




ILS Tips and Tricks for Reference Staff

Presented at the Reference Services Meeting
December 12, 2016 and February 13, 2017
Rose Harrison
Delaware Division of Libraries




Housekeeping ...

- Please interrupt with questions/comments.
- This presentation will be available for your reference.
- Please contact the DLC team at sirsi.support@lib.de.us with any questions.




December presentation covered ...

- Managing holds in WorkFlows, Enterprise, and the DLC mobile app
 - Enterprise in Safari on iOS
 - Display user
 - Delete item v. charge to discard
 - Overview of searching for items in WorkFlows, Enterprise, and the DLC mobile app
- 



February presentation will cover...

- More than one email address on a patron account
 - Making the Item Search wizard more convenient
 - Overview of differences between item searches in WorkFlows, Enterprise, and the DLC mobile app
 - Using WorkFlows search strategies
 - Additional topics you want included
- 

Managing holds ...

WorkFlows	Enterprise	DLC Mobile App
Place Holds <ul style="list-style-type: none"> Specify volume and pickup location 	Place Holds <ul style="list-style-type: none"> Specify volume and pickup location Place digital holds directly	Place Holds <ul style="list-style-type: none"> Specify volume and pickup location Place digital holds indirectly (Downloadables > Overdrive)
Modify Holds <ul style="list-style-type: none"> Suspend/unsuspend Edit pickup location of available/unavailable holds Edit last pickup date Edit hold expiration date Add/edit comment 	Modify Holds <ul style="list-style-type: none"> Suspend/unsuspend (may suspend w/o unsuspend date) Edit pickup location of unavailable holds 	Modify digital holds indirectly (Downloadables > Overdrive)
Cancel Holds	Cancel Holds Cancel digital holds directly	Cancel Holds Cancel digital holds indirectly (Downloadables > Overdrive)

Managing holds in Enterprise and the DLC mobile app (1 of 2) ...

- Place holds
 - Patrons specify volume and pickup location.

The screenshot shows two library records side-by-side. The left record is for 'Hollywood, Calif. : CBS DVD, c2008' and has a purple bar that says 'Request (2 copies) Select item to place a hold'. Below it are two items from 'Bear Library' with right-pointing arrows. The right record is for 'San Diego : Harcourt Brace, c1987' and has a purple bar that says 'Request (5 copies) place on hold' with a right-pointing arrow. Below it are three items from different libraries: 'Brandywine Hundred Library', 'Greenwood Public Library', and 'Milford Public Library'. A fourth item is from 'New Castle Public Library'.

In the mobile app, patron taps on the desired volume. When there are no distinct volumes in the record, patron taps on the purple bar to place a title hold.

The screenshot shows a 'Place Hold(s)' pop-up window. It has a table with three columns: 'Title', 'Pickup Library:', and 'Volume:'. The 'Title' column contains 'Star trek the next generation. Season 3 [videorecording]'. The 'Pickup Library:' column has a dropdown menu with 'Delaware Division of Libraries' selected. The 'Volume:' column has a dropdown menu with 'SET 1-4' selected. Below the table is a 'Place Hold(s)' button.

In Enterprise, the patron selects the volume (if it exists) and pickup library in the pop-up window.

Managing holds in Enterprise and the DLC mobile app (2 of 2) ...

- Modify/Cancel holds
 - In Enterprise, patrons can
 - suspend/unsuspend holds
 - edit pickup location (unavailable holds)
 - cancel holds and digital holds
 - In the DLC mobile app, patrons can
 - cancel holds and digital holds (indirectly)

Library Holds

Items on Hold: 5
Ready for Pickup: 0

Select All Cancel Hold(s) Edit Pickup Location(s) Suspend Hold(s) Cancel Hold Suspension(s)

