Encore Catalog User Guide

washingtoncenterville
PUBLIC LIBRARY

CLASSIC CATALOG VS. ENCORE CATALOG

What's the difference between the Classic Catalog and the Encore catalog?

The Classic Catalog offers a simplified search interface.

The Encore catalog has some advantages like:

- o Advanced searching filters
- o Direct search for digital content
- o Direct search for articles and databases

CHECK MY ACCOUNT

ACCESS MY ACCOUNT

- Access the My Account login screen by doing one of the following:
  - Click on the **My Account** link on the upper right of the Library's website, or...
  - Select **Access My Account** from the **Catalog +** drop-down menu on the Library's website, or...
  - If you are already in the Catalog, click the **Login** link in the upper right corner of the screen
- Enter your name, your 14-digit library card number, and your 4-digit PIN
- Click **Submit**

CREATE NEW PIN NUMBER

The Library has implemented PIN numbers beginning August 2017 for additional security. If you have not logged into your account since this date, you will be required to create a 4-digit numerical PIN

- Access your account
- Enter your name and your library card number. You can leave the PIN box blank
- Click **Submit**
- On next screen, enter a 4-digit numerical PIN twice
- Click **Submit** again

RESET FORGOTTEN PIN NUMBER

- Access your account
- Click **Forgot PIN?**
- Enter your name and library card number
- Click **Submit** again
- You will receive an email at the email address associated with your Library account with a link for resetting your PIN
- If you do not receive an email or have no email address associated with your Library account, ask a librarian for further assistance

CHANGE PIN NUMBER

- Access your account
- Click **your name** link at upper right of the screen
- Click **Edit Pin** link on left side of screen
- A pop-up box will open, asking you to enter your current PIN, then your new PIN twice underneath
- Click **Submit**

CHECK DUE DATES

- Access your account
- Click on **your name** link on the upper right of the screen to open your account information
- By default, the **Checkouts** tab will be open
- A list of the items you currently have out and their due dates will display on the right half of the screen

RENEW MATERIALS

The Library uses automatic renewals for most items within the collection. Eligible items* will automatically be renewed from the item due date. Patrons who have signed up for email notifications will be notified via email about renewed items and new due dates. Items that could not be renewed will appear with their original due dates.

*Items on hold for other patrons or items that have exceeded the maximum number of renewals will not automatically renew. Express Collection items and Wireless Hotspots will not be renewed automatically or manually.

You can still manually renew items by following the steps below:

- Access your account
- A list of the items you currently have out and their due dates will display on the right side of the screen
- Click in the box(es) (*in the Renew column*) next to the individual item(s) you wish to renew and click the **Renew Marked** button (*or renew all your items by clicking the Renew All button*)
- If your renewals are successful, a new due date will appear in the **Status** column. If the items cannot be renewed, a message in red will appear on the screen
- *Note:* HAVING DIFFICULTY RENEWING AN ITEM ONLINE? IF SO, *check to see if your library card is expired*

REVIEW, FREEZE OR CANCEL A HOLD

- Access your account
- Click on the **Holds** link on the left side of the screen
- A list of your filled and unfilled holds and your position in the queue for each item will display under **Status**
- To cancel a hold for an item, click in the box next to that item (*in the Cancel column*) and then click the **Update List** button
- You may also "Freeze" a hold (*unless the item is currently available*). Freezing a Hold deactivates it, allowing others in the queue to receive the item ahead of you, until you reactivate the Hold. (*This is useful if you will be out of town for an extended period, or you have other reading you'd like to catch up on before receiving this particular item being held*.) To freeze a Hold for an item, click in the box next to that item (*in the Freeze column)* and then click the **Update List** button

CHANGE HOLD PICKUP LOCATION

- Access your account
- Click on the **Holds** link on the left side of the screen
- A list of your filled and unfilled holds and your pickup location for each item will display under **Pickup Location**

- To change the pickup location, simple click the dropdown with the current location and select the new pickup location from the list
- In order for this change to take effect, you must click **Update List** button and confirm your changes on the second screen
- If you wish to change the pickup location for multiple items at once, simply change the pickup location for those multiple items and then click the **Update List**. The second screen will confirm all the changes

