

WorldCat Discovery staff configuration

1:37 pm – 2:43 pm Wednesday, March 27, 2024 | (UTC-04:00) Eastern Time (US & Canada)

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Gena Cox 00:08:52.920 --> 00:09:07.280

Welcome everyone to Worldcat discovery staff configuration. My name is Gina Cox. I'm a product trainer here at OCLC, and today I'll be talking about some of the staff side features found within WorldCat Discovery.

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Gena Cox 00:09:12.560 --> 00:09:32.160

Now this course discusses some of the more back end configurations of worldcat discovery that are typically routinely maintained by staff members. We'll start with looking at some basics like updating our library information in the service configuration, then creating staff accounts and setting up those ILS support options. And then.

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Gena Cox 00:09:32.400 --> 00:09:39.600

We'll finally, take a look at a few search tools that weren't covered in the search fundamentals course that I'd really like to, talk about today.

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Gena Cox 00:09:44.600 --> 00:10:04.240

Let's start by doing a very quick level set for the view we'll see today. I always start with this quick quick glimpse here. This is the OCLC training libraries view of WorldCat discovery. So I have my own customizations here such as the branding choices, your interface may look a little bit different, and we may see some of those differences in the class today.

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Gena Cox 00:10:04.440 --> 00:10:08.120

And that's perfectly fine. So I just want to go ahead and call that out.

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Gena Cox 00:10:10.240 --> 00:10:12.680

Let's begin with the Worldcat registry.

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Gena Cox 00:10:15.680 --> 00:10:34.040

So here we are back on that item details screen. I have a title here that I want to take a closer look at. We do see some fulfillment options to the right of the page, but let's pretend that my library

doesn't hold this item, and I want to see which libraries in the area may hold it. So let's go ahead and scroll down a bit.

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Gena Cox 00:10:36.360 --> 00:10:49.720

And we'll come down to the availability of the item here, and we see the heading other availability and holdings, and directly below, we see the button labeled other libraries worldwide. Now if we go ahead and click into that button.

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Gena Cox 00:10:52.480 --> 00:11:07.720

We'll go ahead and see a side panel here sweep in from the right of the screen, and this side panel is showing us a list of libraries in our area that hold this item. And this list is gonna be in descending order from nearest to furthest so that we can get an idea of what's nearby.

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Gena Cox 00:11:10.920 --> 00:11:30.080

Our starting location is pre populated for us because discovery recognizes which institution I am in at the moment. So we see the address here of the OCLC headquarters where the training library is located and where I am today. Those nearby descending libraries are listed beneath our location and each of those.

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Gena Cox 00:11:30.240 --> 00:11:30.800

Libraries.

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Gena Cox 00:11:32.040 --> 00:11:48.520

Contain a view catalog link. Now this link can take us directly to that library's catalog so that we can see it on their site. So for example, I'm going to use one of our libraries here so we could go ahead and find sweet bryer college's library and click their view catalog link.

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Gena Cox 00:11:50.120 --> 00:12:10.240

And we see here sweetbarrier Colleges Worldcat Discovery site and the item that we're looking for. And we can see it's availability status and its location in the stacks. Hello, any sweet bryer, staff that we have in the course today. Now, to make sure that our institution is also findable in this list for other libraries and their users.

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Gena Cox 00:12:10.520 --> 00:12:17.520

Just like I found sweet bryers, we want to take a look at our institution profile. We're gonna go over two service configuration.

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Gena Cox 00:12:19.880 --> 00:12:26.160

So we're in service configuration, and we're under the world cat registry and profile summary.

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Gena Cox 00:12:28.440 --> 00:12:36.680

We can take a look here to see if our information is accurate, and then we can go a little bit further down here to that next tab labeled name and location.

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Gena Cox 00:12:40.520 --> 00:12:58.880

Under name and location, we'll find a few things we can update and work with, like our library's name. Here we have mine, I'm named the OCLC training library. We also have our location, which can be edited if needed. an additional addresses can be added. Now location can also be.

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Gena Cox 00:12:59.080 --> 00:13:01.680

Specified in the next tab down labeled map.

