

## Edit Pathfinder Content

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## Revision History

Date	Section title	Description of changes
November 2002	All sections	Updated as needed to reflect redistribution of actions on new Edit, Action, and View lists.
February 2003	1. Edit pathfinder: basics; 3. Pathfinder actions summary 2. Pathfinder preferences 4. Pathfinder editing techniques	Revised to document new constant data terminology and functions: Derive New Constant Data Record, Apply Default CD, Select Constant Data.  Updated to reflect interface changes and new function buttons on the Pathfinder Options screen. Updated procedures for entering diacritics and special characters.
June 2003	2. Set pathfinder preferences	Revised to reflect changed labels for some buttons on each Options screen: <b>Save for Session</b> and <b>Save My Default</b> .
February 2004	1. Edit pathfinder: basics	Updated information on using the Active Records screen.
May 2004	1. Edit pathfinder: basics	Documented new option to turn off the logoff warning for active records.

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# 1 Edit pathfinder: basics

## Pathfinders you can edit

- You can edit all pathfinders contributed by your institution and all pathfinders for which your institution is a designated **maintainer**. To use a pathfinder contributed by another library, **derive a new pathfinder from** the pathfinder and then modify it.
- You cannot edit a pathfinder while another user is editing the same pathfinder.
- You cannot edit a pathfinder if another user (that is, other staff at the contributing institution or a maintaining institution) has saved a working copy of it in the pathfinder save file. Once a pathfinder is saved, you cannot save a second working copy.
- Only users authorized to edit a pathfinder (users at contributing or maintaining institutions) can save a working copy of the pathfinder.

## Begin editing pathfinder

To	Do this
Edit a pathfinder listed on results screen	Click the <b>Edit</b> button next to the title of the pathfinder you want to edit. If the system responds with a message asking you to clone (derive a new pathfinder from) the pathfinder, click the <b>Clone</b> button to create a copy of the pathfinder for editing.
Edit a displayed pathfinder	On the Edit list, click <b>Edit Pathfinder</b> or <b>Derive New Pathfinder</b> . If the system responds with a message asking you clone (derive a new pathfinder from) the pathfinder, click the <b>Clone</b> button to create a copy of the pathfinder for editing.
Edit a pathfinder created by another library	Display the pathfinder. On the Edit list, click <b>Derive New Pathfinder</b> .
Create and edit a new pathfinder	On the Pathfinders tab, under Create Options, click <b>Pathfinder</b> . Open the list of templates and click <b>Outline</b> or <b>Linear</b> . Supply a URL in the text box or leave the text box empty to start with a blank template. Click <b>Create</b> . the system displays the new pathfinder for editing using the view you select.

## Pathfinder locked for editing

- Once you begin editing a pathfinder or save a working copy of the pathfinder, it is locked.
- Other users cannot edit the pathfinder until you release the lock.
- To **unlock** the pathfinder, **cancel changes** or **replace** the pathfinder in the pathfinder database or delete the working copy from the pathfinder save file.

- For a short-term lock, the system automatically unlocks the pathfinder after **30 minutes** of inactivity. A short-term lock is in effect while a user edits a pathfinder without saving the working copy in the pathfinder save file. The long-term lock placed on a saved pathfinder extends for 180 days unless released. You can renew a long-term lock by resaving a pathfinder.
- **Logoff warning.** When you click **Logoff** to end a session, the system checks for pathfinder records open in edit mode. If you have pathfinders locked for editing or new pathfinders not yet saved or added to the pathfinder database, the system displays a message to remind you to complete the pathfinders (or save them) before logging off.
  - To complete your work on the pathfinder(s), on the message screen click **Show Active Records** or press <Ctrl><Shift><9>. Or, on the Pathfinders tab, under Show Options, click **Active Pathfinders** or press <Alt><4>. On the Active Records screen, under Pathfinders or Pathfinder Save File, click the link for the pathfinder you were editing. For each active pathfinder, the link shows the title and either a pathfinder number or a pathfinder save file number. If the pathfinder contains no title, **No Title Provided** appears in the link. For a new pathfinder (not yet saved or added to the pathfinder database), the link shows only the title or **No Title Provided**.
  - To log off and discard changes to the active pathfinder(s), on the message screen click **Logoff immediately**.
- **Turn off logoff warning for active records**

If you prefer **not** to be notified about active records before logging off, use the **Show or Hide Logoff Warning** option to prevent the system from displaying this warning. To view or change the setting, do one of the following:

  - From the End Your Session screen (the logoff warning), go directly to the Interface Customization Options screen by clicking **Customize your setting**.
  - Or
  - On the General tab, click **Admin**. On the Preferences screen, click **General Options**. Then click **Interface Customization Options**. On the Interface Customization Options screen, find the **Show or Hide Logoff Warning** option and select **Hide**.