REVIEW FINES

- <u>Access your account</u>
- Click on the **Fines/Fees** link on the left side of the screen
- A list of fines for materials you returned overdue (*and any other charges*) will appear

PAY FINES ONLINE

- <u>Access your account</u>
- Click on the **Fines/Fees** link on the left side of the screen to display fines and charges
- Click on the **Pay Online** button
- A pop-up window appears containing a **Fees/Fines** section, where you select the charges you wish to pay, as well as a **Billing Information** and **Credit Card Information** section that tells you what information you will need on the payment screen
- Under the **Fees/Fines** section, select the charges you wish to pay by clicking on the checkbox next to the charge (*Use the **Clear All** and the **Select All** buttons to clear or select all checkboxes*)
- Payment total will be calculated and displayed automatically at the bottom of the **Fees/Fines** section
- Click **Continue** to enter your **Billing Information** and **Credit Card information** (*MasterCard, Visa, or Discover card*)
- Click on the **Pay Now** button to complete the transaction
- After submitting the transaction, a payment receipt is displayed which can be printed by clicking on the **Print** button
- Click on the **OK** button to close this window. You will be returned to the unpaid fines screen of your record. Click on the refresh button of your browser to update your record

PAYING FINES ONLINE: FREQUENTLY ASKED QUESTIONS

WHY DON'T I SEE A PAY ONLINE BUTTON?

- If the fines on your account total less than $1.00, the **Pay Online** button will not appear.

WHAT DO I DO WHEN A SECURITY INFORMATION POP-UP BOX APPEARS?

- If you use Internet Explorer, a Security Information pop-up box may appear with the following prompt: **"This page contains both secure and nonsecure items. Do you wish to display the nonsecure items?"** Simply click **Yes** to continue.

WHAT IS A SECURITY CODE AND WHERE DO I FIND IT ON MY CREDIT CARD?

- Your credit card's security code is a three digit number found on the back of the card at the far right end of the signature strip.

WHY HAS MY PAYMENT BEEN DECLINED?

- Make sure that you are using either a MasterCard, Visa or Discover card. Make sure that the billing information you've entered **matches** the billing information your credit card company has on file. Lastly, make sure that you've entered the credit card number, expiration date, and security code correctly. If your payment is still declined, please visit the Library to pay your fine.

WHY AM I BEING TOLD TO VISIT THE LIBRARY TO PAY MY FINES?

- If the fines you've selected to pay total less than $1.00, you cannot pay online.

WHY ARE THE FINES I'VE JUST PAID ONLINE STILL ON MY RECORD?

- Remember to refresh your browser after you've completed your online payment to update your record: click on your browser's refresh button or press **F5**.

WILL I BE EMAILED A COPY OF THE PAYMENT RECEIPT?

- If an email address was entered in the **Billing Information** section of the payment form, a copy of the receipt will be sent to that address.

SAVE LISTS FOR CHECKOUT

- To save records, click on the **Basket** icon under **Additional Actions** when viewing a record. A box will show up to the right saying that the item is now in your cart
- View your saved records by clicking on the **My Cart** link at the top of the screen
- Click on the **Save to List** link to add saved records to a list
- You will be prompted to log in to your account (if you are already logged in, the login process will be skipped)
- Use the menu to select an existing list or to create a new list and then click the **Add** button
- If you are creating a new list, click on the **Save to new list** link, then enter a name and description and click on the **Create** button

VIEW, EDIT, OR EXPORT YOUR LIST(S)

- <u>Access your account</u>
- If you are already logged in, simply click on **your name** link located in the upper right corner of the screen.
- Once in your account, click on the **My Lists** link
- Select the list you would like to view, edit, or export by clicking on the list's name
- When viewing materials in a list, you may sort by title or author by clicking on the links at the top of the list
- When editing your list, use the **Delete Marked** or **Delete All** buttons to remove items from your list
- To move items from one list to another, select title(s) and click on the **Move Marked** button
- To export your list, click on the **Export List** button
- To return to **My Lists**, click on the **Back to My Lists** button

SAVE YOUR READING HISTORY

Reading History is used to save a list of materials you have checked out previously.

Please read before deciding whether to opt in to My Reading History. In compliance with federal, state, and local statute, the Library could be required to provide details of your borrowing record (your account), including Reading History, if requested by an authorized government agency.