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Gena Cox 00:13:04.960 --> 00:13:23.960

So here we are on the map tab. We see a Google Maps aerial view where we can drag this red marker to indicate the exact longitude and latitude of our location. You see google's suggested marker as well. The red marker, once placed where you'd like it on the map and saved, will automatically update and be stored in the.

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Gena Cox 00:13:24.080 --> 00:13:44.280

Registry. So super convenient there. And while we while we're here I just want to make a quick note that the service configuration, it's definitely a lot in here. The course as to as usual will be recorded and sent out as soon as we're done today. So, no need to take notes or.

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Gena Cox 00:13:44.600 --> 00:13:48.400

Try to memorize where everything is. You can always go back and see where we were today.

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Gena Cox 00:13:51.680 --> 00:14:00.160

So the last thing I just want to point out in this section is the IP addresses. Now this is under IP addresses and then manage IP addresses.

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Gena Cox 00:14:01.960 --> 00:14:21.160

Here we can add and remove IP address ranges so that our campus students, for example, are sure to be covered. So this likely won't be something that you update regularly, but it's always good to know where that is because when you need to know where it is, you need to know where it is. And if you need any assistance, any assistance at all with this, you can always reach out to our support teams and they're happy to help.

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Gena Cox 00:14:26.120 --> 00:14:30.720

I want to go ahead and look at some of the ILS support functionality in WorldCat discovery.

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Gena Cox 00:14:32.680 --> 00:14:39.560

And I can pause here and if there are any questions, feel free to send those to me in the chat and I'll be happy to answer them as we go along as well.

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Gena Cox 00:14:57.600 --> 00:15:17.120

Alright, so iOS support will cover the basics like manually creating a staff account and updating roles and permissions. Quick note that will be looking at manually making the account in this scenario, but you may do patron loads at your library or you may authenticate via third party single sign on. So this part may not apply to you, and that's totally.

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Gena Cox 00:15:18.640 --> 00:15:23.080

And we'll also see receiving user feedback and handling broken link reports and things of that nature.

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Gena Cox 00:15:28.920 --> 00:15:47.760

So we're starting from the admin tab in world share. In WMS. And we're going to look at that user management module. Here I'm going to expand that a bit so we can see it a little better. Now you can search for an already established account here or we can manually create a new account. Again, if your.

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Gena Cox 00:15:48.160 --> 00:15:56.440

Your institution does patron loads, then feel free to go grab a snack and come back at a minute. I'm gonna go ahead and click here on new user.

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Gena Cox 00:16:00.400 --> 00:16:09.800

Now we have a blank user data screen here to populate. Let's go ahead and get the information for Laurel Woods, a new staff member in this hypothetical situation.

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Gena Cox 00:16:13.720 --> 00:16:21.320

So there we go. We have her details entered in, and now let's scroll down the page and look at a few more things to finish up.

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Gena Cox 00:16:25.280 --> 00:16:37.960

Now we've gone ahead and given Laurel a barcode, which will also be her username in this case. I've given her the patron type of staff, and now we're ready to go. So I'll go ahead and click on the Create button.

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Gena Cox 00:16:44.360 --> 00:16:51.160

And we get our confirmation pop up here letting us know that the user was successfully created. We can acknowledge that and click OK.

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Gena Cox 00:16:56.680 --> 00:16:56.960

That's.

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Gena Cox 00:16:59.120 --> 00:17:19.439

And I do have a question here from Helen. Helen asked, is it possible to view all users registered with my organization instead of searching? So great question, Helen. you can see in the top of the screen here you have search by role. So if the users that you're looking for all have a role consistent with their.

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Gena Cox 00:17:20.280 --> 00:17:36.000

So maybe they are, you know, staff members and you want to you want to assign them all, a separate role, you can go ahead and search by role, you'll get a dropdown of all the, all the available roles in your institution. You could click that and then you'd just be given a list of everyone who has that role.

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Gena Cox 00:17:37.840 --> 00:17:45.400

If there's a more specific way that you'd like to search for your users, let me know or reach out to support and we'll try to get that for you.