**Use the Active Records screen**

Action	How to
Go to Active Records screen	Press <Ctrl><Shift><9>. Or On the Pathfinders tab, under Show Options, click <b>Active Pathfinders</b> or press <Alt><4>.

Action	How to
Resume editing a pathfinder	Under Pathfinders, click the pathfinder number. The link for each active pathfinder includes the title from the pathfinder or (if the pathfinder contains no title) <b>No Title Provided</b> . For a new pathfinder (not yet saved or added to the pathfinder database), the link shows only the title or <b>No Title Provided</b> .
Resume editing a saved pathfinder	Under Pathfinder Save File, click the save file number. The link for each active pathfinder includes the title from the pathfinder or (if the pathfinder contains no title) <b>No Title Provided</b> .
Resume editing a pathfinder constant data record	Under Pathfinder Constant Data, click the constant data name. Or click <b>New</b> (if editing a newly created constant data record.).

**Derived new (Cloned) pathfinder not on Active Records screen**

- When you derive a new pathfinder from an existing pathfinder, the **base** pathfinder (the pathfinder you derived from) is no longer listed on the Active Records screen.
- The link for the new pathfinder contains the title only (not a pathfinder number or save file number).

**Pathfinder editing views**

- **Linear view**
  - Provides a complete editing template that shows the content of all fields for each element of the pathfinder.
  - Best when entering information for a group of consecutive elements.
- **Outline view**

- Divides the Editing Pathfinder screen into 2 sections. One section contains the outline. The other section contains the editing template for the element currently selected (marked with an asterisk) in the outline area.
- Provides an outline that shows the titles or URLs of headers, links, search queries, and other elements in the pathfinder. Each title or URL is hyperlinked to a detailed editing template for the element.
- Shows header elements expanded (titles of subordinate headers/links appear) by default. You can collapse the view for each header to display the header title only.
- Lets you click a title or URL in the outline area to move a specific element into editing focus. In the outline area, an asterisk (\*) indicates the element with editing focus.

**Set default editing view**

	Action
1	On the General tab, under Admin Options, click <b>Preferences</b> .
2	At the Preferences screen, click <b>Pathfinder Options</b> .
3	<p><b>Pathfinder views.</b> Under <b>Pathfinder Record View</b>, <b>Pathfinder Save File Record View</b>, and <b>Pathfinder Constant Data Record View</b>, select the view you want to use for editing pathfinders.</p> <ul style="list-style-type: none"> <li>• Click to select the option button for your preferred view (Linear or Outline). While editing a pathfinder, you can switch views at any time.</li> </ul> <p><b>Default setting:</b> Linear.</p>
4	<p><b>Change default or change for current session</b></p> <ul style="list-style-type: none"> <li>• To use the settings for the current session only, at the top or bottom of the Pathfinder Options screen, click <b>Save For Session</b>.</li> <li>Or</li> <li>• To use the settings for future sessions, click <b>Save My Default</b>.</li> </ul> <p><b>Change view while editing or creating a pathfinder</b> While editing a pathfinder or pathfinder constant data, you can switch views at any time using the View list (top right corner of screen). Before creating a new pathfinder or pathfinder constant data record, you can select the editing view at the Create Pathfinder screen or the Create Pathfinder Constant Data screen.</p>

**Customize outline view**

	Action
1	On the General tab, under Admin Options, click <b>Preferences</b> .
2	At the Preferences screen, click <b>Pathfinder Options</b> .

	<b>Action</b>
3	<p>Under Pathfinder Outline View, click an option button to select <b>Split Screen Horizontally</b> or <b>Split Screen Vertically</b>.</p> <ul style="list-style-type: none"> <li>• If you select <b>Horizontal</b>, when you edit a pathfinder in the outline view, the outline appears in the top section of the page and an editing template for the currently selected element appears in the lower section.</li> <li>• If you select <b>Vertical</b>, when you edit a pathfinder in the outline view, the outline appears in the left section of the page and an editing template for the currently selected element appears on the right.</li> </ul> <p><b>Default settings:</b> Screen split horizontally .</p>
4	<p>Specify the <b>relative size</b> of the outline area of the outline view screen.</p> <ul style="list-style-type: none"> <li>• For a screen divided <b>horizontally</b>, specify the percentage of the screen allocated to the top (outline) frame. Type the value in the text box.</li> <li>• For a screen divided <b>vertically</b>, specify the percentage of the screen allocated to the left (outline) frame. Type the value in the text box.</li> </ul> <p><b>Default settings:</b> Top frame size of 65%.</p>
5	<p><b>Change default or change for current session</b></p> <ul style="list-style-type: none"> <li>• To use the settings for the current session only, at the top or bottom of the Pathfinder Options screen, click <b>Save For Session</b>.</li> </ul> <p>Or</p> <ul style="list-style-type: none"> <li>• To use the settings for future sessions, click <b>Save My Default</b>.</li> </ul>