	Title/Author	Status	Pickup at:	Expires
<input checked="" type="checkbox"/>	Shrink your lawn : design ideas for any landscape Hadden, Evelyn J.	Pending	Delaware Division of Libraries	2/23/17
<input type="checkbox"/>	A quilter's ark : more than 50 designs for foundation piecing Rolfe, Margaret.	Pending	Delaware Division of Libraries	8/22/17
<input type="checkbox"/>	Quilter's academy : a skill-building course in quiltmaking V.1 Hargrave, Harriet.	Pending	Delaware Division of Libraries	8/22/17
<input type="checkbox"/>	Julie Hasler's cross stitch designs Hasler, Julie S.	Pending	Delaware Division of Libraries	8/22/17
<input type="checkbox"/>	I contain multitudes : the microbes within us and a grander view of life Yong, Ed,	Pending	Delaware Division of Libraries	10/24/17

Select All Cancel Hold(s) Edit Pickup Location(s) Suspend Hold(s) Cancel Hold Suspension(s)

Verizon 11:35 PM 88%

Back My Account

Delaware Library Catalog Delaware Libraries Catalog

CONFIRMATION REQUIRED
Tap to cancel your hold/recall
Shrink your lawn : design ideas for any landscape Full Record
by Evelyn J. Hadden
Delaware Division of Libraries
status: Active
Tap to cancel your hold/recall

My Account Summary
return to summary

Library Home
click to return

Suspend Holds [X]

When do you want the selected holds to be suspended?

Start Date: 12/12/2016

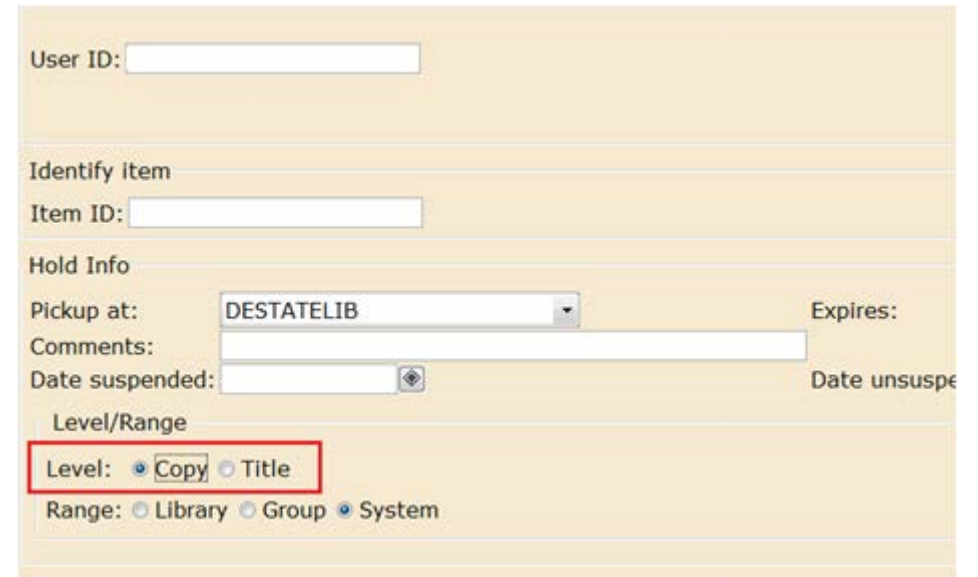
End Date:

Suspend Cancel

Advanced holds management available in Enterprise: patrons can suspend a hold with no unsuspend date. This allows patrons to get on the holds list but to delay arrival until they are ready for the item. Patron needs to cancel the suspension prior to the hold expiration date (one year after hold placed).

Managing holds in WorkFlows...

- When placing a hold:
 - **NEVER** override
 - Workaround: use copy holds for multiple copies from the same record.
- When modifying an **available** hold:
 - When cancelling an available hold or changing the pickup location, **the item must be scanned.**
 - **Contact the pickup library** or go to the holds shelf and scan the item.
- When modifying an **unavailable** hold:
 - No additional actions are necessary.