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Gena Cox 00:17:58.640 --> 00:18:15.440

So let's bring our attention down to this area by identity management and the role accordion menu. So once again, I want to emphasize if your library does identity management and authentication, another way, no worries at all. This is just gonna be showing the manual workflow for a second here.

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Gena Cox 00:18:21.120 --> 00:18:32.440

So let's enlarge that area and we can see just a bit better here. The first thing we want to do is set the staff members password. I can click here and set the, our, click the set reset link.

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Gena Cox 00:18:34.200 --> 00:18:46.680

And once I go ahead and click that, I get a set password, the email on file for that user will receive this email here with instructions to create their password, and then they'll be taken to the screen where they can do just that. So pretty self explanatory there.

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Gena Cox 00:18:53.000 --> 00:19:11.560

So let's go ahead and return to that user's page and world share again. So we're done now with the password for Laurel, and we want to look at that accordion labeled roles. Now roles must be manually assigned regardless of how your users are created, so with this, we're back to being applicable to everyone here, and those of us.

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Gena Cox 00:19:11.800 --> 00:19:16.040

Using third party authentication, are back in the mix now.

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Gena Cox 00:19:18.240 --> 00:19:34.520

So when I open up that accordion, here's my view. Now these rules here are all the rules that are available to me, and the red dash indicates that the role is not assigned to me right now. To edit these, I'll find and click edit in the top right of the screen.

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Gena Cox 00:19:37.800 --> 00:19:44.960

And we'll see that all of these roles now become editable to me, so I can go ahead and select and apply the ones that I want to my user.

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Gena Cox 00:19:47.440 --> 00:20:04.080

So I'm just going to scroll down the list here and find the ones that I'm looking for. Now, of course, we're working with discovery today, so here we are, the two worldcat discovery roles available to my staff member are the Worldcap discovery admin role and the world cap

discovery staff role.

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Gena Cox 00:20:06.160 --> 00:20:26.320

Now these two roles are a little bit different, so we can take a look at what each of them do. First, the admin role, this role grants all of the staff use of discovery will also allowing you to delegate and create other staff accounts as we're doing right now for our demo staff member. So the second role is the general worldca.

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Gena Cox 00:20:26.640 --> 00:20:46.840

Discovery staff role, and that role allows you to access all of the same things as the first one, that admin role, but not create other staff. So in practice, for example, maybe the library supervisor is the person that has to be the discovery admin role while the other libraryans have the staff role, and we can take a look at how that staff role.

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Gena Cox 00:20:46.960 --> 00:20:52.200

Reflects in the website. Any questions about how we go about assigning roles.

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Gena Cox 00:20:54.320 --> 00:21:10.760

Again, roles will need to be assigned manually to our staff members regardless of how we go about creating our users. Again, whether we do patron loads or third party authentication or whether we create them manually as we saw today, the roles themselves will be applied manually for all of us.

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Gena Cox 00:21:20.840 --> 00:21:24.040

Alright, so let's get back to our discovery interface here.

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Gena Cox 00:21:26.200 --> 00:21:30.880

And I just want us to note in the top right of the screen that I am not logged in.

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Gena Cox 00:21:33.040 --> 00:21:36.840

And let's see how that view changes once I am logged in.

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Gena Cox 00:21:41.320 --> 00:21:48.840

So now in the top here, we see that I'm logged in now with my worldcat discovery staff role, and we can see a few differences here.

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Gena Cox 00:21:51.200 --> 00:22:04.640

The first being the staff ILL button here, and we also see the OCLC number of the item here in the brief description. So just a little bit more of an out of convenience here for staff to have a quick access to those things.

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Gena Cox 00:22:17.280 --> 00:22:36.880

And I do see a question asking if this service is free. So the, the difference is that you're going to be seeing with discovery are going to be between regular world cat discovery or worldcat discovery premium in which you have access to what we're seeing here. the access to world share and those sorts of feature.

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Gena Cox 00:22:37.720 --> 00:22:53.160

My Account Features. if you have any questions about that, about whether or not you do have access to that, feel free to reach out to our support teams, support at OCLC dot org. They can look up in just a second, what you have access to and make sure that you're getting the access that you need.

