# Welcome to Enterprise search!

To get started, choose one of these topics.

- Finding my way around
- Using the library catalog Home page
- Searching for items
- Working with search results
- <u>Limiting Search Results</u>
- Viewing the details of an item
- Using My Account
- Using My Lists
- Placing holds
- Using the Select an Action drop-down menu

Important: If you cannot find what you are looking for, or need help for any reason, please ask a librarian.

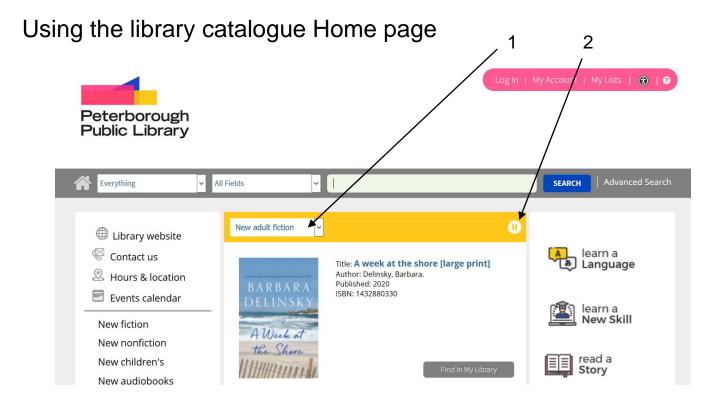
## Finding my way around



### **Navigating**

You can find navigation links in the upper-right corner of the header (1). Click one of these links at any time to log in, go to the My Account page, or go to the My Lists page. You can also click the Home icon (2) to go to the library catalog Home page.

Keyboard NavigationThe standard library catalog interface is made to be accessed primarily with a mouse. However, if you are more comfortable using the keyboard, you can click here (3) to change to an interface that better accommodates that.



### **Viewing Home page content**

The library catalog Home page allows you access to any content the library has set up, such as library announcements, links to websites, etc.

### **Using book lists**

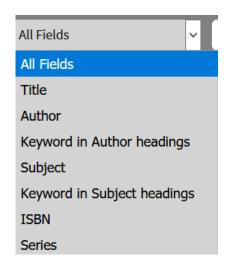
The library can display themed lists of titles that you may find interesting to browse. To view them, select a list from the drop-down (1), and the titles in the list will slowly cycle in the display like a slideshow. To pause the slideshow, click the Pause button (2). Click on any title in the list to bring it up in the display.

Any title you select will display information, like author, publication date, ISBN, etc. For some titles, you can click links to more information, such as a book review or an excerpt You can also click the Find in My Library button to search for the title in your library.

## Searching for items







Digital records show in the public catalogue. To search for online or downloadable material use a digital item search. In the Digital item search results, all the material provided by Hoopla Digital and cloudLibrary will display; whether or not it is available without having to go to each individual platform.

Physical searches are for material picked up at the library. This limiter is found in the drop-down menu under **Everything**.

## **Searching with limits**

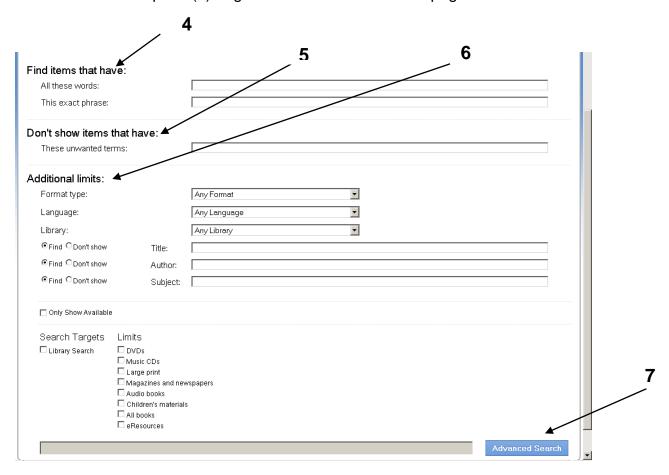
Use the Limits drop-down (1) to limit your search to specific types of items (like Music CDs, for example), or search "Everything."

