# LS2 PAC

Version 3.1



## **Table of Contents**

Landing Page	1
Search Box / Search Suggestions	5
Search Results	7
Third Party Vendors	ç
EBSCO	
NewsBank	
Britannica	
Browse Virtual Shelf	
Refinements	
Title Details	
Details	
All Copies	
Related	
More Info	17
MARC Record View	
Log In	19
Tags	21
Holds	23
More Search Options	25
Advanced	
Reading Levels	
Academic Reserves	
Locations	
Account Summary	
Summary	
Contact InformationLibrary PIN	
EZ Login	
EZ Username	
EZ Password	_
Account Activity	35
Loans	
Holds	
FinesLoan History	
Saved Lists	
Saved Searches	
News Feeds	
eResources	
Additional Links	49

## **Landing Page**

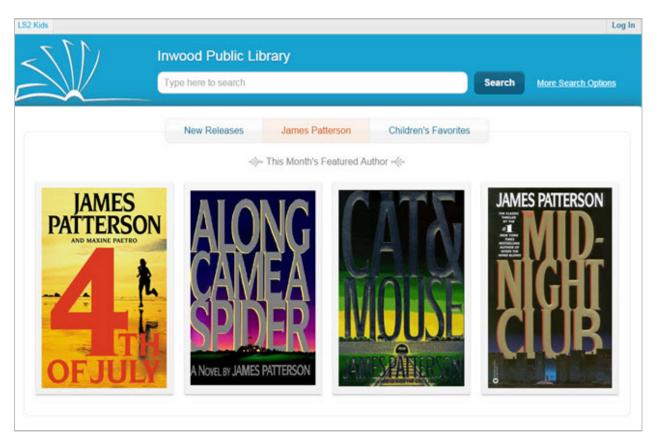
#### **Learning Objectives**

After completing this section, you will be able to:

• Understand the Landing Page

#### **Getting Started**

The **Landing Page** is the first thing borrowers see as an entrance to your catalog. This is a great way to showcase your collections and special events. You can have up to five headings with captions optional displaying featured authors, important holidays, new releases, etc. Four cover images display at one time with continuous movement between titles. When the last title is reached in one heading, the **Landing Page** switches to the next heading displaying related titles.



Borrowers can click a cover image to take them directly to the title details page, or use the arrows to move between the displayed titles.

#### **Library Administrators and the Landing Page**

Before you add or change a heading on the *Landing Page*, you need to create the list or search you want to display. <u>Log in as a Library Administrator and perform a search</u>.

<u>Select titles one at a time</u>: If you want to select titles one at a time from your search results, click the **Add to List** button for each title. The *Choose a list* pop-up displays for you to create a new list (or add to existing lists). **Config** is selected by default since you logged in as an Administrator. You want to make sure you create your list as a **Config**. (**Personal** is used when you are selecting titles for your own personal list.) Continue adding to your list until you are satisfied.

<u>Select titles in batch</u>: If you want to select multiple titles, use the check box on the far right of each title. Under the **Select Action** drop-down, click **Add to List**. The *Choose a list* pop-up displays for you to create a new list (or add to existing lists). **Config** is selected by default since you logged in as an Administrator. You want to make sure you create you list as a **Config**. (**Personal** is used when you are selecting titles for your own personal list.)



<u>Select a search</u>: If you want to save a search for your <u>Landing Page</u>, perform a search and click <u>Save Search</u> next to <u>Search Results for [search term]</u>. A pop-up box displays with your search term prepopulated. Select the check box for <u>save as config</u> search and keep or edit the search term.

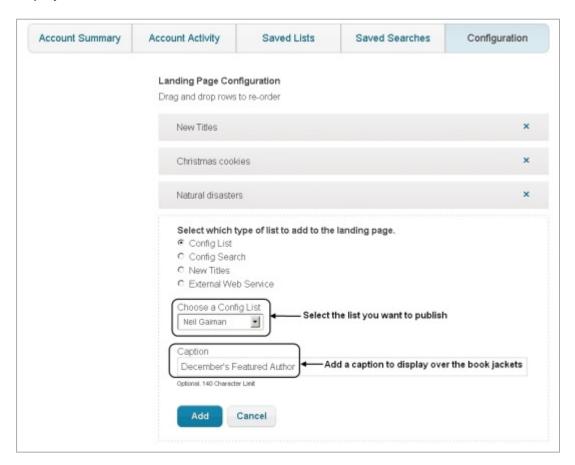


**REMEMBER**: Use capital letters when appropriate. The typed name is how it displays.

<u>To add or change headings on the Landing Page</u>: Log in **LS2 PAC** with your Library Administrator credentials. Click *Library Admin's Account* in the upper right corner to open the **Landing Page Configuration** page.

Only five lists can be displayed at a time. When you have reached the maximum number of lists a message displays, *You've reached the maximum number of lists that can be added to the Landing Page. You must remove a list before you can add another.* If you have less than five headings displayed, click the link **Click to add a list** to expand the Landing Page Configuration.

<u>Config List</u>: Under the list types, select **Config List**. Under **Choose a Config List** click the drop-down arrow to display all of the available config lists. Click the appropriate list name you want to display.



Under **Caption type** a short description. The caption displays over the book covers on the **Landing Page**.

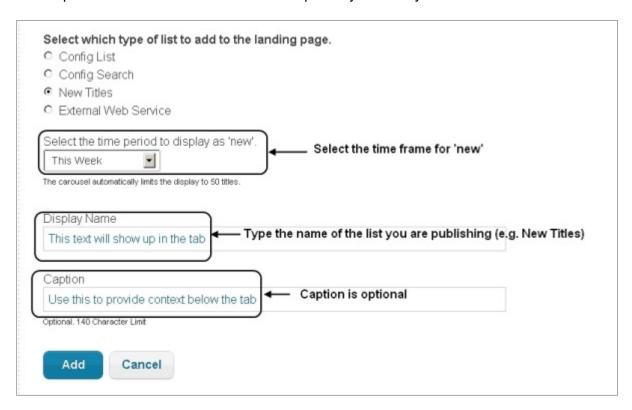
Click **Add**. A green banner displays at the top of the screen, *Landing Page Config Updated Successfully*. Refresh the screen to display the newly added list on the **Landing Page**.

