

WorldCat Discovery interface features

1:35 pm – 2:41 pm Wednesday, February 21, 2024 | (UTC-05:00) Eastern Time (US & Canada)

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Gena Cox 00:09:03.460 --> 00:09:19.420

All right, hello. And welcome everyone to world cat discovery interface features. My name is Gina Cox. I'm a product trainer here at OCLC and today I'll be talking about some of the core interface options and usages found within discovery.

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Gena Cox 00:09:24.580 --> 00:09:41.700

Our learning objectives for this course are going to focus on of course, customizing your discovery interface such as the item detail screen, in particular, we'll look at the, my account interface and how our library users utilize that module, and we'll also look at resource access.

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Gena Cox 00:09:41.860 --> 00:10:02.340

So we have a lot to cover today and let's get started by doing a quick level set for the view. We'll see today. So something I always like to start my classes with. This is the OCLC training libraries view of Worldcat discovery. I have my own customizations here such as the branding choices. Now your interface may look a little bit different and that.

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Gena Cox 00:10:03.440 --> 00:10:06.680

We'll see today. How all of this was configured.

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Gena Cox 00:10:10.480 --> 00:10:14.600

So let's begin with the basic interface configuration.

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Gena Cox 00:10:16.880 --> 00:10:36.720

So we'll start with a very brief glimpse here of the user interface options tab within service configuration. Now if you currently have access to and utilize service configuration, then this looks really familiar to you, if you don't currently have access, you'll want to obtain it from someone in your organization or go ahead and contact OCLC support.

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Gena Cox 00:10:37.360 --> 00:10:45.200

And I'll note that this session is recorded so you can revisit it to

be reminded later where these configuration options live if you'd like to check on those.

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Gena Cox 00:10:46.320 --> 00:11:01.720

These are the five accordion sections that will primarily be looking at today. We have your Worldcat dot org URL, but general display settings, the branding and customization logo settings and custom links.

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Gena Cox 00:11:05.520 --> 00:11:24.080

Now we'll start under Worldcat Discovery and world cat local, and then we'll find user interface options. We'll find that first accordion labeled your world cat- dot org URL and we do see straight straight away here.

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Gena Cox 00:11:24.160 --> 00:11:44.560

That are individual discovery URL unique to each of our institutions. We also see our institution name here, beneath those, We see an option here called Worldcat Dot org redirect. Now today's class is all about making sure our users have a really great experience. So we want them to be on our site. Now this is an option to help guide that.

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Gena Cox 00:11:44.680 --> 00:11:54.520

What this option does is since whenever your users visit Worldcat dot org, and then when they identify an item, they're interested in, they're presented with a few options.

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Gena Cox 00:11:56.720 --> 00:12:16.560

Now here we see some of those options. So I, as the user have clicked on an item in Worldcat dot org, so I will see this pop up message asking me if I would like to instead look at this live. Look at this item in my library's discovery site. I also have the option to stay on Worldcat dot org, but ultimately sometimes you just need that reminder.

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Gena Cox 00:12:16.680 --> 00:12:37.040

As a patron to refocus and recenter your attention on your libraries Resources and services, and this is a great option for that attention back to your institution, and this is gonna be presented based on IP detection. So the user would need to be it within those IP ranges of campus or logged into your VPN, for example.

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Gena Cox 00:12:41.520 --> 00:12:57.520

So we're now gonna look at the branding and logo accordions and first we have branding and customization, and this is where we're able to choose our color schemes. We have color selection, drop downs which opens a color gradient. You can choose from or if you have a specific hex.

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Gena Cox 00:12:57.560 --> 00:13:09.160

Code that your institution prefers to stick with, which is often the case you can manually enter those in the fields here and as we can see those color surface in the header, as well as in the navigational bar.

16

Gena Cox 00:13:12.880 --> 00:13:30.800

Next we have the logo settings, we can enter the URL of our hosted image. We can choose where we want the image to direct us if we click on it. So mind takes the user, right back to my discovery homepage search bar and then we have a field to enter in alternative text for accessibility and we.