User ID:

Identify Item

Item ID:

Hold Info

Pickup at: Expires:

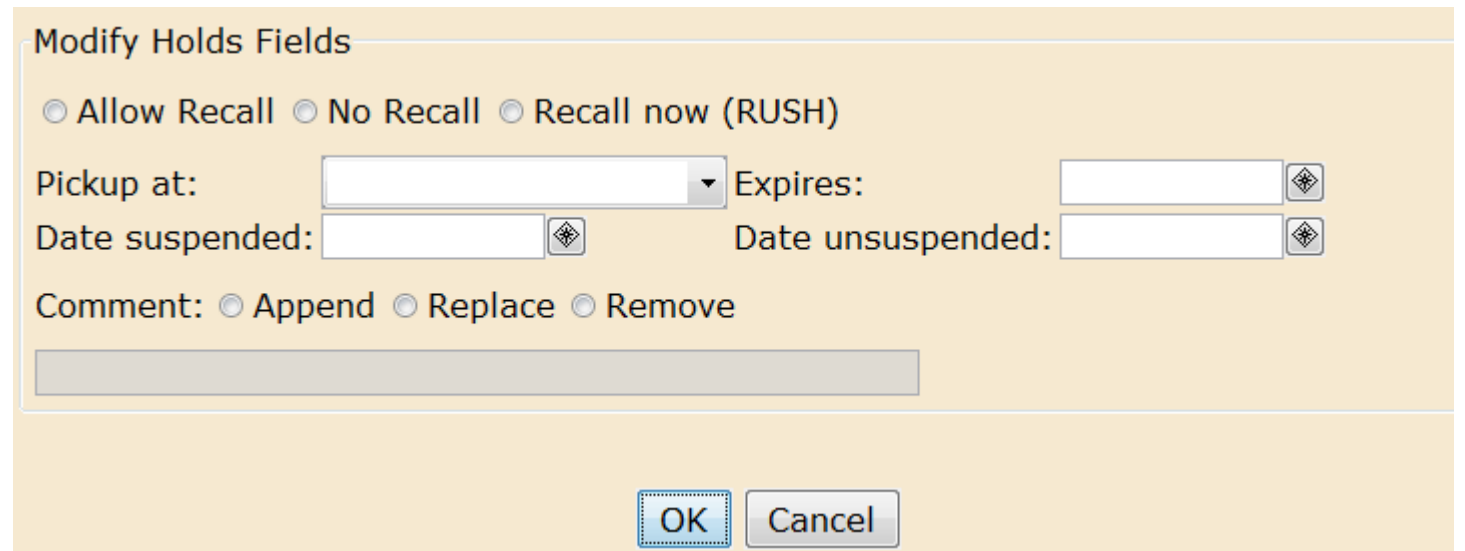
Comments:

Date suspended: Date unsuspected:

Level/Range

Level: Copy Title

Range: Library Group System



Modify Holds Fields

Allow Recall No Recall Recall now (RUSH)

Pickup at: Expires:

Date suspended: Date unsuspected:

Comment: Append Replace Remove

OK Cancel

Enterprise in Safari on iOS ...

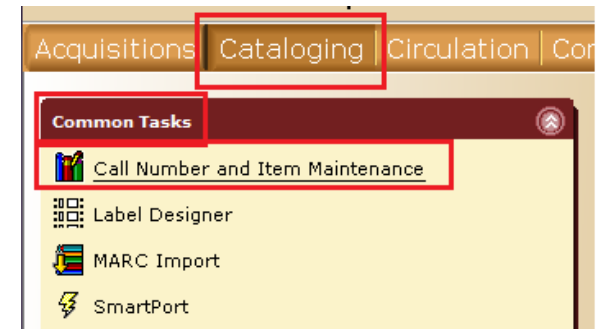
- There is a recurring known issue with rendering web pages when iOS or Safari is upgraded.
 - Problem is not specific to Enterprise.
 - Problem is generally resolved when the other software is upgraded.
 - Workaround 1: recommend DLC app if it will work with the patron's hold management practices.
 - Workaround 2: recommend another browser. (I've had consistent good results with Enterprise in Opera mini.)