<u>Config Search</u>: Select the **Config Search** option from the list types. The **Choose a Config Search** displays a drop-down list of searches saved as Config searches. Click the name of the search from the **Config Search** drop-down list that you want to publish.

Add a caption describing the search, if desired. The caption will display above the book jackets on the Landing Page. Click **Add**. A green banner displays at the top of the screen, *Landing Page Config Updated Successfully*. Refresh the screen to display the newly added list on the **Landing Page**.

<u>New Titles</u>: The <u>Landing Page</u> by default will display titles that have been added to your database in the last year. If the time period displayed is not the time frame you want, you will need to delete the **New Titles** list and re-select **New Titles** and the time frame you want to display

Select the **New Titles** option from the list types. The selection expands to display a drop-down list of time periods. Select from the list the time period your library considers as 'new'.



Under **Display Name**, type what you want to use as the title for this list of items in the entry box. This will be displayed in the tab for this particular selection of items on your **Landing Page**.

Under **Caption**, type a caption in the box, if desired. The caption will display above the book jackets for New Titles. Click **Add**. A green banner displays at the top of the screen, *Landing Page Config Updated Successfully*. Refresh the screen to display the newly added list on the **Landing Page**.

To delete headings from the Landing Page: After logging in as a Library Administrator, click Account to open the Landing Page Configuration. Find the list or search you want to delete and click the 'X' on the far right. A green banner displays at the top of the screen, Landing Page Config Updated Successfully. The list is removed and will no longer show on the Landing Page, but the list or search will still be available under Config lists or searches in the Saved Lists/Saved Searches options.

### **Search Box / Search Suggestions**

#### **Learning Objectives**

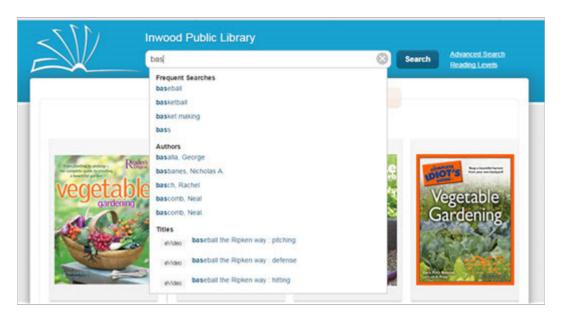
After completing this section, you will be able to:

- Understand how Frequent Searches works
- Search using shortcuts

#### **Getting Started**

To start searching in **LS2 PAC** type your search term in the **Search** box at the top of the screen. You can search using a single word, or type a phrase. You can search using an author's name or a specific title. Search terms containing punctuation (asterisk, question mark, exclamation point, dash, comma, colon, semi-colon, parentheses, forward or backward slash or a possessive apostrophe) are acceptable. If searching using a contraction, typing won't or wont (without apostrophe) returns the same search results. If a borrower enters a search term with no result hits, a message displays and provides alternative suggestions, if applicable.

After typing three or more letters in the **Search** box the top **Frequent Searches** appears and/or top relevant results for **Authors**, **Titles**, or **News Feeds**. The word containing the search term highlights in a bold font.



#### **Search Suggestions**

- Use quotation marks at the beginning and end of the search term for an exact match.
- All shortcuts are case specific with the exception of ISBNs, ISSNs and UPCs. Do NOT use any spaces between the shortcut and the search term. For example, use au: or author:, se: or seriestitles:, isbn: or actual number, etc.
- To search using a multiple character wildcard, place an asterisk (\*) where you would like to find a string of characters. For example, if you type ba\*n, you might retrieve results for Batman, Bergman, Bunyan.

**Note**: Do NOT use an asterisk as the first character of a search.

• To search for a term similar in spelling, type your term and then place a tilde (~) at the end of your term. For example, if you type clap~, you might retrieve results for *clop*, *clip*, *claw*.

### Search Results

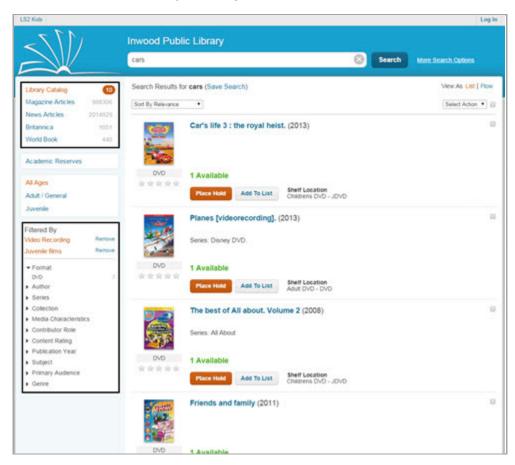
#### **Learning Objectives**

After completing this section, you will be able to:

- Understand the result set
- Sort options

#### **Getting Started**

After a borrower types their search term in the **Search** box, the search results return in a list sorted by **Relevance**, the default sort. The number of results display under **Library Catalog**. If your library has enabled *Britannica*, *NewsBank*, *EBSCO*, and/or *World Book*, the databases and the total number of results show under **Library Catalog**.



The **Sort By** drop-down list provides sorting options:

- Relevance Default, Google-like algorithm, not keyword: boosting if term found in title, author, or subject field (borrower tagging and reviews also considered)
- Newly Added Based on the most recently added titles

**Note**: **Newly Added** is determined by the date added to your library's database via **Cataloging** or **Circulation** and can be different from the publication date

- Publication Date when the item was published, newest to oldest
- Borrower Rating borrower rating listed from the <u>highest</u> rating to <u>lowest</u> rating
- Author author's last name in alpha order
- **Title** listed in alpha order. Any titles starting with a number are listed first.

Selecting another **Sort By** option displays the search results instantly. To navigate through the pages use *Next* and *Previous* found at the bottom of each page of results. If a book cover is not available, a generic book jacket is displayed.