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Gena Cox 00:13:31.840 --> 00:13:35.400

Surfacing in the top left of my discovery site here.

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Gena Cox 00:13:41.680 --> 00:14:02.160

And next we have custom links, we have the ability to utilize seven links here with a few guidelines, if your organization ops to utilize the chat with the library and feature that widget must be entered into the custom link Number one slot, we can also include our a- to Z list here and a remote login link, for example, for our off.

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Gena Cox 00:14:02.880 --> 00:14:09.480

Off campus users, we can also choose to have the text of the link translated as well.

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Gena Cox 00:14:11.760 --> 00:14:22.840

So here we see a preview of the chat widget entered into link number one. Now this, of course is if your library would choose to use that function, have that function established and enabled.

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Gena Cox 00:14:25.360 --> 00:14:39.240

A few things to note here, the link type for the chat widget should be set to library contact info and we also recommend making sure that the code utilizes HTTPS to avoid any of those security warnings.

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Gena Cox 00:14:42.480 --> 00:15:01.680

Now, after link number one, the remaining links can be entered and here we see. I have my a to Z list, my remote login link, maybe if I have stack maps, I might want to put that here, any of my lip guides, purchase suggestions and so on to the right, we see where those are surfacing and we also see the dropdown for these.

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Gena Cox 00:15:02.680 --> 00:15:09.000

Resources, we're next to advanced search and course reserves, but maybe I'd like to call back something else.

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Gena Cox 00:15:12.560 --> 00:15:29.240

Under the custom links menu, we have the ability to change that text to anything we'd like, so resources is the default we can see, but feel free to update this to whatever makes the most sense for your users, right? We want this to be intuitive to our, our institutions particular users.

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Gena Cox 00:15:34.960 --> 00:15:51.600

Next we have the ability to utilize custom notification, we start by toggling on or off whether we'd like this notification to display, and then we have a message field where we can place a message in full or we can direct our users with a link to another.

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Gena Cox 00:15:52.520 --> 00:16:09.200

So as an example, here, I have a message directing users who may need help with indexes to consult a link, and then I have the hyperlink text searching world cat indexes and finally at the bottom, I have the URL for that hyperlink, where I want my users to be taken.

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Gena Cox 00:16:12.720 --> 00:16:31.280

And we can see where those surface is. Now, at the top of my world cat discovery screen in a dart grade box, I have my tax and my hyperlink there. Ready to be utilized. This may also be a good opportunity to note unexpected library closures, upcoming holiday hours plan maintenance, and other things of that nature.

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Gena Cox 00:16:36.400 --> 00:16:51.640

And then we just have a brief look at our footer here with things like language preference and institution information number four. You'll note is a reflection of our banner links in the header navigational bar number. Five is all of our custom links. We just set up together.

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Gena Cox 00:16:56.240 --> 00:17:08.040

And now that we've got ahead and cover the basics here and got the lay of the land, just take a quick pause for a poll question, if you'd like to participate, you'll see a poll window open for you.

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Gena Cox 00:17:13.520 --> 00:17:23.400

So custom links may include which type of links go ahead and think about it for just a second, and then we'll go a little bit deeper into our interface features.

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Gena Cox 00:17:48.080 --> 00:18:05.840

All right, everyone got it, right? So the answer is both the chat wizard widget must be placed in link Number one, if utilize in the remote login link can be linked to desired and any other links the library wishes to place are entirely welcome. The only limitation is that there may be seven of them.

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Gena Cox 00:18:11.760 --> 00:18:26.120

So we have our interface looking the way we want it, We have our links where we want them, and now let's take a look at item descriptions if you attended the first class or searching fundamentals. This is where that class leaves off and we're going to pick right up.