Display user ...

- Your library's display user (e. g. REHOBOTHDISPLAY, with a profile of DISPLAY) is used to indicate that items are not in their usual home location.
 - Due date is NEVER.
 - Items recirculate to patrons.
 - Items are checked out to patrons. When returned, status returns to display.
 - Check them in before marking them MISSING and/or LOST.
- Remove items from the display user's account once they're no longer physically on display.
- **Use the display user only for your library's items.**
 - Other library's items will indicate they're on display, but not *where* they're on display.

Delete item v. charge to discard user ...

- The discard user (e. g., SMYDISCARD , with a profile of DISCARD) is used to indicate that items are no longer available and should be removed from the database.
 - Items are removed through a manual report every six months or by request (sirsi.support@lib.de.us).
- To delete (*immediately* and *permanently* remove) an item from the database:
 - Log in as your TECH user (e .g., LAUDISCARD)
 - Cataloging module > Common Tasks group > Call Number and Item Maintenance wizard
 - Locate item in the catalog (search with barcode when possible)
 - **Verify that the correct item is highlighted** in the left-hand panel.
 - Click on the Delete button.
 - Deleting the last item in a call number will delete the call number.
- When to use which method?
 - If your library removes items from OCLC,
 - Delete all but the last item in a title record.
 - Use the discard user for the last item in a title record.
 - Do not delete items you're donating to another library.



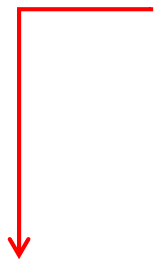
More than one email address on a patron account ...

- In some situations, a patron may require notices be delivered to more than one email address.
 - Parent/Guardian on a dependent's account
 - Someone else picks up the item for a patron (outreach/book buddy patron)
- The correct format is to enter the email addresses ***separated by a single comma*** (do not include a space). For example,

`firstaddress@here.com,secondaddress@there.com`

Making the Item Search wizard more convenient ...

- If you frequently switch tabs to find information in the Item Search wizard, set properties that will directly display needed information.
 - Right-click on the wizard
 - Select Properties
 - Defaults tab
 - Search Preferences – set Type, Index, and Library you use most often.
 - Editor Display Options – check Display descriptive labels (for entries)
 - Tab Display Preference – select the tab you use most often



Personal Author	100	1	Hardy, Susannah, eauthor.
Title	245	12	A killer kebab / cSusannah Hardy.
Edition	250		First edition.
Publication	264	1	New York : bBerkley Prime Crime, c2016.
Physical description	300		viii, 294 pages ; c18 cm.
Content	336		text 2rdacontent

Item Search (F2) : Set Properties

Display property page: Wizard Startup Never

Behavior Defaults Helpers

Search preferences

Type: KEYWORD

Index: Title

Library: ALL

Display View Pane

Editor display options

MARC View Display fixed fields

Descriptive view **Display descriptive labels (for entries)**

Tab Display Preference

Control

Bibliographic

MARC Holdings

Call Number/Item


Orders

Serial control

Selectionlists

OK Cancel

Searching for items (general) ...

	WorkFlows	Enterprise	DLC Mobile App
Items displayed	All items in catalog. Does not include OverDrive.	Visible only, including OverDrive. Can checkout/hold eBooks.	Visible only. OverDrive via Downloadables menu. Can checkout/hold eBooks.
Limit searches	Pre-search: Advanced search gadget. 	Pre-search: Advanced search. Post-search: Availability and filters panel.	No. Add more search terms.
Search by fields	Yes. Select index.	Yes. Select index.	No.
Sort results	Title, author, and publication year.	Relevance, title, author, and publication year.	No.
Spelling correction	No.	Fuzzy. Will offer “did you mean?”	No. Use truncation.