Use the filters on the left side of the search results to narrow the search. A breadcrumb trail of selected filters display. To narrow by locations, click **Change** to the right of **All Locations**. Clicking any title in the result set opens the **Details** page for the selected title, providing a more title information.

Borrowers accessing the PAC from outside the library will see their home or preferred location setting based on their login location.

4

### **Third Party Vendors**

#### **Learning Objectives**

After completing this section, you will be able to:

• View available third party vendors: EBSCO, NewsBank, Britannica, World Book

#### **Getting Started**

**LS2 PAC** has several third party vendors you can enable. You need a subscription with the third party vendor and provide the credentials to a TLC Administrator for the service to be 'turned on'. The services currently available are: *EBSCO*, *NewsBank*, *Britannica*, and *World Book*.

#### **EBSCO**

If your library subscribes to **EBSCO**, borrowers can access articles and journals pulled from eJournals, eBooks, and print subscriptions that have been published by various sources, such as, Publishers Weekly, Library Journal, New York Times, Forbes, among others.

**EBSCO** has been renamed *Magazine Articles* to reflect the type of search, but it can be renamed whatever you want to call it. Contact TLC Support to assist in your request.

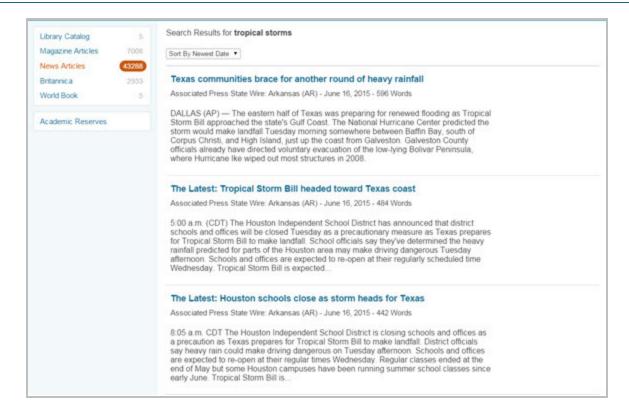
Click the *Magazine Articles* heading, and then click the title in the search results to view the article in a new tab. If no further information is available, the title will not appear as a link.

#### **NewsBank**

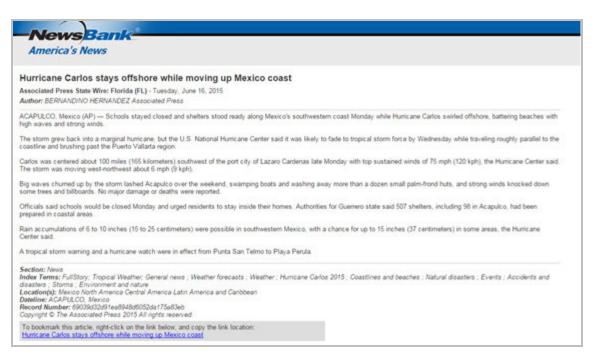
If your library subscribes to **NewsBank**, borrowers can access Web-based news and information resources that cover current issues and events and a wide variety of other subjects from around the world. **NewsBank** currently has 350 newspapers online with 150 million articles

**NewsBank** has been renamed *Newspaper Articles* to reflect the type of search, but it can be renamed whatever you want to call it. Contact TLC Support to assist in your request.

Click the *Newspaper Articles* heading to display the search results.

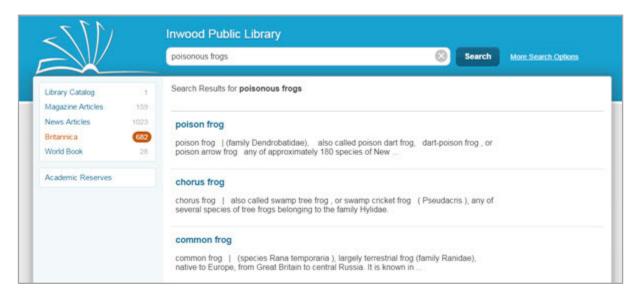


Click the title to view the article in a new tab. If no further information is available, the title will not appear as a link.



#### **Britannica**

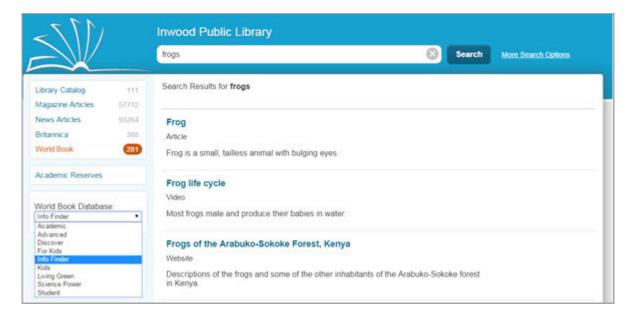
If your library subscribes to **Britannica**, borrowers can access hundreds of thousands of articles, videos, images, biographies, and websites pulled from several editors and expert contributors.



Click the *Britannica* heading and then click the title to view the article in a new tab. If no further information is available, the title will not appear as a link.

#### **World Book**

If your library subscribes to **World Book**, borrowers can access early learning to advanced research through a diverse list of possibilities, such as *Discover*, *Info Finder*, *Living Green*, and more. Click the *World Book* heading to display the search results. Selected databases are reflected in a drop-down list on the left side of the search results. Click a database from the list to narrow your search.



