Click the **DO NOT DISPLAY COVER IMAGES** button in the CBB Toolbar to set the CBB display to "list" format. (The **DO NOT DISPLAY COVER IMAGES** button is available *only* when the CBB display is currently set to "thumbnail" format.)

> You can use the **My Preferences** function to set the *default* display format for the CBB display.

- Click the ▼ button for a database to "collapse" (hide) the associated "brief browse" list. Click the ▶ button for a database to "expand" (display) the associated "brief browse" list.

- Some databases may have "database descriptions" or "resource notes" attached. Database descriptions provide "abbreviated" descriptions of the database. Resource notes provide *additional* information about the database. Click the ⓘ icon next to the name of the database for which you wish to view the resource note.

- An RSS Feed 🔊 icon may be shown at the top of the CBB "brief browse" list for *each* A-G database included in your search. If desired, you can subscribe to an RSS feed for the associated database to receive automatic updates alerting you to new records added to the database (see *Subscribing to an AGent RSS Feed* on page **3-8** for details).

- If your library has enabled the "Google™ Book Search" feature, search results that include a title available through Google Book Search include a 🔍 Google Preview icon. Clicking the 🔍 Google Preview icon opens Google Book Search in an additional browser window, with the page for the associated title displayed.

- Brief browse lists for some Reference databases may include icons indicating that a "full text" version of an article is available (F), that an "abstract" of an article is available (A), or that "citations" are available for an article (C).

- For "brief browse" lists displayed as a result of a Keyword Search or Advanced Search of your library's Union catalog, items in the "brief browse" list are arranged according to either the sort order specified in your search criteria (**Newest Publication Date First**, **Newest Publication Date Last**, **Newest Record First**, **Newest Record Last**, **Alphabetically by Title**, **Alphabetically by Author**, **Number of Locations/Title, LC Call Number/Title, Dewey Call Number/Title, Local Call Number/Title**, **URL** or **Relevancy**) or the specified default sort order for your account.

> If your search results in *more than 1,000* titles for a given database, the "brief browse" list for the database will be *unsorted*.

  - If you performed a Keyword Search or Advanced Search of a *single* Union catalog (Auto-Graphics database), and *fewer than* 1,000 hits were returned, you can use the **Sort By** menu to re-sort the title list as desired.

  - When you perform a search of an AG database by **Title**, *and* select **Relevancy** as the sort order, titles that are an *exact match* to your search term are shown at the beginning of the search results list.

- Use your browser's scroll bar to scroll through the current page displays.

- Use the **Prev Set** and **Next Set** buttons to display other pages of a "brief browse" list, one page at a time.

- Click a title link in a "brief browse" list to view the Full Record Display for the associated title.

- If desired, you can combine (deduplicate) search results from the *currently displayed* pages of *all* "brief browse" lists and sort by title, author or publication date (see *Combining Search Results* on page **3-6** for details).

- If desired, you can print a copy of selected records from *one or more* "brief browse" lists (see *Printing Selected Records* on page **3-10** for details).

- If desired, you can email a copy of selected records from *one or more* "brief browse" lists to yourself or another person (see *Emailing Selected Records* on page **3-10** for details).

- If desired, you can save a copy of selected records from *one or more* "brief browse" lists to a file on your local workstations (see *Saving and Exporting Selected Records* on page **3-11** for details).
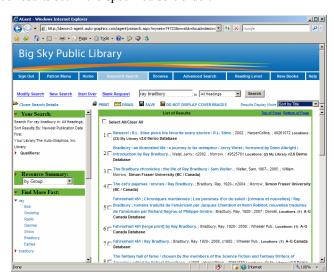
Combining Search Results

You can combine (deduplicate) search results from the *currently displayed* pages of *all* "brief browse" lists and sort by title, author or publication date.

To combine similar items (deduplicate):

> When combining similar items (deduplicating) shown in "brief browse" lists, only those titles shown on the *currently displayed pages* of each "brief browse" list are included in the combined results set. *Additional* matching titles (not shown on the currently displayed pages of the "brief browse" lists) may exist in *one or more* resources.

> Media type icons *are not* shown when viewing deduplicated browse lists.

1. Scroll each "brief browse" list, as necessary, to locate the page in each list from which you wish to generate the combined results set.

2. Select the desired option from the **Results Display Mode** menu in the CBB Toolbar.

- **Sort by Title** - combines similar titles shown on the *currently displayed pages* of all "brief browse" lists, and arranges the results set in alphabetic order, by title.

- **Sort by Author** - combines similar shown on the *currently displayed pages* of all "brief browse" lists, and arranges the results set in alphabetic order, by author.

- **Sort by Date** - combines similar shown on the *currently displayed pages* of all "brief browse" lists, and arranges the results set in chronological order, by publication date.

3. The screen refreshes to display the combined results set in the specified sort order.

- The sequence number for each title that has been combined (for which *more than one* bibliographic record existed in *one or more* resources) is highlighted.

- The **Locations** field for deduplicated records shows a listing of *all resources* that contained a copy of the deduplicated title.

- To view the Full Record Display for the *first* resource shown in the **Locations** field, click the title link for the associated title. To view the Full Record Display for *other* resources shown in the **Locations** field, click the name of the desired resource.

Typical Deduplicated Results Set

4. To return the CBB display to the *full* results set, select **Group by Resource** from the **Results Display Mode** menu in the CBB Toolbar. The screen refreshes to display the "brief browse" lists for all resources included in the search.

To modify your search:

- Select **Modify Search** from the **Search Options** menu to return to the previous search screen, with your previous search criteria intact.

To perform a new search:

- Select **New Search** from the **Search Options** menu to return to the previous search screen, with your previous search criteria removed.

- Select **Start Over** from the **Search Options** menu to display the *default* search screen.

Using Narrow Your Search

Narrow Your Search lets you refine (narrow) a current search results set (retrieved from an A-G database) based on categories and "filters" (facets) found within the results set. A "facet" is a distinct feature or aspect within a results set, or a way in which an item can be classified. **Narrow Your Search** is distinct from the **Related Terms** function in that **Related Terms** *expands* the original search to discover additional topics of interest, while **Narrow Your Search** *narrows* the existing search results to let you "drill down" deeper into the existing results set. Facets can be cumulatively applied to a results set in *any order*.

Narrow Your Search is accessed from the **Search Details** pane of the Continuous Brief Browse (CBB) display.

> **Narrow Your Search** is an *optional* feature, and *may not* be available for all systems.

To use Narrow Your Search:

1. Perform a Keyword Search, Browse, or Advanced Search of your library's database for the desired search term(s).

   - The screen refreshes to display the Continuous Brief Browse (CBB) display. The Continuous Brief Browse (CBB) display shows the "brief browse" (title or term) list for your search.

2. Scroll the **Search Details** pane to the **Narrow Your Search** (Faceted Search) field.

   - The **Narrow Your Search** field shows a list of categories, such as **Formats** and **Subject**.

CBB Display – Faceted Search

> The *specific* categories available are defined by your library.

- Each category lists "filters" such as **Books** or **Visual Materials** that can be applied to the current search results set to *narrow* the results. For results sets retrieved through Keyword Search or Advanced Search, the total number of titles associated with each filter is shown in parentheses following the filter name.

> If *more than five* filters are available for a given category, the *top five* filters (based on the number of titles associated with the filter) are shown, and a **More choices** link is shown at the end of the category. Click the **More choices** link to view up to the top 25 filters available for the category. (Click the **Fewer choices** link to return the listing to the "top five" filters.)

3. Click a filter in the **Narrow Your Search** field to limit the search results to *only* those titles associated with the selected filter.

   - The CBB display refreshes to show only those titles associated with the selected filter.

   - The **Narrow Your Search** section refreshes to show *only* those categories and filters available for the "filtered" results set.

   - A "filters dialog" displays above the CBB "brief browse" list. The dialog shows the *original* **Search** term with the number of titles originally returned, and the current "filter string" with the number of titles in the *filtered* results set.

     ○ The "filter string" lists the filter in the order in which they were applied.

4. Select *additional* filters from the **Narrow Your Search** field, as desired, to "drill down" further into the results set.

5. To *remove* a filter, click the **X** button following the name of the filter in the "filters dialog."

Subscribing to an AGent RSS Feed

> The "RSS Feeds" feature may not be enabled for all systems. The "RSS Feeds" feature is available for your library's AGent and/or AGent VERSO catalog(s) *only*. It is not available for reference, or Z39.50 databases.

The **RSS Feeds** function lets you subscribe to an RSS feed for *all* A-G databases "owned" by your library. The RSS feeds provide *automatic* updates alerting you to new records added to the associated databases (records that *did not* previously exist in the databases, regardless of the record's publication dates or actual dates of record creation).

The RSS feed function creates a URL based on the *original* search term(s) you entered (*excluding* any search qualifiers). When this URL is entered into an RSS "news reader" or RSS-capable web browser, the URL retrieves a list of records *most recently* added to the database (up to 50) that match your *original* search criteria.

Typical CBB Display
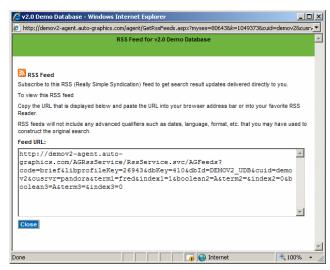
When RSS feed functionality is *enabled*, a icon is shown at the top of the CBB "brief browse" list for *each* A-G database included in your search, allowing you to access and copy the *unique* URL associated with the search. A **What's This** link associated with the icon displays instructional text and/or library policy information related to RSS feed functionality and terms of use.
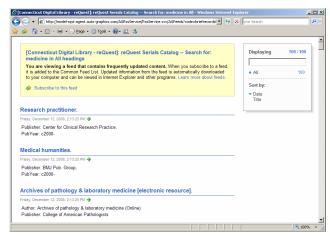
To subscribe to an RSS feed:

1. Perform a search of *one or more* of your library's A-G databases.

   - The Continuous Brief Browse (CBB) screen displays when the search is complete. A ⧉ icon is shown at the top of the CBB "brief browse" list for *each* A-G database included in your search.

2. Click the ⧉ icon for the desired database.

   - The RSS Feed dialog displays in an *additional* browse window.

3. Using the *right-hand* mouse button, click the text in the **Feed URL** text box.

   - A shortcut menu displays.

4. Choose **Select All** from the shortcut menu.

   - The text in the **Feed URL** text box is highlighted.

5. Using the *right-hand* mouse button, click the text in the **Feed URL** text box.

   - A shortcut menu displays.

6. Choose **Copy** from the shortcut menu to copy the selected URL. Click the **Close** button on the RSS Feed dialog to close the dialog.

7. Launch your RSS "news reader" (or RSS-capable web browser). Click the address bar text box on your "news reader" or browser.

   - A shortcut menu displays.

8. Choose **Paste** from the shortcut menu.

   - The "copied" URL is pasted into the address bar.

9. Press the <Enter> key to access the AGent RSS news feed.

   - A list of "recently added" items displays.

Refer to the documentation for your "news reader" or web browser for information on navigating the display and/or saving the RSS feed to your list of "favorites."

RSS Feed Dialog

Typical RSS Feed Display

Printing Selected Records

You can print a copy of *selected records* from the *currently displayed* pages of one or more "brief browse" lists.

To print selected records:

1. Use the checkboxes associated with each title in a "brief browse" list to select the records you wish to print.

   - A *checkmark* ☑ indicates the associated record *is* selected for printing. An *empty checkbox* ☐ indicates the associated record *is not* selected for printing. Clicking a checkbox repeatedly will toggle it on and off.

   - Use the **Select All/Clear All** checkbox to select or deselect *all records* on the current page of the associated "brief browse" list.

2. When the desired records have been selected from the *currently displayed* pages of the "brief browse" lists, click the **PRINT** 🖨 link.

   - A formatted version of the selected records displays in an *additional* browser window.

3. Click the **Print** link.

   - A standard Print dialog displays.

4. Make the appropriate selection on the Print dialog, then click the **OK** or **Print** button, as applicable. (Click the **Cancel** button to cancel the print request.)

5. Click the **Close** link to close the formatted search results screen.

Emailing Selected Records
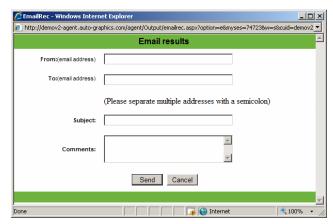
You can email a copy of *selected records* from the *currently displayed* pages of one or more "brief browse" lists to yourself or to another party.

To email selected records:

1. Use the checkboxes associated with each title in a "brief browse" list to select the records you wish to email.

   - A *checkmark* ☑ indicates the associated record *is* selected for email. An *empty checkbox* ☐ indicates the associated record *is not* selected for email. Clicking a checkbox repeatedly will toggle it on and off.

   - Use the **Select All/Clear All** checkbox to select or deselect *all records* on the current page of the associated "brief browse" list.

2. When the desired records have been selected from the *currently displayed* pages of the "brief browse" lists, click the **EMAIL** ✉ link.

   - The Email Results dialog displays in an *additional* browser window.

3. Enter the email address you wish shown in the "From" field of the email in the **From** text box.

- The **From** field is *prefilled* with your email address (taken from your User Record) or the *default* email address defined by your library's System Administrator (if an email address *is not* included in your User Record).

- If an email address *is not* included in your User Records, *and* your library's System Administrator *has not defined* a default **From** address, the **From** field is *blank*.

4. Enter your email address (or the email address of the person to whom you wish to send the selected records) in the **To (email address)** text box.

Email Results Dialog

- If you wish to send the records to *more than one* person, separate multiple email addresses with semicolons. *Do not* include spaces between email addresses.

5. Enter the desired subject line for the email in the **Subject** text box.

6. Enter any *additional* text you wish to include with the email in the **Comments** text box.

7. When all necessary information has been entered, click the **Send** button.

- The confirmation message "Your email has been sent!" displays when your email has been sent.

**8.** Click the **Close** button to close the confirmation message.

Saving and Exporting Selected Records
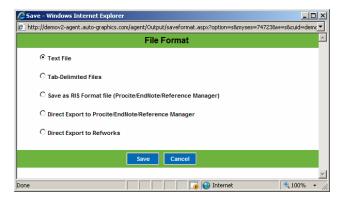
You can save a copy of *selected records* from the *currently displayed* pages of one or more "brief browse" lists to a file on your local workstation. Records can be saved in text format, tab-delimited format, or RIS format (for import into bibliographic software such as Procite, EndNote, Reference Manager or RefWorks). Alternately, selected records can be *directly* exported to Procite, EndNote, Reference Manager or RefWorks running on a local workstation.

To save selected records:

1. Use the checkboxes associated with each title in a "brief browse" list to select the records you wish to save.

- A *checkmark* ☑ indicates the associated record *is* selected for saving. An *empty checkbox* ☐ indicates the associated record *is not* selected for saving. Clicking a checkbox repeatedly will toggle it on and off.

- Use the **Select All/Clear All** checkbox to select or deselect *all records* on the current page of the associated "brief browse" list.

2. When the desired records have been selected from the *currently displayed* pages of the "brief browse" lists, click the **SAVE** 💾 link.

- The File Format dialog displays in an *additional* browser window.

3. Select the format in which you wish to save the selected records by selecting the **Text File**, **Tab-Delimited Files** or **Save as RIS Format file** radio button, as desired.

4. Click the **Save** button on the File Format dialog.

- A File Download dialog displays.

5. Select the **Save this file to disk** radio button, then click the **OK** button.

- A standard Save As dialog displays.

6. Enter a name for the file in the **File name** text box.

7. Select the location in which you wish to save the record.

File Format Dialog
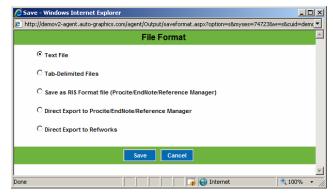
8. Click the **Save** button to download the record.

- Depending on your browser, a status dialog may display while the record is being downloaded. When the record has been downloaded, a "Download Complete" message displays. Click the **Close** button to close the status dialog.

To export selected records:

1. Use the checkboxes associated with each title in a "brief browse" list to select the records you wish to export.

- A *checkmark* ☑ indicates the associated record *is* selected for saving. An *empty checkbox* ☐ indicates the associated record *is not* selected for saving. Clicking a checkbox repeatedly will toggle it on and off.

- Use the **Select All/Clear All** checkbox to select or deselect *all records* on the current page of the associated "brief browse" list.

2. When the desired records have been selected from the *currently displayed* pages of the "brief browse" lists, click the **SAVE** 💾 link.

- The File Format dialog displays in an *additional* browser window.

3. Select the **Direct Export to Procite/EndNote/Reference Manager** or **Direct Export to Refworks** radio button, as desired.

> If you select the **Direct Export to Procite/EndNote/Reference Manager** option, *be sure* the application to which you wish to export the records is *current-ly installed* on your local workstation.

4. Click the **Save** button on the File Format dialog.

- A File Download dialog displays.

File Format Dialog

5. Select the **Save this file to disk** radio button, then click the **OK** button.

  • A Choose Destination dialog displays. The dialog lists *all* supported applications currently installed on your workstation.

6. Highlight the name of the application to which you wish to export the selected records, then click the **OK** button.

  • The selected records are exported to the selected application, and the application launches *automatically*.

Working with Lists

AGent and AGent VERSO provide a "Lists" feature that lets you save "brief" bibliographic records from an A-G or Z39.50 database to *one or more* online lists. Saved records can be printed, or exported in one of several available formats.

The "Lists" feature is available *only* if your library has enabled the functionality.
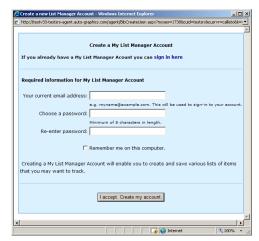
Creating a "Lists" Account

If you access AGent or AGent VERSO as an *unauthenticated* "generic" patron or guest, you *must* create a "Lists" account before you can use the feature.

If you log into AGent or AGent VERSO using a personal **Username or Barcode** and **Password or PIN**, access to the "Lists" feature is available to you *automatically*.