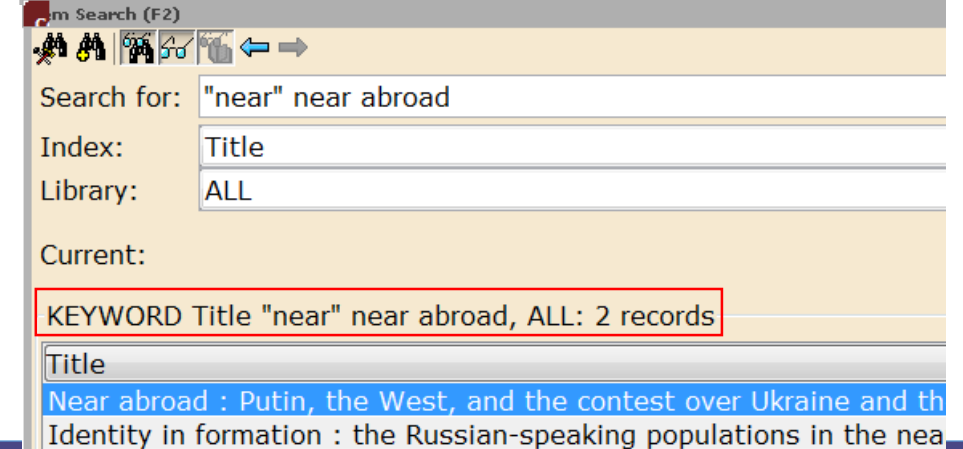
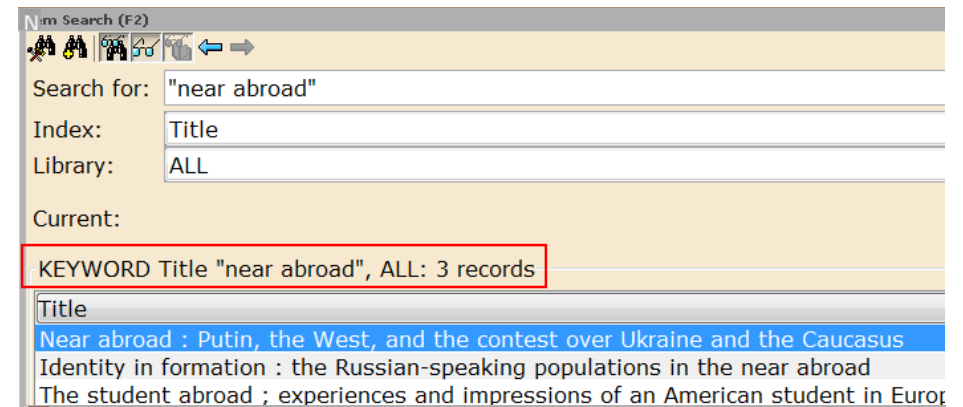
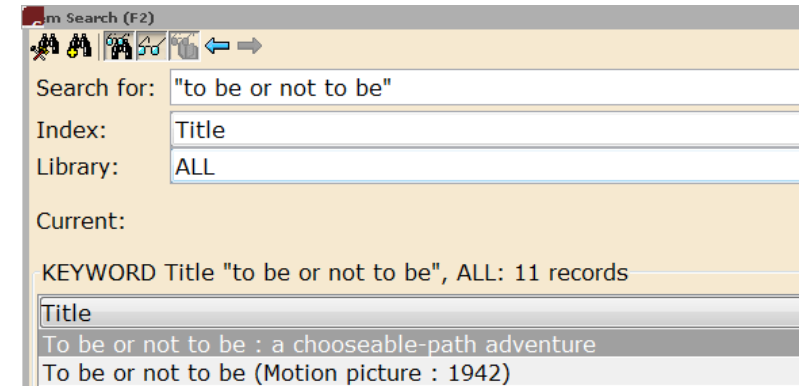
Searching for items (operators and stop words) ...