## 2 Set pathfinder preferences

### Why set pathfinder preferences?

- Indicate whether you prefer to edit pathfinders in outline view or linear view.
- Customize the outline view for editing pathfinders.
- Customize display of pathfinder options in header elements. Select options to expand (show) or collapse (hide).

### How to set pathfinder preferences

	Action
1	<ol style="list-style-type: none"> <li>1. On the General tab, under Admin Options, click <b>Preferences</b>.</li> <li>2. On the Preferences screen, click <b>Pathfinder Option</b>.</li> </ol>
2	<p><b>Pathfinder views.</b> Under <b>Pathfinder Record View</b>, <b>Pathfinder Save File Record View</b>, and <b>Pathfinder Constant Data Record View</b>, select the view you want to use for editing pathfinders.</p> <ul style="list-style-type: none"> <li>• Click to select the option button for your preferred view (Linear or Outline). While editing a pathfinder, you can switch views at any time.</li> </ul> <p><b>Default setting:</b> Linear.</p>
3	<p><b>Pathfinder Options display</b> Under Pathfinder Options view, choose which pathfinder options to hide (collapse) or show (expand) when you create a new pathfinder or begin editing a pathfinder.</p> <p><b>Options</b></p> <ul style="list-style-type: none"> <li>• Available in the Pathfinder Header and/or in Header elements.</li> <li>• Determine what information appears (in the entire pathfinder or in the part subordinate to the header), how the content is formatted, and how users navigate to or from that specific header.</li> </ul> <p><b>Default setting:</b> All option groups are expanded.</p> <p>You can</p> <ul style="list-style-type: none"> <li>• <b>Hide (collapse) all Options groups.</b> Select the option button labeled <b>Collapse Options</b>.</li> <li>• <b>Show (expand) all Options groups.</b> Select the option button labeled <b>Expand Options</b>.</li> <li>• <b>Show (expand) selected Options group(s).</b> Select the option button for each group you want to show (expand). Clear the option button for each group you want to hide (collapse).</li> </ul> <p><b>Note:</b> You can expand or collapse option groups at any time while editing a pathfinder. Your settings control initial display, not availability, of pathfinder options.</p>

	Action
4	<p><b>Pathfinder Outline View.</b></p> <ul style="list-style-type: none"> <li>• Customize the pathfinder outline view by selecting a horizontal or vertical screen split and specifying relative frame sizes.</li> </ul> <p><b>Default settings:</b> horizontal screen split with top frame size of 65%.</p>
5	<p><b>Change default or change for current session</b></p> <ul style="list-style-type: none"> <li>• To use the settings for the current session only, at the top or bottom of the Pathfinder Options screen, click <b>Save For Session</b>.</li> <li>Or</li> <li>• To use the settings for future sessions, click <b>Save My Default</b>.</li> </ul>

**Save changes, cancel, or restore original defaults**

- When finished viewing and/or changing options on this screen, use the buttons at the top and bottom of the screen to take an action.

Button	Purpose/Result
Go Back	<ul style="list-style-type: none"> <li>• Return to the previous screen.</li> </ul>
Save for Session	<ul style="list-style-type: none"> <li>• Save changes on this screen for the current session only.</li> <li>• When you log off, the system restores your previous default settings.</li> </ul>
Save My Default	<ul style="list-style-type: none"> <li>• Save changes on this screen for the current session and future sessions.</li> <li>• The new settings remain in effect until you change them.</li> </ul>
Reset	<ul style="list-style-type: none"> <li>• Restore original Connexion settings for options on this screen.</li> <li>• Reverse any changes you made during the current session or in previous sessions.</li> </ul>
Cancel	<ul style="list-style-type: none"> <li>• Reverse any changes you made since you accessed this screen during the current session.</li> <li>• Your previously saved settings remain in effect.</li> </ul>

### 3 Pathfinder actions: summary

While working with a pathfinder, you can take the following actions. Some actions are available in edit mode only. A few actions are available in display mode only. Some actions are available for pathfinders in the pathfinder database only; other actions are available only for pathfinders in the pathfinder save file.