To create a "Lists" account:

1. Click the **View My Lists** link from *any* Search screen, or from the CBB display.

  • The List Manager Sign In screen displays in an *additional* browser window.

2. Click the **Create an account now** link.

  • The screen refreshes to display the Create a My List Manager Account screen.

Create a My List Manager Account Screen

3. Enter your email address in the **Your current email address** text box.

4. Enter a password for your account in the **Choose a password** and **Re-enter password** text boxes.

  • Make sure your password is *at least* eight characters long.

  • Make sure there are *no spaces* in your password.

  • Make sure you enter your password in *exactly* the same way in both the **Choose a password** and **Re-enter password** text boxes.

5. Click the **I accept. Create My Account** button.
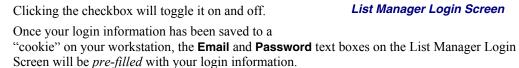
REMEMBER TO KEEP YOUR PASSWORD SECURE. **DO NOT** tell your personal password to anyone. **DO NOT** write your password down. You will use your email address and password for all future logins to the "Lists" feature, so remember it! If you think your password may be compromised, you can change it at any time (see *Editing Your List Manager Account* on page **3-20** for details). If you forget your password, click the **I cannot access my account** link on the List Manager Sign In screen. The system will reset your password, and a *new* password will be sent to your email address.

Logging In to the Lists Manager
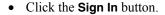
If you access AGent or AGent VERSO as an *unauthenticated* "generic" patron or guest, you *must* create a "Lists" account before you can log in to the List Manager (see *Creating a "Lists" Account* on page **3-13** for details).

For *unauthenticated* **"generic" patrons or guests:**

- Click the **View My Lists** link from *any* Search screen, or from the CBB display.
  - The List Manager Sign In screen displays in an *additional* browser window.
- Enter your email address in the **Email** text box.
- Enter your personal password in the **Password** text box.
  - Your password will display on the screen as a series of asterisks.
- If you wish to save a "cookie" containing your login information to your workstation for future logins, select the **Remember me** checkbox on the login screen.
  - A *checkmark* ☑ indicates a "cookie" *will* be saved to your workstation.
  - An *empty checkbox* ☐ indicates a "cookie" *will not* be saved to your workstation.
  - Clicking the checkbox will toggle it on and off.
  - Once your login information has been saved to a "cookie" on your workstation, the **Email** and **Password** text boxes on the List Manager Login Screen will be *pre-filled* with your login information.

List Manager Login Screen

If your workstation is used by *more than one* person, to prevent unauthorized access to the List Manager for your account, it is recommended that you *do not* save your login information to a "cookie".

- Click the **Sign In** button.
  - The View My Lists screen displays.

For *authenticated* **patrons:**

- Click the **View My Lists** link from *any* Search screen, or from the CBB display.
  - The View My Lists screen displays.
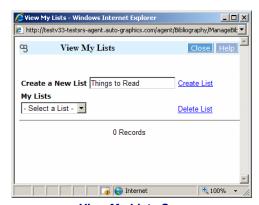
Creating Lists

You can create *one or more* lists into which you can save selected records.

To create a list:

- On the View My Lists screen, enter a name for the list in the **Create a New List** text box.
  - ○ The list name can be a *maximum* of 50 characters, *including spaces*.
  - ○ You *cannot* change the name of a list once it has been created.

- Click the **Create List** link.
  - ○ The new list is added to the **My Lists** menu.
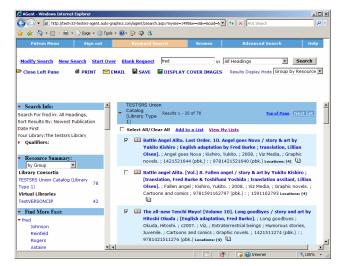
View My Lists Screen

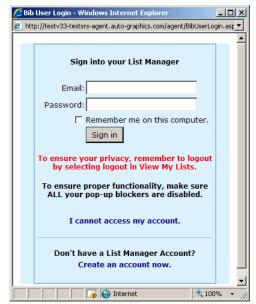## Adding Records to a List

You can add records to a List from a CBB "brief browse" list or a Full Record Display. Additionally, records added to a list may be subsequently deleted from the list.
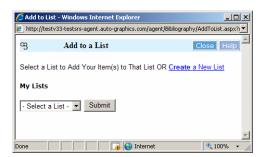
To add records from a CBB "brief browse" list:

1. Access the "brief browse" from which you wish to select records.

2. Use the checkboxes on the left-hand side of each list to select the records you wish to add (from the current page of the "brief browse" list) to a list.

   - A *checkmark* ☑ indicates the associated record is selected.

Typical CBB "Brief Browse" List

   - An *empty checkbox* ☐ indicates the associated record is not selected.

   - Clicking a checkbox repeatedly will toggle it on and off.

3. Click the **Add to a List** link above the "brief browse" list (or the 📖 button for Icon Toolbars) to add the selected record(s) to a list.

   - The Add to a List screen displays in an *additional* browser window.

4. Select the desired list from the **My Lists** menu.

   - If you wish to create a *new* list into which to add the selected record(s), click the **Create a New List** link.
     - ○ The screen refreshes to display the Create a New List screen.

Add to a List Screen

- Enter a name for the list in the **Enter a New List Name** text box.

  o The list name can be a *maximum* of 50 characters, *including spaces*.

  o You *cannot* change the name of a list once it has been created.

- Click the **Save New List** button to save the list.

  o The Create a New List screen closes, and the selected record(s) are added to the new list.

Create a New List Screen

  o The CBB screen refreshes with a 📖 icon shown following the "locations" information of each record added to the list.

5. Click the **Submit** button to add the selected record(s) to the list.

- The Add to a List screen closes, and the CBB screen refreshes with a 📖 icon shown following the "locations" information of each record added to the list.

> When adding records to a list from a CBB "brief browse" list, you *must* add the records on a *page-by-page* basis. If you select records from a given page of a "brief browse" list and then view *another* page of the list (or perform a new search) *before* adding the current selections to your list, the current selections *will not* be retained.

6. Repeat steps **2** through **5** to add *additional* records from other pages of the current "brief browse" list to a list.

7. Perform additional searches, as desired, to add *additional* records to your lists.

To add a record from a Full Record Display:

1. Access the Full Record Display for the record you wish to add to a list.

2. Click the **Add to a List** button in the Toolbar (or the 📖 button for Icon Toolbars) to add the record to your Bibliography.

- The Add to a List screen displays in an *additional* browser window.

Typical Full Record Display

3. Select the desired list from the **My Lists** menu.

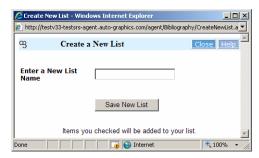- If you wish to create a *new* list into which to add the selected record(s), click the **Create a New List** link.

  o The screen refreshes to display the Create a New List screen.

- Enter a name for the list in the **Enter a New List Name** text box.

  o The list name can be a *maximum* of 50 characters, *including spaces*.

  o You *cannot* change the name of a list once it has been created.

- Click the **Save New List** button to save the list.

  ○ The Create a New List screen closes, and the record is added to the new list.

  ○ The Full Record Display refreshes with a 📖 icon shown in the upper right corner of the screen.

4. Click the **Submit** button to add the record to the list.

5. The Add to a List screen closes, and the Full Record Display refreshes with a 📖 icon shown in the upper right corner of the screen.

6. Repeat steps **1** through **4** to add *additional* records to a list.

7. Perform additional searches, as desired, to add *additional* records to your lists.

Viewing and Managing Lists
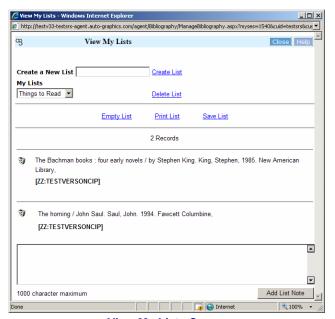
You can view your lists and delete any unwanted records prior to printing or saving the records.

To display your lists:

- View the current content of your lists using any of the following methods:

  ○ Click the **View My Lists** link on any Search screen.

  ○ Click the **View My Lists** link (or the 📖 button for Icon Toolbars) above a CBB "brief browse" list.

  ○ Click the **View My Lists** button in the Toolbar (or the 📖 button for Icon Toolbars) on any Full Record Display.

- The View My Lists screen displays in an *additional* browser window.

To view the contents of a list:

- Select the desired list from the **My Lists** menu.

  ○ The screen refreshes to display the current contents of the selected list.

View My Lists Screen

To add notes to a list:

- Enter the desired notes in the text box at the bottom of the list.

  ○ You list notes may be a *maximum* of 1000 characters, *including spaces*.

- Click the **Add List Note** button to save your notes.

To remove a *single* record from a list:

- If necessary, select the desired list from the My Lists menu.

- Click the 🗑 icon to the left of the record you wish to remove from the list.
  - ○ The View My Lists screen refreshes with the selected record removed from the list.

To remove *all* records from a list:

Do not empty a list until you have printed or saved the records. Once the records are deleted, you must *reselect* the records if you wish to restore them to the list.

1. If necessary, select the desired list from the **My Lists** menu.

2. Click the **Empty List** link on the View My Lists screen to remove *all* records from the list.

- A confirmation dialog displays the message "Are you sure you want to empty (*list name*) list?"

3. Click the **OK** button to continue with the deletion. (Click the **Cancel** button to cancel the deletion and retain the current records in the list.)

- The confirmation dialog closes, and the View My Lists screen refreshes to display an "empty" list.

To delete a list:

1. If necessary, select the desired list from the **My Lists** menu.

2. Click the **Empty List** link on the View My Lists screen to delete the selected list.

- If the currently selected list *is empty*, the View My Lists screen refreshes with the selected list removed from the **My Lists** menu.

- If the currently selected list *is not empty*, a confirmation dialog displays the message "Are you sure you want to delete (*list name*) list?"

3. Click the **OK** button to continue with the deletion. (Click the **Cancel** button to cancel the deletion and retain the list.)

- The confirmation dialog closes, and the View My Lists screen refreshes with the selected list removed from the **My Lists** menu.

Printing a List

You can print a copy of the records from any list.

Any list notes associated with the list *are not* included when printing a list.

To print a list:

1. Open the desired list (see *Viewing and Managing Lists* on page 3-17 for details).

2. Click the **Print List** link.

- The screen refreshes to display a formatted version of the list.

3. Click the **Print** link.
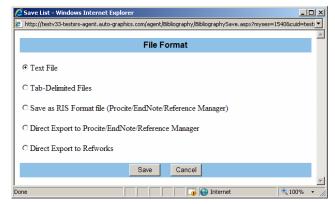
- A standard Print dialog displays.

4. Make the appropriate selection on the Print dialog, then click the **OK** or **Print** button, as applicable. (Click the **Cancel** button to cancel the print request.)

5. Click the **Close** link to close the formatted list.

Saving a List

You can save a copy of the records list from a list to a file on your local workstation. Records can be saved in text format, tab-delimited format, or RIS format (for import into bibliographic software such as Procite, EndNote, Reference Manager or RefWorks). Alternately, selected records can be *directly* exported to Procite, EndNote, Reference Manager or RefWorks running on a local workstation.

To save a list:

1. Open the desired list (see *Viewing and Managing Lists* on page **3-17** for details).

2. Click the **Download** button.

- The File Format dialog displays in an *additional* browser window.

3. Select the format in which you wish to save the list by selecting the **Text File**, **Tab-Delimited Files** or **Save as RIS Format file** radio button, as desired.
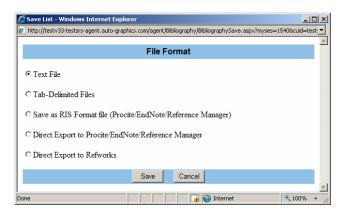
File Format Dialog

4. Click the **Save** button on the File Format dialog.

- A File Download dialog displays.

5. Select the **Save** button, then click the **OK** button.

- A standard Save As dialog displays.

6. Enter a name for the file in the File name text box.

7. Select the location in which you wish to save the file.

8. Click the **Save** button to download the file.

- Depending on your browser, a status dialog may display while the record is being downloaded. When the record has been downloaded, a "Download Complete" message displays. Click the **Close** button to close the status dialog.

To export a list:

1. Open the desired list (see *Viewing and Managing Lists* on page **3-17** for details).

2. Click the **Download** button.

- The File Format dialog displays in an *additional* browser window.

3. Select the **Direct Export to Procite/EndNote/Reference Manager** or **Direct Export to Refworks** radio button, as desired.

File Format Dialog

> If you select the **Direct Export to Procite/EndNote/Reference Manager** option, *be sure* the application to which you wish to export the records is *currently installed* on your local workstation.

4. Click the **Save** button on the File Format dialog.

    *   A File Download dialog displays.

5. Select the **Save** button, then click the **OK** button.

    *   A Choose Destination dialog displays. The dialog lists *all* supported applications currently installed on your workstation.

6. Highlight the name of the application to which you wish to export the selected records, then click the **OK** button.

    *   The selected records are exported to the selected application, and the application launches *automatically*.

Editing Your List Manager Account

If you access AGent or AGent VERSO as an *unauthenticated* "generic" patron or guest, you can edit your List Manager account to change your email address and/or personal password.

To edit your List Manager account:

1. Access the View My Lists screen (see *Viewing and Managing Lists* on page **3-17** for details).

2. Click the **Edit Account** link.

    *   The My Account screen displays in an *additional* browser window.

3. If desired, enter a *new* email address in the **Email** text box.

4. If desired, change your account password:

    *   Enter your *current password* in the **Old Password** text box.

    *   Enter a *new password* for your account in the **New Password** and **Confirm New Password** text boxes.

My Account Screen

    ○   Make sure your password is *at least* eight characters long.

    ○   Make sure there are *no spaces* in your password.

    ○   Make sure you enter your password in *exactly* the same way in both the **New Password** and **Confirm New Password** text boxes.

5. Click the **OK** button to save your changes. (Click the **Cancel** button to cancel your changes and retain your current account information.)

    *   The My Account screen closes *automatically*, and the changes to your account information are saved.

> If you enter an *incorrect* **Old Password** or an *invalid* **New Password**, or if the passwords entered in the **New Password** and **Confirm New Password** text boxes *do not* match, an error message displays. Re-enter the necessary information, and resubmit your changes.

Logging Out of the List Manager

If you access AGent or AGent VERSO as an *unauthenticated* "generic" patron or guest, you *must* log out of your List Manager account to ensure your privacy and protect your information.

To log out of the List Manager:

- Access the View My Lists screen (see *Viewing and Managing Lists* on page **3-17** for details).

- Click the **Logout** link.
  - ○ The View My Lists screen closes *automatically*, and you are logged out of the List Manager.

Term List
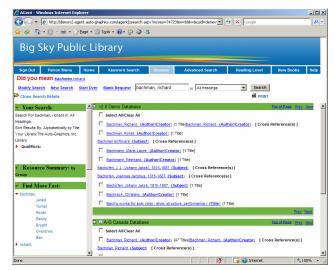
A Term List is displayed on the Search Summary as the result of a Browse. The Term List displays the index heading which *most closely* matches your search term as the first entry in a list of headings. You can browse the Term List forward and backward from this point. The *specific* data presented in the Term List depends on the type of search performed (alphabetical Browse, standard number search).

Browse Term List

The Browse Term List is displayed as the result of a *Browse* of a *bibliographic database*.

To view the Term List:

- Term List entries are arranged in alphanumeric order, by term.

- When a Browse is performed using **All Headings** as the **in** criteria, each item in the list indicates the index from which its term is taken; either **<Author/Creator>**, **<Title>** or **<Subject>**.

- Use the scroll bar to scroll through the current page display.

- Use the **Prev** and **Next** links at the top or bottom of the Term List to display other pages of the list.

Term List - Browse

- Each item in the Term List serves as a link that allows you to display additional information for the term. Click a link to do the following:
  - ○ **[1 Title]** lets you view the Full Record Display for the associated term (see *Full Record Display* on page **3-26** for details).
  - ○ **[__ Titles]** lets you view a Title List for the associated term (see *Title List* on page **3-23** for details).
  - ○ **[Cross Reference(s)]** lets you view a list of related subjects (see *Cross Reference List* on page **3-23** for details).

- If desired, you can print a copy of selected search results (see *Printing Search Results* on page **3-37** for details).

To modify your search:

- Use the search term fields at the top of the Search Summary screen to modify your search, *or*, click the **Modify Search** link on the Search Summary screen to return to the previous search screen, with your previous search criteria intact.

To perform a new search:

- Use the search term fields at the top of the Search Summary screen to enter a new search, *or*, click the **New Search** link on the Search Summary screen to return to the previous search screen, with your previous search criteria removed.

- Select **Start Over** from the **Search Options** menu on the Search Summary screen to display the *default* search screen.

Number List

The Number List is returned as the result of a *Browse* of a *bibliographic database* using a standard publication number (ISBN, LCCN, etc.) as the search criteria.

To view the Number List:

- Number List entries are arranged in numeric order, by publication number.

- Use the scroll bar to scroll through the current page display.

- Use the **Prev** and **Next** links at the top or bottom of the Number List to display other pages of the list.

- Each item in the Number List serves as a link that allows you to display additional information for the term. Click a link to do the following:

  ○ **[1 Title]** lets you view the Full Record Display for the associated term (see *Full Record Display* on page 3-26 for details).

Number List

  ○ **[__ Titles]** lets you view a Title List for the associated term (see *Title List* on page **3-23** for details).

- If desired, you can print a copy of selected search results (see *Printing Search Results* on page **3-37** for details).

To modify your search:

- Use the search term fields at the top of the Search Summary screen to modify your search, *or*, click the **Modify Search** link on the Search Summary screen to return to the previous search screen, with your previous search criteria intact.

