

## III Millennium OPAC TIPS


*This is a brief OPAC “cheat sheet” compiled by the Reference Issues Committee. For more Millennium training documents, visit <http://riclan.org/support> or view the HELP Manuals in Millennium Client.*

- ❖ If an author is entered first name first (as a patron might), the system will automatically redirect the search to the correct *last name, first name* entry.
- ❖ “See” and “See also’s” references are not showing up at this time. They are in the authority files and should be there when we go live.
- ❖ Searches can be refined from any screen – use the index drop down menus, sort options, scopes and Limit/Sort search to add or change search criteria.
- ❖ “View Entire Collection” is a scope, not a limit. Limits are set on the Advanced Search or Limit/Sort Search screens. You may only enter **one** scope, but **multiple** limits.
- ❖ “Limit/Sort Search” is a powerful tool. It appears on any browse search. You may limit the results to any format listed on the drop down menu. The new results will show yours AND other library locations. Three locations show on the first results page for each item. Go into the full record to see all locations. If you use the scope (the window with “View Entire Collection”) to limit to one library location or material type, results will display **only** for the one location or material type.
- ❖ If “Limit to Available Items” is selected, be aware that Reference materials might not be included in the results. It will look only for circulating items.
- ❖ The Search History drop down menu keeps track of queries – use as a shortcut to return to previous searches. This may clear if the computer isn’t used for a while and OPAC times out – or if HOME is selected to start a new search.
- ❖ Many fields in an item record are linked for interactive searching – author, title, subject, or call number can be selected and searched.
- ❖ Use the live subject headings to link to items of similar subjects – used to be called Related Works.
- ❖ “General Keyword” is a big index that includes Author, Title, Subject, Notes and possibly Contents fields.

- ❖ There several ways to return to earlier screens without using the BACK arrow of a web browser – Return to List, Previous Screen, Another Search, Start Over, New Search and Home appear on almost all displays.
  - **ANOTHER SEARCH** brings up the same search index tab (author, title, etc), keeps scope & saves search history, eliminate limits.
  - **START OVER & NEW SEARCH** return to basic search homepage, keep the scope and search history, eliminate limits.
  - **HOME** returns to basic search homepage, wipes out scope, limits, and search history.
  
- ❖ Holds will show on the title results list where it says “55 copies available at Ashaway, Barrington...” Few holds show at the moment because only the staff practice holds are entered.
  
- ❖ Item Specific holds cannot be placed in OPAC. Try finding the correct record in OPAC, copy the ISBN #, go into Client, paste the ISBN into Millennium search screen (use i-standard number) and place the item specific hold. If you are in staff mode, on the extended display, the bib number appears on the screen at the top of the record (ex. B16317907). You can also paste this into Client using “.Record No.” from the pull-down list.
  
- ❖ To pull up all records at a particular location of a particular format (DVD/Sound Recordings, etc), use Advanced Search, select the limit(s) and enter \*\* (double asterisk) as a wildcard in the search field. OPAC will not search with an empty search field.
  
- ❖ ISBN in staff mode is called “Standard Number”.
  
- ❖ Truncation/Wildcards:
  - ? replaces one letter (wom?n) or (cat?)
  - \* is for up to 5 characters (labor\*) will get laboratory and laborious
  - \*\* can be used for any number of non-space characters.
  - Use \*\* as wildcard to fill the search field when you want to bring up everything in a category.
  - Keyword searching can also include the operators “near” to find terms within 10 words of one another; and “within”  
Ex.: “water within 5 pollution”.
  
- ❖ Patrons may change their email addresses in VIEW YOUR PATRON RECORD but cannot change anything else.
  
- ❖ Patrons (and staff) can save “preferred searches” of favorite authors, subjects, etc. These are stored in “View Your Patron Record” and will be updated automatically as new items in those categories are added to the system.

- ❖ Log into Staff Mode OPAC with a staff coded library barcode. Toggle back & forth between views using STAFF VIEW & PUBLIC VIEW buttons.
- ❖ Author, title, and subject fields are NOT interactive in Staff Mode.
- ❖ View activity dates in Staff Mode by selecting an item number for a particular location in the full item record
- ❖ If you are in Staff Mode and go into the full record of the item you will see a list of the owning libraries using the new library abbreviations we are not familiar with yet. At the top of the screen click on “Public View” and you will see the library names spelled out.
- ❖ Four functions you will need Millennium Client for:
  1. Change item status
  2. Update Patron record
  3. Item specific holds/Queue status
  4. Run Holds list



- ❖ Open the Millennium Toolbar by selecting  from the side menu in the client. Use this to toggle back and forth between the OPAC (globe) and the Circulation or Cataloging modules.
- ❖ To search a patron record in Circ Desk mode, scan barcode or enter the letter 'n' (which is the index tag for Patron Name) followed by the patron name.
- ❖ To view where a patron is on the holds list, go into the patron record in Millennium Client; bring up holds; click or highlight one hold/RIGHT CLICK on the item – gives you a list of holds on this item.

If you find new or shorter ways of doing things when you start using III OPAC or Millennium Client, please share them with everyone by posting them on Clan mail!