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Gena Cox 00:18:28.400 --> 00:18:47.600

So here we have a view of the item details and this is what we'd see once we click into an item from our search results screen, now, again, if you attended the search fundamental class, you'll note, this is right, where we left off. I have the details here split into two sections, so we can digest them a little bit easier above. We have the brief.

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Gena Cox 00:18:48.120 --> 00:19:08.720

Details, this is what is visible from those search results display and it remains persistent at the top of the item detail screen after we click into it below. We have the item description, This information is predominantly sourced from the mark record. Now in the next two slides, I want to quickly show where this data lives for any.

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Gena Cox 00:19:08.880 --> 00:19:11.320

Catalogers who are watching today.

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Gena Cox 00:19:17.680 --> 00:19:38.160

So first we have the brief item detail, we have the type of

information like title author and summary, and then we have the interface label, which is how we can expect to see it surface on the screen, and then some information on which Mark fields are at play here and a few additional notes. Now, again, there's no need to memorize this, this information.

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Gena Cox 00:19:38.200 --> 00:19:58.640

Will be linked in the class as a company learner guide. So don't be scared and even more, so we don't want to be scared on this screen either. So, so lots of information here again. No, need to squit and memorize all of this. This is just a quick example of the extensive information on the item description. Again, that was the lower half of.

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Gena Cox 00:19:59.200 --> 00:20:12.280

Details again, just like before this is linked to, in the learner guide for those who would like to investigate further and really examine where that data is pulling from. I just like to point it out for those that really want to take a deeper dive into that topic.

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Gena Cox 00:20:15.820 --> 00:20:35.660

So sometimes in our item details results, we see this yellow highlight and we covered this a bit in the search fundamental score. So feel free to go back to that recording if you'd like to revisit this highlights are matching onto our search terms, but I also wanted to point out that if you utilize a search index, like subject we will see the relevance in.

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Gena Cox 00:20:36.340 --> 00:20:56.060

That area as well, and that's because that index will appear in our search results set, so we can see in the search bar, I use the subject index S- U. colon and now at the bottom of the screen in the red box, you can see my subjects are highlighted. Let me show you a side-by-side comparison of this.

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Gena Cox 00:20:58.700 --> 00:21:16.620

So here we can see that comparison on the left. I've done a search with the subject index and you can see that my subject headings are displaying for me. I did that same search on the right without the subject index and I don't get the subject headings so discoveries assuming here that.

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Gena Cox 00:21:16.660 --> 00:21:37.100

If you are using a subject index, you're probably pretty interested in

what those headings are, and you would find it useful to see them displayed. Now this is just something worth noting for users, especially those power users, other faculty, and so on, this may be worth nudging them towards using that index more, often if they aren't already or just getting them increasingly comfortable.

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Gena Cox 00:21:37.220 --> 00:21:40.700

With using those indexes if they aren't already using them.

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Gena Cox 00:21:42.300 --> 00:21:48.220

Next, let's look at the area below this, the item descriptions area and some of our options there.

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Gena Cox 00:21:50.620 --> 00:22:09.340

First, we have the option to reorder our data fields. This is done in service configuration and in a nutshell here we have the ability to promote or demote fields to promote fields is to float them up and make them more readily apparent to the user, whereas to demote them is to suppress them further down the page.

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Gena Cox 00:22:09.740 --> 00:22:15.020

So look at this first hand, let me bring up our service configuration screen here.

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Gena Cox 00:22:16.140 --> 00:22:27.300

So we are now in my service configuration and we are under Worldcat discovery and then item detail settings, but you can see highlighted in blue to the left here.

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Gena Cox 00:22:28.300 --> 00:22:48.780

Now, from the accordion options, we'll find an expand reorder data fields right now, we can see that I have subjects as my first visible detail and I have chosen to display this field with the label subject headings. Now my second field here, let me scroll down so we can get that right in the middle of the screen.

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Gena Cox 00:22:50.700 --> 00:22:54.380

My second visible detail is physical description.