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Gena Cox 00:23:04.520 --> 00:23:08.240

The same item, again, let me go back just a little bit here.

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Gena Cox 00:23:16.240 --> 00:23:17.720

So we can just see that change.

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Gena Cox 00:23:20.880 --> 00:23:30.240

So not signed in and then once you are assigned in, again, we have that staff ILL button and the quick view of that OCLC number.

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Gena Cox 00:23:34.200 --> 00:23:34.400

That's.

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Gena Cox 00:23:35.920 --> 00:23:54.200

So again, just that added extra convenience on this page here. So this same item when I click into it to look at the item details while still logged in as staff, we now in the middle of the page here, I can see the staff only mark view for this item. I can go ahead and click into this.

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Gena Cox 00:23:56.360 --> 00:24:03.720

And I get a panel view of the mark record. At the top we have a link to access a printer friendly view, a full view. Let me bring that up here.

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Gena Cox 00:24:05.560 --> 00:24:11.480

And here we are with that full detailed mark record. For us to take a look at in a little bit more of depth here.

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Gena Cox 00:24:19.400 --> 00:24:37.000

So again, some of those stats staff features and discovery allow us just that, that extra bit of convenience, so that our, our staff, our librarians, our cataloggers aren't going into multiple interfaces to find the information they need. They can quickly grab it right there all in one place.

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Gena Cox 00:24:43.280 --> 00:24:59.480

And the next thing I want to look at is the ability to submit user feedback for our users to contact us at the library. The feedback submission link is found in the footer here, and I can expand that a bit to make it easier to see. And we'll click this link here, send feedback.

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Gena Cox 00:25:03.600 --> 00:25:14.880

Our users are gonna be taken to this form where they can input their information, their name and email, as well as their feedback to configure this a little bit will return to our service configuration interface.

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Gena Cox 00:25:19.800 --> 00:25:20.680

Now we'll be working.

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Gena Cox 00:25:22.320 --> 00:25:26.960

In the ILS support and maintenance tab, and the first thing we'll look at here.

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Gena Cox 00:25:29.120 --> 00:25:39.640

Is the toggle to enable feedback. And that's just turning that, that feature on for us. And then the email to which you'd like to receive these submissions.

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Gena Cox 00:25:42.160 --> 00:25:58.600

Then we'll come down to our privacy policy, and this is where we can

input our policy details and a link if desired to give that transparency to our users who might be submitting their information to us. And you'll see in a minute how all that information that is given to us when they reach out to us.

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Gena Cox 00:26:01.640 --> 00:26:20.360

So in my case here, I have the customized privacy policy heading reading OCLC training library privacy policy. I have a customized blurb here about the privacy policy for my test library, and then I have a customized URL, a link that takes the user to the more detailed document.

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Gena Cox 00:26:23.160 --> 00:26:23.400

That's.

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Gena Cox 00:26:28.400 --> 00:26:37.240

Now if we go back to our feedback submission form and scroll down to the bottom, we now see that privacy policy that I input and the link to the more detailed document as well.

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Gena Cox 00:26:42.960 --> 00:27:01.520

So with those emails are submitted by our users, they'll come to us like this with the name and contact information of our user. The message they included, and some details about their session, like which library they were visiting, their session ID, their IP address, and browser, details that might be used for troubleshooting, for example, if.

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Gena Cox 00:27:01.960 --> 00:27:21.720

They're reporting an issue. So in a situation like this, I might imagine that perhaps they're letting us know that they can't access something or they have an outage. We can take a look at the browser that they're using or their session ID and kind of piece together what was happening and understand, ok, there maybe was an outage at that point or we had a planned.

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Gena Cox 00:27:22.600 --> 00:27:26.600

Downtime and figure out what exactly maybe the issue.

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Gena Cox 00:27:28.320 --> 00:27:34.840

So that's the, the pieces of information that are given to us and that's why that privacy policy just might, might be something worth posting there.

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Gena Cox 00:27:40.440 --> 00:27:44.440

We'll return a service configuration, take a look just below where we were.