### Searching by field

Select a field from the Fields drop-down (2) to search within a specific field (for example, Title, Author, or Subject), or search from "All Fields."

### Using advanced search

If you want more search options to help you find exactly what you're looking for, click the Advanced Search option (3) to go to the Advanced Search page.



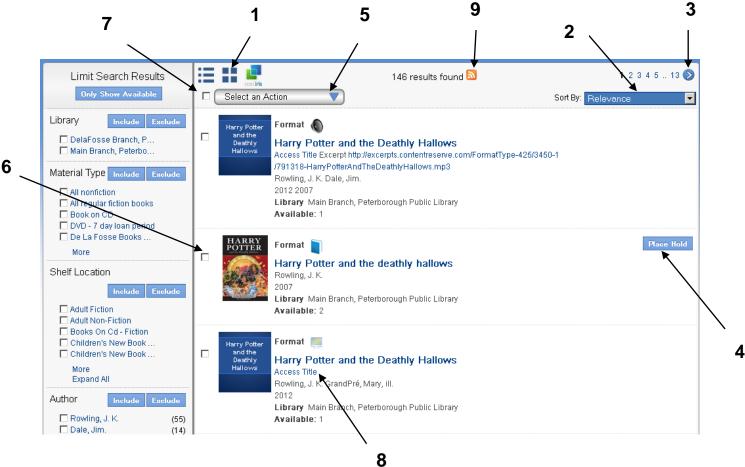
With Advanced Searching, you can search exact phrases (4) or exclude terms from your search (5). For example, if you wanted to do a search on potters but did not want results for "Harry Potter," you could search the term "potter" and enter "Harry" in the unwanted terms box.

You can also apply any combination of limits on your search with Additional limits (6), including format type, language, location, fields, availability, and targets.

Once you have set up your search with the terms and limits you want, click the Advanced Search (7) button to get your search results.

Note: While there are many options to limit your search, there is the likelyhood that selecting too many limits will not return any search results.

### Working with search results 9 5 7



### **View options**

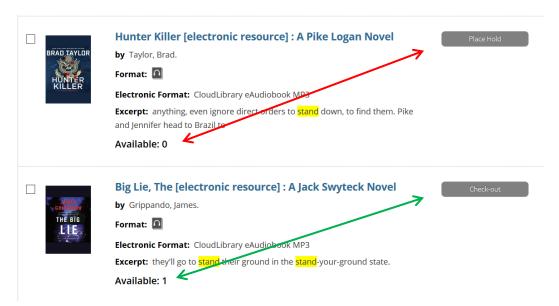
There are three different view options for your search results: List view, Grid view, and Cooliris view. Click any of these icons to change the view (1).

### Sorting search results

After you have received the results of a search, you can sort the results by publication date (ascending or descending), title, or author (2). The most relevant results are then sorted by that option.

### **Digital items**

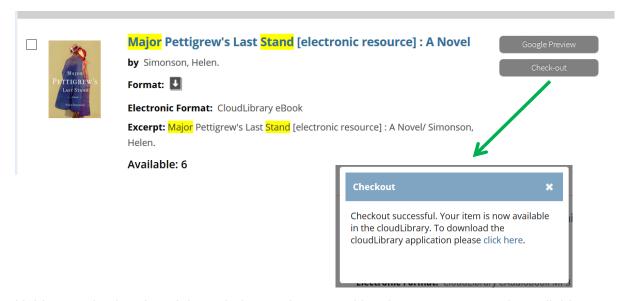
Holds and checkouts of digital items can be done directly within the catalogue



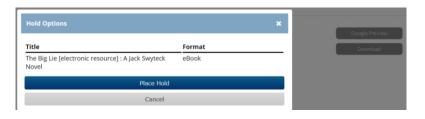
When a digital item is checked-out within the catalogue, one will need to go to the appropriate app (CloudLibrary or Hoopla); or desktop computer to download and access the title. Each platform directs users a little differently at this step:

- CloudLibrary sends a message and automatically checks the item out. Go to your app to download and access, or click on the link provided to get the cloudLibrary app.
- Hoopla Digital takes you directly to the item in either the Hoopla website in your browser or in the app

CloudLibrary sends this message when you check out an item in the catalogue:



Holds can also be placed through the catalogue on titles that are not currently available.