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Gena Cox 00:22:56.460 --> 00:23:16.300

But let's say I want to promote this and have this detail be the first thing we see because perhaps I find that my users are really primarily

interested in that physical description more so than anything else and this, of course, applies to any of the, any of the facets that we see here. So I can click this and as you can see, I can move.

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Gena Cox 00:23:16.380 --> 00:23:36.780

Around, and I can drag that up to the top and now I would have that floated to be the top of my search results on that item detail screen now. I can also, if I decide that, I don't want physical description to surface at all unless my user clicks on that, see more link. I can.

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Gena Cox 00:23:38.380 --> 00:23:46.540

Sort of under the fold so to speak and I simply do that by dragging that over here to that demote from view column.

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Gena Cox 00:23:48.300 --> 00:23:50.300

So I'll move that back.

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Gena Cox 00:23:51.500 --> 00:23:54.140

And let's take a look here.

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Gena Cox 00:23:56.620 --> 00:24:12.780

So we can see the same example on the left. I have physical description at the top of my list and I have it labeled as material description on the right. We see that reflected with the material description field right there at the top of the item description section.

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Gena Cox 00:24:20.940 --> 00:24:39.500

So while we're on the topic of subject headings a note here that those subject headings can be customized ordered and promoted based on library preference. So I have some instructions here on how to do that. These instructions are also included in the learner guide for those interested these preferences live in service configur.

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Gena Cox 00:24:39.740 --> 00:24:42.140

Under item detail settings.

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Gena Cox 00:24:47.820 --> 00:25:00.620

So we see this selected data sources according still in the same area, we've been working today and this time we'll find that subject heading spocabularies tab in the center of the page.

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Gena Cox 00:25:07.060 --> 00:25:19.700

We see various subject heading vocabularies. We're able to choose from and we're also able to manually select sources as well. You can see, I have gone ahead and selected a few, like Nico off to the right.

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Gena Cox 00:25:28.140 --> 00:25:46.700

A few more things on the item details screen to look at first we have the Google Books preview button. Now this button is static, so there's no configuration needed on our part and it'll always surface directly under the cover art of the material. This will open a new tab with the relevant preview and when finished you're able to return to your discovery.

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Gena Cox 00:25:53.100 --> 00:26:12.300

And finally below the details of the item being looked at, we'll find browse the shelf, the browser shelf function displays items located next to a selected item call number. So this means that the call number of the item we have selected and discovery this applies the physical.

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Gena Cox 00:26:12.940 --> 00:26:32.780

With an LHR, but if those items have an EBOOK available as well, you'll see that here noted in, in the example that this is a feature really great for those users who don't necessarily have a specific item in mind and when a truly browse and for those who are, you know, really for those of us who want to enable.

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Gena Cox 00:26:33.020 --> 00:26:38.100

That more stumble upon serendipity of discovering those sort of titles.

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Gena Cox 00:26:49.420 --> 00:26:57.660

We'll do another quick pull here. Subject heading vocabularies can be customized true or false.

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Gena Cox 00:27:27.180 --> 00:27:30.620

Once again, everyone got it, right? That is true.

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Gena Cox 00:27:33.580 --> 00:27:37.500

Let me peek over to our discovery layer here.

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Gena Cox 00:27:47.020 --> 00:28:04.300

There we go. So I wanted to show us just in real time a quick look at that browse the shelf feature. So in this example, we're gonna talk about this item a little bit later in the session, but if I have gone ahead and located this item in my catalog as the user.

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Gena Cox 00:28:04.940 --> 00:28:24.780

And perhaps I want to work entirely virtually and I just want to see, I want to sort of mimic that experience of what would that be like to physically be in the library and be able to stumble upon those titles that I may not even know we're out there, right? So what I'll do is I'll come right down here and we have browse the shelf enabled.

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Gena Cox 00:28:26.060 --> 00:28:45.260

And this is going to show me all of the items that would appear on the shelf next to the item that I currently have selected and this again is going to be based on the LHR on those call numbers for those items that do have an E- book available again, as I mentioned, we do have that e- book noted here.