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Gena Cox 00:27:46.240 --> 00:28:06.360

Right below that privacy policy section to a new section labeled report of broken link form. This area also allows us to enable the ability to report a broken link so we can toggle that on or off. And we can choose to specify which email address the submissions are delivered to perhaps I want these emails to go to my databases or my.

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Gena Cox 00:28:06.960 --> 00:28:20.800

Resource library. And then a confirmation message that we can customize. My message here, thanks the user and includes a phone number for them to use if they'd like. Let's see how this also surfaces on our website here.

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Gena Cox 00:28:24.040 --> 00:28:37.480

So we'll go ahead and return to our item that we've been working with, and we'll focus in on the access panel. Let me zoom in a little bit to make that more clear here. And the link that we're looking for is that report a broken link.

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Gena Cox 00:28:41.400 --> 00:28:59.680

When we go and click that link, we're prompted with this pop up panel to submit our broken link report because in this situation we are a user and we weren't able to access this item in the database, and we want to perhaps bring this to the attention of our library and who works with our e resources or our licensing, things of that nature.

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Gena Cox 00:29:02.480 --> 00:29:07.360

So we'll go ahead and fill out this form with our name, our email address, and our optional message.

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Gena Cox 00:29:08.800 --> 00:29:17.320

We'll then go ahead and send the report off. I've added a note here that the items link sent me to a four oh four error screen, for example.

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Gena Cox 00:29:21.000 --> 00:29:36.200

And now we get our confirmation screen with our custom message that we

wrote in service configuration, so there's my thank you note and the phone number if they so choose to use it. And we see a report sent confirmation in the bottom left corner just to let us know that that's gone through.

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Gena Cox 00:29:49.760 --> 00:30:07.040

The email that we as staff receive is seen here. So we have the contact information of the user, we have their message, and the broken link in question with its home database for us to investigate, so we know where this is coming from if you know perhaps we have to reach out to the vendor or the publisher, to get that result.

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Gena Cox 00:30:15.960 --> 00:30:34.280

So that's now look at a few of our search configurations. Now, if you'd like to take a look at our previous two classes, we talked at length about search configurations and strategies there. So feel free to go back and take a peek at those recordings if you'd like. But here I want to cover.

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Gena Cox 00:30:34.520 --> 00:30:53.640

Two things that we didn't quite get to in those other classes. Simply because they are a bit more accustomed to each library. So we'll look at search box generators, which can be embedded into other websites, and we'll also look at alternate subject headings, which is a really great feature that we're excited to have, and I'm very excited to talk about today.

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Gena Cox 00:30:55.800 --> 00:31:02.080

And before we dive into this, I just want to give another pause here if there are any questions, feel free to send this to me in the chat.

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Gena Cox 00:31:23.200 --> 00:31:41.400

So we're gonna start back in service configuration again. We've been here a lot today. I do just wanna hold a little sidebar here. If you have access right now to service configuration, great. If you don't, there maybe someone in your library who can get you that access or you can share.

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Gena Cox 00:31:42.400 --> 00:31:53.800

This recording with them. If you don't have access and you believe that you should, you can also reach out to OCLC, to our support agents and they'll be happy to work with you to get you the access that you need.

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Gena Cox 00:32:01.320 --> 00:32:11.960

So we're gonna be here under the search box generator tab, and we have these five accordion options on the screen. We'll start with the first accordion labeled search box preview and code.

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Gena Cox 00:32:16.360 --> 00:32:36.480

When we expand that accordion, we have a live preview of our search box, so we can keep tabs on our changes and how they're applying. We can work our way down, and then to the next accordion, let's hop down under select databases for search box. So pretty self explanatory here. We're choosing which database we'd like our searches in the search box to apply to.

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Gena Cox 00:32:37.480 --> 00:32:55.880

I'm going to go ahead and select all databases and keep it general, but you can get a specific as you'd like here and you can tailor search boxes for any specific use. In this case, we'll say I'm not targeting a specific area of study or topic of interest. I'm just creating a general search box to post to my institution's homepage and drive some traffic to my catalog.