Action	How to
Display pathfinder	<p>From a pathfinder edit view (outline or linear),                      On the Edit list, click <b>Display Pathfinder</b>.</p> <p>From a brief entry on a results screen,                      Click the hyperlinked title of the pathfinder you want to display.                      The system presents the pathfinder in HTML format. You can check the organization, verify correct formatting, and test navigation.</p> <p>In the displayed pathfinder</p> <ul style="list-style-type: none"> <li>• <b>Embedded search.</b> The system performs any embedded searches against the Resource Catalog and includes the results in the pathfinder.</li> <li>• <b>URL display.</b> The system displays the URL of each resource in parentheses after the title. For items with corresponding bibliographic records, the system shows the first URL unless you chose to override defaults and specified the URL to show by a number.</li> <li>• <b>Resource links.</b> For items inserted by creating an embedded search, by adding flagged records, or by taking the Link URLs to RC Records action, the system shows or hides links to bibliographic records as specified them using the Resource Links option (Pathfinder Header: Format Option).</li> <li>• <b>Customization for Links.</b> For items inserted by creating an embedded search, by adding flagged records, or by taking the Link URLs to RC Records action, the system displays the title and description from the bibliographic record or a title and/or description you entered in the pathfinder Link element.</li> <li>• <b>Format options.</b> If you specified a stylesheet, inserted images, specified sorting for headers or links, defined separators, or set other format options, the displayed pathfinder reflects your choices.</li> <li>• <b>HTML code embedded in Description fields.</b> If you set the <b>Embedded HTML?</b> option to <b>Yes</b> for a Description field (in any pathfinder element) and also inserted the HTML code required, the displayed pathfinder shows the browser's rendering of the embedded code. For example, the pathfinder reflects text formatting code such as a line break (&lt;br&gt;) or displays an image you included (&lt;IMG SRC=" "&gt;) or includes a link to related content. If <b>Embedded HTML?</b> is set to <b>No</b> (default setting), the browser treats the Description as text only.</li> <li>• <b>Access restrictions.</b> For Licensed Resource elements, if you specified access restrictions using the <b>Access available to</b> option, information on restrictions appears immediately after the link to the resource.</li> </ul>

Action	How to
Edit pathfinder	<p>From a pathfinder display view, On the Edit list, click <b>Edit Pathfinder</b>.</p> <p>From a brief entry on a results screen, Click the <b>Edit</b> button next to the title of the pathfinder you want to edit.</p> <p>If the system responds with a message asking you to clone the pathfinder, click the <b>Clone</b> button to create a copy of the pathfinder for editing.</p> <p>The system presents the pathfinder in the edit view (outline or linear) you specified in Display Options.</p>
Change edit view	<p>Scroll to the beginning of the pathfinder. Open the View list and click <b>Outline</b> or <b>Linear</b>.</p>
Derive new pathfinder	<p>From a pathfinder display or edit view, On the Edit list, click <b>Derive New Pathfinder</b>.</p> <p>The system displays the prompt <code>Do you want to preserve local content?</code></p> <p>Click <b>OK</b> to include local-content elements in the new (cloned) pathfinder.</p> <p>Click <b>Cancel</b> to exclude local-content elements.</p> <p>The pathfinder content is redisplayed in an editing template. NEW appears in the Pathfinder: field. When you submit the new pathfinder, the system supplies a pathfinder number.</p>
Delete pathfinder from the main pathfinder database (your library's pathfinders only)	<p>View (display or edit the pathfinder you want to delete. On the Action list, click <b>Delete Pathfinder</b>.</p> <p>The system asks you to confirm that you want to delete the pathfinder. To delete the pathfinder, click <b>Yes</b> or <b>Yes, wait for response</b>. To cancel deleting the pathfinder, click <b>No</b>.</p>
Delete pathfinder from pathfinder save file	<p>Retrieve a saved pathfinder you want to delete. On the Action list, click <b>Delete Save File Record</b>.</p> <p>Click <b>OK</b> to confirm that you want to delete the pathfinder. The system removes the working copy of the pathfinder from the pathfinder save file. The master pathfinder remains in the pathfinder database.</p>
Derive a constant data record from a pathfinder	<p>This action creates a pathfinder constant data record with the content of any pathfinder.</p> <ol style="list-style-type: none"> <li>1. Retrieve and view the pathfinder on which to base a constant data record.</li> <li>2. On the Edit list click Derive New Constant Data Record.</li> <li>3. Edit the content for the constant data record.</li> <li>4. On the Action list, click <b>Save Constant Data Record</b>.</li> <li>5. In the dialog box, enter a name for the pathfinder constant data record. Use a name that indicates the content or purpose of the pathfinder constant data.</li> <li>6. Then click <b>OK</b> to add the record in your institution's pathfinder constant data database.</li> <li>7. The system displays a confirmation message that includes the constant data name you entered.</li> </ol>