### **Paging**

Click the Previous and Next icons (3) to move forward and backward through pages of search results.

### Placing a hold

Items in your search results that are holdable at your library will have a Place Hold button (4) that you can click to put the item on hold.

Note: You can also place a hold on an item by using the Select An Action menu.

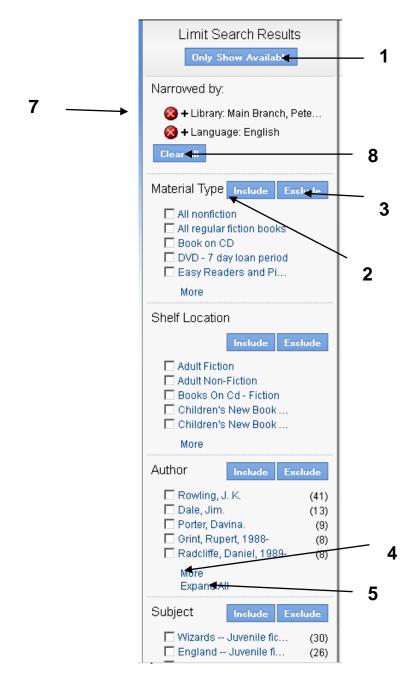
### Selecting an action

From the Select An Action drop-down menu (5), you can place holds on items, add items to your My Lists, and email or print item information. Select the items you want from your search results page by selecting the item check box(es) (6), or use the Select All check box (7) to select all items on the page. Then select the action you want to take from the Select An Action menu. .

### Saving searches as RSS feeds

If you use RSS, you can click the RSS icon (9) to save any of your searches as an RSS feed. This way, you can see updated results of your specified searches through your RSS reader. To take advantage of RSS feeds, you must have an RSS enabled browser or an RSS reader.

## Limiting Search Results



## **Using the Show Only Available option**

Click the Show Only Available button (1) to limit your search results to only items that are available for checkout.

### **Using limits**

Limits are organized by fields (like Author, Format, Language, Subject, etc.). You can use limits in one of the following ways:

•Click on a limit. By clicking a single limit, you will narrow your search results to meet that limit. For example, Under format, if you click on "Books on CD - Fiction," your search results will

only include items that are fiction books on CD.

•Select a limit or multiple limits to include in or exclude from your search results. You can select one or multiple limits within a single field by clicking the check box next to the limit(s).

If you want to include limits in your search results, click the Include button (2). For example, if you select to include Books on CD and All nonfiction, your search results will only include only these types of material.

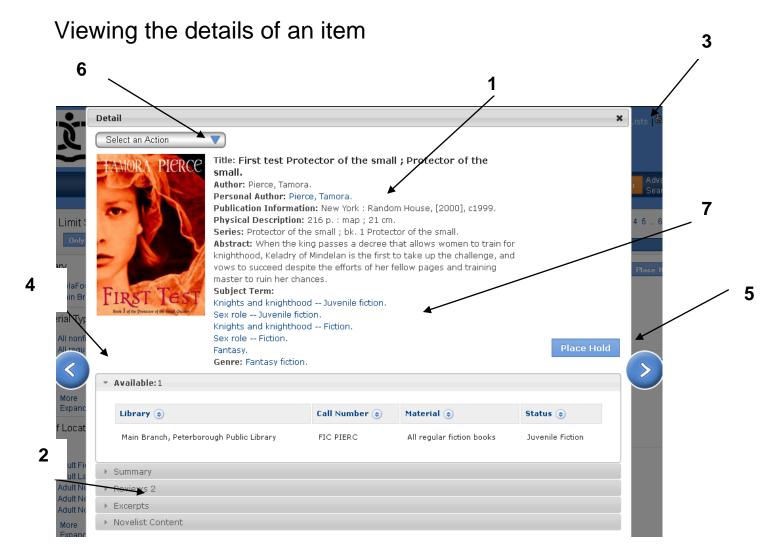
If you want to exclude limits from your search results, click the Exclude button (3). For example, may want to select to exclude Easy readers and DVDs from your search results.