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Gena Cox 00:33:02.920 --> 00:33:21.840

Next I'm gonna create some tabs here. I'll start with a really general tab labeled all materials. The format will be everything and the identifying icon will be everything. And here's our preview where we can see that first tab we've activated is our all materials tab.

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Gena Cox 00:33:25.520 --> 00:33:34.240

Next I'll make an articles tab, we're just gonna repeat that process. So this would just be for searching something more specific in this case articles. So I've named it.

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Gena Cox 00:33:36.280 --> 00:33:40.120

And I'll limit it to just searching articles, of course, I'll give it the article's icon.

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Gena Cox 00:33:42.160 --> 00:34:01.840

And here is our preview again and here we see that articles tab that my user can toggle over to if they wish. We can also see that I've done the same and created an emails tab for my users looking for online only items and resources. Again, pretty self explanatory here, but this is a really cool feature, that is really great to think outside the.

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Gena Cox 00:34:02.480 --> 00:34:22.879

Excuse the pun box with. I've seen situations where libraries have created these search boxes and passed on that HTML code to perhaps their local museum to post. That search box on their website, drive traffic to the library to look up something specific to do with maybe an art ins.

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Gena Cox 00:34:23.240 --> 00:34:31.679

That's happening at that museum. So there are a lot of creative ways to use this sort of functionality to drive traffic to our catalog and to get some more eyes on our materials there.

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Gena Cox 00:34:36.360 --> 00:34:56.200

We'll move down to the next accordion, and, and we'll see the results defaults accordion. Here we can configure how we want the results screen to appear for our users. Again, we covered this in our previous classes, but let's bring our attention down to the select default search index where we can determine which type of search index we want our users to be.

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Gena Cox 00:34:56.200 --> 00:35:08.360

Be using. So I have keywords selected here again cause my goal is to just keep it really general, but this can be set to whatever makes the most sense for your users or the use that you're going for with creating this search box.

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Gena Cox 00:35:18.360 --> 00:35:20.240

So we've checked in on our preview.

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Gena Cox 00:35:21.960 --> 00:35:34.360

We've selected the databases that we want our search box to be looking in. We've created some tabs and we've set our default preferences for our search results. Finally, we'll make sure that our search box looks the way we want it to look.

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Gena Cox 00:35:38.440 --> 00:35:56.360

Under the choose colors and text accordion, we'll go ahead and do exactly that. First, we have our color selection. We can use the gradients provided or we can insert our own hex codes if we'd like. I know a lot of us probably have specific color schemes that go along with our university, our organization that we'd like to use. So we can pop those in there.

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Gena Cox 00:35:58.280 --> 00:36:03.120

We'll input a call to action button text that we'd like to use here. I've just chosen the word search.

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Gena Cox 00:36:06.080 --> 00:36:10.520

And we have the label for our search box instructing our users on what the search box actually does.

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Gena Cox 00:36:13.720 --> 00:36:26.440

And we have hint text giving a nudge to our users here mine simply says to enter search terms above. And then we have the completed search box and we can grab that HTML code and insert the box into whatever site we'd like.

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Gena Cox 00:36:30.280 --> 00:36:48.800

Again I'm thinking about other libraries that I've seen use this in different ways, I'm gonna quickly call out a Pepperdine. They have done a great job with their search boxes, get really tailored into areas of study and point their users to very specific collections, take a look at theirs. if.

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Gena Cox 00:36:48.840 --> 00:36:55.960

If you get a chance, but, yeah, this is a great way to drive that traffic and i'd love to see what everyone else is doing.

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Gena Cox 00:36:58.640 --> 00:36:59.480

Any questions about that?

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Gena Cox 00:37:14.640 --> 00:37:34.280

Alright, because otherwise we are breathing through today. we are currently at two thirty one p. m. and this is the last topic we are gonna cover, so we might be getting out of here a little bit early, I might be dismissing anyone from class a little early today. But the final thing here that I really want to talk about is alternative subje.

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Gena Cox 00:37:34.560 --> 00:37:34.960

Headings.

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Gena Cox 00:37:36.280 --> 00:37:52.840

And this is something that I'm really excited about and really excited to talk about with you today. So we also refer to these as locally preferred subject headings, and here's a quick look at our documentation about this feature if you'd like to read some more up on it. You can find it on help dot OCLC dot org.

