How To Set Up the "Locate Similar Record" Function and Use It to Overlay Bib Records

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Introduction – the Process

The Locate function in ALEPH is present in the OPAC - GUI and WEB, the ILL module, and the Cataloging module. When locate is selected, the system uses the record that is open to construct a search string that it searches in the target database. This database can be an ALEPH database (or base) or a z39.50 database. In order to overlay a local bibliographic record with a record from a z39.50 library, you need to use the 'Locate similar record' function in the Cataloging module. This option is available from the edit menu in that module. After selecting 'locate' you will retrieve a list of target databases. This list is controlled by the locate.dat file on your client and can be edited in the GUI Admin module. After selecting a single target database the source record will be searched using the search strategy configured in tab_locate for that target. If records are found, they will be displayed in a brief display window. From this window there are two options — to display the full record or to select the record. Selecting the record will result in your local record being overlaid/merged with the newly retrieved record.

The Locate Menu

The list of target libraries can consist of ALEPH databases and bases as well as z39.50 databases. To edit the list of libraries you will need to go into the GUI Admin module. Select Libraries Manager from the Configuration pull-down menu and go to the third tab of the Libraries Manager. The tab is called Bases. This list should be edited to include only those ALEPH and Z39.50 bases that your library wishes to target in locate searches. This list will have to include bases targeted in Cataloging, GUI-OPAC and ILL searches. To find out how to add additional z39.50 libraries, see the document z39.50 gate. Note that any base or database name that is entered in locate.dat must also be set up in tab_locate.

An example of z39.50 libraries entered in locate.dat:

MIT Libraries by Z39.50	MIT	Z3901
Metro. Boston Library Net.	MBLN	Z3901
Louisiana NOTIS Consortium	LOUIS	Z3901

Note that the contents of the first column are textual, the second column must contain the z39.50 base name assigned in tab_base.eng and the third column must contain z3901. All MARC21 libraries will be in Z3901. [Z3902 is for UNIMARC and z3904 is for German MARC].

The Locate Table [tab_locate]

The Locate table tells the system which field or fields in the local record should be used to construct a search for the same record in an external database. The Locate in the OPAC and Cataloging modules uses the XXX01/tab/tab_locate; the Locate in the

ILL module uses the XXX20/tab/tab_locate. This means that the search mechanism you configure for Cataloging will also be in force when you attempt to locate a similar record from the OPAC. Keep this in mind when setting up the tables. Also keep in mind that the locate function will only work in databases that are mentioned explicitly in tab_locate.

In tab_locate you define three things:
- the field or fields in the local record that will be used to derive a search string,
- the manner in which keywords will be extracted from the field to create a search string,
- the indexes in the target database that will be searched.

There are three programs that derive search terms from fields:

locate_str_0 - Takes sub-field content as is
locate_str_1 - Runs "build_filing_key" on sub-field and takes the two longest words
locate_str_2 - Takes year from 008## Position 8 Length 4

Most fields should use locate_str_1. For details on tab_locate, consult the *Database Management Guide*, section UTIL G.1.h.

Setting up the merge and overlay for locate

The ALEPH configuration table tab_fix, which is located in the data_tab directory of XXX01 and XXX20 libraries, has a section for Locate. This section is marked with LOCAT in col. 1. The LOCAT section should have a line to call tab_doc_merge. It can call any section in tab_doc_merge, but unless you set up a special section, section 1 should be used as the default. To call other fix_doc programs, simply enter them with LOCAT in the first column and the program name in the second. Tab_fix should be set up in the XXX01, XXX10 and XXX20 databases.

[tab_fix]
LOCAT fix_doc_merge_1

(For additional information on tab_fix, consult the *Database Management Guide*, section UTIL M.11.)

The ALEPH configuration table responsible for determining which fields from the local and target records are retained or overwritten in tab_doc_merge. Locate can either use the default settings (the section with 01 in the first column) or new settings can be created. Note that the value entered in column one of tab_doc_merge should correspond to the final digit in the fix_doc_merge line entered in tab_fix. So, if you are using section 01 of tab_doc_merge, tab_fix will read LOCAT   fix_doc_merge_1. If you are using section two, tab_fix will read LOCAT   fix_doc_merge_2.

(For additional information on tab_doc_merge, consult the *Database Management Guide*, section UTIL M.15.)

Client settings

There is a flag in the CATALOG\TAB\catalog.ini file on the PC client marked Locate. This section controls whether or not the merge is automatic. If set to Y, the merge will be automatic, N or Q function identically and result in a system prompt before merging the two records.

```
[Locate]

MergeRecord=Q
```

There are three possible values; Y, N, Q:
  Y= Merge;
  N= Open a new window;
  Q = pop-up a query dialog window.