Use the More and Fewer options (4) to expose or hide limits within a field incrementally. You can also use the Expand All or Collapse All options (5) to either show all limits in a field, or go back to only showing the first five.

### **Removing limits**

Any limits you have applied will appear in the "Narrowed by" section. Limits you have included in search results will have a plus (+) sign; limits you have excluded will have a minus (–) sign.

Click the Delete button (7) to remove an individual limit, or remove all limits by clicking the Clear all button (8).



### **Detail display**

When you click on a search result title or image, a new window displays details for that item.

In the catalog data, you might see links (an author's name, for example) (1) that you can click to begin a new search for that link's content. Or do the same with subject links (7).

In the catalog data, use the sort icon ( ) to sort items. Click once to sort ascending. Click again to sort descending.

The different sections (2) contain information about item availability, item summaries, reviews, excerpts, as well as Novelist. Click on the section you want to open and scroll down to view its content.

To close the item detail view, click the Close button (3), or click anywhere outside the detail display window.

### **Paging**

Click the Next and Previous buttons (4) to view the detail page of the next or previous item. The order of the items is the same as it is on the search results page.

### Placing a hold

Items that can be checked out will have a Place Hold button (5) that you can click to put the item on hold. Note: You can also place a hold on an item by using the Select An Action menu (6).

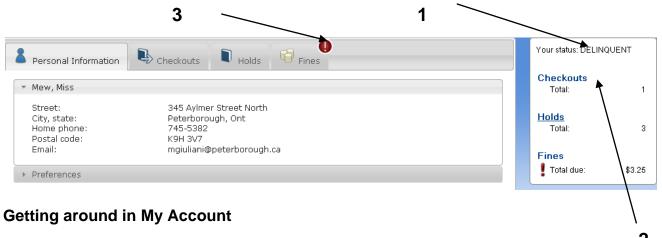
## Selecting an action

From the Select An Action drop-down menu (6), you can place a hold on the item, add the item to My Lists, and email or print item information.

## **Using My Account**

My Account lets you view your checkouts, holds, and any fines you may have. You can also view your personal information, change your PIN, and set up your preferences.

Go to My Account page by clicking My Account from the upper-right corner of the header. If you are not already logged in, the system will prompt you to log in before you can access the My Account page.



There are four My Account tabs: Personal Information, Checkouts, Holds, and Fines. Clic a tab to open it up.  $^{\mathbf{2}}$ 

### Understanding the summary box

The summary box (1) gives you a quick view of the number of items you have currently checked out, the number of items you have on hold, and the amount of fines you owe your library. You can click a heading (2) (for example, "Checkouts") to open the corresponding tab.

The summary box also shows your user status. Some statuses prevent you from performing certain actions (for example, if you have unpaid fines, you may have a status that prevents you from renewing items you have checked out). If you have questions about your status, talk to a staff member at your library.

#### Alert icons

Alert icons will appear in My Account when a new action is available to you. For example, if you have a hold that has arrived and is ready for you to pick up, you will see an alert icon on your Holds tab and in your summary box next to the Holds heading (3). Alert icons will appear when:

- · You have overdue checkouts
- You have holds that are ready for you to pick up
- You have any new or unpaid fines

These topics will explain more about each tab in My Account:

#### **Personal Information**

The Personal Information tab has four sections: User information (your name will appear as the heading), address information and Preferences.

#### **User information**

The User information section displays your personal information. If you see something that is inaccurate or outdated, please talk to a librarian at your library.

#### **Preferences**

Set up your personal preferences in the Preferences section. You can configure these options:

- •Default My Account Tab lets you select which tab (Personal Information, Checkouts, Holds, or Fines) opens when you access the My Account page.
- •Preferred List lets you select a default My List. When you add a title to your lists, the program adds it to the default list. If you select "no default list", the program prompts you to select a list. You can create a list to use as your preferred list in the My Lists page.
- •Preferred Pickup Library lets you select which library you want to use as your pickup library, or the library where you go to pickup holds.