To perform a new search:
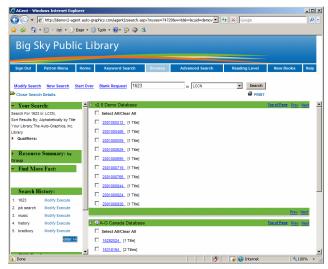
- Use the search term fields at the top of the Search Summary screen to enter a new search, *or*, click the **New Search** link on the Search Summary screen to return to the previous search screen, with your previous search criteria removed.
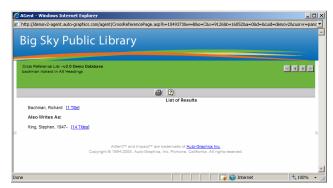
- Select **Start Over** from the **Search Options** menu on the Search Summary screen to display the *default* search screen.

Cross Reference List

The Cross Reference List is displayed *only* as a result of selecting a **[Cross Reference(s)]** link from a Browse Term List (see ***Browse Term List*** on page **3-21** for details). The type of list, database name and associated term are displayed at the top of the list.

To view the Cross Reference List:

- The first entry in the list shows the term to which the cross references apply.

- The **Your Library Uses** section lists the cross references for the associated term.

Cross Reference List

- Cross Reference List entries are arranged in alphanumeric order, by term.

- Use the scroll bar to scroll through the current page display.

- Each item in the Cross Reference List has an associated link that allows you to display additional information for the term. Click a link to do the following:

  - **[1 Title]** lets you view the Full Record Display for the associated term (see ***Full Record Display*** on page **3-26** for details).

  - **[__ Titles]** lets you view a Title List for the associated term (see ***Title List*** on page **3-23** for details).

- Click the **Print** button, or 🖨 button (for Icon Toolbars) to print a copy of the current page of the Cross Reference List (see ***Printing Search Results*** on page **3-37** for details).

Title List
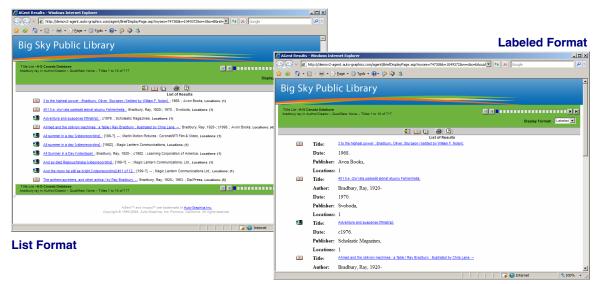
A Title List is displayed on the Search Summary screen as the result of a Keyword Search or Advanced Search. A "standalone" Title List is displayed by selecting certain links on Term Lists, Number Lists, Cross Reference Lists and Full Record Displays, or by clicking a "hit" count in the **Resource Summary** field of the Search Summary **Left Pane**. The type of list, database name, term and search criteria are displayed at the top of the list, along with the total number of titles in the list. The **Qualifiers** field displays a "**Click here**" link when search qualifiers have been specified for a search (for Advanced Search *only*). Clicking the "**Click here**" link opens an *additional* browser window that displays a list of search qualifiers specified for the search. The "**Click here**" link *is not* shown for Keyword Search or Browse, or when *no* search qualifiers are specified for Advanced Search.

> Search Qualifiers are *site dependent*, and *may not* be applied to all **Resources** selected for a given search. When selected, Search Qualifiers are *always* applied to your library's Union catalog(s).

Title Lists shown on the Search Summary screen may be viewed in one of two formats; **List Format** or **Thumbnail Format** (see ***Using Continuous Brief Browse (CBB)*** on page **3-2** for details). Standalone Title Lists may also be viewed in one of two formats:

- **List Format:** Displays bibliographic information as a single line.

- **Labeled Format:** Displays bibliographic information in a single column, with display labels for each field appearing in **bold** text.

List Format

Labeled Format

Standalone Title List

To view standalone Title Lists:

- For Title Lists displayed as the result of a Keyword Search or Advanced Search of your library's Union catalog, items in the Title List are arranged according to either the sort order specified in your search criteria (**Newest Publication Date First**, **Newest Publication Date Last**, **Newest Record First**, **Newest Record Last**, **Alphabetically by Title**, **Alphabetically by Author**, **Number of Locations/Title, LC Call Number/Title, Dewey Call Number/Title, Local Call Number/Title**, **URL** or **Relevancy**) or the specified default sort order for your account (see *My Preferences* on page **5-9** for details).

  ○ When you perform a search of an AG database by **Title**, *and* select **Relevancy** as the sort order, titles that are an *exact match* to your search term are shown at the beginning of the search results list.

  > If your search results in *more than 1,000* titles, the Title List will be *unsorted*.

- The "Media Type" icon at the beginning of each entry in the Title List indicates the media in which the associated title is available.

Archival Mixed Materials　　**Books**　　**Computer Files**　　**Maps**　　**Music**

Music Scores　　**Non-musical Sound Recordings**　　**Serials**　　**Visual Materials**

- If your library has enabled the "Google™ Book Search" feature, search results that include a title available through Google Book Search include a 🔍 Google Preview icon. Clicking the 🔍 Google Preview icon opens Google Book Search in an additional browser window, with the page for the associated title displayed.

- Select **List** or **Labeled** from the **Display Format** menu to change the way Title List information is displayed.

- Use your browser's scroll bar to scroll through the current page display.

- Use the ◀ and ▶ buttons at the top or bottom of the Title List to display other pages of the list, one page at a time. Use the ◀| and |▶ buttons to display the *first* and *last* page of the list, respectively.

- To scroll forward or backward *several pages* at a time, use the scroll bar at the top of the Title list.

  - ○ Move the cursor along the scroll bar to the desired position.
  - ○ Click the scroll bar to scroll the Title List to the corresponding location.

- Click a title link to view the Full Record Display for the associated title (see *Full Record Display* on page **3-26** for details).

- Click the **Print** button, or 🖨 button (for Icon Toolbars) to print a copy of the current page of the Title List (see *Printing Search Results* on page **3-37** for details).

To view *other* search results:

- To view the Title List for another database, click the "hit" count for the desired database in the **Resource Summary** field of the Search Summary **Left Pane**.

To modify your search:

- Use the search term fields at the top of the Search Summary screen to modify your search, *or*, click the **Modify Search** link on the Search Summary screen to return to the previous search screen, with your previous search criteria intact.

To perform a new search:

- Use the search term fields at the top of the Search Summary screen to enter a new search, *or*, click the **New Search** link on the Search Summary screen to return to the previous search screen, with your previous search criteria removed.

- Select **Start Over** from the **Search Options** menu on the Search Summary screen to display the *default* search screen.

Reference Database "Hit" List

Reference Database "Hit" Lists are displayed as the result of clicking the "hit" count for a Reference database in the **Resource Summary** field of the Search Summary **Left Pane**. Results retrieved from a reference database are displayed in the "native" interface for the associated database and will vary between databases. In general, the "Hit" List displays a list of full-text articles, and may also include a synopsis for each article in the list. Clicking a link in the "Hit" List will display the associated full-text article.

Typical Reference Database "Hit" List

To view *other* search results:

- To view the Title List for another database, click the "hit" count for the desired database in the **Resource Summary** field of the Search Summary **Left Pane**.

To modify your search:

- Use the search term fields at the top of the Search Summary screen to modify your search, *or*, click the **Modify Search** link on the Search Summary screen to return to the previous search screen, with your previous search criteria intact.

To perform a new search:

- Use the search term fields at the top of the Search Summary screen to enter a new search, *or*, click the **New Search** link on the Search Summary screen to return to the previous search screen, with your previous search criteria removed.

- Select **Start Over** from the **Search Options** menu on the Search Summary screen to display the *default* search screen.

Full Record Display

The Full Record Display is displayed as the result of a search of a *single* database that returns *one* title, by clicking a title link on a Title List or by clicking a **[1 Title]** link from a Term List. The type of list, database name, term and search criteria are displayed at the top of the list, along with the current title number and total number of titles in the list.

Each Full Record Display includes complete bibliographic information for the associated title. The Full Record Display *may* include a book jacket illustration and other "enriched" content (**Annotations**, **Reviews**, **Table of Contents**, etc.). For databases selected from your library consortium, or for other "trading partner" libraries, the Full Record Display includes **Locations Information** (a list of libraries that have a copy of the title) and may include "shelf status" for the item. Other related information is provided, depending on the display format you choose. You can perform additional searches by selecting links in the bibliographic data.

If your library has enabled the "Google™ Book Search" feature, search results that include a title available through Google Book Search include a icon. Clicking the icon opens Google Book Search in an additional browser window, with the page for the associated title displayed.
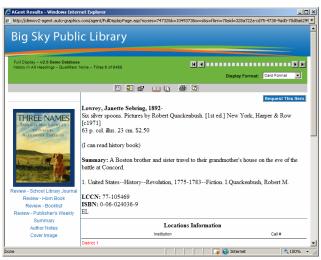
> The book jacket illustration and content enrichment features are *optional*, and may not be enabled for your library.

The Full Record Display may be viewed in one of three formats:

- **Card Format:** Displays bibliographic information as a traditional catalog card.

  > The Card Format display is available for your library's Union catalogs *only*.

- **Labeled Format:** Displays bibliographic information in a single column with display labels for each field appearing in **bold** text.

- **MARC Format:** Displays bibliographic information with both standard and locally-defined tags, indicators and subfields according to MARC 21 specifications.

Card Format

MARC Format

Labeled Format

Full Record Display Formats

To view the Full Record Display:

- Use your browser's scroll bar to scroll through the current page display.

- Use the ◀ and ▶ buttons to display other records from the Title List, one record at a time.

- Use the ◀◀ and ▶▶ buttons to display the *first* and *last* records from the Title List, respectively.

- To scroll forwards or backwards *several records* at a time, use the scroll bar at the top of the list.

  ○ Move the cursor along the scroll bar to the desired position.

  ○ Click the scroll bar to scroll to the corresponding Full Record Display.

- Select **Card Format**, **Labeled Format** or **MARC Format** from the **Display Format** menu to change the way bibliographic information is displayed.

- Each Full Record Display contains complete bibliographic information, including title, author, description, subject, notes and catalog numbers(s). Links in the bibliographic display let you perform *additional* searches from the Full Record Display.

> Depending on the database from which the Full Record Display was retrieved, bibliographic links *may not* be available. Additionally, bibliographic links are shown on **Labeled Format** displays *only*.

  ○ Click an **Author** link to view a list of other titles by the same author.

  ○ Click a **Title** link to view a list of other items with the same name.

  ○ Click a **Series** link to view a list of other titles from the same series.

  ○ Click a **Subject** or **Genre** link to view a list of other titles in the same subject area.

  ○ Click an **Internet Location** link (URL) to view the associated title online. The title displays in an *additional* browser window.

> Internet Links are shown on *both* Labeled Format and Card Format displays *only*. Titles accessed via an Internet Location link *may* be prepared in PDF format (for viewing using Adobe's Acrobat Reader). You *must* have Acrobat Reader installed on your workstation to view these titles.

- Click the **Request This Item** button or **3rd Party Request** button, as appropriate, in the upper right-hand corner of the bibliographic display, or the **Request This Item** button, or 🖼 button (for Icon Toolbars), to submit an interlibrary loan request for the current title (see *Chapter 4, Interlibrary Loan* for details).

> Depending on the configuration of your library's AGent system, the Full Record Display may show *either* the **Request This Item** button *or* the **3rd Party Request** button. The Full Record Display *will not* show *both* buttons.

  - ○ If your library has enabled the *optional* **Buy / Borrow / Suggest** feature, you can click the **Borrow This Item** button in the left column of the Full Record Display to submit an interlibrary loan request (see *Using Borrow* on page **3-35** for details).

    > The **Borrow This Item** button *is not* available if your library uses a *third-party* ILL provider.

- If your library uses the Enhanced Record Display feature, the bibliographic record *may* include links (**Online Booksellers** or **OpenURL Resources**) to other sources for obtaining the current title (see *Using the Enhanced Record Display* on page **3-32** for details).

- If your library has enabled the *optional* **Buy / Borrow / Suggest** feature, you can:

  - ○ *Purchase* a copy of the title from a selected bookseller or other vendor (see *Using Buy* on page **3-34** for details).

  - ○ Submit a request to *borrow* a copy of the title through interlibrary loan (see *Using Borrow* on page **3-35** for details).

  - ○ Submit a *suggestion* to your library to *purchase* a copy of the title (see *Using Suggest* on page **3-36** for details).

- If your library has enabled the **Reader Reviews** feature, you can:

  - ○ View Reader Reviews for the title written by library staff members and/or other library patrons (see *Viewing Reader Reviews* on page **3-37** for details).

  - ○ Write a Reader Review for the title (see *Writing a Reader Review* on page **3-38** for details).

- The Toolbar located above the bibliographic display provides the means of navigating your search results from the Full Record Display (see *The Toolbar* on page **2** for more information).

  - ○ Click the **Title List** button, or 📧 button (for Icon Toolbars), to return to the Title List from which the Full Record Display was accessed.

  - ○ Click the **Full Display** button, or 📄 button (for Icon Toolbars), to return from a **Locations** list (see *Viewing Locations* on page **3-29** for details) to return to the associated Full Record Display (this button is available *only* on **Locations** list displays).

  - ○ Click the **Help** button, or 🆘 button (for Icon Toolbars), to display the online Help file.

  - ○ Click the **Request This Item** button, or 🖼 button (for Icon Toolbars), to submit an interlibrary loan request for the title (see *Chapter 4, Interlibrary Loan* for details).

    > The **Request This Item** button *is not* available if your library uses a *third-party* ILL provider.

  - ○ Click the **Blank Request** button, or 📧 button (for Icon Toolbars), to use the Blank ILL Request form to submit an interlibrary loan request (see *Chapter 4, Interlibrary Loan* for details).

- Click the **Print** button, or 🖨 button (for Icon Toolbars) to print a copy of the current page of the Full Record Display (see *Printing Search Results* on page **3-37** for details).

To view *other* search results:

- To view the Title List for another database, click the "hit" count for the desired database in the **Resource Summary** field of the Search Summary **Left Pane**.

To modify your search:

- Use the search term fields at the top of the Search Summary screen to modify your search, *or*, click the **Modify Search** link on the Search Summary screen to return to the previous search screen, with your previous search criteria intact.

To perform a new search:

- Use the search term fields at the top of the Search Summary screen to enter a new search, *or*, click the **New Search** link on the Search Summary screen to return to the previous search screen, with your previous search criteria removed.
- Select **Start Over** from the **Search Options** menu on the Search Summary screen to display the *default* search screen.

Viewing Locations

Full Record Displays accessed from Auto-Graphics' databases or from other "trading partner" libraries include **Locations Information** (a list of libraries that have a copy of the title).

To view Locations information:

- **Locations Information** is located at the bottom of the Full Record Display. Use the scrollbar to scroll to the **Locations Information** list.

  ○ The **Locations Information** list shows the *first 20* libraries with copies of the title. To view the *next 20* libraries, click the **Click here to view additional locations** link at the bottom of the **Locations Information** list. The screen refreshes to display the additional locations.

Locations Information List

  ○ Use the ◀ and ▶ buttons to display other pages of the **Locations Information** list, one page at a time.

  ○ Use the ◀◀ and ▶▶ buttons to display the *first* and *last* page of the **Locations Information** list, respectively.

  ○ To scroll forward or backward *several pages* at a time, use the scroll bar at the top of the **Locations Information** list. Move the cursor along the scroll bar to the desired position, then click the scroll bar to scroll the **Locations Information** list to the corresponding location.
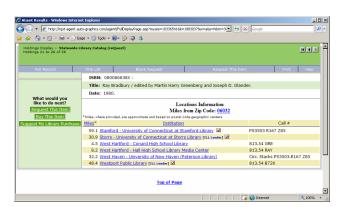
- The names of institutions participating in your library's Interlibrary Loan program are appended with the notation "**[ILL Lender]**".

- Click a library name in the **Locations Information** list to view the ILL Participant Record for the associated library. The Participant Record displays in an *additional* browser window (see *Viewing Library Information* on page **5-13** for details).

- A ☑ icon following the library name indicates that "shelf status" is available for the current title. Click the ☑ icon to view shelf status for the *current title* for the *associated library* (see *Viewing Shelf Status* on page **3-32** for details).

- To return to the Full Record Display, click the **Full Display** button, or 🔳 button (for Icon Toolbars), in the Toolbar.

For libraries with Enhanced Advanced Search:

If your library has enabled the Enhanced Advanced Search option (see *Enhanced Advanced Search* on page **2-15** for details), the **Locations Information** field on Full Record Displays includes distance information (**Miles** from the *currently specified* Zip Code) for each location holding a copy of the associated title.

Enhanced Locations Information List
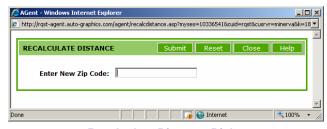
- The **Miles from Zip Code** field shows the *currently specified* Zip Code. By default, this is the Zip Code of the library under which you logged in. If you applied a Distance qualifier to your search (see *Adding a Library Location and/or Distance Qualifier (Enhanced)* on page **2-20** for details), the **Miles from Zip Code** field shows the Zip Code specified when the qualifier was added.

- By default, **Locations Information** is sorted *alphabetically*, by **Institution** (library) name. Click the **Miles** link to sort the list by *distance*, from nearest to farthest. Click the **Institution** link to sort the list alphabetically by **Institution** (library) name.

- If desired, you can *recalculate* distance (**Miles**) information for a *new* Zip Code:

  > The option to recalculate **Miles** is available *only* if you *did not* specify a Distance qualifier (see *Adding a Library Location and/or Distance Qualifier (Enhanced)* on page **2-20** for details) or Scoping qualifier (see *Adding a Scoping Qualifier (Basic)* on page **2-19** for details) for the search.

Recalculate Distance Dialog

  - In the **Miles from Zip Code** field, click the currently specified zip code; the Recalculate Distance dialog displays in an *additional* browser window.

  - Enter the desired Zip Code in the **Enter New Zip Code** text box, then click the **Submit** button; the Recalculate Distance dialog closes *automatically*, and the **Locations Information** refreshes to display the recalculated distances (**Miles**).