Should you decide that you no longer wish to keep a Reading History, you may opt out at any time.

- Access your account
- Click on the **Reading History** link on the left side of the screen
- *If you have not yet opted in*: Click on the **Save Reading History** button on the right side of the screen. Once you opt in, items will be added to your history list from this point forward as they are checked out
- *If you have already opted in*: A list of the materials you have checked out since opting in will display. The list will include the title, author, checkout date, and copy number for each item
- If you wish to remove one or more items from your reading history, simply click in the box next to that item (*in the **Mark** column*) and then click the **Delete Marked** button (*or click **Delete All** to delete all items from your reading history*)

How to Opt Out of Reading History

- You must first delete all items from your history (*see above*) before you are able to opt out
- Once you have deleted all history items, click the **Opt Out** button on the right side of the screen

CHANGE YOUR PERSONAL INFORMATION

- Access your account
- Click on the **Edit Account** button at the top left of the screen
- Enter your current telephone number including area code
- Enter your current email address
- Select your notice preference. Click **Telephone** to receive notices via automated phone message.
- Click **Email** to receive notices via email and text. See: Change Your Notice Preference.
- *Note: Changes to your mailing address cannot be made online. These changes must be made in person at the Library, and require proof of current address*

CHANGE YOUR NOTICE PREFERENCE

You may elect to receive notifications via automated phone message or via email and text by simply modifying your personal information (*See: Change Your Personal Information*)

AUTOMATED PHONE MESSAGE NOTICES

If you elect phone notices, the following types of notices will be sent to you via the telephone number you provide in your personal information:

- Hold Pickup Notice
- 1st Overdue Notice

- 2nd Overdue Notice
- Notes:
  - *Item titles will NOT be identified in the phone message.*
  - *Two attempts will be made to reach you via phone.*

EMAIL NOTICES / A.K.A. EXPRESS NOTICES

If you elect email notices, the following types of notices will be sent to you via the email address you provide in your personal information:

- Hold Pickup Notice
- 1st Overdue Notice
- 2nd Overdue Notice
- Courtesy Notice
- Hold Cancellation Notice
- Notes:
  - *You must enter a valid email address to receive email Notices*
  - *Item titles will be listed on email notices and will be visible to all who have access to the email account*
  - *To help ensure that notices are not blocked, please add these addresses to your email address book: notices@wcpl.lib.oh.us, wcplpub@wcpl.lib.oh.us*

TEXT ALERTS (OPTIONAL)

You may elect to receive text alerts **in addition to** email notices. Text alerts will alert you that an item is coming due, an item is on hold, or an item is overdue. Text alerts will refer you to your online account for more detailed information.

- <u>Access your account</u>
- Click on the **Edit Account** button at the top right of the screen
- Click **Email** to receive notices via email and text
- Enter your current email address
- Enter one comma with NO SPACE directly after the email address
- Type in your 10-digit mobile phone number (no hyphens)
- Type **@sms.oplin.org** directly after your mobile number (no spaces)
- Example: **myemailaddress@yahoo.com,9371234567@sms.oplin.org**
- ***Note***:
  - *You must sign up for email alerts in addition to text alerts*
  - *Your mobile phone must be set up to accept text messages*
  - *Standard messaging rates will apply*
- ***Note****: Having trouble receiving text notices from WCPL? Text HELP to 877-675-4632. Contact your cell phone provider about being able to receive shortcode messages from 877-675-4632 if problem persists.*

CHECK LIBRARY CARD EXPIRATION DATE

- <u>Access your account</u>
- Your library card expiration date is listed under your personal information on the left side of the screen.

- ***Note:*** *Changes to your library card expiration date cannot be made online. If you have a New Patron, Teacher, Home-bound, or non-Ohio account and your library card is expired, you will be unable to check out items from the eCollection, use self-checkout, renew an item online or place an item on hold online. Please visit the Library and present a picture ID and proof of current address (driver's license or military license showing a current address or a license and a bill with your current address). To renew an item immediately or place an item on hold, simply call the Library for assistance.*