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Gena Cox 00:28:54.220 --> 00:28:55.420

All right.

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Gena Cox 00:28:56.860 --> 00:29:04.340

We'll go ahead and carry on here. So next we will look at access options for our discovery users.

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Gena Cox 00:29:09.580 --> 00:29:26.220

So our access options are centered around this box here on the right that we're probably all pretty familiar with, and this service is for all of us again, like I said, on the right of our items and discovery, this is called the access options panel.

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Gena Cox 00:29:26.220 --> 00:29:46.700

And its job is to identify the best way for the user to access the item that they're working with are looking at. It's going to check for circulation holdings and availability, and then it's going to connect us to the appropriate request form. The best electronic access option will display first if possible.

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Gena Cox 00:29:46.740 --> 00:30:07.180

Followed by our holding statement and our request button whether a placeholder or a request button is relevant here we can see in our

example here we start with the option to utilize the e- book. We then see our holding statement and that the item is available and where it's located in our stacks.

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Gena Cox 00:30:07.220 --> 00:30:24.980

And then we have a Placeholder button since I do own this item now in just a moment, we'll look at those two options whether Placeholder or request an ill and we'll see how those work, but again, because I do own this item, I'm seeing the placeholder button rather than the request and ill- button.

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Gena Cox 00:30:28.280 --> 00:30:48.120

Now, while this panel is by default labeled as the access options panel, we're able to customize this to display anything we'd like, so in my case, I've chosen the custom text option and I've labeled it as how to get this item that customization is found in the item detail settings of service configuration. We also.

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Gena Cox 00:30:48.760 --> 00:30:51.760

The ability to add a translation as well.

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Gena Cox 00:30:55.800 --> 00:31:05.040

So now let's look at the actual access options. So we'll start with items owned by our library, which again would prompt a Placeholder button.

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Gena Cox 00:31:06.680 --> 00:31:17.080

So first I want to start by deciding how I want this button to be labeled. I can utilize any text. I want here and I've kept it simple and just typed in Placeholder.

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Gena Cox 00:31:22.040 --> 00:31:39.320

And now I want a customize where that button displays. So in this case I've opted to display the Placeholder button dependent upon the material type and I decided to display it for monographs for serials and articles, but not from my electronic MA.

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Gena Cox 00:31:41.240 --> 00:31:56.560

I have the option to instead simply opt to always show the button to never show the button or to factor in things like location and item status, which gets a little bit more involved with your local policies for a more customized experience.

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Gena Cox 00:32:03.640 --> 00:32:07.360

But now let's look at ill buttons.

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Gena Cox 00:32:09.400 --> 00:32:29.880

So we'll start by ensuring that are open URL resolvers are in place. So I have a few examples here for our world share ill- libraries ILIAD libraries or a library that simply wants to link to their own custom ISOL form. You'll just put that link here and give it a name that you recognize.

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Gena Cox 00:32:30.760 --> 00:32:37.800

By putting this link here it will surface in a drop- down menu on the next screen, which is where we really need it.

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Gena Cox 00:32:39.480 --> 00:32:50.800

Now, again, I have world chair ill Iliot and a custom link here, but this is also if you are to pass a library, this is also where that link could go as well.

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Gena Cox 00:32:56.120 --> 00:33:05.600

So now we've come to the Placeholder request button screen under the resources sharing accordion. I want to find the button configuration.

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Gena Cox 00:33:09.560 --> 00:33:28.120

And then here's the drop- down menu. I just mentioned where I can pick which of those open Urls I want to use the point, my users to my ill- request form. What a Malfull there. So we see that drop down and that's where those links are going to surface. Let me go back just so we're all on the same page here.

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Gena Cox 00:33:28.320 --> 00:33:39.160

Those links under open URL resolvers, you can go ahead and create a resolver, put in the link where you want your users to go for their ill- request.

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Gena Cox 00:33:41.560 --> 00:33:46.840

And then in that drop down, you'll be able to choose which of those links you'd like to utilize.