Action	How to
Cancel changes to pathfinder	<p>On the Edit list, click <b>Cancel Changes</b>.</p> <p>The system asks you to confirm that you want to cancel your edits.</p> <p>Click <b>Yes</b> to discard edits and unlock the pathfinder for editing.</p> <p>Click <b>No</b> to keep your changes and continue editing.</p>
Apply default pathfinder constant data	<p>Create a new pathfinder.</p> <p>Or</p> <p>Retrieve a pathfinder you want to edit from the pathfinder database or the pathfinder save file.</p> <p>Edit the pathfinder.</p> <p>On the Edit list, click <b>Apply Default Pathfinder Constant Data</b>.</p>
Select Constant Data	<p>On the Edit list, click Select Constant Data</p> <p>In the list of constant data records, click the hyperlinked name of the constant data record you want to apply.</p>
Reformat pathfinder	<p>Use the Reformat action to add or delete multiple elements.</p> <p>To tag an element for deletion, open the Functions list and click <b>Tag Delete</b>.</p> <p>To add an empty element, open the Functions list in the preceding element and click <b>Tag Add</b>. In the dialog box, type the number of elements to add (1 to 10); then click <b>OK</b>.</p> <p>On the Edit list, click <b>Reformat Pathfinder</b>.</p> <p>The system removes any elements tagged for deletion and adds empty elements at specified positions.</p>
Add pathfinder to the pathfinder database	<p>Create a pathfinder by harvesting, by cloning, or by completing a blank template.</p> <p>Or</p> <p>Retrieve a saved new pathfinder.</p> <p>On the Action list, click <b>Add Pathfinder</b>.</p> <p>Click <b>OK</b> to continue and add the pathfinder.</p> <p>Click OK to confirm that you want to create a preliminary bibliographic record for the pathfinder. Verify your e-mail address for system notification when the preliminary record is created. Then click <b>Create</b>.</p>
Replace pathfinder in the pathfinder database	<p>Open an edit view of a pathfinder you have been modifying.</p> <p>Or</p> <p>Retrieve a modified pathfinder from the save file.</p> <p>On the Action list, click <b>Replace Pathfinder</b>.</p> <p>Click <b>OK</b> to confirm the action.</p> <p>The system replaces the master pathfinder with the edited version. If you retrieved a saved pathfinder, the system deletes the working copy from the pathfinder save file.</p> <p>Note: Unless your library added the pathfinder to the database or is a designated maintainer of the pathfinder, you cannot modify it.</p>
Save pathfinder	<p>On the Action list, click <b>Save Pathfinder</b>.</p> <p>Open the status list and click the status you want to assign to this pathfinder.</p> <p>Click <b>Yes</b> to add the pathfinder to the save file.</p>

Action	How to
Export pathfinder as HTML (static page export) <b>Not available for a pathfinder in the pathfinder save file</b>	<p>On the Action list, click <b>Export HTML</b>.</p> <p><b>Internet Explorer.</b> In the File Download dialog box, select <b>Save to Disk</b> and click <b>OK</b>.</p> <p><b>Netscape Navigator.</b> In the Unknown File Type dialog box, click <b>Save File</b>.</p> <p>In the Save As dialog box, navigate to the folder in which you want to save the HTML file for the pathfinder. In the File Name box, keep the displayed name or replace it with a more informative name. Add htm as the file name extension. Then click <b>Save</b>.</p> <p>Move the exported file to the appropriate location on your Web server.</p> <p>Before exporting the pathfinder,</p> <ul style="list-style-type: none"> <li>• The system runs any embedded search and inserts links to the retrieved records.</li> <li>• For links inserted by adding flagged bibliographic records, the system accesses the associated records to obtain updated URLs before exporting the pathfinder.</li> <li>• However, the search is not rerun nor URLs updated when users access the static pathfinder page.</li> </ul>
Export pathfinder link (dynamic link export) <b>Not available for a pathfinder in the pathfinder save file</b>	<p>On the Action list, click <b>Export Pathfinder Link</b>.</p> <p>A new browser window opens containing 2 versions of a link to the pathfinder: a PURL (Persistent URL) and a standard URL.</p> <p><b>PURL or URL?</b> In most cases, we recommend that you use the provided PURL as the link to your pathfinder. However, if the pathfinder contains <b>anchors</b> (jumps to elements within the pathfinder page) and if you expect most pathfinder users to have Netscape browsers, use the URL as the pathfinder link. Netscape browsers may have problems connecting to a PURL if the target page contains anchors.</p> <p>Copy 1 of the links and paste it in the appropriate page on your web site. Add an informative title for the link.</p> <p>When users access the pathfinder via the link, the system reruns any embedded searches it contains and supplies updated URLs for any links that come from associated bibliographic records.</p>
Flag or Unflag pathfinder	<p>On the Action list, click <b>Flag Pathfinder</b> or <b>Unflag Pathfinder</b>.</p> <p><b>Note:</b> You cannot flag a new pathfinder (not yet submitted, no pathfinder number).</p>