Record my checkout history and Show my chechout history are selected as the default

- To show your checkout history **BOTH** must be selected.
- If you uncheck the <u>Record my checkout history</u> and then click <u>Update</u>, no checkout history will be recorded from that date onwards. History may still be shown but nothing new will be added.

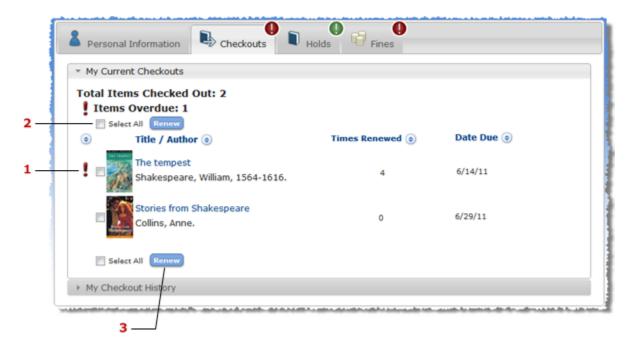
Checkout history is seen under the Checkouts tab – records items that have been returned.



This feature and will only show a history from mid July 2018 and onwards.

### Checkouts

The Checkouts tab has My Current Checkouts. If you have any overdue items, an alert icon will appear in this tab.



### **My Current Checkouts**

The My Current Checkouts section displays the items that you have currently checked out. If you have any items that are overdue, they will appear at the top of the list with the alert icon (1).

You can click on the title or image of any item to view its detail page.

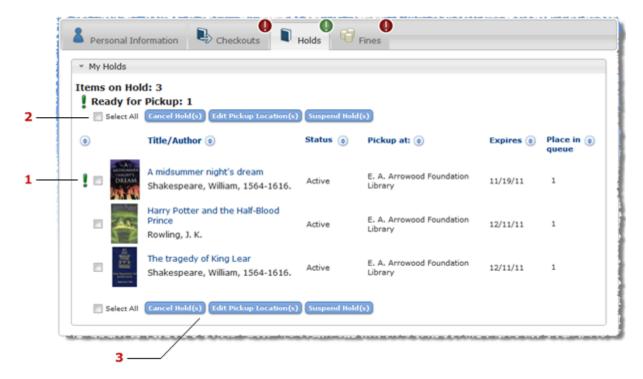
If you want to renew items, select the items you want to renew (or select them all by using the Select All check box (2)) and then click the Renew button (3). To renew digital checkouts, you will need to visit the app or the website.

From the digital checkout section., all Hoopla titles have the HPL in the format name., CloudLibrary titles are not always clear. Some titles will not show the covers or format information - only a due date. These are books that have been borrowed in CloudLibrary but belong to other libraries, are not in our own collection. We do not hold the record information for them..



Use the sort icon ( ) to sort items. Click once to sort ascending. Click again to sort descending.

#### Holds



### My Holds

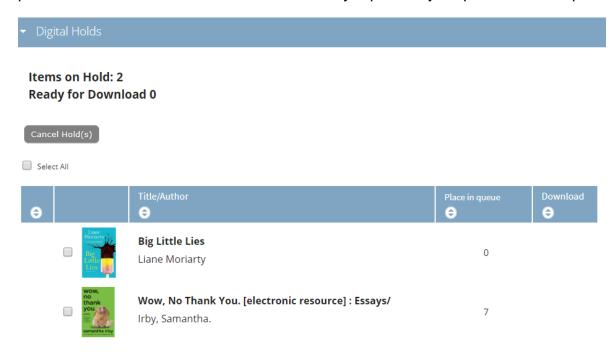
You can view all your holds in the My Holds section. Any holds that have arrived and are now available for you to pick up will appear at the top of the list with the alert icon (1).

You can click on the title or image of any item to view its detail page.