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Gena Cox 00:33:51.800 --> 00:34:09.080

And then I'll use the button label field to customize the text that

appears on this button. So mind says request this item from another library, but yours may simply say request an ill or again, whatever makes the most sense for your users, whatever's gonna resonate with them the most.

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Gena Cox 00:34:14.840 --> 00:34:21.879

Now, again, like before I want to choose where this button will display, meaning, which types of items will show this button.

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Gena Cox 00:34:23.800 --> 00:34:33.720

Here I've decided that. I want this fulfillment button this ill-button to display on monographs, serials and articles, but not on electronic materials.

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Gena Cox 00:34:45.560 --> 00:35:06.040

All right, we are moving along here and the last module I want us to look at today is our user features. So what sorts of things can my users actually do in discovery. What Perks are in the, my account interface. So let's dive into that. Next, we'll note here that I am not signed in, in this example, I.

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Gena Cox 00:35:06.040 --> 00:35:16.360

I've just done a search for a title here and probable libraries and I see on my brief results here that I have a few options. I have site share or save.

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Gena Cox 00:35:18.840 --> 00:35:38.040

Now these are probably pretty self-explanatory, but we'll go through them just so we're on the same page here and what our options are for each, each button there. So site gives us the ability to export a citation or generate and copy a citation. of course, we always encourage users to manually check their citations and ensure their accuracy there.

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Gena Cox 00:35:38.040 --> 00:35:58.520

If there is any missing information in the citation that will be represented with capital letters, the share feature will allow us to copy a Permal link to the record or to send an email with a link to the record and then the save option will add the record to a temporary list for us to work with. So let's see a few.

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Gena Cox 00:35:58.560 --> 00:36:00.720

Examples of each of these.

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Gena Cox 00:36:02.360 --> 00:36:22.200

And service configuration under display settings, we have an accordion called Citation style. So here you can check on or off the citations you wish to offer to your, your, to your users, then when they click the site button in the discovery interface, we see this pop up to the right of our screen.

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Gena Cox 00:36:22.240 --> 00:36:37.880

And we have the ability to export a citation there to end note to ref works, for example, we also have the ability to generate and copy out a citation ourselves using the drop down here of all those citation Siles styles we selected in service configuration.

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Gena Cox 00:36:39.520 --> 00:36:46.480

No hard and fast rules here you can select or de- select again, whatever makes the most sense for your institution for your users.

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Gena Cox 00:36:51.640 --> 00:37:08.280

Next we have share when we click that button, we'll see the pop- up in the middle of the screen here, allowing us to copy out that item URL to send directly or to generate an email. we can plug in a return email address the recipients, we'd like to send to a subject.

102

Gena Cox 00:37:08.320 --> 00:37:30.680

Field and a quick personalized message, if we like to, once we send that off the recipient gets an email that looks like the one we see here on the right. I went ahead and sent that to myself, so we could see how that looks. We have some information on the title a link to the item and a link to the library discovery page at the bottom and we also have that custom message there at the top saying Hello, here's the book. I was telling you about.

103

Gena Cox 00:37:37.080 --> 00:37:45.320

Now next we have save, so we had site share and save. Let's look at save together in real time.

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Gena Cox 00:37:48.600 --> 00:37:58.080

So we're back in discovery. I'm gonna go ahead and sign out here so we can see the difference between a signed out interaction and assigned in interaction.

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Gena Cox 00:37:59.840 --> 00:38:12.560

Go back to that item there. Okay, so we have our item here, and again, I want to know, we can see. I'm not signed in, so I'll go ahead and click save. We see the start icon here.

106

Gena Cox 00:38:14.360 --> 00:38:24.800

And we now see that that star is filled blue and I see that there is now a number one, next to my saved items link in the top, right of the screen.

107

Gena Cox 00:38:27.000 --> 00:38:46.840

Now, if I click into the saved items link, I can see my items here and I have a note letting me know that this list is temporary through my current session, so I can either email it cite it or delete it from here We see those options in the middle of our page under.