#### **Browse Virtual Shelf**

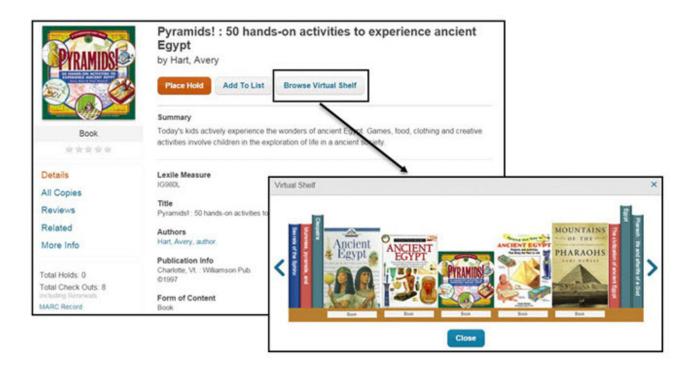
#### **Learning Objectives**

After completing this section, you will be able to:

Understand the Browse Virtual Shelf

#### **Getting Started**

Once a borrower has performed a search and clicked a title to display the title details, the **Browse Virtual Shelf** feature provides the option to view similar items before and after the initially displayed title. The **Browse Virtual Shelf** button opens the shelf and allows the borrower to 'browse the shelf' without actually going 'into the stacks'.



The selected title displays in the middle of the shelf. Clicking any book cover on the shelf opens the title details for that title. Clicking any book spine moves the associated title to the center of the shelf. Using the forward or backward arrows slides the next group of books. The format of each item displays below the item on the shelf. Click *Close* when you are finished browsing.

### Refinements

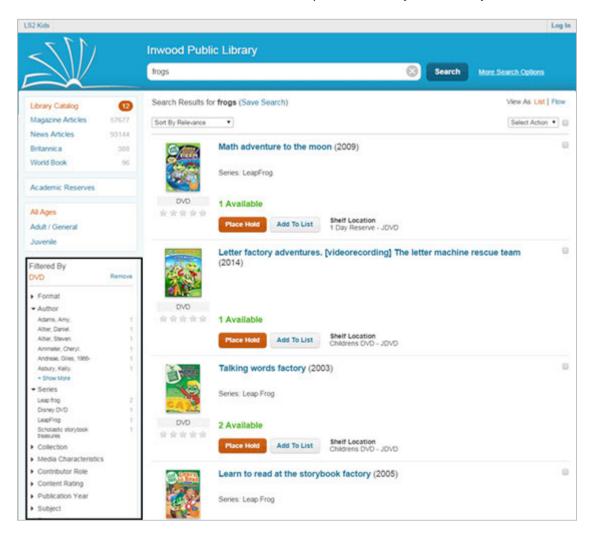
#### **Learning Objectives**

After completing this section, you will be able to:

• Filter results using refinements

#### **Getting Started**

**Refinements**, located on the left side of the screen, provides a way to narrow your search.



The **Format** refinement is the default, and opens displaying the number of results found for each of the formats related to the borrower's keyword. Click any of the refinement headings to expand the refinement. A Show More link indicates there are additional refinements for the associated heading.

Clicking a refinement from the list changes the borrower's search results. The selected refinement name appears below **Filtered By** and the refined search results display. Remove the selected refinement by clicking **Remove**.

#### **RDA Express**

For libraries using **RDAExpress**, additional refinements display: *Audience Characteristics*, *Content Rating*, *Media Characteristics*, *Music Characteristics*, and *Contributor Role*.

### **Title Details**

#### **Learning Objectives**

After completing this section, you will be able to:

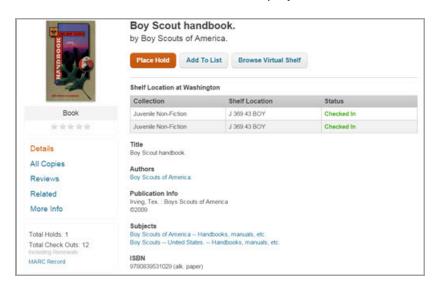
- View Details
- Add a borrower review
- View NoveList Select
- View MARC record

#### **Getting Started**

**Title Details** displays details about the title, but also offers the borrower an option to view *All Copies*, *Reviews*, *Related*, and *More Info*.

#### **Details**

The **Details** option provides Title, Authors, Subjects, and more information. For those libraries using **RDAExpress**, *Media Characteristics*, *Music Characteristics*, *Content Ratings*, and *Form of Content* display. If **Reading Level Integration** is enabled, the *Lexile Measure*, *AR Reading Level*, *AR Interest Level*, *AR Points*, *and/or AR Quiz Number* displays.



Click the link under any of the headings to initiate new search results.

#### **All Copies**

**All Copies** provides a list of the copies for all of your configured locations displaying the collection, shelf location, and status for each item.



#### **Reviews**

**Reviews** displays reviews provided by borrowers and/or from various sources, such as, *Publishers Weekly*, *Booklist*, *School Library Journal*, and others. The number in parenthesis indicates how many reviews are available.



Click the arrow to expand the reviews. Click Add New Review to write a review about the title.

Depending on your library settings for Borrower Reviews, a written review posts immediately or awaits approval by a Library Administrator. To remove borrower reviews in **LS2 PAC**, log in as a Library Administrator and go to **Reviews** for a selected title. Click Remove for each review you want to delete.

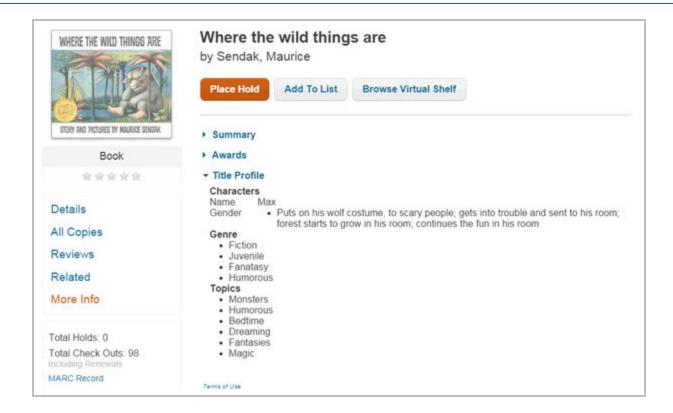
#### Related

The **Related** option provides ratings and reviews, recommendations, similar books, related books, and tags, when applicable. This option will only be displayed if your library has enabled **NoveList Select** and/or **LibraryThing**.