Mapping a Library Location

> The "Map a Library Location" feature is *optional*, and may not be enabled for all systems. The "Map a Library Location" feature is available for your library's Auto-Graphics Resource Sharing catalog(s) *only*. It is not available for AGent VERSO, reference, or Z39.50 databases.

If your library *does not* have a copy of a title, you may wish to obtain a copy from *another* local library. AGent provides a feature that lets you "map" a library location (get driving directions to a selected library) that holds a copy of the desired title.

Locations Information Field

A **Map Location** button is shown next to *each library* listed in the **Locations Information** field on the Full Record Display.

To map a library location:

1. Access the Full Record Display for the desired title.

2. If necessary, select **Card Format** or **Labeled Format** from the **Display Format** menu.

3. Scroll the Full Record Display to the **Locations Information** field.

4. Click the **Map Location** button for the library location you wish to map.

   - The Map a Library Location screen displays in an *additional* browser window.

   - The address 🔵B (destination address) text box is pre-filled with the address for the selected library location.

5. Enter *your address* in the address 🔵A (starting address) text box.

6. If desired, select the language in which you wish directions to be displayed from the **Language** menu.

7. Click the **Get Directions** button.

   - The Map a Library Location screen refreshes to display a map and "turn by turn" driving directions from the specified starting address to the specified destination address.

Map a Library Location Screen

To print driving directions:

1. Map the desired library location.

2. Click the **Print** button on the Map a Library Location screen.

   - A standard Print dialog displays.

3. Make the appropriate selection on the Print dialog, then click the **OK** or **Print** button, as applicable. (Click the **Cancel** button to cancel the print request.)

4. Close the Map a Library Location window.

Using the Enhanced Record Display

The Enhanced Full Record Display provides *additional* tools to aid in locating or purchasing a copy of the title, or locating an on-line full-text copy of the title. When the Enhanced Full Record Display is enabled, the Full Record Display *may* include one or more of the following buttons:

- **Online Booksellers** - Clicking this button displays a list of *additional* resources you may search to obtain a copy of the associated title (either through direct purchase or interlibrary loan). Titles are located through ISBN matching.

  > The **Online Booksellers** button is shown *only* when the Full Record Display is viewed in **Labeled Format** or **MARC Format**.

- **OpenURL Resources**- Clicking this button displays a list of resources you may search to access an on-line *full text* copy of the associated title. Titles are located through ISSN matching.

  > The **OpenURL Resources** button is shown *only* when the Full Record Display is viewed in **Labeled Format**.

To access OpenURL Resources or Online Booksellers:

1. From the desired Full Record Display, click the **OpenURL Resources** or **Online Booksellers** button, as appropriate.

- An *additional* browser window opens, displaying a list of other available resources from which you may try to obtain or access the associated title.

2. Click the link for the additional resource you wish to search (click the **Close** button to close the list and return to the Full Record Display).

Typical Additional Resources List

- AGent *automatically* submits a search to the site using the ISBN or ISSN, as appropriate, for the associated title.

- Results from the selected resource display in an *additional* browser window. Results are displayed in the *native* interface for the selected resource.

3. Click the **Close** button to close the list of available resources and return to the previous Full Record Display.

Viewing Shelf Status
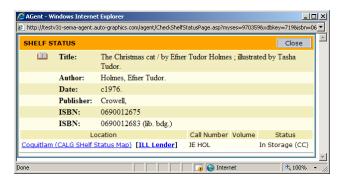
The Shelf Status feature lets you view the "shelf status" for a title to determine if it is currently available for loan. The Shelf Status feature is available through the **Locations Information** section of the Full Record Display (see *Full Record Display* on page **3-26** and *Viewing Locations* on page **3-29** for details). Libraries for which shelf status information is available are indicated by a 🗹 icon following the name of the library.

To view shelf status information:

1. Access the Full Record Display for the title for which you wish to check shelf status (see *Full Record Display* on page **3-26** for details).

2. Scroll to the **Locations Information** section of the Full Record Display (see *Viewing Locations* on page **3-29** for details).

3. Click the ☑ icon for the library for which you wish to view shelf status information.

- The Shelf Status screen displays in an *additional* browser window.

4. The Shelf Status screen provides the following information:

- The upper section of the Shelf Status screen shows brief bibliographic information (**Title**, **Author**, publication **Date** and **Publisher**) for the associated title. The "Media Type" icon in the upper left-hand corner of the screen indicates the media in which the title is available (see *Title List* on page **3-23** for details).

Shelf Status Screen

- The lower section of the Shelf Status screen lists *one or more* locations holding copies of the associated title. Each line in the listing provides the following information:

  ○ **Location** - the name of the library holding a copy of the associated title.

  ○ **Call Number** - the identifying Call Number for the associated title.

  ○ **Status -** the current status (availability) of the associated title (**Checked In**, **On Hold**, **Lost**, etc.).

> The specific values shown in the **Status** field may differ between libraries. For example, an item that is currently available for loan may have a status of **Available**, **Checked In** or some other value.

5. Click the **Close** button on the Shelf Status screen to close the screen and return to the previous Full Record Display.

Reference Database Display

A Reference Database Display is shown as the result of selecting the "hit" count for a reference database from the Search Summary screen. The format and content of the display is determined by the database provider, and varies between databases.

The Reference Database Display generally includes a list of items matching your search criteria. Clicking a link from this list displays the associated information.

Additional search and display functions may also be available from within the reference database. For more information, view the online Help file for the database, or ask your librarian for assistance.

Typical Reference Database Display

To view *other* search results:

- To view the Title List or Reference Database Display for another database, click the "hit" count for the desired database in the **Resource Summary** field of the Search Summary **Left Pane**.

To modify your search:

- Use the search term fields at the top of the Search Summary screen to modify your search, *or*, click the **Modify Search** link on the Search Summary screen to return to the previous search screen, with your previous search criteria intact.

To perform a new search:

- Use the search term fields at the top of the Search Summary screen to enter a new search, *or*, click the **New Search** link on the Search Summary screen to return to the previous search screen, with your previous search criteria removed.

- Select **Start Over** from the **Search Options** menu on the Search Summary screen to display the *default* search screen.

Buy / Borrow / Suggest

Libraries may *optionally* include **Buy / Borrow / Suggest** functionality on Full Record Displays in AGent. When enabled, these options allow library staff and patrons to:

- **Buy** - Search for and purchase a copy of the associated title from a library-defined and maintained list of vendors

- **Borrow** - Request to borrow a copy of the title through Interlibrary Loan (this option can be displayed *in addition to* or *in substitution for* the current **Request This Item** option)

- **Suggest** - Suggest that their library purchase a copy of the associated title (when enabled, this functionality is available to library patrons *only*)

Full Record Display - Buy / Borrow / Suggest

> **Buy / Borrow / Suggest** features are *optional*, and may not be enabled for all libraries.

Using Buy

The **Buy** feature lets you *purchase* a copy of a selected title from a selected bookseller or other vendor. The list of available vendors is defined and maintained by your Library Administrator.

To use the Buy feature:

1. Locate and display the Full Record Display for the title you wish to purchase.

2. Click the **Buy This Item** button in the left column of the Full Record Display.

   - The Buy This Item screen displays in an *additional* browser window.

Buy This Item Screen

- The Buy This Item screen shows a list of booksellers or other vendors from which you may be able to purchase a copy of the associated title.

3. Click the name of the bookseller or vendor from which you wish to purchase the item.

- The selected vendor's web site opens automatically in an *additional* browser window, and AGent submits a search of the vendor's site to locate the desired title.

4. Follow the instruction on the vendor's website to purchase a copy of the title.

Using Borrow

The **Borrow** feature lets you submit a request to borrow a copy of the title through interlibrary loan.

> The **Borrow** option may be displayed *in addition to* or *in substitution for* the standard **Request This Item** option.

To use the Borrow feature:

1. Locate and display the Full Record Display for the title you wish to borrow.

2. Click the **Borrow this Item** button in the left column of the Full Record Display.

    - **For libraries using the *standard* Request This Item function:** AGent searches *the current database* for potential lenders for the title.

    - **For libraries using the *enhanced* Request This Item function:** AGent searches *all selected databases* for potential lenders for the title. A status screen showing the status of the search (percentage of searching currently completed) displays while the search is in process.

3. When the search for ILL lenders is complete:

    - If the title *is not* held by a library registered as a potential lender for your library, the message "Your ILL request cannot be submitted at this time. None of the other libraries holding this item are currently registered as a potential lender for your library." displays. Click the **Go Back** button to close the message and return to the Full Record Display. If desired, you can use the Blank Request form to submit a request to borrow the item.

Typical ILL Request Form

- If the title *is* held by a library registered as a potential lender for your library, the ILL Request Form displays in an *additional* browser window. Bibliographic information, **Material Type** and **Format** for the title you wish to borrow are prefilled by the system. The system prefills the **Request Date** field on the form with the current calendar date.

> If your library (the library under which you logged into AGent) owns a copy of the title you wish to borrow *and* your library has enabled "owned by this library" notification, an advisory dialog displays the message "The item you're requesting is owned by your library. Please check on its availability before submitting this request." Click the **OK** button to close the dialog, and check with your library to see if the item you wish to borrow is currently available *before* submitting the ILL request.

4. Complete and submit the ILL Request Form to submit your **Borrow** request (see *Using the ILL Request Form* on page **4-4** for details).
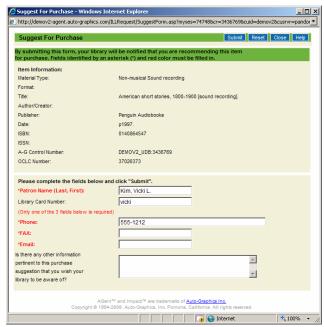
Using Suggest

The **Suggest** feature lets you submit a suggestion to your library to purchase a copy of the associated title.

To use the Suggest feature:

1. Locate and display the Full Record Display for the desired title.

2. Click the **Suggest for Purchase** button in the left column of the Full Record Display.

- The Suggest form displays in an *additional* browser window.

- The **Item Information** field is *pre-filled* with bibliographic information for the title (taken from the Full Record Display).

3. Enter the necessary patron information:

- Enter your name in the **Patron Name** text box. *This information is mandatory*.

  > Depending on the configuration of AGent for you library, the system *may* automatically fill the **Patron Name** field with the name from your user record. If your name is entered automatically, you *should not* change it.

Typical Suggest Form

- Enter your library card number in the **Library Card Number** text box.

- Enter your telephone number, fax number and/or email address in the appropriate **Phone**, **FAX** and **Email** text boxes. *You must provide at least one of these items.*

- Enter any other information related to your suggestion in the text box provided.

4. When all necessary information has been entered, click the **Submit** button to submit your suggestion.

Printing Search Results

You can print a copy of the currently displayed search results screen.

The **Print** function *is not* available for Reference Database Hit Lists or Reference Database Displays.

To print search results:

1. Access the Number List, Cross Reference List, Title List or Full Record Display you wish to print.

2. Click the **Print** button, or 🖨 button (for Icon Toolbars).

- A formatted version of the *current page* of the search results screen displays in an *additional* browser window.

    For Term Lists, Number Lists and multi-page Title Lists, only the *currently displayed page* of the list is formatted for printing. To print the *entire* list, you must submit a separate print request for *each page* of the list.

3. Click the **Print** link.

- A standard Print dialog displays.

4. Make the appropriate selection on the Print dialog, then click the **OK** or **Print** button, as applicable. (Click the **Cancel** button to cancel the print request.)

5. Click the **Close** link to close the formatted search results screen.

Reader Reviews

AGent offers a Reader Reviews feature that lets you contribute to your library's catalog by submitting comments, reviews, ratings and other information related to a title. You retain control to edit or delete reviews you have submitted. You can also view reviews submitted by *any* library patron or staff member.

The Reader Reviews feature is *optional*, and may not be enabled for all systems.

Viewing Reader Reviews

You can view Reader Reviews written by *any* library patron or staff member.

The Reader Reviews feature is *optional*, and may not be enabled for all systems.

To view a Reader Review:

1. To access Reader Reviews from a CBB "brief browse" list, click the **Reader Reviews** link for a title in a CBB "brief browse" list (see ***Using Continuous Brief Browse (CBB)*** on page **3-2** for details).

- The Reader Review screen for the title displays in an *additional* browser window.

    The **Reader Reviews** link is shown on CBB "brief browse" lists *only* if your library has enabled the *optional* "Display Average Reader Reviews Score on Brief Record" feature.

2. To access Reader Reviews from a Full Record Display, click the **Reader Reviews** button (see ***Full Record Display*** on page **3-26** for details).

    The number in parentheses on the **Reader Reviews** button shows the *total* number of reviews written for the title. If a zero "**0**" is shown, there are *no* reviews currently written for the title.

- The Reader Reviews screen for the title displays in an *additional* browser window.

- If your library has enabled the feature, you can *write* a review for the title (see ***Writing a Reader Review*** on page **3-38** for details).

3. Each review includes the following information:

Typical Reader Reviews Screen

- The name of the library from which the review was submitted.

- A "graphic" rating for the title (★☆☆☆☆ = poor, ★★★★★ = excellent)

- A title for the review

- The date on which the review was created or last edited

- The name of the reviewer (shown only the library has allowed the use of "screen names" in Reader Reviews)

- The review text

4. If your library has enabled the *optional* "Inappropriate Review Link" feature, click the **Report this review as inappropriate** link to notify the library of an inappropriate or offensive review.

- The message "This review has been reported to the library" displays in an *additional* browser window. Click the **Close** button to close the message and return to the Reader Review.

> When you report a review as "inappropriate," the review is *temporarily* deleted from the associated bibliographic record. The review must be approved by library staff before it is again made available for viewing.

5. Use the scrollbar to view all reviews for the title.

6. Click the ☒ button in the upper right hand corner of the screen to close the Reader Reviews screen.

Writing a Reader Review

If desired, you can write a Reader Review for a title. You may also edit reviews you have previously created, or delete reviews that you have created.

> The Reader Reviews feature is *optional*, and may not be enabled for all systems. Additionally, a library may allow patrons to *view* Reader Reviews (written by library staff), but not to *write* Reader Reviews.

> You can add a Reader Review *only* to titles retrieved from your library's catalog. You can write *only one* review for any given title.

To write a Reader Review:

1. To access Reader Reviews from a CBB "brief browse" list, click the **Reader Reviews** link for a title in a CBB "brief browse" list (see ***Using Continuous Brief Browse (CBB)*** on page **3-2** for details).

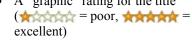- The Reader Review screen for the title displays in an *additional* browser window.

> The **Reader Reviews** link is shown on CBB "brief browse" lists *only* if your library has enabled the *optional* "Display Average Reader Reviews Score on Brief Record" feature.

2. To access Reader Reviews from a Full Record Display, click the **Reader Reviews** button (see *Full Record Display* on page **3-26** for details).

- The Reader Reviews screen for the title displays in an *additional* browser window.

3. Click the **Write an online review** link.

- If this is your *first* review for *any* title, the Review Policy Statement screen displays. This screen shows your library's policy (rules and regulations) for submitting online Reader Reviews.

- Read the Review Policy Statement *completely*, then click the **I Agree** button to accept the Review Policy Statement.

    o The Enter Your Review screen displays.

- If you *do not* accept the Review Policy Statement, you *must* click the **I Do Not Agree** button.

> You *must* accept the Review Policy Statement in order to submit an online review. If you click the **I Do Not Agree** button, the Review Policy Statement screen closes, and you will not *be allowed to submit a review.*
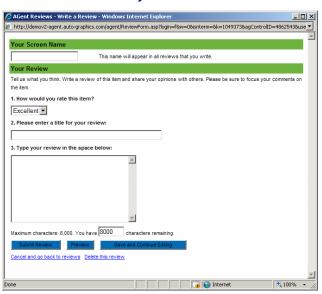
- If you have *previously* accepted your library's Review Policy Statement, the Enter Your Review screen displays.

> All fields on the Enter Your Review screen are *required*.

4. If desired, enter a "screen name" for yourself in the **Your Screen Name** text box. Your screen name will appear on *all reviews* that your write.

- Your screen name can be a *maximum* of 50 characters, *including spaces*.

> The **Your Screen Name** text box is shown *only* if your library has enabled the feature.

Review Policy Statement Screen

Enter Your Review Screen

5. Select your rating for the title from the **How would you rate this item** menu; either **Excellent**, **Good**, **Average**, **Fair** or **Poor**.

6. Enter a title for your review in the **Please enter a title for your review** text box.

   - The title of your review can be a *maximum* of 50 characters, *including spaces*.

7. Enter the text for your review in the **Type your review in the space below** text box.

   - The text for your review can be a *maximum* of 8,000 characters, *including spaces*.

8. If you wish to *periodically save* your review while you are writing, click the **Save and Continue Editing** button.

   - The *current content* of your review is saved, and the Enter Your Review screen remains *open* to allow you to continue.

9. If you wish to *preview* your review before submitting, click the **Preview** button.

   - A *formatted* version of your review displays in an *additional* browser window. Click the ✕ button in the upper right corner of the window to close the window and return to the Enter Your Review screen.

10. When you have completed your review, click the **Submit Review** button. (If you wish to *cancel* your review, click the **Cancel and go back to reviews** link *before* submitting the review. Your review *is not* saved to your library's catalog.)

    - The Enter Your Review screen closes, and your review is saved to your library's catalog.

    > If you have used the **Save and Continue Editing** function after entering text in *both* the **Please enter a title for your review** and **Type your review in the space below** text boxes, clicking the **Cancel and go back to reviews** link *will not* cancel your review, but will instead *submit* your review and *add it* to your library's catalog. If you *do not* wish the review to be included in your library's catalog, you must *delete* the review.

    > If your library has enabled the *optional* "Mediated Reader Reviews" feature, your review must be approved by library staff *before* it is made available for viewing.

To edit a Reader Review:

1. Use Keyword Search, Browse or Advanced Search to access the Full Record Display for a title for which you have *previously* written a review.

2. Click the **Reader Reviews** button.

   - The Reader Reviews screen for the title displays in an *additional* browser window.

3. Click the **Write an online review** link.

   - The Enter Your Review screen displays. The screen is *prefilled* with the content of your *previously written* review.

