Sierra System Administration

# How to Troubleshoot Scopes and Scoping

This guide covers both scoping for patron searches of the catalog and scoping for staff functions.

## Trouble Report Descriptions

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

**Best Practices:** **using database maintenance scoping with multiple accounting or serial units.**

If you have not previously done so, create a login with no scope assigned. This login will only be used by the administrator for clean-up. Set the login's Login Tab in the Login Manager to prompt for user initials.

Some system administrators create a set of administrative "troubleshooting" user initials for each accounting or serial checkin unit in order to be able to access records without having to request the user initials and password of the staff member who created an unscoped record. The administrator determines to which unit the staff member belongs and enters the appropriate administrative user initials during the clean-up process.

**A staff member tries to edit a newly created record and receives the message: "Record outside of Scope".**

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

**Resolution:**

1. Log into the system using the login with no scope assigned.
2. If the record belongs to an accounting or serial unit (order, checkin), enter the user initials of the staff member who created the unscoped record or your administrative "troubleshooting" user initials to set the correct unit.
3. Add the correct location code and save the change. The record should now be correctly scoped and available to the staff member.

To prevent the problem from occurring in the future, be sure that every record creation template contains a valid scoped location or prompts the user to enter a location code. Make sure that staff workflow includes inputting a valid location during manual record creation and inputting a valid location code for downloaded records.

### When users limit a WebPAC search to a specific scope, items in a recently added location aren't found.

**Cause:** The location code was added to records before it was added to the scope rule.

**Resolution:** Make sure the location has been added to the appropriate scope rule.

1. Use an unscoped login to log on to the system.
2. Create a review file of the unscoped records by finding all records with the unscoped location code.
3. Use Rapid Update to insert a suppression code into the unscoped records.
4. Still using Rapid Update, insert a code that does not indicate suppression.

Changing a suppression code causes the system to reindex the records, forcing them into the proper scope.

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

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

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