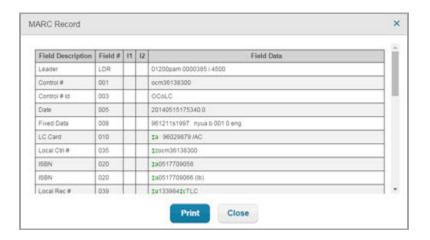
#### More Info

The **More Info** option provides *Summary*, *Awards*, *Title Profiles*, *Chapter Excerpts*, *Table of Contents* and information about the *Author*, when available.



#### **MARC Record View**

Clicking the MARC Record link opens the MARC record dialog, displaying all of the MARC information; *Field Description*, *Field #*, *Indicators*, *and Field Data*. The option to print is also available.



The MARC Record link is an optional feature

**Note**: You can also access the MARC Record view by adding */marcrecordview?* before the *resourceid=[resourceid]*. Using this method does not require the **MARC Record** link to be enabled to access the MARC record directly.

### Log In

#### **Learning Objectives**

After completing this section, you will be able to:

• Log in to your account

#### **Getting Started**

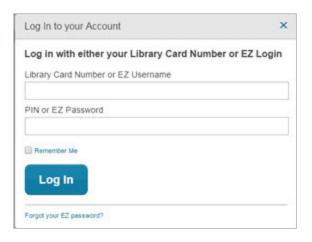
The **Log In** area is found on the upper right corner of the screen. **LS2 PAC** offers many options using library credentials.



#### A Log In is required to:

- Access/change account information
- Access other databases (e.g., EBSCO, Britannica, etc.)
- Add Tags
- Pay a Fine
- Place a Hold
- Save a List
- Save a Search
- Write Reviews

Click **Log In** to open the *Log In to your Account* form. The borrower can log in using their *Library ID* and *PIN*, or they can create an *EZ Login* to make remembering their credentials easier.



After logging in with your library credentials, an **Account** drop-down list slides out to the left of **Log In**. This list links to *Account Summary*, *Account Activity* consisting of *Loans*, *Holds*, *Fines*, and *Loan History* (when applicable), in addition to *Saved Lists* and *Saved Searches*. This list provides quick access for borrowers who want information about their account.

If there are any issues on a borrower's account, a red circle displays next to their name. The red circle displays a number indicating how many issues need attention. Issues may be overdue loans, outstanding fines, or arrived holds. Clicking the red circle opens the *Account Summary*. The borrower immediately can see the areas that need addressed.



The borrower can create an EZ Login at any time. If a borrower has created an *EZ Login* and forgot their *EZ Login* credentials, the **Forgot your EZ password?** link assists in creating a new one. For more information on setting up an EZ Login, see the EZ Login section.

The Remember Me check box, when selected, retains your login during your session. You will not be continually prompted for your information if *Remember Me* is selected.

### **Tags**

#### **Learning Objectives**

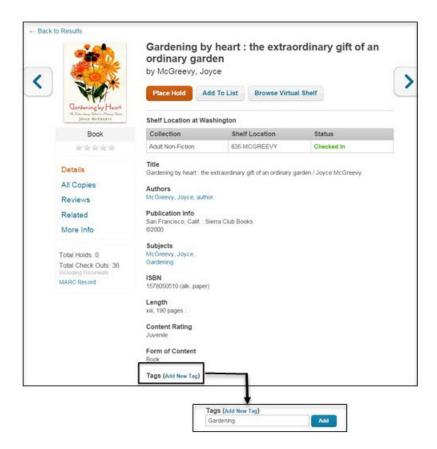
After completing this section, you will be able to:

- Understand tagging
- Add tags
- Remove tags

#### **Getting Started**

Tagging is the process of assigning personal keywords ("tags") to items. **Tags** are located on the **Details** page. **LS2 PAC** has two different types of tagging: *Borrower* and *Dynamic*.

Borrower tags are entered by borrowers as they search. If the borrower has not previously logged in to their account, a log in dialog box prompts for their library credentials. The borrower clicks **Add New Tag** in Title **Details**. An entry box opens for the borrower to type a search term relevant to the result. Multiple tags can be entered under one title.



*Dynamic* tags are automatically entered by the system as a "tag" based on the search term. The tag immediately displays the search term used for the first item viewed in title details. If the borrower selects any other items in the results set and views the title details, no further tagging takes place. A new search term will restart the process.

Tags assist borrowers in locating relevant material and are used in the relevance boosting in search results. Tags are always displayed in lowercase. Clicking a tag generates new search results containing tags with that specific term.

#### Holds

#### **Learning Objectives**

After completing this section, you will be able to:

- Place holds for first available and specific copy
- Place multiple holds simultaneously

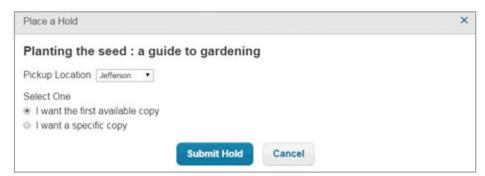
#### **Getting Started**

The **Place Hold** button is found on the *Search Results* page, the *Details* page, and *Saved Lists* in the Account area. Borrowers can place hold on title level items or item level items depending on your library's setting. If on shelf holds are not allowed a message displays, *Due to library settings, holds are not allowed on available items.* 

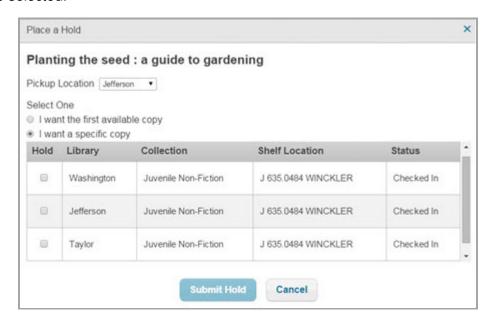


After clicking the **Place Hold** button a dialog box displays. If the borrower is not previously logged into their account, a log in dialog box prompts for their library credentials.

If both title level and item level holds are allowed, the borrower is presented with the *Place a Hold* dialog offering two options.