From this section, you can also cancel a hold, edit a hold's pickup location (library), or suspend a hold. To perform one of these actions, select the items you want (or select them all by using the Select All check box (2)) and then click one of these buttons (3):

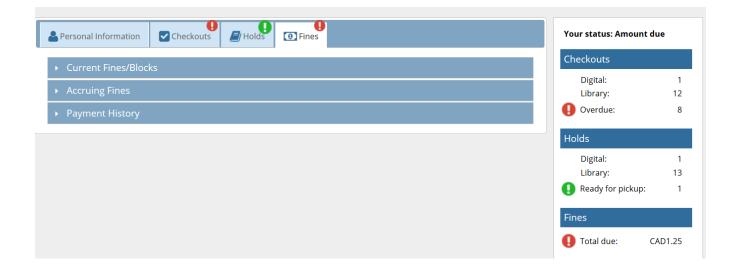
- •Cancel Hold(s). After you click this button, a window will open to confirm the cancellation. Click Yes to cancel the hold or No to go back.
- •Edit Pickup Location(s). After you click this button, a window will open where you can select the new pickup location. Click Change to change the location or Cancel to go back (only for currently unavailable items).
- •Suspend Hold(s). When you click this button, a window will open with a calendar you can use to select the start date of the suspension and the end date of the suspension. Click Suspend to suspend the hold or Cancel to go back.
- •Cancel Hold Suspension. When you click this button, a window will open to confirm the cancellation. Click Yes to cancel the hold suspension or No to go back.

Digital Holds only gives the title of the book and not the actual place in the hold queue. The position is listed as 0 – this does not accurately represent your position in the queue.



#### **Fines**

The Fines tab has 3 sections: Accruing Fines, Current Fines, and Payment History. If you have any new or unpaid fines, an alert icon will appear in this tab. You can pay fines in person at your library or online.



### **Accruing Fines**

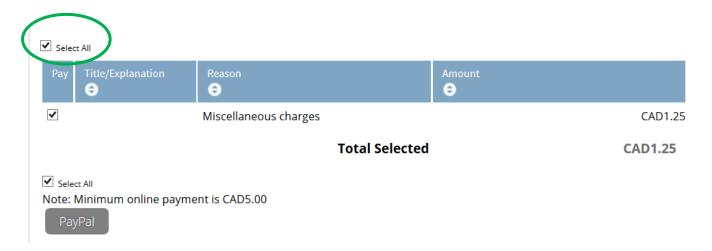
Go to the Accruing Fines section to view any accruing fines assessed to your library account. An accruing fine is a fine that is added to over time (for example, for a late book that is fined more every day that it is not checked in past the due date).

#### **Current Fines**

Go to the Current Fines section to view any new or unpaid fines.

You can click on the title or image of any item to view its detail page.

You can pay fines in person at your library, or online using PayPal. To pay online with PayPal there is a minumun payment of \$5.00 you can select which fine to pay off by checking the box beside the fine or click on the select all to pay everything together.



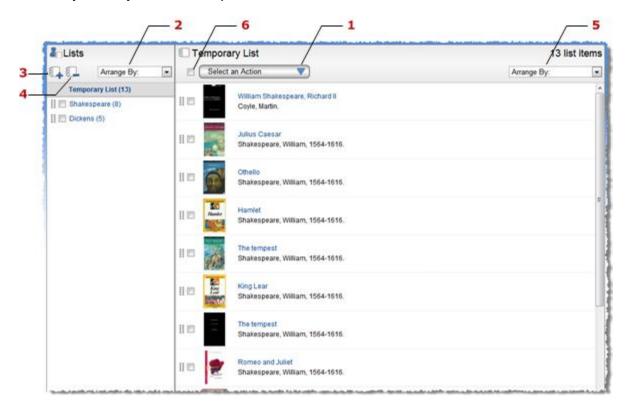
Use the sort icon ( ) to sort items. Click once to sort ascending. Click again to sort descending.

## **Payment History**

You can view a history of any payments you have made to fines in the Payment History section. This section will display the dates you made payments and the amount that was paid.