## 4 Pathfinder editing techniques

Technique	How to
Move to element	<p><b>Linear view.</b> Scroll the Editing Pathfinder screen to locate the element.</p> <p><b>Outline view.</b> In the outline area, click the hyperlinked title or URL of the element to bring that item into editing focus. You may need to expand sections (by clicking the arrow buttons) to display titles for all links, subheaders, etc.</p>
Move to field within element template	<p>Click within the field you want to edit.</p> <p>Or</p> <p>Press &lt;Tab&gt; to move the insertion point to the field.</p>
Change text in field	<p>Press &lt;Insert&gt; to turn insert mode on or off as you prefer. Add text or replace existing text.</p> <p>Use standard editing techniques:</p> <p>Press &lt;Backspace&gt; or &lt;Delete&gt; to delete single characters.</p> <p>Cut, copy, and paste text.</p> <p>Paste text copied from bibliographic records or from electronic resources.</p>
Clear text from field	<p>Press &lt;Backspace&gt; or &lt;Delete&gt; to delete single characters.</p> <p>Or</p> <p>Select the text. Right-click the highlighted text. On the popup menu click <b>Cut</b>.</p>
Undo text changes <Ctrl><Z>	<p>To reverse the most recent text change, use the standard Windows <b>undo</b> keystroke: &lt;Ctrl&gt;&lt;Z&gt;.</p> <p>The following functions are supported in recent browser versions. Specific functionality may change with browser upgrades. Check browser Help or documentation for details.</p> <p><b>Undo last change, current text box:</b> Press &lt;Ctrl&gt;&lt;Z&gt; once.</p> <p><b>Undo series of changes, current text box:</b> Press &lt;Ctrl&gt;&lt;Z&gt; once to reverse each change, beginning with the last.</p> <p><b>Undo series of changes in different text boxes:</b> Place the insertion point in the desired text box and then press &lt;Ctrl&gt;&lt;Z&gt;.</p> <p>Begin with the text box most recently modified and return to the other text boxes in reverse order (retrace your steps).</p> <p><b>Notes on browser-based Undo</b>  <b>Browser dependent.</b> Support for &lt;Ctrl&gt;&lt;Z&gt; varies with browser name and version.  <b>Refresh clears undo memory.</b> If you take an action that refreshes the screen (for example, select an item on the navigation bar, the Action list, or the Functions list for a field), the undo memory is cleared.</p>

Technique	How to
Enter diacritics and special characters Character chart window <b>Internet Explorer for Windows only</b>	<ol style="list-style-type: none"> <li>1. Place the cursor where you want to insert a diacritic or special character.</li> <li>2. Press &lt;F7&gt;.</li> <li>3. In the Enter Diacritics and Special Characters window, click a character or diacritic to insert it at the cursor position.                             <ul style="list-style-type: none"> <li>• <b>Note: Diacritic follows letter.</b> To insert a diacritic, first type the letter it modifies. Then insert the diacritic following the letter.                                     <p><b>Example:</b> To enter the letter <b>u</b> with an <b>umlaut</b>, type <b>u</b>. Then open the Enter Diacritics and Special Characters window and, in the character chart, click the <b>umlaut</b> symbol.</p> <p><b>(Note: Windows only.</b> Not supported by Macintosh versions of IE.)</p> </li> </ul> </li> </ol>
Enter diacritics and special characters Bar syntax (mnemonic codes)	<p><b>Enter diacritics and special characters using mnemonic codes.</b></p> <p><b>Diacritics.</b></p> <ol style="list-style-type: none"> <li>1. <b>Type the code for a diacritic after the letter it modifies (Unicode syntax).</b></li> <li>2. First type the letter modified by the diacritic.</li> <li>3. Type a vertical bar (pipe) symbol (Shift + backslash on most keyboards).</li> <li>4. Then type the mnemonic for the diacritic.</li> <li>5. Then type another vertical bar symbol.                             <p>Do not type a space between the letter and the code for the diacritic.</p> </li> </ol> <p><b>Example:</b> To enter an <b>e</b> with an acute accent, type <b>e ac </b></p> <p><b>Special characters.</b></p> <ol style="list-style-type: none"> <li>1. Type a vertical bar (pipe) symbol (Shift + backslash on most keyboards).</li> <li>2. Type the mnemonic for the diacritic.</li> <li>3. Then type another vertical bar symbol.</li> </ol> <p><b>Code list</b></p> <p><b>Note: appearance in edit mode</b></p> <ul style="list-style-type: none"> <li>• Characters entered using this method are automatically replaced with typographic forms.</li> <li>• If you prefer, you can set an option to view the bar syntax in edit mode.</li> </ul>
Table of ALA-defined diacritics and special characters	<ul style="list-style-type: none"> <li>• On the header bar (black bar at the top of every system screen), click <b>Diacritics</b>.</li> </ul> <p>Use the table to identify a character, find a character by name, or copy a character for input in a record.</p>