- I want the first available copy: Receive whatever copy is returned to the library.
- I want a specific copy: Hold a specific copy from a selected location, collection, and shelf location. If this option is selected, a table expands offering the different options. Select the check box under the Hold heading for the specific copy you want. More than one check box can be selected.



After making your selection and choosing your **Pickup Location** from the drop-down list, click **Submit Hold**. Regardless of which option the borrower chooses, a message displays advising whether their hold was placed successfully. All successful holds are now located under **Holds** in the borrower's account area. If the borrower is denied approval for some or all holds, a message displays advising which items are unsuccessful and the reason why. Some reasons why the borrower might be denied:

- The borrower has reached the maximum number of allowed holds.
- The borrower has outstanding fines.
- The borrower already has the item on hold or checked out.

In addition to individual holds, you can also place multiple holds on the **Search Results** page and **Saved Lists**. Select the check boxes on the far right for the individual titles you want to place a hold. Under the **Select Action** drop-down, click *Place a Hold*. A message displays advising whether their holds were placed successfully. All successful holds will now be located under **Holds** in the borrower's account area.

### **More Search Options**

#### **Learning Objectives**

After completing this section, you will be able to:

- Search using Boolean Operators (Power Search)
- Search for Reading Level Integration
- Search for Academic Reserves

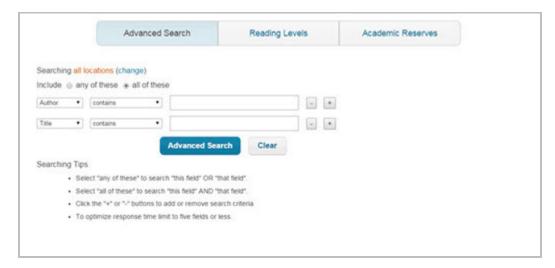
#### **Getting Started**

A More Search Options link displays when your library has enabled Reading Level Integration and Academic Reserves. This link consists of three forms:

- Advanced perform a more complex search by using Boolean Operators.
- Reading Levels perform a search for Lexile and/or Accelerated Reader
- Academic Reserves –perform a search for Departments, Courses and/or Instructors

If your library only has *Reading Levels* enabled, two links display: *Advanced* and *Reading Levels*. If your library only has *Academic Reserves* enabled, two links display: *Advanced* and *Academic Reserves*.

#### **Advanced**



If you want to limit your searching locations click change. For libraries with a single location, or limited to a single location in a configuration, this option is removed. Select whether you want to

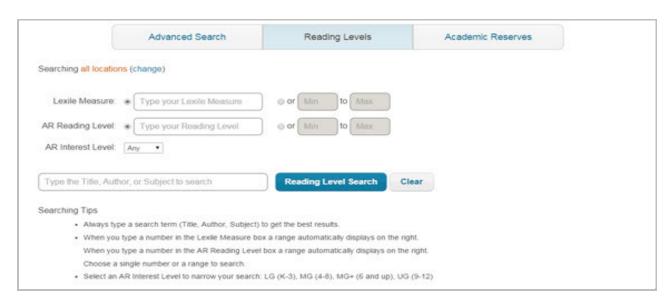
include **any of these** (search for this field OR that field), or **all of these** (search for this field AND that field).

In the first drop-down list, select from one of the following: *Any Field, Title, Author, Series, Subject, Note, Tag, ISBN, UPC,* or *Local Call #.* In the next drop-down list, select *begins with, contains, exactly matches,* or *does not contain.* The borrower types their search term in the blank field box.

**Note**: If *Local Call #* is selected, only 'begins with' is available to aid in narrowing your search.

Click the **Advanced Search** button, or to add another search criteria, click the **plus sign** button. Repeat the steps as needed. You can add up to five fields of search criteria.

#### **Reading Levels**

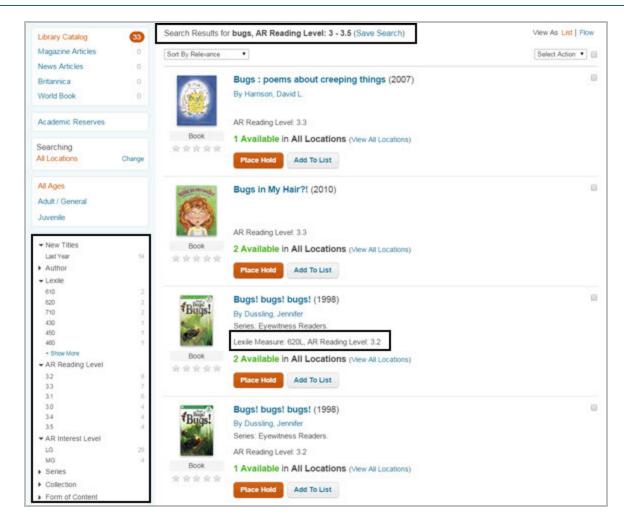


If you want to limit your searching locations click change. For libraries with a single location, or limited to a single location in a configuration, this option is removed. Reading Levels allows borrowers to search and view Lexile and/or Accelerated reading levels depending on which reading programs were enabled .

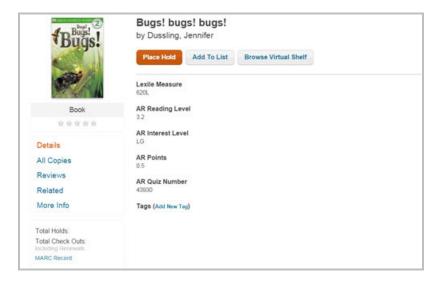
Type the **Lexile Measure** or **Reading Level** in the entry box. The range will automatically be populated. For **Lexile Measure**, the range shows 100 below and 50 above the Lexile Measure. For **AR Reading Level**, the range shows 0.5 below and 0.5 above the Reading Level. You can also type your own or modify the range to meet your desired search. In addition, you can select the **AR Interest Level** from the drop-down list.

It is recommended to always type a search term to get the best results. After completing your search criteria, click **Reading Level Search**. Reading Level information is also viewable in *Loans*, *Holds*, *Saved Lists*, and *Loan History* in the account area of **LS2 PAC**.