108

Gena Cox 00:38:46.840 --> 00:38:48.600

The yellow note.

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Gena Cox 00:38:50.440 --> 00:38:57.760

Otherwise, I would need to log in to work with it further. So let's go ahead and log in so we can see that difference.

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Gena Cox 00:39:03.480 --> 00:39:19.960

All right, so now that I'm logged in, I have two additional options for working working with this item. I can either create a list to house this item or I can move it to an existing list. I've already created.

111

Gena Cox 00:39:20.760 --> 00:39:23.960

If I want to move it, I'll simply click on move.

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Gena Cox 00:39:26.520 --> 00:39:39.640

And in the pop- up here, we'll see the available list. I have to which I could move this item right now. It looks like I just have the one called Books about Libraries and I could simply go ahead and add it to this list.

113

Gena Cox 00:39:41.240 --> 00:39:46.280

Or, however, if I want to create a new list, I could do that as well.

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Gena Cox 00:39:48.280 --> 00:39:53.360

So let's see how I did that for that list. Books about libraries that I already had created.

115

Gena Cox 00:39:58.520 --> 00:40:15.160

So if we click on that create button, it'll prompt me what this form that we see here, you know, the first field I see is list name, and this is one of the two required things we have to work with here. So I've put a name here for my list books about LIB.

116

Gena Cox 00:40:15.840 --> 00:40:20.560

I then have the ability to add a description of my list and this is optional.

117

Gena Cox 00:40:22.240 --> 00:40:42.680

Below description, I have my final field and the second required option, which is a privacy setting. Now this setting is toggled on or off to shared or private if shared a Permal link is generated and that the user can use to send to others, but if private, no, Permal link is created and it's only visible to the creator or to those.

118

Gena Cox 00:40:43.880 --> 00:40:53.400

That permanent link, if the privacy has changed later, for example, so a shared list doesn't populate anywhere outside of this Permalink.

119

Gena Cox 00:41:01.680 --> 00:41:18.800

Once a list is created, it can be accessed from the, my account drop down menu by clicking on save lists and we'll see all of our list here and our options for working with them, like emailing or grabbing that Permal link if desired again, users will need to be logged in for this access.

120

Gena Cox 00:41:22.800 --> 00:41:40.720

Now another thing that our users will be able to do is save a search and create a search alert. Again, these are available for users logged in, but are really cool features that our discovery team are working on first saved searches, which allows to maintain a search that.

121

Gena Cox 00:41:41.720 --> 00:42:01.200

Worked hard to tailor and we want to revisit it later, then we have search alerts which allow users to monitor new and relevant information that will then be sent to them periodically as we the library, acquire new titles and items that they may find interesting.

So what does this look like? Let's take a look here. So.

122

Gena Cox 00:42:01.200 --> 00:42:21.680

So we'll start by conducting a search like normal, and then we see these two options surface for us at the top of our results set save search and create alert again, noting that I am logged in for this. Well, first select save.

123

Gena Cox 00:42:21.720 --> 00:42:22.840

Search.

124

Gena Cox 00:42:25.520 --> 00:42:44.720

We see this panel emerge from the right of the screen titled save search by default, it is given the title of whatever we originally entered into the search bar, but we can change that to anything. We'd like it's showing us the parameters of our search and any filters. I had applied mine here is pretty basic, but I really think this is especially use.

125

Gena Cox 00:42:44.840 --> 00:43:05.200

FUL for that really drill down honed in search by our power users that maybe just has a few too many filters and specifications for them to remember off hand and they want to lock lock that search into place here for later. So I can then toggle on to create an alert for the search as well from here, if I'd like, and then I can save it.

126

Gena Cox 00:43:05.840 --> 00:43:11.920

And if I were to go ahead and click on create an alert, I would get a separate panel. So let's take a look at that.