## **Using My Lists**

When you find items in Searching that you want to keep and organize, you can save them in your My Lists. You can create and customize your lists, and you can print or email your lists. From My Lists, you can also place holds on items.



## Adding items to My Lists

You can add items to your My Lists by using the "Select An Action" drop-down from either a search results page or an item's detail display.

If you are logged in to the system, you will be prompted to select which of your lists you want to save items to.

If you are not already logged in to the system, any items you add to My Lists will be sent to a "Temporary List." To access your custom lists, you will need to first log in.

## **Using your Temporary List**

If you are logged in to the system, you can move items into other lists, or you can save the entire list. In essence, you will be creating a new list out of the items in your Temporary List.

To save your Temporary List, select Save Temporary List from the Select An Action menu (1). A window will open and ask you to name the new list. Enter the name and click Save to save the list or Cancel to go back. If you log out without saving the list, the Temporary List will be cleared.

If you are not logged in, the list of titles will be cleared after your session has expired (about 10 minutes with no activity in the browser). You can log in after you have placed items in your Temporary List to move them to one of your saved lists.

### **Viewing and arranging My Lists**

Your Temporary List and your saved lists are listed in the left-side window under the "Lists" heading.

To view a list, click on it. It will open in the main window.

To arrange your saved lists, do one of the following:

- •Use the ( || ) icon to drag and drop your lists in the order you want them to appear.
- •Use the Arrange By drop down (2) to arrange your lists alphabetically (ascending or descending), or by the time they were created (most recent first or oldest first).

### Adding/Deleting lists

To create a new list, click the Add List button (3). A window will open and prompt you to name your new list. Enter the name and click Create to create the new list or Cancel to go back.

To delete lists, select the lists you want to remove and then click the Delete Lists button (4).

Viewing and arranging items in a list

You can click on the title or image of any item to view its detail page.

To arrange items in a list, do one of the following:

- •Use the ( || ) icon to drag and drop your lists in the order you want them to appear.
- •Use the Arrange By drop down (5) to arrange the items in your list alphabetically (ascending or descending), or by the time they were added to the list (most recent first or oldest first).

### Selecting an action

First, select the items you want to do an action on, or use the Select All check box (6) to select all items on the page. Then choose the action you want to take from the Select An Action menu (1).

## Placing holds

Many items in your library are available for holds.

If you are not already logged in when you try to place a hold, the system will prompt you to log in.

A window will appear for you to specify the library where you want to pick up the item when it arrives. Once you have selected the pickup library, click Place Hold. The system will tell you if the hold was successfully placed or not.

Once you have placed a hold on an item, you will be able to see it in My Account under the Holds tab.

## Using the Select an Action drop-down menu

The "Select an Action" menu is found on the search results page, on an item's detail display, and in My Lists. Depending on your library's configuration, you will see these options in the "Select an Action" menu:

- Place Hold: This option lets you place a hold on selected items .
- •Add to My Lists: This option lets you save selected items to a list. If you are not already logged in, items will automatically be sent to a temporary list. You can see this temporary list by going to the My Lists page.

If you are logged in, a window will appear and ask you to specify which of your saved lists you want to add the item(s) to. Select the list you want and click Add.

The system will tell you when items were added successfully, and then you can see them when you go to the My Lists page.

Note: The "Add to My Lists" option will not appear when you are on the My Lists page.

- •Email: This option lets you email item information. A window will appear where you can enter the email address where the item(s) information will be sent. If you want to send the email in plain text format instead of HTML, select the option. Click Send Email when you have finished.
- •Print: This option lets you print item information. The item(s) information will display on a new page in print format. Use your browser's print option to send the information to a printer.

The following options will also appear in the "Select an Action" menu on the My Lists page:

- •Delete Selected: This option lets you remove items from a list. A window will appear to confirm that you want to remove the item(s) from your list. Click Delete to remove the item(s) or Cancel to go back.
- •Move: This option lets you move items from one list to another. A window will appear for you to select which list you want to move the item(s) to. Click Move to move the item(s) or Cancel to go back.

on lets you copy item you want to copy the		will appear for you to tem(s) or Cancel to