4. Edit your screen name, rating, review title and/or review text as desired.

   > If you change your screen name, the change will be applied to *all reviews* you have written. You *cannot* submit reviews under multiple screen names.

5. If you wish to *periodically save* your review while you are editing, click the **Save and Continue Editing** button.

- The *current content* of your review is saved, and the Enter Your Review screen remains *open* to allow you to continue.

6. If you wish to *preview* your review before submitting, click the **Preview** button.

- A *formatted* version of your review displays in an *additional* browser window. Click the ⊠ button in the upper right corner of the window to close the window and return to the Enter Your Review screen.

7. When you have finished editing your review, click the **Submit Review** button. (If you wish to *cancel* your review, click the **Cancel and go back to reviews** link *before* submitting the review. Your review *is not* saved to your library's catalog.)

- The Enter Your Review screen closes, and the changes to your review are saved.

If you have used the **Save and Continue Editing** function during editing, clicking the **Cancel and go back to reviews** link *will not* cancel your changes, but will instead *submit* the changes to your review.

To delete a Reader Review:

1. Use Keyword Search, Browse or Advanced Search to access the Full Record Display for a title for which you have *previously* written a review.

2. Click the **Reader Reviews** button.

- The Reader Reviews screen for the title displays in an *additional* browser window.

3. Click the **Write an online review** link.

- The Enter Your Review screen displays. The screen is *prefilled* with the content of your *previously written* review.

4. Click the **Delete this review** link.

- A confirmation dialog displays the message "Are you sure you want to delete this review?"

5. Click the **OK** button to delete the review, close the Enter Your Review screen and Reader Reviews screen, and return to the previous Full Record Display. (Click the **Cancel** button to cancel the deletion, close the Enter Your Review screen, and return to the Reader Reviews screen.)

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Chapter 4. PATRON INTERLIBRARY LOAN

Overview

AGent provides three options for submitting interlibrary loan requests; the ILL Request Form (accessed from a Full Record Display), the 3rd Party Request (accessed from a Full Record Display) or the Blank Request Form (accessed from the **Patron Menu**). Interlibrary loan requests can be initiated by library staff and, if authorized, by library patrons and guests. AGent provides the ability for patrons to track the status of their in-process ILL requests.

> Interlibrary loan features are available for patron use only if your library has set the authorization.

This chapter provides the procedures to:

- Prepare and submit an interlibrary loan request using the Blank Request Form
- Prepare and submit an interlibrary loan request from a Full Record Display
- Submit a 3rd Party Request from a Full Record Display
- Submit an ILL tracking request
- View the ILL request summary
- Search library information

Submitting ILL Requests

If your library does not have a title available, you can submit a request to borrow the title from *another* library or to copy pages from it.

You use your name and a personal password to track requests. You can use the same name and password for multiple requests, or you can use a different name and/or password for each request. Since you track your requests using your name and password, it is recommended that you use the same name/password combination for all requests. If you forget your password, you will not be able to track your requests, unless you ask your librarian to check them for you.

> If you are an authenticated user, the system will automatically use your login username and password to generate your ILL requests.

Using the Blank Request Form

You can use the Blank Request Form to submit an Interlibrary Loan Request. The Blank Request Form lets you enter the name of the item you wish to borrow, add special instructions related to the request, and include your contact information so you can be notified when the requested item is available. The system pre-fills the **Request Date** field on the form with the current calendar date.

To prepare the Blank Request Form:

> Fields identified in Red color *must* be filled in. All other fields are *optional*. To reset the form to its initial conditions, click the **Reset** button.
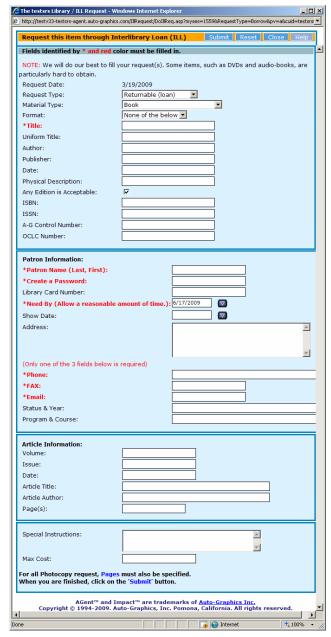
1. Access the Blank Request Form:

- From a Title List or Full Record Display, click the **Blank Request** button, or button (for Icon Toolbars).

> For some libraries, the **Blank Request** button *is not* available on Title Lists and Full Record Displays.

- From the **Patron Menu**, select **Blank ILL Request**.

  - The Blank ILL Request Form displays in an *additional* browser window. The system prefills the **Request Date** field on the form with the current calendar date.

2. Select the type of request from the **Request Type** menu.

- Select **Returnable (Loan)** for a borrow request; select **Non-returnable (copy)** for a photocopy request. (**Returnable (loan)** is the default selection for this field.)

- If your library has enabled the "Copyright Confirmation" feature, a "Copyright Confirmation" message displays when you select **Non-returnable (copy)** as the **Request Type**. You *must* acknowledge (accept) the Copyright Statement when submitting your copy request.

  - Click the **OK** button on the "Copyright Confirmation" message to accept the Copyright Statement and continue with the request. The "Copyright Confirmation" message closes.

Blank ILL Request Form

  - Click the **Cancel** button on the "Copyright Confirmation" message to cancel the request. The "Copyright Confirmation" message *and* the ILL Request Form close.

3. Select the desired material type for the item you wish to borrow from the **Material Type** menu. (**Book** is the default selection for this field.)

4. If you wish to specify a desired format for the item you wish to borrow, select the desired format from the **Format** menu. (**None of the below** is the default selection for this field.)

5. Use the **Any Edition is Acceptable** checkbox to indicate whether or not *another* edition of the title may be supplied when filling the request.

- A *checkmark* ☑ indicates *any edition* may be supplied when filling the request.

- An *empty checkbox* ☐ indicates that only the *edition specified* may be supplied when filling the request.

- Clicking the checkbox repeatedly will toggle it on and off.

> The **Any Edition is Acceptable** checkbox is *selected* by default.

6. Enter the appropriate bibliographic information in the **Title**, **Uniform Title**, **Author/Creator**, **Publisher**, **Date** and **Physical Description** text boxes. Enter any standard numbers that uniquely identify the title in the **ISBN**, **ISSN**, **A-G Control Number** and/or **OCLC Number** text boxes.

   - The publication **Title** is *mandatory*. All other information is *optional*.

   - Enter the **Date** (of publication) using the format MM/DD/YYYY, *including* the slashes.

7. Enter the necessary Patron Information:

   - Enter your name in the **Patron Name (Last, First)** text box. *This information is mandatory.*

   > Depending on the configuration of AGent for your library, the system *may* automatically fill the **Patron Name (Last, First)** field with the name from your user record. If your name is entered automatically, you *cannot* change it.

   - If the **Create a Password** text box is shown, enter a password for your request. A password is *required* if you wish to use the **ILL Request Tracking** feature (see *ILL Request Tracking* on page **4-8** for details). Your password may be a *maximum* of 10 characters (letter and number).

   > If the system automatically filled the **Patron Name (Last, First)** field, you will use your login **Password or PIN** to access the **ILL Request Tracking** feature.

   - If the **Library Card Number** text box is shown, enter your library card number.

   - By default, the system enters a **Need By** date *90 days* from the *current* calendar date. If you wish to change the default **Need By** date, click the **Need By** ▽ button to use the Date Entry Calendar to select the date by which you need the item (see *Using the Date Entry Calendar* on page **4-7** for details).

   - If the item you are requesting is intended for use on a *specific date* (such as for a film, video or recording), click the **Show Date** ▽ button to select the desired date (see *Using the Date Entry Calendar* on page **4-7** for details).

   - If you wish, enter your mailing address in the **Address** text box.

   - Enter your telephone number, fax number and/or email address in the appropriate **Phone**, **FAX** and **Email** text boxes. *You must provide at least one of these items.*

   - If appropriate, enter your "classification" (such as "Undergraduate" or "class of 2011") in the **Status & Year** text box.

   - If appropriate, enter your "major" (such as "Physics" or "English") in the **Program & Course** text box.

8. If desired, select the library location or branch from which you would like to pick up the item from the **Pickup Location** menu. *The default value for this field is determined by your library.*

9. If the item you are requesting is a serial, enter the necessary **Article Information**:

   - Enter the volume number, issue number and issue date in the **Volume**, **Issue** and **Date** text boxes. *This information is mandatory for serial requests.*

   - Enter the article title and author in the **Article Title** and **Article Author** text boxes.

10. If you selected **Non-returnable (copy)** from the **Request Type** menu, enter the page number(s) you wish copied in the **Pagination** text box. *This information is mandatory for photocopies requests.*

11. If necessary, enter any text meant for the library staff in the **Special Instructions** text box.

12. In some cases, a lending library may charge a loan or photocopy fee for items supplied through Interlibrary Loan. Enter the *maximum* you are willing to pay to borrow/copy the requested item in the **Max Cost** or **Maximum you are willing to pay** text box, as applicable.

13. Click the **Submit** button to submit the ILL request.

- If your Interlibrary Loan Request is *unsuccessful:*

  ○ If you enter incomplete information in the Blank Request Form, a message dialog displays indicating the required information.

  ○ Click the **OK** button on the message dialog to return to the Blank Request Form. Enter the required information and click the **Submit** button to resubmit the request.

- If your Interlibrary Loan Request is *successful*:

  ○ A progress message displays while your request is being processed.

  ○ An ILL Request Confirmation screen displays summarizing your request, and indicating that your request has been accepted by the system. Click the **Close** button to close the confirmation screen return to AGent.

- If desired, you can print a copy of the ILL Request Confirmation screen (see *Printing ILL Request Confirmation* on page **4-8** for details).

Typical ILL Request Confirmation Screen

Using the ILL Request Form

The ILL Request Form lets you prepare and submit your request while online — no paperwork is necessary. Bibliographic information for the title you are requesting is entered automatically at the top of the form.

> Refer to *Chapter 2, Searching*, and *Chapter 3, Viewing Search Results*, for procedures to locate and access the Full Record Display for the title for which you wish to request an interlibrary loan.

> Fields identified in Red color *must* be filled in. All other fields are *optional*. To reset the form to its initial conditions, click the **Reset** button.

To submit an Interlibrary Loan Request:

1. From the Full Record Display for the title you wish to borrow, click the **Request This Item** button.

- **For libraries using the** *standard* **Request This Item function:** AGent searches *the current database* for potential lenders for the title.

○ If the title *is not* held by a library registered as a potential lender for your library, the message "Your ILL request cannot be submitted at this time. None of the other libraries holding this item are currently registered as a potential lender for your library." displays. Click the **Go Back** button to close the message and return to the Full Record Display. If desired, you can use the Blank Request form to submit a request to borrow the item (see *Using the Blank Request Form* on page **4-1** for details).

○ If the title *is* held by a library registered as a potential lender for your library, the ILL Request Form displays in an *additional* browser window.

- **For libraries using the *enhanced* Request This Item function:** AGent searches *all selected databases* for potential lenders for the title. A status screen showing the status of the search (percentage of searching currently completed) displays while the search is in process.

  ○ When the search for ILL lenders is complete, the ILL Request Form displays in an *additional* browser window.

If the title you wish to borrow is owned by your library (the library under which you logged into AGent) *and* your library has enabled "owned by this library" notification, the message "The item you're requesting is owned by your library. Please check on its availability before submitting this request." displays at the top of the ILL Request Form. You should check with your library to see if the item you wish to borrow is currently available *before* submitting the ILL request.

2. Bibliographic information, **Material Type** and **Format** for the title you wish to borrow are prefilled by the system. The system prefills the **Request Date** field on the form with the current calendar date.

Typical ILL Request Form

3. Select the desired request type from the **Request Type** menu.

- Select **Returnable (Loan)** for a borrow request; select **Non-returnable (copy)** for a photocopy request. (**Returnable (loan)** is the default selection for this field.)

- If your library has enabled the "Copyright Confirmation" feature, a "Copyright Confirmation" message displays when you select **Non-returnable (copy)** as the **Request Type**. You *must* acknowledge (accept) the Copyright Statement when submitting your copy request.

○ Click the **OK** button on the "Copyright Confirmation" message to accept the Copyright Statement and continue with the request. The "Copyright Confirmation" message closes.

○ Click the **Cancel** button on the "Copyright Confirmation" message to cancel the request. The "Copyright Confirmation" message *and* the ILL Request Form close.

4. Use the **Any Edition is Acceptable** checkbox to indicate whether or not *another* edition of the title may be supplied when filling the request.

- A *checkmark* ☑ indicates *any edition* may be supplied when filling the request.

- An *empty checkbox* ☐ indicates that only the *edition specified* may be supplied when filling the request.

- Clicking the checkbox repeatedly will toggle it on and off.

> The **Any Edition is Acceptable** checkbox is *selected* by default.

5. Enter the necessary **Patron** Information:

- Enter your name in the **Patron Name (Last, First)** text box. *This information is mandatory.*

> Depending on the configuration of AGent for you library, the system *may* automatically fill the **Patron Name (Last, First)** field with the name from your user record. If your name is entered automatically, you *cannot* change it.

- If the **Create a Password** text box is shown, enter a password for your request. A password is *required* if you wish to use the **ILL Request Tracking** feature (see *ILL Request Tracking* on page **4-8** for details). Your password may be a *maximum* of 10 characters (letter and number).

> If the system automatically filled the **Patron Name (Last, First)** field, you will use your **Password or PIN** to access the **ILL Request Tracking** feature.

- If the **Library Card Number** text box is shown, enter your library card number.

- By default, the system enters a **Need By** date *90 days* from the *current* calendar date. If you wish to change the default **Need By** date, click the **Need By** ▽ button to use the Date Entry Calendar to select the date by which you need the item (see *Using the Date Entry Calendar* on page **4-7** for details).

- If the item you are requesting is intended for use on a *specific date* (such as for a film, video or recording), click the **Show Date** ▽ button to select the desired date (see *Using the Date Entry Calendar* on page **4-7** for details).

- If you wish, enter your mailing address in the **Address** text box.

- Enter your telephone number, fax number and/or email address in the appropriate **Phone**, **FAX** and **Email** text boxes. *You must provide at least one of these items.*

- If appropriate, enter your "classification" (such as "Undergraduate" or "class of 2011") in the **Status & Year** text box.

- If appropriate, enter your "major" (such as "Physics" or "English") in the **Program & Course** text box.

6. If desired, select the library location or branch from which you would like to pick up the item from the **Pickup Location** menu. *The default value for this field is determined by your library.*

7. If the item you are requesting is a serial, enter the necessary **Article Information**:

- Enter the volume number, issue number and issue date in the **Volume**, **Issue** and **Date** text boxes. *This information is mandatory for serial requests.*

- Enter the article title and author in the **Article Title** and **Article Author** text boxes.

8. If you selected **Non-returnable (copy)** from the **Request Type** menu, enter the page number(s) you wish copied in the **Pagination** text box. *This information is mandatory for photocopies requests.*

9. If necessary, enter any text meant for the library staff in the **Special Instructions** text box.

10. In some cases, a lending library may charge a loan or photocopy fee for items supplied through Interlibrary Loan. Enter the *maximum* you are willing to pay to borrow/copy the requested item in the **Max Cost** or **Maximum you are willing to pay** text box, as applicable.

11. Click the **Submit** button to submit the completed Interlibrary Loan Request Form.

- If your Interlibrary Loan Request is *unsuccessful:*

  ○ If you enter incomplete information in the Blank Request Form, a message dialog displays indicating the required information.

  ○ Click the **OK** button on the message dialog to return to the Blank Request Form. Enter the required information and click the **Submit** button to resubmit the request.

- If your Interlibrary Loan Request is *successful*:

  ○ A progress message displays while your request is being processed.

  ○ An ILL Request confirmation screen displays summarizing your request, and indicating that your request has been accepted by the system. Click the **Close** button to close the confirmation screen return to AGent.

Typical ILL Request Confirmation Screen
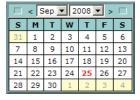
- If desired, you can print a copy of the ILL Request Confirmation screen (see *Printing ILL Request Confirmation* on page **4-8** for details).

Using the Date Entry Calendar

Use the Date Entry Calendar to select the **Need By** date and **Show Date** on the ILL Request Form or Blank Request Form.

To select a date from the Date Entry Calendar:

1. Click the ▼ icon next to the date entry text box.

- The Date Entry Calendar displays. The calendar shows the current day, month and calendar year.

2. Use the Month and Year drop-down menus to select the desired calendar month and year, or click the < and > buttons to scroll backwards and forwards one month at a time.

3. Click the desired date.

    •   The Date Entry Calendar closes, and the selected date is automatically entered in the associated text box.

Submitting a 3rd Party ILL Request

Some libraries may use a 3rd party provider to manage ILL activities for the library. In these cases, the Full Record Display includes a **3rd Party Request** button in place of the **Request This Item** button. Click the **3rd Party Request** button to access the ILL Request Form.

> See your librarian for information on completing and submitting your ILL request using the 3rd Party Request form.

Printing ILL Request Confirmation

You can print a copy of the ILL Request Confirmation screen as a record of your ILL request.

To print ILL request confirmation:
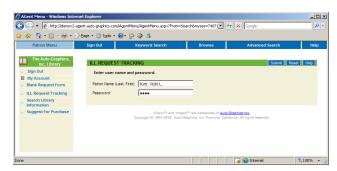
1. On the ILL Request Confirmation screen, click the **Print** button.

    •   A formatted version of the Confirmation screen displays in an *additional* browser window.

2. Click the **Print** link.

    •   A standard Print dialog displays.

3. Make the appropriate selection on the Print dialog, then click the **OK** or **Print** button, as applicable. (Click the **Cancel** button to cancel the print request.)

4. Click the **Close** link to close the formatted ILL Request Confirmation screen.

ILL Request Tracking

You can check the status of your ILL request(s) using the name and personal password you entered when submitting the request(s).