Technique	How to
Apply default pathfinder constant data	<p>On the Edit list, click <b>Apply Default Pathfinder Constant Data</b>.</p> <p>When you apply default pathfinder constant data, elements in your default constant data are inserted in the pathfinder:</p> <ul style="list-style-type: none"> <li>• <b>Replaced elements.</b> If your default pathfinder constant data contains a Pathfinder Header or a Feedback element (Send comments to), these elements replace corresponding elements in the pathfinder you are editing.</li> <li>• <b>Inserted elements.</b> Headers, links, and other content from constant data are inserted. Existing headers, inks, embedded searches, etc. are retained.</li> <li>• <b>Headers</b> inserted from constant data appear before existing headers at the appropriate header level.</li> <li>• <b>Links</b> from constant data that are not preceded by a header in the constant data are inserted under the first existing header, after any existing links in the first section.</li> </ul>
Delete element	<p>Move to the element you want to delete.</p> <p>Open the Functions list to the left of the element. Then click <b>Cut</b>.</p>
Delete header and subordinate content	<p>Move to the header element you want to delete.</p> <p>Open the Functions list to the left of the element. Then click <b>Cut*</b>.</p> <p>The system removes the header and all links, subheaders, and sublinks subordinate to that header. This action removes all content up to the next header at the same level as the deleted header.</p>
Delete multiple elements	<p>Move to an element you want to delete.</p> <p>Open the Functions list to the left of the element. Then click <b>Tag Delete</b>.</p> <p>Repeat to tag more elements you want to delete.</p> <p>Scroll to the beginning of the pathfinder. On the Edit list, click <b>Reformat Pathfinder</b>.</p> <p>The system removes elements tagged for deletion.</p>

Technique	How to
Copy element	<p>Move to the element you want to copy. Open the Functions list to the left of the element. Then click <b>Copy</b>.</p> <p>Move to the element above the position at which you want to insert the element you are copying. Open the Functions list to the left of the element. Then click <b>Paste</b>.</p>
Move element	<p>Move to the element you want to move. Open the Functions list to the left of the element. Then click <b>Cut</b>.</p> <p>Move to the element above the position at which you want to insert the element you are moving. Open the Functions list to the left of the element. Then click <b>Paste</b>.</p>
Cancel changes to pathfinder	<p>Scroll to the beginning of the pathfinder. On the Edit list, click <b>Cancel Changes</b>. The system asks you to confirm that you want to cancel your edits. Click <b>Yes</b> to discard edits and unlock the pathfinder for editing. Click <b>No</b> to keep your changes and continue editing.</p>