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Gena Cox 00:37:54.480 --> 00:38:13.360

Today we'll walk through some of the basics of getting this in place together. So locally preferred subject headings do not literally replace bibliographic data, but rather it disguises the terms and displays a more inclusive term in its place. So let's see how that works.

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Gena Cox 00:38:17.400 --> 00:38:31.360

No surprise here, we're gonna begin right back in service configuration where we've been today. Under world cat discovery search settings, and then we'll find the accordion menu labeled alternative subject headings, and we'll go ahead and expand that accordion.

117

Gena Cox 00:38:36.040 --> 00:38:49.360

Now once we're here, we can start by turning this feature on by simply toggling the button to enable that. We'll then want to go to the OCLC help site and grab our template. So let's head over to the website together.

118

Gena Cox 00:38:52.400 --> 00:38:55.560

And here we are on that page that I was just showing us.

119

Gena Cox 00:38:57.520 --> 00:39:08.400

So I'm gonna find here we have in our table of contents, download and edit the local subject remapping template. I can scroll down to find it or I can go ahead and pop down here.

120

Gena Cox 00:39:13.520 --> 00:39:19.080

Right here we have a link to access that template as well as detailed instructions on how to download it. If needed.

121

Gena Cox 00:39:20.520 --> 00:39:25.640

Here is that template. I'm gonna highlight it so we can see it on the page there.

122

Gena Cox 00:39:28.920 --> 00:39:33.080

I'll go ahead and open up that template here and we come to this Google Doc.

123

Gena Cox 00:39:35.400 --> 00:39:54.960

Now this template is a collaborative template, which is also very exciting. So we're free to add to it, but we want to be careful not to delete anything so we can go ahead then and export a copy of it and continue to edit it if necessary to make sure it's exactly the way our library wants it to be. So what does that mean.

124

Gena Cox 00:39:55.240 --> 00:39:59.280

Making it the way that we want it to be? Let's take a look at my template here.

125

Gena Cox 00:40:01.640 --> 00:40:21.160

So here I have the template downloaded to my computer, maybe i'm pulling it off my desktop and I'm taking a look at it here, and I have it edited the way I'd like it to be with the alternate terms that are important to my library. So we see the subject heading in column G here in the middle of the page, and we see the alternative.

126

Gena Cox 00:40:21.360 --> 00:40:41.720

Heading and column H So what we want to do is take what is in column G camouflage it, disguise it, and instead display what's in column H Again, we're not actually replacing the bibliographic data. We're just sort of overlaying that text visibly in the worldcap Discovery interface.

127

Gena Cox 00:40:43.840 --> 00:40:57.240

So here's an example of one that I've chosen. I've chosen the original subject heading homeless persons, and I've opted to replace it with a more inclusive person first terminology, which is people experiencing homelessness.

128

Gena Cox 00:41:00.400 --> 00:41:18.280

So this applies to this one specific subject heading, but it also applies to all of the other subject headings that I am including in my template that I'm going to be uploading today. But we'll just look at this one to get that, that, that understanding of where the surface is.

129

Gena Cox 00:41:19.760 --> 00:41:28.760

So I have my template, how I like it. I'm gonna go ahead and save it.

And I'm going to return to service configuration, and I'm going to upload my template.

130

Gena Cox 00:41:31.240 --> 00:41:40.800

Now we see that mine is already uploaded. I have the ability to replace it if I'd like, but if you do not already have this in place, you'll see a file browser here to go ahead and upload that.

131

Gena Cox 00:41:44.000 --> 00:41:53.200

Now I just want to note, once this template is uploaded, it cannot be re downloaded from the site. So just make sure to keep a copy for yourself on hand if you'd like to have it.

132

Gena Cox 00:41:59.960 --> 00:42:19.120

And once our template is uploaded, we'll come back to our discovery sky site here. And we can see that I have searched for the old term homeless persons, and that is the old subject heading that I've chosen to replace, right? So I've searched for that. And remember, this is the term that I want to hide.