To submit an ILL Tracking Request:

1. From the **Patron Menu**, select **ILL Request Tracking**.

    •   The ILL Request Tracking Password screen displays in an *additional* browser window.

    •   The screen *may be* prefilled with your **Patron Name** and **Password**.

ILL Request Tracking Password Screen

2. If necessary, enter your name and personal password in the **Patron Name** and **Password** text boxes.

    •   Your name and password *must* be the same as those you used when you made your ILL request(s). If you forget your password, there is *no way* to track your request(s).
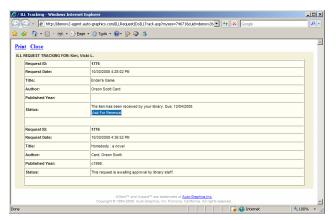
3. Click the **Submit** button to submit the completed ILL Request Tracking form.

- An ILL Request Summary shows the status of *all* your ILL requests submitted using the entered name and password.

ILL Request Summary

The ILL Request Summary lists all the outstanding requests for the name and password combination you entered in the ILL Request Tracking form. If you have made requests using more than one name or password, you must make a separate request for each name and password combination to view all of your requests. The ILL Request Summary is a display screen only. You cannot update or delete listed items.

To view the ILL Request Summary:

- Use the scroll bar to scroll through the display. Use the **Top of Page** link to return to the top of the page.

- For summaries which contain more than one request, items are listed in reverse chronological order based on the date the request was made (the most recent request is listed first, followed by the older requests).

- Each item in the summary shows the **Request ID** number, **Request Date**, **Title**, **Author/Creator** and **Published Year** for the title requested, and the current **Status** of the request.

- If your library has enabled the "Due Dates in ILL Request Tracking" option, due dates for items requested through Interlibrary Loan are shown in the **Status** field of the ILL Request Tracking screen.

Typical ILL Request Summary Screen

  - ○ **For *new* requests:** The due date is added to the ILL Request Tracking screen when your library receives the item from the lending library.

  - ○ **For *renewal* requests:** The *new* due date is added to the ILL request Tracking screen when your request for renewal is accepted by the lending library.

- If your library has enabled the "Mediated Patron Renewal Requests" option, you can submit a request to *renew* the loan for an item from the ILL request Tracking screen (see *Submitting a Mediated Patron Renewal Request* on page **4-10** for details).

- If desired, you can print a copy of the ILL Request Summary screen (see *Printing the ILL Request Summary* on page **4-10** for details).

- When finished, click the **Close** button on the ILL Request Summary screen to close the screen and return to AGent.

To submit a new ILL Tracking Request:

- From the **Patron** menu, select **ILL**, then choose **Patron Request Tracking** from the **ILL** submenu.

Printing the ILL Request Summary

You can print a copy of the ILL Request Summary screen as a record of your ILL request status.

To print the ILL request summary:

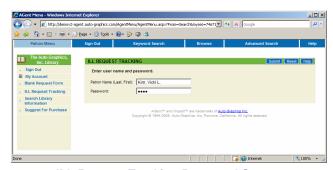1. On the ILL Request Summary screen, click the **Print** link.

    - A standard Print dialog displays.

2. Make the appropriate selection on the Print dialog, then click the **OK** or **Print** button, as applicable. (Click the **Cancel** button to cancel the print request.)

3. Click the **Close** link to close the ILL Request Summary screen.

Submitting a Mediated Patron Renewal Request
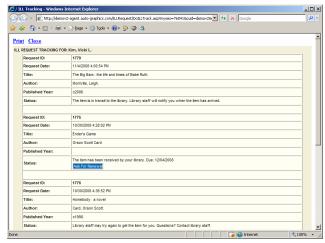
When the mediated patron renewal request function is enabled, the **Status** field on the patron ILL Request Tracking screen for all items on *initial* loan to a patron includes an **Ask For Renewal** button.

To submit a renewal request:

1. From the **Patron Menu**, select **ILL Request Tracking**.

    - The ILL Request Tracking Password screen displays in an *additional* browser window.

2. Enter the appropriate name and personal password in the **Patron Name** and **Password** text boxes.

    - The name and password *must* be the same as those used when the ILL request was submitted.

ILL Request Tracking Password Screen

3. Click the **Submit** button to submit the completed ILL Request Tracking form.

    - An ILL Request Summary shows the status of *all* ILL requests submitted using the entered name and password.

4. Click the **Ask For Renewal** button for the item for which you wish to request a renewal.

    - A confirmation dialog displays the message "Do you want to renew this item?"

    - Click the **OK** button to submit the request for renewal. (Click the **Cancel** button to cancel the renewal request and return to the ILL Request Tracking screen.)

ILL Request Tracking Screen

5. The ILL Request Tracking screen refreshes to indicate the request for renewal has been submitted.

> The renewal request must be approved by the borrowing library prior to forwarding to the lending library (see *Processing Mediated Patron Renewal Requests*, below, for details).

Canceling ILL Requests
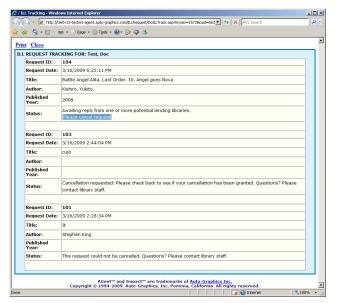
When the Patron Request Cancellation feature is enabled, the **Status** field on the patron ILL Request Tracking screen for "in process" requests *may* include a **Please cancel request** button.

> You may submit a cancellation request *only* for those ILL Requests with a *current status* of **Awaiting Approval** (borrower), **Pending** (lender), **Will Supply** (lender – for AG Closed systems), **In Process** (lender – for AG Closed systems), or **Will Supply/In Process** (lender – for ISO ILL systems). All cancellation requests *must* be approved by *your library*, and in some cases, by the *current lender* as well.

To cancel an ILL request:

1. From the **Patron Menu**, select **ILL Request Tracking**.

   • The ILL Request Tracking Password screen displays in an *additional* browser window.

2. Enter the appropriate name and personal password in the **Patron Name** and **Password** text boxes.

   • The name and password *must* be the same as those used when the ILL request was submitted.

3. Click the **Submit** button to submit the completed ILL Request Tracking form.

   • An ILL Request Summary shows the status of *all* ILL requests submitted using the entered name and password.

ILL Request Tracking Screen

4. Click the **Please cancel request** button for the desired request.

   • A confirmation dialog displays the message "Do you want to cancel this item?"

5. Click the **OK** button on the confirmation dialog to complete the cancellation request. (Click the **Cancel** button if you *do not* want to cancel the request.)

   • The screen refreshes to display the message "Cancellation requested: Please check back to see if your cancellation has been granted."

Searching Library Information
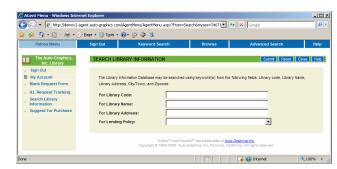
The **Search Library Information** function lets you view the Participant Record for *any* library in your consortium or collective. The Participant Record may include **Lender Information** (library name, address, days open, etc.), **Address / Contact Information**, **Holiday List**, **ISO External Communications** information, **URL Information** and **Other Related Information**. The Participant Record also includes a link to the library's lending policies.

Library staff may view the *complete* Participant Record for any library. Library patrons and guests may view *abbreviated* Participant Records, as configured by the library's ILL Administrator (see the *AGent ILL Administration User Guide* for details).
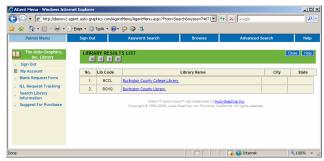
To search library information:

1. From the **Patron Menu** (see *The Patron Menu* on page **3** for details) or **Staff Menu** (see *The Staff Menu* on page **4** for details), as appropriate, select **Search Library Information**.

   - The Search Library Information screen displays.

2. Enter your search criteria as desired using *one or more* of the available search options.

   - To search for a library by library code, enter the desired library code in the **For Library Code** text box.

     ○ You must enter a *complete* library code.

Search Library Information Screen

   - To search for a library by library name, enter the desired library name in the **For Library Name** text box.

     ○ You may enter a *complete* or *partial* library name. You must enter at least *two characters* in the **For Library Name** text box.

   - To search for a library by location, enter the desired address in the **For Library Address** text box.

     ○ You may enter a *complete* or *partial* library address. You must enter at least *two characters* in the **For Library Address** text box.

   - To search for a library by lending policy for a selected material type, select the desired material type from the **For Lending Policy** menu.

     ○ The **For Lending Policy** menu lists *all* material types for which *at least one* library in the database has specified a lending policy.

3. When the desired search information has been entered, click the **Submit** button to submit your search.

   - If your search is *unsuccessful:* If your search does not return any results, the message "No Match found for this search. Please check your spelling and try again." displays. Click the **Go Back** button to return to the Search Library Information screen to refine your search.

   - If your search is *successful*:

     ○ If your search returns *more than one* library, the Library Result List displays. Click the name of a library in the list to display the Library Information screen for the selected library in an *additional* browser window.

     ○ If your search returns *one library only*, the Library Information screen for the library displays.

Typical Library Results List

Viewing Library Information

The Library Information screen displays the Participant Record for a selected library. A library's Participant Record contains all the information necessary to ensure the proper handling of interlibrary loan activities with the institution, including a participant profile, interlibrary loan (ILL) contact information, Preferred Lender List, general lending/ILL policies, operating hours, detailed ILL policy information and links to related information.

Library staff may view the *complete* Participant Record for any library. Library patrons and guests may view *abbreviated* Participant Records, as configured by the library's ILL Administrator (see the *AGent ILL Administration User Guide* for details).

Typical Library Information Screen

The Library Information screen provides the following information:

- **Lender Information**

    ○ **Library Code** – Code assigned to the library by Auto-Graphics.

    ○ **Library Name** – The name of the library.

    ○ **Agency Code** – MARC Agency code assigned to the library by the Library of Congress. *(This information is viewable by library staff only.)*

    ○ **Broker Code** – Code designating the broker responsible for fulfilling ILL requests. *(This information is viewable by library staff only.)*

    ○ **Days to Respond** – Number of business (open) days within which the participant library will respond to ILL requests received as a lender. *The participant library determines this information. (This information is viewable by library staff only.)*

    ○ **Days to Supply** – Number of calendar days it takes the participant library, as a lender, to send requested material to a borrower. *The participant library determines this information. (This information is viewable by library staff only.)*

    ○ **Days to Return** – Number of calendar days (including shipping days) a borrower can check out material before it must be back to the lender. *The participant library determines this information. (This information is viewable by library staff only.)*

    ○ **OCLC Code** – Code assigned to the library by OCLC. (This information is viewable by library staff only.)

    ○ **Days Open** – Days of the week on which the library is normally open (excluding holidays).

    ○ **Preferred Lender List** – A listing of the codes (assigned by Auto-Graphics) for the libraries designated as preferred ILL lenders to the current library. *(This information is viewable by library staff only.)*

    ○ **Primary Default Lender** – Code assigned to the *primary* default lender for the library. *(This information is viewable by library staff only.)*

    ○ **Secondary Default Lender** – Code assigned to the *secondary* default lender for the library. *(This information is viewable by library staff only.)*

- ○ **System Wide -** A listing of the codes (assigned by Auto-Graphics) for *all* the ILL participant libraries registered as potential lenders for the library or consortium, taken from the System Wide Record. *(This information is viewable by library staff only.)*

- ○ **Notes -** Additional notes related to lender information. *(This information is viewable by library staff only.)*

- • **Address / Contact Information**

  - ○ **Address 1, Address 2, City, State Zip**. - The street address of the library.

  - ○ **Ship to Address -** Shipping address of the library (if different from the street address *only*).

  - ○ **Route Schedule -** General information related to pickup/delivery times for common carriers used in shipping borrowed materials.

  - ○ **ILL Contact Name -** Name of the staff member responsible for managing ILL activities for the library.

  - ○ **ILL Contact Title -** Title of the staff member responsible for managing ILL activities for the library.

  - ○ **ILL Phone Number -** Phone number by which to reach the library for matters related to ILL.

  - ○ **ILL Fax Number -** Fax number by which to reach the library for matters related to ILL.

  - ○ **ILL Email Address -** Email address by which to reach the library for matters related to ILL.

  - ○ **Ariel Address -** Ariel address by which to reach the library for matters related to ILL.

  - ○ **ILL Pickup Locations -** Lists all Pickup Locations defined for the library.

- • **Holiday List -** Lists the *normal business days* on which the library is closed for holidays or vacation.

- • **External Communications** *(This information is viewable by library staff only.)*

  - ○ **Transmit request to another system -** Indicates whether ILL requests sent to the library will be transmitted to an ILL system *outside* of the AGent system. Shows **Yes** for ILL trading partners *outside* your consortium or collective. Shows **No** for ILL trading partners that are members of your consortium or collective.

  - ○ **System type -** Shows the system type for the ILL trading partner *outside* your consortium or collective; either **ISO ILL**, **OCLC Direct to review** or **OCLC Direct to profile**.

  - ○ **Transport method -** Shows the means by which ILL requests are forwarded to the ILL trading partner *outside* your consortium or collective; either **Direct connection (TCP/IP)** or **Email (SMTP)**.

  - ○ **Computer or Email Address -** Address for the computer that will process requests (for **Direct connection** transport method) or email address to which requests will be sent (for **Email** transport method).

  - ○ **Computer Port No. -** Port number for the computer that will process requests.

  - ○ **ISO System Code -** Code assigned to the library by Auto-Graphics.

  - ○ **Code Type -** Code type for the library (assigned by Auto-Graphics).

- • **Other Related Information**

  - ○ **Is the Library Open to the Public? / Explanation -** Indicates whether or not the library is open to the public, and identifies any exclusions, conditions or limitations.

  - ○ **Can the Public Borrow Material in Person? / Explanation -** Indicates whether or not the public can borrow material form the library in person, and identifies any exclusions, conditions or limitations.

  - ○ **Can the Public Borrow Material through ILL? / Explanation -** Indicates whether or not the public can borrow material form the library through ILL, and identifies any exclusions, conditions or limitations.

- ○ **Hours Library Open -** Normal business hours for the library.

- ○ **Exceptions to Library Hours Open -** Indicates any exceptions to the normal business hours for the library.

- **Patron Notification Set-up**

  - ○ **ILL Status / E-Mail Text -** Shows *up to five* ILL status categories and the associated E-Mail messages forwarded to patrons when an ILL request enters the associated status.

- **EMail Notice Setup**

  - ○ **EMail Notice Subject -** Shows the notice subject for patron notification emails.

  - ○ **EMail Notice From Name -** Shows the notice "from" name for patron notification emails.

  - ○ **EMail Notice From Address -** Shows the notice "from" address for patron notification emails.

  - ○ **CC Email Address -** Shows the CC email address to which copies of all patron notification emails are sent.

- **URL Information**

  - ○ **Do you want e-mail notification? -** Indicates whether or not the library will receive e-mail notifications on receipt of ILL requests, either **Yes** or **No**.

  - ○ **E-mail notification address -** The e-mail address to which notifications of ILL requests will be sent (e-mail notifications are sent *automatically* by the system).

  - ○ **Library Catalog (URL) -** The URL for the library's Online Public Access Catalog (OPAC).

  - ○ **Library Homepage (URL) -** The URL for the library's Home Page.

  - ○ **ILL hours open -** The hours during which the library is open for ILL activities.

  - ○ **Directions -** Directions for locating the library.

  - ○ **Directions (URL) -** The URL for a map and/or "driving directions" page maintained by the library.

  - ○ **Regulations (URL) -** The URL for a policies/rules/regulations page maintained by the library.

  - ○ **System Message (URL) -** The URL for a general "messages" or "announcements" page maintained by the library.

  - ○ **ILL Message (URL) -** The URL for an ILL-specific "messages" or "announcements" page maintained by the library.

  - ○ **ILL Help Page (URL) -** The URL for an ILL services "Help" page maintained by the library.

  - ○ **Library Help Page (URL) -** The URL for a general library services "Help" page maintained by the library.

To view the Library Information screen:

- Use the scrollbar to scroll through the entire page.

- If desired, click the **Hide Empty Fields** button to remove empty fields (fields containing no data) from the display. (Click the **View All Fields** button to show *all* fields in the display.)

- Click the **ILL Policy Link** button to display ILL policy information for the library (see *Viewing ILL Policies* on page **5-16** for details).

- Click the **Print** button to print a copy of the Library Information Screen (see *Printing Library Information* on page **5-17** for details).

- Click the **Close** button to close the Library Information screen and return to the Library Results List or Search Library Information screen, as applicable.
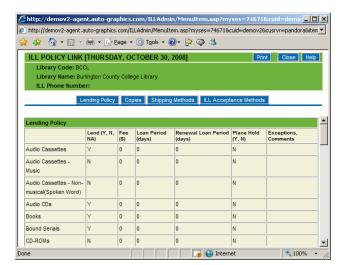
Viewing ILL Policies

The Library Information screen includes an **ILL Policy Link** to *detailed* ILL policy information for the library.

To view ILL policy information:

1. Access the Library Information screen for the desired library (see ***Searching Library Information*** on page **5-11** for details).

2. Click the **ILL Policy Link** button.

   • The ILL Policies screen displays in an *additional* browser window.

3. The ILL Policies screen provides the following information:

   • **Lending Policy -** The **Lending Policy** section contains a listing of material types (books, videos, etc.), and identifies the library's ILL lending policy for *each material type* in its collection.

Typical ILL Policies Screen

   ○ **Lend (Y, N, NA) -** Indicates whether or not the library lends the associated material type through ILL; **Y** indicates the library *does* lend the associated material type through ILL, **N** indicates the library *does not* lend the associated material type through ILL, **NA** indicates the library *does not own* any items of the associated material type.

   ○ **Fee ($) -** Lists the fee required, in US dollars, to borrow items of the associated material type through ILL.

   ○ **Loan Period (days) -** Indicates the number of days for which an item of the associated material type can be borrowed through ILL.

   ○ **Renewal Loan Period (days) -** Indicates the number of days by which the loan period for an item of the associated material type currently on loan can be extended (renewed). A **0** in this column indicates the initial loan *cannot* be renewed.