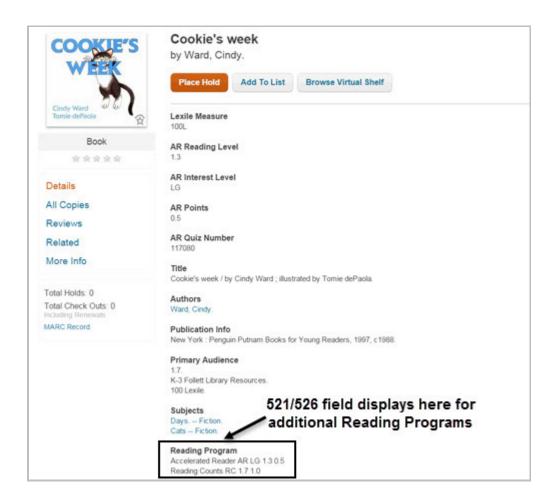
On the search results page, a breadcrumb displays at the top, followed by the titles matching your search criteria. The refinements on the left can help to narrow the search results. **Lexile Measure** and/or **AR Reading Level** display on the individual results.



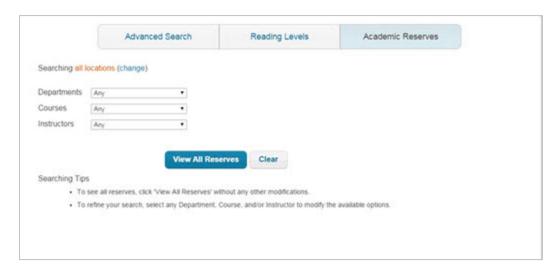
For **Accelerated Reader**, click the title to view the **AR Points**, **AR Interest Level** and, if enabled, the **AR Quiz Number** under the title details.



For those libraries who display the 521 and/or 526 field, the reading level information associated with the MARC record displays under the **Reading Program** heading, or your customized heading. TLC recommends turning off the 521/526 field unless your library displays additional reading programs, such as *Reading Counts!* or *Fountas*, and *Pinnell*.



#### **Academic Reserves**



Click the **View All Reserves** button to display all items on reserve, or refine your search using the location filter and/or drop-down lists for **Department**, **Course**, and **Instructor**.

Limit your locations by clicking change next to *Searching all locations*. For libraries with a single location, or limited to a single location in a configuration, this option is removed.

Use the drop-down list to select a **Department**, **Course**, and/or **Instructor**. Only one option can be selected per field. When you are finished, click **View Reserves**.

Your reserves display on the search results page. On the left side you find the total number of results associated with your selected criteria. The search results show the selected criteria: *Department, Course,* and *Instructor.* 



For those titles that have more than one copy, borrowers can click *Show Additional Copies* when available to go to *All Copies* to view additional copies available that are not on reserve.

### **Locations**

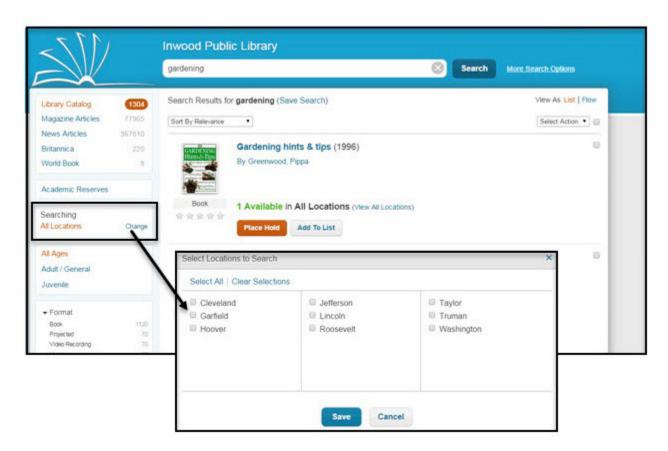
#### **Learning Objectives**

After completing this section, you will be able to:

Limit results to specific locations

#### **Getting Started**

**All Locations**, located below **Searching** on the left side, allows the borrower to refine their search results to a specific location or locations. Click **Change** to select the check box for each location you want to limit. Click **Save**. *All Locations* updates to the number of selected locations, retained throughout the borrower's current session.



### **Account Summary**

#### **Learning Objectives**

After completing this section, you will be able to:

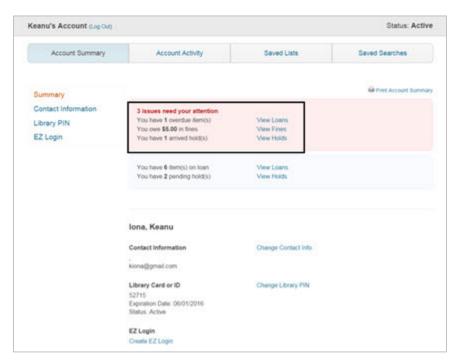
- View a quick summary of your account
- View/change contact information and library PIN
- Create/edit **EZ Login** credentials

#### **Getting Started**

**Account Summary** displays the following areas: *Summary*, *Contact Information*, *Library PIN*, and *EZ Login* or *EZ Username/EZ Password*. Borrowers access these areas by logging in

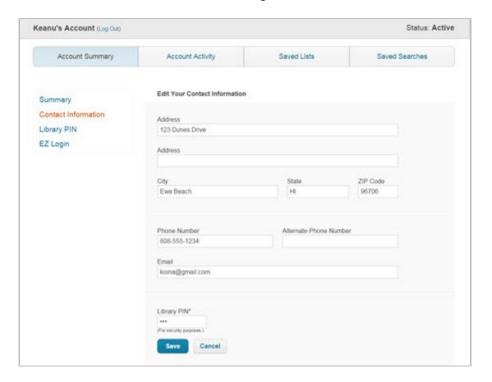
#### **Summary**

**Summary** provides a quick overview of any issues needing immediate attention and a summary of any items on loan or pending holds. The borrower sees their contact information, library card or ID, expiration date and status, and EZ Login information, if created. Click the **View** links to go directly to a specific area.