127

Gena Cox 00:43:13.520 --> 00:43:24.640

So now we see our title or our panel is titled create alert and it looks much the same as the previous save search panel and we have the same title option.

128

Gena Cox 00:43:26.320 --> 00:43:46.800

And we see our parameters outline the difference here is we see an email field. Now if we go ahead and enter our email here and create this alert, we will periodically be notified via email whenever any new items are added to our library collection, which fit this criteria. Again, this is especially fun of a feature.

129

Gena Cox 00:43:46.840 --> 00:43:57.920

For our power users, our researchers, our researchers, but especially our faculty too. We're finding that faculty are really loving the ability to create an alert for those newly added titles.

130

Gena Cox 00:44:00.880 --> 00:44:19.680

And I do want to quickly just hop over here to service configuration and just to show you where that is because it's currently in beta. So if you'd like to try that out, we are in our service configuration, we are under world Cat discovery and world cat local, and then we're gonna find display settings here.

131

Gena Cox 00:44:20.720 --> 00:44:40.560

I'm gonna say, okay, and head over there. Now we see search alert, beta second from bottom here. The accordion options and enable search alert is where you would go ahead and turn that on for your patrons. You then have the ability to customize what sort of cadence you would like.

132

Gena Cox 00:44:40.720 --> 00:44:58.160

Users to receive their search alerts, so we have weekly monthly or quarterly and then we also have a duration of how long those search alerts should continue all the way from six months through to thirty-six months before that search alert would expire and need to be recreated.

133

Gena Cox 00:45:00.480 --> 00:45:16.520

We, then of course have the ability to customize the text here, minus using the default text create alert, which we just, which we've just seen, but you can change that to custom text and utilize whateverbiage that your users would resonate with.

134

Gena Cox 00:45:20.240 --> 00:45:38.160

And again, if you would like to toggle that on and play with that a bit that is world Cat discovery and world cat local in our service configuration interface display settings beneath that and the search alert beta, according you'll want to go ahead and click enable search alert to turn that on.

135

Gena Cox 00:45:45.840 --> 00:46:03.760

So, a final look at the, my account drop down that we've seen a couple times here just to look at it a bit closer. Of course these links will take us to the, my account screen or that same screen can be accessed from your libraries discovery URL followed by a forward slash in the

word account. The first half of this.

136

Gena Cox 00:46:04.560 --> 00:46:24.240

Pertains to world shared libraries and we're seeing this because my training library is a world Share library integrated with World share circulation. So we see my checkouts borrowing history and other circulated functions here the bottom half will be available to all discovery users and those are the functions we focus on today, like our.

137

Gena Cox 00:46:24.920 --> 00:46:26.120

And items.

138

Gena Cox 00:46:30.000 --> 00:46:48.560

And finally a lapse with that interface where those previous functions live in tabs are the top of our screen and from this view, the user still maintains access to all of our existing links in the banner, we established earlier at the beginning of the class, like our resources drop down at the top there next to advanced search and course reserve.

139

Gena Cox 00:46:58.160 --> 00:47:14.160

A final poll question as we wrap up when working with an item. Let me open that poll for you when working with an item users, have the ability to site share safe or all of the, above. This is a soft ball. We're all gonna get this, right? And while you're doing.

140

Gena Cox 00:47:14.480 --> 00:47:17.760

If you have any questions, feel free to pop them in the chat.

141

Gena Cox 00:47:46.800 --> 00:48:05.360

All right, so that concludes today's session for any questions or queries that you may have about the content we cover today or if you need any assistance in setting anything up, feel free to reach out to our customer support teams by, by visiting help dot OCLC dot org and clicking on that contact support link.

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Gena Cox 00:48:05.480 --> 00:48:25.480

At the top of the page, I want to, thank you again, Everyone for joining me today, I appreciate you taking a little less than an hour out of your day to learn a little bit more about discovery with me, and I hope you have a wonderful rest of your day and rest of your week and be well everyone, thank you again, bye- bye for now.