   ○ **Place Hold (Y, N) -** Indicates whether or not "holds" may be placed on items of the associated material type; **Y** indicates "holds" *can* be placed on items of the associated material type, **N** indicates "holds" *cannot* be placed on items of the associated material type through ILL,

   ○ **Exceptions, Comments -** Indicates any exceptions, restrictions or conditions on borrowing items of the associated material type through ILL.

   • **Copies -** The **Copies** section contains a listing of copy methods (Photo-copy, FAX, etc.), and identifies the fees charged, in US dollars, for copy requests submitted through ILL.

   ○ **# of copies at no charge -** Indicates the number of print copies (pages) for a given copy request for which no fee is charged.

   ○ **Per copy charge -** Indicates the fee (price-per-page) for print copies for a given copy request in excess of the **# of copies at no charge**.

○ **Electronic Data/Microfiche/Microfilm/Micropaque/Other -** Indicates the fee (price-per-page) for copies for the associated media type for a given copy request.

- **Shipping Methods -** The **Shipping Methods** section contains a listing of shipping methods (US Mail, UPS, etc.), indicates whether or not the library utilizes the associated shipping method, and lists the materials that may be shipped by each method listed.

  ○ **Materials -** Indicates the *specific* materials that may be shipped using the associated shipping method. If the **Materials** field is *blank* for a *supported* shipping method, it indicates that *any material type* may be shipped using the associated method.

  ○ **Y, N -** Indicates whether or not the library uses the associated shipping method; **Y** indicates the library *does* use the associated shipping method (subject to the limitations listed in the **Materials** field), **N** indicates the library *does not* use the associated shipping method.

- **ILL Acceptance Methods -** The **ILL Acceptance Methods** section contains a listing of ILL request submission methods, and indicates whether or not the library accepts ILL requests submitted using the associated method.

  ○ **Accept ILL By (Y, N) -** Indicates whether or not the library accepts ILL requests submitted using the associated method; **Y** indicates the library *does* accept ILL requests submitted using the associated method, **N** indicates the library *does not* accept ILL requests submitted using the associated method.

4. Use the scrollbar to scroll through the entire page.

5. Click the **Lending Policy**, **Copies**, **Shipping Methods** and **ILL Acceptance Methods** tabs to scroll the ILL Policies screen to the associated section.

6. Click the **Close** button to close the ILL Policies screen and return to the Library Information screen.

Printing Library Information

You can print a copy of the Library Information screen.

To print library information:

1. Access the Library Information screen for the desired library (see *Searching Library Information* on page **5-11** for details).

   - If desired, click the **Hide Empty Fields** button to remove empty fields (fields containing no data) from the display.

2. Click the **Print** button.

   - An *additional* browser window opens, displaying the formatted Library Information.

3. Click the **Print** link.

   - A standard Print dialog displays.

4. Make the appropriate selections on the Print dialog, then click the **OK** or **Print** button, as applicable. (Click the **Cancel** button to cancel the print request.)

5. Click the **Close** link to close the formatted Library Information screen.

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Chapter 5. FOR AUTHENTICATED USERS

Overview

AGent offers a number of helpful features for users of *authenticated* systems. When you log into AGent as an *authenticated user* (library patron or staff member), the following features are available to you through the **Patron Menu** or **Staff Menu**, as appropriate:

> Additional features and functions available to Library Staff *only* are described in *Chapter 6, For Library Staff*.

- **My Account** - displays the **My Account** menu from which you may access the following features and functions:

  ○ **My Account** - lets you change your login **Password or PIN** and add, edit or delete personal information from your user record. The **My Account** screen also provides access to the **My Search History**, **My Favorite Resources**, **My Preferences**, **Display/Hide Resources**, **Enter My Passwords** and **Edit Translate/Authority Preferences** (for CAT Administration staff *only*) features and functions.

  ○ **My Search History** - provides a listing of your last 20 searches, in reverse chronological order (most recent search first), allowing you to easily execute or modify a prior search. (**My Search History** is also accessible from the **Patron Menu** or **Staff Menu**.)

  ○ **My Favorite Resources** - lets you select your favorite resources from all resources available through your library. Your favorite resources are *automatically* selected each time you log into AGent.

  ○ **My Preferences** - lets you *easily* configure a number of system options to suit your own particular needs. You may also add *up to five* personalized Web Links to the **Resources** menu. (**My Preferences** is also accessible from *any* AGent Search screen.)

  ○ **Display/Hide Resources** - lets you "hide" selected resources. Selected resources are *not* shown in the **Resources** list on any AGent search screen.

  ○ **Enter My Passwords** - Maintains a record of your login information for *user authenticated* reference databases (see *Searching Reference Databases* on page **2-18** for details). You may edit or delete information as desired.

- **URL Submission Form** - lets you submit a Uniform Resource Locator (URL) for inclusion in the Auto-Graphics AGURL Database.

  > This feature is available *only* to subscribers to Auto-Graphics AGURL Database.

- **Blank Request Form** - lets you submit an Interlibrary Loan (ILL) request if your library does not have a title available (see *Using the Blank Request Form* on page **4-1** for details).

  ○ **For patrons:** The Blank Request form is available from the CBB display or through the **Patron Menu**.

  ○ **For library staff:** The Blank Request form is available from the CBB display, through the **Staff Menu**, or through the **ILL Options** menu on Full Record Displays.

  > This feature is available *only* if your library has granted you appropriate ILL permissions.

  > Library Staff with ILL Permissions can access the Blank Request Form through the AGent ILL Administration Module (see the *AGent ILL Administration User Guide* for details).

- **ILL Request Tracking** - lets you track the progress of in-process ILL requests you have submitted (see *ILL Request Tracking* on page **4-8** for details). This feature is available through the **Patron Menu** *only*.

- **Search Library Information –** lets you search your consortium's database of member libraries, and view the library information (Participant Record) for a selected library (see *Searching Library Information* on page **4-11** for details).

> This feature is available *only* if your library has granted you appropriate ILL permissions.

> Library staff may view the *complete* Participant Record for any library. Library patrons may view *abbreviated* Participant Records, as configured by the library's ILL Administrator (see the *AGent ILL Administration User Guide* for details).
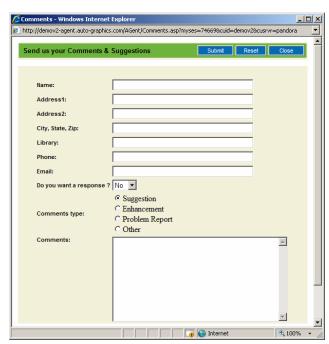
- **Suggest For Purchase** - lets you submit a suggestion to your library to purchase an item.

- **About AGent** - displays information about the AGent application. This feature is available through the **Staff Menu** *only*.

- **AGent News** - displays the AGent "News" page. This feature is available through the **Staff Menu** *only*.

- **Documentation** - displays the AGent "Documentation Download" page. This feature is available through the **Staff Menu** *only*.

- **Application Guide** - Displays the AGent online "Application Guide", which has information related to *optional* features and functions available for AGent, guidelines for *customizing* features and functions within AGent, and *additional* technical information. This feature is available through the **Staff Menu** *only*.

Using the Feedback Form

The **Comments/Feedback** link at the bottom of the **Patron Menu** "Welcome" screen or the "Welcome" screen for *any* staff module provides you with a means of submitting suggestions, enhancement requests, problem reports or other feedback directly to Auto-Graphics. Additionally, Customer SuperUsers can configure the system to send copies of all submitted Feedback forms to *additional* email addresses.

To use the Comments/Feedback form:

1. Click the **Comments/Feedback** link at the bottom of the **Patron Menu** "Welcome" screen or the "Welcome" screen for *any* staff module.

   - The Feedback Form displays in an *additional* browser window.

2. Enter your name in the **Name** text box.

3. Enter your address in the **Address 1**, **Address 2** and **City, State, Zip** text boxes.

4. If you wish to receive a response to your comment/suggestion, enter your phone number and/or email address in the **Phone** and **Email** text boxes, as appropriate.

Feedback Form

- If you wish to receive a response to your comment/suggestion, you *must* provide *either* a **Phone** number *or* **Email** address.

5. Indicate whether or not you wish to receive a response to your comment/suggestion by selecting the appropriate option from the **Do you want a response?** menu; either **Yes** or **No**.

- The *default* selection for this field is **No**.

6. Select the **Comments type** radio button that best describes the type of comment/suggestion you are submitting (the *default* selection for this field is **Suggestion)**:

- **Suggestion** - a suggestion for an improvement to an *existing* feature or function

- **Enhancement** - a suggestion for the addition of a *new* feature or function

- **Problem report** - a notification of improper operation or failure of an *existing* feature or function

- **Other**

7. Enter the text of your comment/suggestion in the **Comments** text box. *This field is mandatory.*

8. When all desired information has been entered, click the **Submit** button to send your comment/suggestion. The Feedback for closes *automatically*.
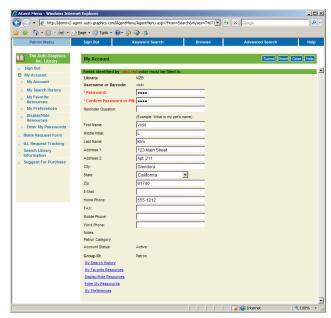
> If you omit a *mandatory* field, a warning dialog displays when you click the **Submit** button. Click the **OK** button on the dialog to close the dialog and return to the form. Enter the necessary information, then resubmit the form.

My Account

The **My Account** feature lets you access and edit your user record. Depending on your login mode (as either a library patron or as a staff member), some features and functions may not be available to you.

To access My Account:

- From the **Patron Menu** or **Staff Menu**, as appropriate, select **My Account** then choose **My Account** from the submenu displayed.

  ○ The My Account screen displays. The screen is pre-filled with the current information from your user record.

- From the My Account screen, you may choose to:

  ○ Change your Password or PIN

  ○ Add, edit or delete personal information (name, address, phone number, etc.)

  ○ Access the **My Search History** feature (see *My Search History* on page **5-5** for details)

My Account Screen

○ Access the **My Favorite Resources** feature (see *My Favorite Resources* on page **5-6** for details).

○ Access the **Display/Hide Resources** feature (see *Display/Hide Resources* on page **5-7** for details).

○ Access the **Enter My Passwords** feature (see *Maintaining Passwords for Reference Databases* on page **5-8** for details).

○ Access the **My Preferences** feature (see *My Preferences* on page **5-9** for details).

• Access the **Edit Translate/Authority Preferences** feature (see *Editing Translate/Authority Preferences* on page **5-14** for details). This feature is available to CAT Administration staff *only*.

> Depending on the specific configuration of AGent for your library, some field names may be different than those described and illustrated in the following paragraphs.

Changing Your Password or PIN

To prevent unauthorized access to your AGent account, you can change your **Password or PIN** periodically, or at any time you feel it is no longer secure.

To change your Password or PIN:

1. Enter a new password in the **Password** and **Confirm Password or PIN** text boxes.

• Your password can contain *any* combination of alphabetic and/or numeric characters, and the underscore character "_". *Do not* include spaces in your password. **Enter your password in *exactly* the same way in both text boxes.**

> If you do not enter your password i*dentically* in both the **Password** and **Confirm Password or PIN** text boxes, a dialog displays the message "Passwords do not match. Please reenter." when the record is saved. Click the **OK** button on the dialog to close the message, and reenter the password in the **Password** and **Confirm Password or PIN** text boxes.

2. Click the **Submit** button to save your new password.

• The My Account screen closes *automatically*.

Editing Your Personal Information

You can add, edit or delete personal information (name, address, phone number, etc.) in your user record. You *cannot* change your **Username or Barcode**.

To edit personal information:

1. If desired, enter or edit your password reminder question in the **Reminder Question** text box.

> In the event you forget your password, you may request that your reminder question be e-mailed to you to provide a hint as to your password. When you enter a reminder question in your user record, *be sure* to include your e-mail address in the **E-mail** text box (see step 4, below).

2. Enter or edit your first name, middle initial, and last name in the **First Name**, **Middle Initial** and **Last Name** text boxes.

3. Enter or edit your mailing address using the **Address1**, **Address2**, **City, Zip** and **Country** text boxes, and the **State** drop-down menu.

4. Enter or edit your e-mail address, telephone numbers and fax number in the **E-mail**, **Home Phone**, **Mobile Phone**, **Work Phone** and **FAX** text boxes.

5. Enter or edit your birth date and Social Security Number in the **Date of Birth** and **SSN** text boxes.

6. Click the **Submit** button to save your changes.

- The My Account screen closes *automatically.*
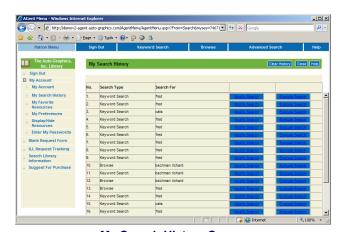
My Search History

The **My Search History** feature retains a record of previous searches allowing you to easily execute or modify a prior search. The number of searches saved in **My Search History** is determined by the **Searches to save in History** setting in **My Preferences** (see *My Preferences* on page **5-9** for details).

To modify or execute a prior search:

- From the **Patron Menu** or **Staff Menu**, as appropriate, select **My Account**, then choose **My Search History** from the submenu displayed; the My Search History screen displays,
  - OR -
  From the My Account screen (see *My Account* on page **5-3** for details), click the **My Search History** link; the My Search History screen displays in an *additional* browser window.

  ○ The My Search History screen provides a listing of your most recent searches, in reverse chronological order (most recent search *first*).

My Search History Screen

  ○ The **Search Type** field shows the type of search performed (**Keyword Search**, **Browse**, **Advanced Search**). The **Search For** field shows the search terms entered for the search.

  ○ Each search listed retains the selected search sources, (as well as any index selections for Enhanced Keyword Search, Browse and Advanced Search).

- To *execute* a prior search, click the **Execute Search** link for the desired search.

  ○ The My Search History screen closes *automatically*.

  ○ The system refreshes to display the appropriate search screen with the search parameters for the prior search entered; the search is then submitted *automatically.*

- To *modify* a prior search, click the **Modify Search** link for the desired search.

  ○ The My Search History screen closes *automatically*.

  ○ The system refreshes to display the appropriate search screen with the search parameters for the prior search entered.

  ○ Make changes to the search term(s), search source(s), and index, scoping and qualifier selections, as desired, then click the **Search** button to submit the search.

- To *delete all searches* from **My Search History**, click the **Clear History** button. A confirmation dialog displays the message "Continue to Clear your Search History?"

  ○ Click the **OK** button to clear all prior searches from your Search History. (Click the **Cancel** button to cancel the clear operation and leave the prior searches intact.)

  ○ The **My Search History** screen refreshes with all prior searches removed from the list.
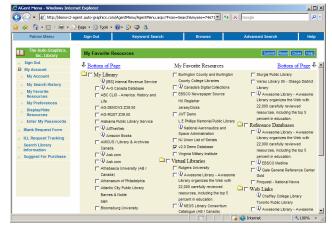
AGent User Guide

My Favorite Resources

Use the **My Favorite Resources** function to select and save your favorite resources from a list of *all resources* available through your library. Each time you log into AGent, your favorite resources are *automatically* selected in the **Resources** menu of each AGent search screen. If you make changes to the **Resources** selected for a given search, you can restore your favorite resources by clicking the **Reset** button.

> Changes to **My Favorite Resources** *do not* take effect until the next time you log in to AGent.

To select or modify your favorite resources:

1. From the **Patron Menu** or **Staff Menu**, as appropriate, select **My Account**, then choose **My Favorite Resources** from the submenu displayed; the My Favorite Resources screen displays,
   - OR -
   From the My Account screen (see *My Account* on page **5-3** for details), click the **My Favorite Resources** link; the My Favorite Resources screen displays in an *additional* browser window.

   My Favorite Resources Screen

   - The My Favorite Resources screen lists *all* resources available to you through your library.

   - Resources are organized under *source headings* (category groupings) such as **My Library**, **Union Libraries**, **Web Resources**, etc. Source headings are shown in **bold** type, and are indicated by a 📁 icon.

2. Use the checkboxes to select/deselect your favorite resources:

   > Checkboxes are not available for weblinks.

   - A *checkmark* ☑ indicates the associated resource is *selected* (will be included in your favorite resources).

   - An *empty checkbox* ☐ indicates the associated resource is *not selected* (will not be included in your favorite resources).

   - Clicking a checkbox repeatedly will toggle it on and off.

3. To select an *individual resource*, select the checkbox ☐ for the desired search source.

4. To select *all resources* within a source heading, select the checkbox ☐ for the desired source heading. The checkboxes for *all resources* under the source heading are selected *automatically*.

   > The *maximum* number of resources that can be selected for any single search was established when your library's AGent system was installed, according to the requirements specified by your library or consortium. If you select *more* than the established *maximum* number of resources as your favorite resources, a warning dialog displays the message "The maximum number of selected databases per broadcast search for your library is (*number*)." Click the **OK** button on the warning dialog to close the dialog. The *last* resource you selected is *automatically* deselected.

5. When all desired resources have been selected, click the **Submit** button to save your changes.

   - A confirmation dialog displays the message "Your changes will not be applied until you log back in.".

6. Click the **OK** button on the confirmation dialog.

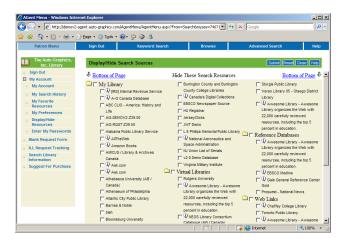   - The My Favorite Resources screen closes *automatically*.

Display/Hide Resources

By default, the **Resources** list shown on each AGent search screen lists *all* resources available to you through your library. You can use the **Display/Hide Resources** function to "hide" selected resources in the **Resources** list. Each time you log into AGent, all resources you have selected to "hide" *are not* shown in the **Resources** menu of each AGent search screen.

> Changes made using the **Display/Hide Resources** function *do not* take effect until the next time you log in to AGent.