HOW TO SEARCH THE ENCORE CATALOG

- Access the Catalog by doing one of the following:
  - Enter a title, author, or keyword in the bar on the top right of the screen and press the **magnifying glass icon** or press the **Enter key**, or…
  - Select **Encore Catalog** from the **Catalog +** drop-down menu on the Library's website, or...
  - If you are already in your account, click the **Encore Home** link on the upper left corner of the screen, or the **Encore Home** link at the bottom of the screen, under **Search Tools** to return to the catalog search
- Enter an author, title, or keyword in the text box (*See: Search Tips or Advanced Search Tips*)
- Click the **Arrow** button or press the **Enter** key - the results of your search will display
- From the list of Search Results, click on the title you are interested in
- A Details Screen will display information about the title, as well as the number of copies in the Library system, location of those copies, and the current status/availability of each copy. *(**Note:** If an item is needed immediately **and** has a "checked in" status, please call the library.)*

SEARCH TIPS

When using Encore, you start off using a basic keyword search. Instead of having to specify an index to search (title, author, subject, keyword, etc.), you can simply type those values into the keyword search to get results.

SEARCHING BY TITLE

Type as much or as little of the title as you want. For example:

- merchant of venice
- merchant of v
- merchant

SEARCHING BY AUTHOR

Type the author's or artist's last name first. For example:

- shakespeare
- shakespeare, william
- angelou, m

SEARCHING BY KEYWORD

Type the keyword you want to find. For example:

- good to great
- Indian cooking

SEARCHING BY SUBJECT

Type as much or as little of the subject as you want. For example:

- children's rights
- motion pictures
- United States History Civil War, 1861-1865

A subject search uses a specific, controlled vocabulary for describing Library materials. If you do not find what you are looking for in the subject index, try a keyword search or ask a librarian for assistance.

USING FACETS IN SEARCH RESULTS

Facets provide a way of limiting your search results after you do a basic keyword search.

- Facets will be on the left side of the results screen, under the **Refine By** heading
- You can limit, or "refine," your search by things like availability, format, location, and more
- Related searches are available under the **Related Searches** heading. These let you search for other subjects if the one you tried isn't giving you the results needed
- Once you click on a facet, the results list will automatically refresh
- Multiple facets can be used at once
- The list of facets that you are using will appear at the top left side of the screen under **Current Refinements**
- To remove a facet, simply click on the **X** button to the right of it

ADVANCED SEARCH TIPS

- You can use the Advanced Search to select limiters like title, author, subject, format, location, year, and more
- If you don't want to use the Advanced Search, you can use the following search statements in the basic keyword search:

t:	Title	t: drawing animals
a:	author/creator	a: clive cussler
b:	bibliographic location code	b: cjn b: (caf | waf)
y:	year, must be expressed as a range with brackets	y:[2015-2015] y:[2009-2015]
l:	language, following MARC abbreviations	l:ger
c:	collection	c:37
f:	format	f:a
d:	subject	d: edison thomas

- In order to see a full list of codes, you can view them from the Advanced Search page
- Example: to search for Jane Austen books in the Adult Fiction collection at the Centerville Library, you could enter: *a: austen, jane b: caf f:a* which means you are restricting your search for physical Jane Austen books at the Centerville Library branch

ADJACENCY

- Multiple words are searched together as one phrase
- Example: world health organization

WILDCARDS

- Words may be right-hand truncated using an asterisk
- "*" for 1-5 characters
- "**" for open-ended truncation
- "*" to replace a single character anywhere within a word
- Example: environment* polic*
- Example: inter**
- Example: wom*n

BOOLEAN OPERATORS

- There is no need to use "and" in your search. If you are searching for a specific phrase, use quotation marks around the phrase
- If you want to search for either/or, use the pipe symbol "|" (which is **shift key +** "/") instead of the word "**or**"
- If you want to create a more complex search, use the parentheses to group search terms together
- Example: "human resources" will give you results specifically for the phrase human resources

- Example: *vegan | vegetarian | gluten-free* will give you results for either vegan OR vegetarian OR gluten-free
- Example: *(vegan | vegetarian | gluten-free) cookery* will give you results for cookery that is either vegan OR vegetarian OR gluten-free