Technique	How to
<p>Display pathfinder to check results of editing</p>	<p>From a pathfinder edit view (outline or linear), Scroll to the beginning of the pathfinder. On the Edit list, click <b>Display Pathfinder</b>. The pathfinder in HTML format. You can check the organization, verify correct formatting, and test navigation. In the displayed pathfinder</p> <ul style="list-style-type: none"> <li>• <b>Embedded search.</b> The system performs any embedded searches against the Resource Catalog and includes the results in the pathfinder.</li> <li>• <b>URL display.</b> The system displays the URL of each resource in parentheses after the title. For items with corresponding bibliographic records, the system shows the first URL unless you chose to override defaults and specified the URL to show by a number.</li> <li>• <b>Resource links.</b> For items inserted by creating an embedded search, by adding flagged records, or by taking the Link URLs to RC Records action, the system shows or hides links to bibliographic records as specified them using the Resource Links option (Pathfinder Header: Format Option).</li> <li>• <b>Customization for links.</b> For items inserted by creating an embedded search, by adding flagged records, or by taking the Link URLs to RC Records action, the system displays the title and description from the bibliographic record or a title and/or description you entered in the pathfinder Link element.</li> <li>• <b>Format options.</b> If you specified a stylesheet, inserted images, specified sorting for headers or links, defined separators, or set other format options, the displayed pathfinder reflects your choices.</li> <li>• <b>HTML code embedded in Description fields.</b> If you set the <b>Embedded HTML?</b> option to <b>Yes</b> for a Description field (in any pathfinder element) and also inserted the HTML code required, the displayed pathfinder shows the browser's rendering of the embedded code. For example, the pathfinder reflects text formatting code such as a line break (&lt;br&gt;) or displays an image you included (&lt;IMG SRC=" "&gt;) or includes a link to related content. If <b>Embedded HTML?</b> is set to <b>No</b> (default setting), the browser treats the Description as text only.</li> <li>• <b>Access restrictions.</b> For Licensed Resource elements, if you specified access restrictions using the <b>Access available to</b> option, information on restrictions appears immediately after the link to the resource.</li> </ul>
<p>Specify a Cascading Style Sheet</p>	<p>In the Pathfinder Header element, click the arrow button labeled <b>Options</b>. Then click the arrow button labeled <b>Format Options</b>. In the Style Sheet URL field type the URL of the Cascading Style Sheet you want applied to this pathfinder.</p>

## 5 Navigation links for pathfinders

### Why provide navigation aids?

- Save time for users. Reduce scrolling.
- Make content easier to find and use.
- Help users understand the structure of the pathfinder(s).

### Table of contents for pathfinder

	Action
1	<p><b>Create section headers with anchor names.</b> For each pathfinder section, add a Header element. Provide a Header Title that identifies the content of the section. Expand the Navigation Options for the section Header. In the Anchor Name field, type a short identifier for the section; this identifier is the target for links to this Header.</p> <p><b>Example:</b> For a section covering library news and announcements, type <b>What's New at the Library</b> in the Title field and <b>whatnew</b> in the Anchor Name field.</p>
2	<p><b>Add Links for Contents.</b> At the top of the pathfinder, add a group of Link elements, one for each section. The Links are the items in the pathfinder Contents.</p>
3	<p><b>Complete Link elements.</b> In each Link element, enter a Title that matches the title of a pathfinder section. In the URL field for the Link, type a reference to the Anchor Name assigned to the section Header.</p> <p><b>Example:</b> To create a Contents item for the section on library news, add a Link element with <b>What's New at the Library</b> in the Title field and <b>#whatnew</b> in the URL field.</p>
4	Display the pathfinder and test the links.

### Back to Top link from within the pathfinder

	Action
1	In the Pathfinder Header element, expand the Navigation Options.
2	In the Anchor Name field, type <b>top</b> .
3	At the place where you want to insert a Back to Top link, add a Link element.
4	In the Link element, type Back to Top in the Title field and type #top in the URL field.
5	To place Back to Top links at other locations (such as at the end of each pathfinder section, or directly under each section header) copy the new Link element and paste it wherever you want.

**Link from main pathfinder to subordinate pathfinder**

	Action
1	In the main pathfinder, add an element to contain a link to a subordinate pathfinder. You can use a Header, SubHeader, Link, Sublink, or Licensed Resource element.
2	Retrieve and display a subordinate pathfinder you want to link to the main pathfinder. On the Action list, click <b>Export Pathfinder Link</b> . The system opens a separate window containing a PURL and URL for the pathfinder. Copy the text of the PURL or the URL.
3	Return to the main pathfinder and move to the element you created to link to the subordinate pathfinder.
4	In the URL field of the element (under Navigation Options for a Header), paste the copied PURL or URL for the subordinate pathfinder.
5	Submit the main pathfinder to save the changes.
6	Repeat steps --- to create links to other subordinate pathfinders.

**Link from subordinate pathfinder to main pathfinder**

	Action
1	Open the subordinate pathfinder for editing.
2	Add an element to contain a link to a main pathfinder. You can use a Header, SubHeader, Link, or Sublink element.
3	Retrieve and display the main pathfinder you want to link to the from the subordinate pathfinder. On the Action list, click <b>Export Pathfinder Link</b> . The system opens a separate window containing a PURL and URL for the pathfinder. Copy the text of the PURL or the URL.
4	Return to the child pathfinder and move to the element you created to link to the parent pathfinder.
5	In the URL field of the element (under Navigation Options for a Header or SubHeader), paste the copied PURL or URL for the main pathfinder.
6	Submit the child pathfinder to save the changes.