To "display" or "hide" resources:

1. From the **Patron Menu** or **Staff Menu**, as appropriate, select **My Account**, then choose **Display/Hide Resources** from the submenu displayed; the Display/Hide Resources screen displays,
    - *OR* -
    From the My Account screen (see *My Account* on page **5-3** for details), click the **Display/Hide Resources** link; the Display/Hide Resources screen displays in an *additional* browser window.

    Display/Hide Resources Screen

    - The Display/Hide Resources screen lists *all* resources available to you through your library.

    - Resources are organized under *source headings* (category groupings) such as **My Library**, **Union Libraries**, **Web Resources**, etc. Source headings are shown in **bold** type, and are indicated by a 📁 icon.

2. Use the checkboxes to display/hide the desired resources:

    - A *checkmark* ☑ indicates the associated resource is *selected* (will be *hidden* in the **Resources** list on *all* AGent search screen).

    - An *empty checkbox* ☐ indicates the associated resource is *not selected* (will be *displayed* in the **Resources** list on *all* AGent search screens).

    - Clicking a checkbox repeatedly will toggle it on and off.

3. To select an *individual resource*, select the checkbox ☐ for the desired search resource.

4. To select *all resources* within a source heading, select the checkbox ☐ for the desired source heading. The checkboxes for *all resources* under the source heading are selected *automatically*.

5. When all desired resources have been selected, click the **Submit** button to save your changes.

    - A confirmation dialog displays the message "Your changes will not be applied until you log back in.".

6. Click the **OK** button on the confirmation dialog.

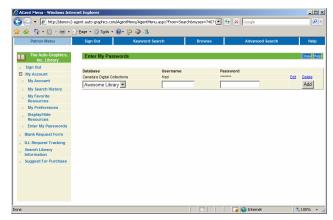   - The Display/Hide Resources screen closes *automatically*.

Maintaining Passwords for Reference Databases

Your library may make certain reference databases available that require *user authentication*. You need to supply a *personal* username and password to search and access these sites. The **Enter My Passwords** function lets you store your *personal* username and password for *each* user-authenticated reference database available through your library. When you include a user-authenticated reference database in a search, AGent *automatically* submits your personal username and password to the site to retrieve the search results.

To add a username and password:

1. From the **Patron Menu** or **Staff Menu** as appropriate, select **My Account**, then choose **Enter My Passwords**.

    • The Enter My Passwords screen displays. The Enter My Passwords screen lists *all* currently defined personal usernames and passwords for user-authenticated reference databases.
    - OR -
    From the My Account screen (see *My Account* on page **5-3** for details), click the **Enter My Passwords** link; the Enter My Passwords screen displays in an *additional* browser window.

    Enter My Passwords Screen

    > If *no* usernames and passwords are currently defined, the message "No Records Found" shows at the top of the screen.

    • The **Database** menu lists *all* user-authenticated reference databases available through your library.

2. Select the database for which you wish to enter your username and password from the **Database** menu.

3. Enter your *personal* username and password for the selected database in the **Username** and **Password** text boxes, respectively.

4. When the appropriate information has been entered, click the **Add** button.

    • Your **Username** and **Password** for the selected database are added to the list at the top of the screen, and the selected database is removed from the **Database** menu.

5. Repeat steps **2** through **4** to add usernames and passwords for *additional* databases.

    > When usernames and passwords have been added for *all available* user-authenticated databases, the **Database** menu is removed from the screen.

To edit usernames and passwords:

1. From the **Patron Menu** or **Staff Menu** as appropriate, select **My Account**, then choose **Enter My Passwords**.

    • The Enter My Passwords screen displays. The Enter My Passwords screen lists *all* currently defined personal usernames and passwords for user-authenticated reference databases.

    > If *no* usernames and passwords are currently defined, the message "No Records Found" shows at the top of the screen.

2. Click the **Edit** link for the database for which you wish to edit your username and/or password.

- The *currently defined* **Username** and **Password** for the associated database are displayed in *editable* text boxes.

- Edit your **Username** and **Password** as appropriate.

3. When all desired changes have been entered, click the **Update** link.

- The list at the top of the screen refreshes to display your changes.

4. Repeat steps **2** and **3** to edit *additional* usernames and passwords.

To delete usernames and passwords:

1. From the **Patron Menu** or **Staff Menu** as appropriate, select **My Account**, then choose **Enter My Passwords**.

- The Enter My Passwords screen displays. The Enter My Passwords screen lists *all* currently defined personal usernames and passwords for user-authenticated reference databases.

   > If *no* usernames and passwords are currently defined, the message "No Records Found" shows at the top of the screen.

2. Click the **Delete** link for the database for which you wish to delete your username and/or password.

- A confirmation dialog displays the message "Are you sure you want to delete this record?"

3. Click the **OK** button to delete your **Username** and **Password** for the associated database. (Click the **Cancel** button to cancel the deletion and leave the **Username** and **Password** for the associated database unchanged.)

- The list at the top of the screen refreshes with the **Username** and **Password** for the selected database deleted.

- The associated database is returned to the **Database** menu.

My Preferences

The **My Preferences** feature lets you easily configure a number of system options to suit your own particular needs. You may also add up to five personalized Web Links to your **Resources** menu. The **My Preferences** feature can be accessed from the My Account screen, or from *any* AGent search screen.

> Preferences set using the **My Preferences** feature apply *only* when you log into AGent using your personal user name and password. Depending on the configuration of AGent for your library or consortium, some options may not be available.

To set your user preferences:

1. From the **Patron Menu** or **Staff Menu**, as appropriate, select **My Account**, then choose **My Preferences** from the submenu displayed; the My Preferences screen displays,
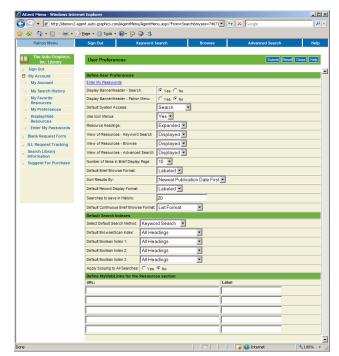*- OR -*
From the My Account screen (see *My Account* on page **5-3** for details), click the **My Preferences** link; the My Preferences screen displays in an *additional* browser window,
- OR -
Click the **My Preferences** link on *any* AGent search screen; the My Preferences screen displays in an *additional* browser window.

2. Use the options in the **Define User Preferences** field to configure *general* preferences for AGent:

- If desired, click the **Enter My Passwords** link store your *personal* username and password for *each* user-authenticated reference database available through your library (see *Maintaining Passwords for Reference Databases* on page **5-8** for details).

- If your library has enabled multiple language support, select the desired display language for the AGent Search interface from the **Select Default Language** menu.

  ○ The **Select Default Language** menu lists *all* display languages available through your library or consortium.

- Use the **Display Banner/Header - Search** options to enable or disable display of the library or consortium banner on all screens in the AGent Search interface.

  ○ Select the **Yes** (banner/header *will* be displayed) or **No** (banner/ header *will not* be displayed) radio button, as desired.

Typical User Preferences Screen

- Use the **Display Banner/Header - Patron Menu** (for library patrons) or **Display Banner/Header - Admin** (for library staff) options to enable or disable display of the library or consortium banner on the **Patron Menu** screen or staff administration screens, as appropriate.

  ○ Select the **Yes** (banner/header *will* be displayed) or **No** (banner/header *will not* be displayed) radio button, as desired.

- **For library staff** *only***:** Select your desired default login mode from the **Default Login Group** menu.

  ○ The **Default Login Group** selection determines the staff mode you will enter when the **Staff Menu** button on any AGent search screen is selected.

  ○ The **Default Login Group** menu lists *all* staff modes to which you are granted access.

- Select your desired default system access display from the **Default System Access** menu.

  ○ The **Default System Access** selection determines the screen that displays when you *first* login to AGent.

  ○ **For library patrons:** Select **Search** to display the *default* search screen (see step 3, below, for details) for your account when you login to AGent. Select **Patron Menu** to display the Patron Menu for your account when you login to AGent.

  ○ **For library staff:** Select **Search** to display the *default* search screen (see step 3, below, for details) for your account when you login to AGent. Select **Admin** to display the staff screen for your **Default Login Group** (see step 5, above, for details) when you login to AGent.

- Use the **Use Icon Menus** option to enable or disable the "icon-based" toolbar in the AGent search interface (see *The Toolbar* on page **2** for details).

  ○ Select **Yes** to use the "icon-based" toolbar. Select **No** to use the "text-based" toolbar.

- Select your desired display format for search sources in the **Resources** menu on all AGent search screens from the **Resource Headings** menu.

  ○ Select **Collapsed** to display the resource headings only in the **Resources** menu (clicking a heading name displays the individual search sources under the heading).

  ○ Select **Expanded** to display the individual search sources under *each* resource heading in the **Resources** menu.

- Use the **View of Resources** menus to "display" or "hide" the **Resources** menu on the AGent **Keyword Search**, **Browse** and **Advanced Search** screens.

  ○ Select **Displayed** to display the **Resources** menu on the associated AGent search screen.

  ○ Select **Hidden** to hide the **Resources** menu on the associated AGent search screen. (The **Resources** menu can be *selectively* displayed at any time by clicking the **Display the Resources of (***library name***)** link on any AGent search screen for which the **Resources** have been hidden.)

- Select the number of search results (items) you wish to be shown on *each page* of Title Lists, Term Lists and Number Lists from the **Number of Items in Brief Display Page** menu; either **10**, **20**, **30**, **40**, **50** or **100**.

- Select your desired default display format for Title Lists (see *Title List* on page **3-23** for details) from the **Default Brief Browse Format** menu; either **List** or **Labeled**.

- Select your desired default sort order for search results (Title Lists) from the **Sort Results By** menu; either **Newest Publication Date First**, **Newest Publication Date Last**, **Newest Record First**, **Newest Record Last**, **Alphabetically by Title**, **Alphabetically by Author**, **Number of Locations/Title, LC Call Number/Title, Dewey Call Number/Title, Local Call Number/Title**, **URL** or **Relevancy**.

- Select your desired default display format for Full Record Displays from the **Default Record Display Format** menu; either **Card**, **Labeled** or **MARC**.

- Enter the number of searches you wish to save in your Search History (see *My Search History* on page **5-5** for details) in the **Searches to save in History** text box.

  ○ You may save from **0** to **50** searches in your Search History.

- Select your desired default display format for brief browse lists on the Search Summary screen from the **Default Continuous Brief Browse Format** menu; either **List Format** or **Thumbnail Format**.

- **For ILL Administration staff *only***: Use the **Start With ILL Menu Tree Open** options to set the *default* display format for the **ILL Options** menu on Full Record Displays; either **Yes** (the **ILL Options** menu is *expanded* by default) or **No** (the **ILL Options** menu is *collapsed* by default).

- **For CAT Administration staff *only***: Use the **Start With Cataloging Menu Tree Open** options to set the *default* display format for the **Cataloging** menu on Full Record Displays; either **Yes** (the **Cataloging** menu is *expanded* by default) or **No** (the **Cataloging** menu is *collapsed* by default).

- **For CAT Administration staff *only***: Use the **Start With UDMM Menu Tree Open** options to set the *default* display format for the **UDMM Options** menu on Full Record Displays; either **Yes** (the **UDMM Options** menu is *expanded* by default) or **No** (the **UDMM Options** menu is *collapsed* by default).

3. Use the options in the **Default Search Indexes** field to configure *search* preferences for AGent:

- Select your desired default search method from the **Select Default Search Method** menu; either **Keyword Search**, **Browse** or **Advanced Search**.

  ○ Your default search method determines the AGent search screen that displays when you *initially* login to AGent.

- Select your desired default search index for **Browse** searches from the **Default Browse/Scan Index** menu.

  ○ The **Default Browse/Scan Index** menu lists all indexes supported by your library's AGent system.

- Select your desired default search indexes for **Advanced Search** searches from the **Default Boolean Index 1**, **Default Boolean Index 2** and **Default Boolean Index 3** menus.

  ○ The **Default Boolean Index 1**, **Default Boolean Index 2** and **Default Boolean Index 3** menus list all indexes supported by your library's AGent system.

- **For CAT Administration staff** *only***:** Select your desired download cart type from the **Download Cart Type** menu; either **My Cart** or **Library Cart** (see the *AGent CAT Administration User Guide* for more information).

  ○ The **My Cart** option lets you save records for download to a *unique* cart associated with your *user name*. Other CAT staff members *cannot* add records to this list.

  ○ The **Library Cart** option allows *multiple* CAT staff members to add records for download to a *common* cart associated with *your library*.

- Indicate whether or not you wish scoping to be applied to *all* searches using the **Apply Scoping to All Searches** radio buttons.

  ○ Select the **Yes** radio button to apply your scoping selection to *all* searches (Keyword Search, Browse, Advanced Search). Select the **No** radio button to apply your scoping selection to Advanced Search *only*.

4. If desired, use the **Define MyWebLinks for the Resources section** to add up to *five* personalized Web Links to the **Resources** menu for your account.

> Personal Web Links are displayed at the top of the **Resources** menu under the heading **My Web Links**.

- Enter the *full* Uniform Resource Locator (including **http://**) for the desired Web Link in the **URL** text box.

- Enter a name for the web link in the associated **Label** text box.

> The **Label** can include alphabetic and numeric characters and spaces. The **Label** may be a *maximum* of 50 characters in length, *including* spaces.

5. Once all desired preferences have been specified, click the **Submit** button to submit your changes.

- A confirmation dialog displays the message "Apply changes to the current session?"

6. Click the **OK** button to apply changes to your preferences to your *current* login session. Click the **Cancel** button to leave your preference unchanged for your *current login session*, and to apply your changes at your *next login*.
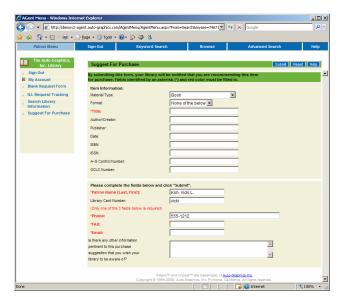
- The User Preference screen closes *automatically*.

Suggest For Purchase

The **Suggest For Purchase** feature lets you submit a suggestion to your library to purchase a copy of a title.

The **Suggest For Purchase** feature is available *only* if your library has enabled the *optional* Buy / Borrow / Suggest functionality.

To use Suggest For Purchase:

1. From the **Patron Menu**, select **Suggest For Purchase**.

   - The Suggest For Purchase form displays.

2. Select the desired material type for the item you wish your library to purchase from the **Material Type** menu. (**Book** is the default selection for this field.)

3. If you wish to specify a desired format for the item, select the desired format from the **Format** menu. (**None of the below** is the default selection for this field.)

4. Enter the appropriate bibliographic information in the **Title**, **Author/Creator**, **Publisher** and **Date** text boxes. Enter any standard numbers that uniquely identify the title in the **ISBN**, **ISSN**, **A-G Control Number** and/or **OCLC Number** text boxes.

Suggest For Purchase Screen

   - The publication **Title** is *mandatory*. All other information is *optional*.

   - Enter the **Date** using the format MM/DD/YYYY, *including* the slashes.

5. Enter the necessary patron information:

   - Enter your name in the **Patron Name** text box. *This information is mandatory*.

     Depending on the configuration of AGent for you library, the system *may* automatically fill the **Patron Name** field with the name from your user record. If your name is entered automatically, you *should not* change it.

   - Enter your library card number in the **Library Card Number** text box.

   - Enter your telephone number, fax number and/or email address in the appropriate **Phone**, **FAX** and **Email** text boxes. *You must provide at least one of these items*.

   - Enter any other information related to your suggestion in the text box provided.

6. When all necessary information has been entered, click the **Submit** button to submit your suggestion.

Editing Translate/Authority Preferences

> Translate/Authority Preferences are available only if your library has purchased the *optional* Translate/Authority module. The **Edit Translate/Authority Preferences** feature is available to CAT Administration staff *only*.

Authority Preferences are used to configure the authority validation hierarchy for the user. The authority validation hierarchy determines the order in which authority records are searched during authority control processing (see the *AGent Authority/Translate User Guide* for details). The validation hierarchy may include records from sources such as the Library of Congress, National Library of Canada, Medical Subject Headings, etc.
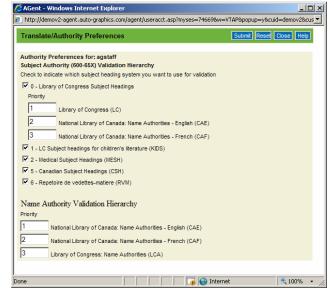
During authority control processing, AGent searches authority records from the top of the validation hierarchy down, until a match is found. When a match for a bibliographic heading is found in an authority record at the top of the validation hierarchy, the bibliographic heading is flagged as "**VALIDATED**" and the remaining authority records are not searched.

> Your Translation preferences are established by your library's User Administrator, and *cannot* be edited using the **Edit Translate/Authority Preferences** feature.

To modify Authority/Translate preferences:

1. From the My Account screen (see *My Account* on page **5-3** for details), click the **Edit Translate/Authority Preferences** link.

   - The Translate/Authority Preferences screen displays in an *additional* browser window.

2. Use the **Subject Authority (600-65X) Validation Hierarchy** checkboxes to select the authority files you wish to use for "subject" validation.

   - A *checkmark* ☑ indicates the associated authority file *will be* used for subject validation.

   - An *empty checkbox* ☐ indicates the associated authority file *will not be* used for subject validation.

   - Clicking a checkbox repeatedly will toggle it on and off.

Translate/Authority Preferences Screen

3. If the **Library of Congress Subject Headings** option has been selected, use the **Priority** text boxes to specify the priority (order of preference) for the authority files listed, beginning with "**1**."

   - You must enter a *unique* preference number in *each* **Priority** text box.

4. Use the **Name Authority Validation Hierarchy – Priority** text boxes to specify the priority (order of preference) for the authority files listed, beginning with "**1**."

   - You must enter a *unique* preference number in *each* **Priority** text box.

5. When all desired changes to authority/translate preferences have been made, click the **Submit** button to save your changes.

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