	WorkFlows	Enterprise	DLC Mobile App
Boolean Operators define relationships between search terms	AND, NOT, OR, XOR	No. Any of these operators and stop words can be included in searches.	No. Any of these operators and stop words can be included in searches.
Positional Operators connect words or phrases in a single field entry	SAME (in same field) NEAR (adjacent in same field) ADJ (adjacent to each other in the order in which they're entered)		
Stop words are ignored	A, an, as, at, be, but, by, do, for, if, in, it, of, on, the, to		

Searching for items (operators and stop words - examples) ...

- WorkFlows

- Enclose operators and stop words in quotation marks to force them to be included as words in a search.
 - "to be or not to be" (no searchable words)
- It is sometimes useful to omit operators/stop words
 - this book good for *This book is not good for you*
 - busy street for *Near a busy street*
- When building search phrases, note the differences between
 - "near" far (two terms - 25 records)
 - "near" near far (positional operator - 7 records)
 - "near" adj far (positional operator - 6 records)
 - "near" and far (Boolean phrase - 26 records)
 - "near and far" (three terms - 18 records)
 - "near" not (far or death) which is equivalent to "near" not far not death (includes near, excludes far, excludes death - 180 records)



Searching for items (substitution and truncation) ...

	WorkFlows	Enterprise	DLC Mobile App
Substitution/truncation	? (single character) \$ (any number of characters)	No.	Truncation only. No special character – just type partial words.

- WorkFlows

- Use substitution when you know how many letters you need but are not sure which ones they are.
 - `wom?n` returns records containing woman or women
 - `bo??s` returns records containing bones, books, bowls, boxes, bolts, etc.
- Use truncation when you are not sure of a word ending. It can represent any number of characters.
 - `institution$` returns records containing institution, institutional, institutional
- The truncation character also works for multiple characters in the middle of a word
 - `ki$ers` returns records containing killers, kissers, kippers, kissinger's, kingmaker's, etc.
 - `do$es` returns records containing does, doggies, doodles, dollies, documentaries, etc.
- The substitution and truncation characters may not occur as the first characters of a word.

Searching for items (Relational Operators) ...

	WorkFlows	Enterprise	DLC Mobile App
Relational Operators <, >, =, <>, <=, >=	Yes. Use the General index and Keyword type.	Publication year is available post-search: Availability and filters panel.	No.

- WorkFlows

- Relational operators help search numerical expressions. Use the General index and the Keyword search type.

- Use relational operators to restrict results by publication date. Note the spaces before and after the relational operator.

- GED and {pbyr} > 2014

- Enclose relational operators in quotation marks to include them in a search term, such as "e=mc2"

Search for:

Index:

Library:

Current: [Stubblefield, Mike. --- Honda Civic automotive repair ma](#)

KEYWORD General honda {ti} and {pbyr} < 2000, ALL: 21 records

Search for:

Index:

Library:

Current: [Stubblefield, Mike. --- Honda](#)

KEYWORD Title "e=mc2", ALL: 6 records

Resources...

- WorkFlows
 - Help File Topic: Search Strategies and Browsing Techniques (WF help)
 - WorkFlows Workbooks for Delaware Libraries (ProfDev and Consortium)
- Enterprise
 - Training Guide Edited for DLC (ProfDev and Consortium)
- Resources available at:
 - Professional Development LibGuide – <http://guides.lib.de.us/profdev> , Public Services – 000 Tab, center column.
 - Consortium website <https://consortium.lib.de.us/> (Requires login with your library's CIRC login and password.)
 - WorkFlows, Help menu or Help wizard in the Common Tasks of each module.
 - Write to sirsi.support@lib.de.us



Contact information:

Rose Harrison
Administrative Librarian
Delaware Division of Libraries

302.257.3003

sirsi.support@lib.de.us (Messages to this address reach the entire DLC team.)