133

Gena Cox 00:42:21.840 --> 00:42:31.240

So we'll note, however, that our list of subject headings uses the alternative text we input, which is people experiencing homelessness.

134

Gena Cox 00:42:33.200 --> 00:42:43.080

So while it is not the ultimate solution to insensitive subject headings, we really want to try to begin making those efforts to allow and welcome more inclusivity.

135

Gena Cox 00:42:44.760 --> 00:42:47.920

So again, typically, maybe I, I wouldn't search for.

136

Gena Cox 00:42:49.240 --> 00:43:09.640

S U colon homeless persons. I did it in this situation just so we can see that one to one comparison, but typically if our users are doing a general keyword search without indexes and they're essentially getting to materials of this nature, they're not going to encounter that, that subject term instead, they will.

137

Gena Cox 00:43:09.640 --> 00:43:12.640

Will encounter people experiencing homelessness. That's what they'll be seeing here.

138

Gena Cox 00:43:14.960 --> 00:43:18.960

So go ahead and feel free to give this a try, see how this template could work for your library.

139

Gena Cox 00:43:21.960 --> 00:43:30.160

Now let's quickly return to service configuration and we'll find our notification settings for letting our users know that our subject heading has been disguised.

140

Gena Cox 00:43:32.760 --> 00:43:52.520

In this case, I've chosen to use custom text where I have given a content warning that the potentially harmful term has been camouflaged. So that user can decide whether to continue when they click on an alternate subject heading and reveal that old subject heading at its place. So we're not hiding anything from anyone, we're not duping anyone. We're just giving that little war.

141

Gena Cox 00:43:53.240 --> 00:44:12.400

That, the subject heading they've clicked on has been disguised and that the true subject heading under the mask, so to speak will be displayed for them. So here's that pop up we see when a user clicks on that alternate subject heading. So in this case, if we went ahead and clicked on.

142

Gena Cox 00:44:13.160 --> 00:44:24.360

People experiencing homelessness, we would see this pop up just providing transparency for our users to let them know that the visible term is disguised and that they can continue on and see the original term if they so choose.

143

Gena Cox 00:44:27.200 --> 00:44:34.200

Now you do see a question from Lizzie. Does this mapping work even if you have turned off the expand search terms option? Yes, it does.

144

Gena Cox 00:44:36.880 --> 00:44:56.440

Interesting that you bring that up, our discovery product team is working on the second phase of this initiative, which will also be to expand related terms using this same template here. So if you take a look at that document on help dot OCLC dot org, there's some detail.

145

Gena Cox 00:44:56.640 --> 00:45:16.160

In there about how phase two is to also extend this into expanded search terms as well. So very exciting we'll have content out about that in the near future as it's released and I'll be including that in the classes as well. We also have a training video that will be released when that feature is released as well walking us through.

146

Gena Cox 00:45:17.040 --> 00:45:21.560

How to do both what we saw today and incorporating the expanded search terms option.

147

Gena Cox 00:45:24.680 --> 00:45:28.920

Now there any other questions about local hub subject? Yep.

148

Gena Cox 00:45:36.000 --> 00:45:56.040

Andrew asked are the alternative subject headings indexed? Like when searching, would you wanna use the original heading or could you use either when searching and get the same results? So I'm not sure if they are, indexed in, in that way. I'd like to do some experimenting with that and see what sort of searches bring back.

149

Gena Cox 00:45:56.040 --> 00:46:10.560

Back what sort of results. I'd also love to check with our discovery team and see what advice they have for doing searches to get those specific results. let me follow up with you, Andrew. I'd love to get a clear answer for you.

150

Gena Cox 00:46:29.520 --> 00:46:47.600

Alright, well that concludes today's session. We briefed breezed through that together today. For any questions or queries that you have about the content we covered today or if you need any assistance in setting anything up, feel free to reach out to our customer support teams by visiting help dot OCLC dot org and clicking on that contact.

151

Gena Cox 00:46:47.880 --> 00:47:00.400

Support link found at the top of the page. Again, I want to thank everyone for joining me today. I appreciate you taking 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. Thank you everyone.