




ILS Tips and Tricks for Reference Staff

Presented at the Reference Services Meeting
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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.



This presentation will cover...

- 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...

- Overview of differences between item searches in WorkFlows, Enterprise, and the DLC mobile app
- Searching in WorkFlows
 - The difference between a subject search and a general search
 - Keyword v. Browse searching
 - Advanced search
 - Item search shortcuts
- Additional topics you want included



Managing holds ...

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

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 entries for '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 entries for different libraries: 'Brandywine Hundred Library', 'Greenwood Public Library', and 'Milford Public Library', each with a right-pointing arrow. A fourth entry for 'New Castle Public Library' is partially visible at the bottom.

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 only 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 unsuspe

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 unsuspe:

Comment: Append Replace Remove

OK Cancel

Enterprise in Safari on iOS ...

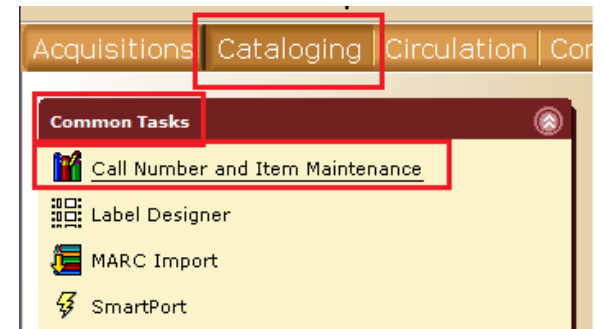
- There is a recurring known issue with rendering web pages when iOS or Safari is upgraded.
 - Problem is not specific to Enterprise.
 - Problem is generally resolved when the other software is upgraded.
 - Workaround 1: recommend DLC app if it will work with the patron's hold management practices.
 - 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.



Searching for items (1 of 2) ...

	WorkFlows	Enterprise	DLC Mobile App
Spelling correction	No.	Fuzzy. Will offer “did you mean?”	No. Use truncation.
Substitution/truncation	? (single character) \$ (any number of characters at end of word)	No.	Truncation only. No special character – just type partial words.
Boolean Operators	AND, NOT, OR, XOR	No. These words can be included in searches.	No. These words can be included in searches.
Positional Operators	NEAR (adjacent in same field) ADJ (adjacent to each other in the order in which they’re entered)	No. These words can be included in searches.	No. These words can be included in searches.

Searching for items (2 of 2) ...

	WorkFlows	Enterprise	DLC Mobile App
Stop words	A, an, as, at, be, but, by, do, for, if, in, it, of, on, the, to. Enclose in quotation marks (“if”) to force stop word search.	No. These words can be included in searches.	No. These words can be included in searches.
Search by fields	Yes.	Yes.	No.
Limit searches	Pre-search: Advanced search gadget. 	Pre-search: Advanced search. Post-search: Availability and filters panel.	No. Add more search terms.
Items included	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.
Sort hit list	Title, author, and publication year.	Relevance, title, author, and publication year.	No.

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:

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