PLACING LIBRARY MATERIALS ON HOLD

- Access the Catalog by doing one of the following:
    - Enter a title, author, or keyword in the bar on the top right of the screen and press the **magnifying glass icon** or press the **Enter key**, or…
    - Select **Encore Catalog** from the **Catalog +** drop-down menu on the Library's website, or...
    - If you are already in your account, click the **Encore Home** link on the upper left corner of the screen, or the **Encore Home** link at the bottom of the screen, under **Search Tools** to return to the catalog search
- Enter an author, title, or keyword then press the **Arrow** button or **Enter key** to display your results
- Select the **Request It** link to the right of the item you want to place on hold
- You will be prompted to log in to your Account (if you are already logged in, the login process will be skipped)
- To log in, enter your name, your 14-digit library card number, your 4-digit PIN and click the **Submit** button
- Select a pickup location and click the **Submit** button to finish placing the hold
- ***Note:*** *If for some reason a hold may not be placed on an item, you will receive a message to see a librarian for assistance*
- ***Note:*** *Having difficulty placing an item on hold online?* If so, see: Check Library Card Expiration Date

CHECK THE STATUS OF MATERIALS YOU PLACED ON HOLD

- See: *Review, Freeze or Cancel a Hold*

GETTING REVIEWS, EXCERPTS, AND ADDITIONAL INFORMATION

Many of the items in the Catalog have additional information about the material, such as tables of contents, first chapters or excerpts, summaries, and reviews. To access this additional information:

- Search the catalog by author, keyword, title, etc. (*See: Search Tips*)
- Click on the item you are interested in from the list to pull up the Details Screen
- Once in the Details Screen, click on the **cover art** (*i.e., picture of the book cover, DVD cover, etc.*) on the left side of the screen. *(Some materials will not have accompanying cover art. If cover art is not shown for an item, you will not be able to access reviews, excerpts, or other additional information for that item.)*
- An "Additional Information" screen will display, with links to the types of information available for that particular item
- Click on the link for the information you are interested in
- A screen with that additional information will display

ADDITIONAL ACTIONS

There are several additional actions that can be found to the right side of each individual item on the results screen, right under the **Request It** link

EMAIL

- Click on the **Envelope** icon to send an email containing an item's record, including location, availability, due dates, format, description, etc.
- You can send an email to multiple recipients

TAGGING

- Click on the **Plus sign** icon to select the **Tag** icon, which allows you to tag books and other items with personally created keywords and descriptions
- Enter a tag or multiple tags for an item, then hit **Submit**
- You can view all the tags that item might have by viewing the item's details screen. Tags will be found under the **Community Tags** header toward the end of the page
- You can also do a basic keyword search for tags to pull up all the items with that specific tag

TIPS AND TROUBLESHOOTING

BROWSER & SCREEN RESOLUTION

- Internet Explorer 10, Chrome 43.0.2357 or Safari 8.07 or higher is recommended.
- The Catalog is best viewed at a screen resolution of 1024 x 768 pixels or greater.

ENABLING COOKIES

- Your browser must be set to accept cookies from our website in order to log in and perform functions in your account (update your personal information, place holds, renew items, etc.).
- How to enable cookies in your web browser

DELETING TEMPORARY INTERNET FILES & COOKIE FILES (CACHE)

You can fix many browser problems simply by clearing your cache.

- How to clear your browser's cache

ENABLING JAVA & JAVASCRIPT

- You must have JavaScript enabled when using the Catalog.
- How to turn on JavaScript

FIREWALLS/SECURITY SUITES

- Sometimes firewalls and security suites block access to sites, including the Catalog. Check to make sure that your software does not block cookies and that browser privacy is disabled. In addition, you may need to temporarily disable your firewall to successfully log in. You can then enable your firewall when you are finished using the Library's website/catalog. To disable and enable your firewall and/or security suite, follow the instructions provided with your software.

RESETTING YOUR BROWSER TO DEFAULT SETTINGS

- If the above steps do not resolve your issue, you can try resetting your browser to its defaults. This will remove any errant settings that may have accidentally been activated.
- *How to reset browser settings*

REPORTING CATALOG PROBLEMS

- Ask a Librarian and describe your problem
- Please be sure to include the following information:

- - Where you were when the problem occurred (*home, work, etc.*)
    - Date and time when the problem occurred
    - The nature of the problem
    - Any error message you may have received
- Typically we respond within one business day. If you need a more immediate response, call 937/433-8091, ext. 2 during the Library's <u>business hours</u>

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