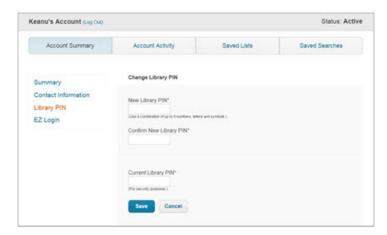
#### **Contact Information**

**Contact Information** allows borrowers to change their contact information. After the borrower makes the appropriate changes, they must enter their Library PIN or EZ Login Password into the **Library PIN** field box and then click **Save**. A message advises, *Your information was saved*.



#### **Library PIN**

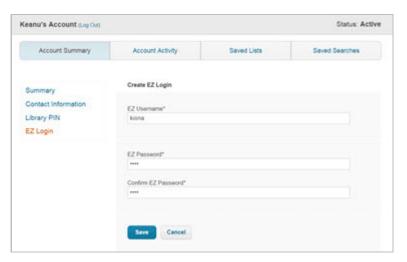
**Library PIN** allows borrowers to change their Library PIN. From **Account Summary** click *Library PIN*. On the **Library Pin** page type the new *Library PIN* in the appropriate box. Confirm the *New Library PIN* by typing it again. Type the borrower's *Current Library PIN* in the box. Click **Save**. A message advises, *Your Library PIN has been changed*.



#### **EZ Login**

**EZ Login** allows the borrower to create an **EZ Login** with an *EZ Username* and *EZ Password*. The following tips will help borrowers with creating an **EZ Login**:

- The *EZ Username* is not case-sensitive and can be used with a combination of any letters, numbers, and/or symbols. For example, *123456*, *1luvBks!*, *Luv2Read*.
- Some systems allow borrowers to have a maximum of up to eight characters. *The EZ Password* is case-sensitive and can be used with any combination of uppercase letters, lowercase letters, numbers, and symbols. For example, 123456, 1luvBks!, Luv2Read.



When the borrower is finished typing the *EZ Username*, *EZ Password* and confirming the *EZ Password*, click **Save**.

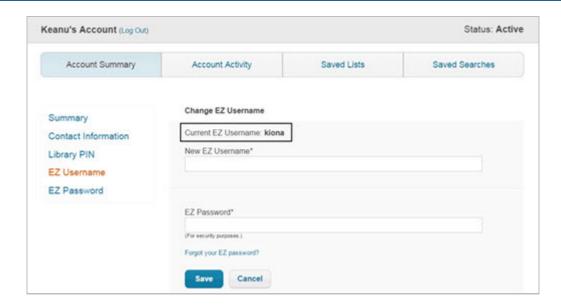
**Note**: If you do not see the **EZ Login** option, but instead see **EZ Username** and **EZ Password**, you already have an established **EZ Login**. If you are not sure of your **EZ Username**, go to **Account Summary**. At the bottom of the screen, under the heading **EZ Login**, your **EZ Username** displays.

Borrowers will not be able to create an **EZ Login** for schools using LDAP.

#### **EZ Username**

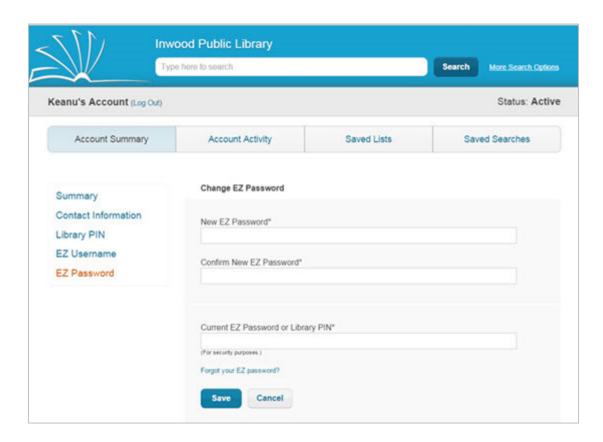
**EZ Username** allows borrowers to change their EZ Username. Type the *New EZ Username* and the *EZ Password* in the appropriate boxes. Click **Save**. A message advises, *Your EZ Username* has been updated.

**Note**: The borrower's **Current EZ Username** displays on the *Change EZ Username* page.



#### **EZ Password**

**EZ Password** allows borrowers to change their *EZ Password*. Type the *New EZ Password* in the box, and type the *New EZ Password* again to confirm Type the borrower's *Current EZ Password* or *Library PIN* in the box and click **Save**. A message advises, *Your EZ Password has been changed*.



# **Account Activity**

#### **Learning Objectives**

After completing this section, you will be able to:

- Renew loans
- Suspend and cancel holds
- Pay fines

#### **Getting Started**

**Account Activity** displays the following areas: *Loans*, *Holds*, *Fines*, and *Loan History* (if enabled). Borrowers access their account information by logging in. Click the drop-down arrow, located next to the [*Borrower's first name Account*] and select **Account Activity** or the individual area they want to access.

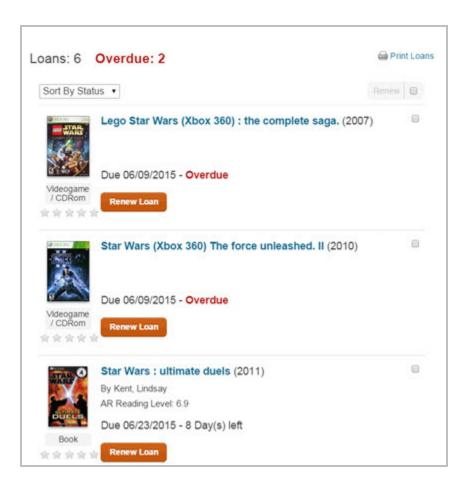
#### Loans

Under **Loans**, the number of loans and overdues are summarized. A list of items currently checked out of the library displays, along with the respective due date, followed by the number of days remaining before it is due.

#### Available options:

- **Sort By**: Click the **Sort By** arrow to select a different sort by option. Options include: *Status*, *Title*, and *Author*.
- **Details**: Click the title to view the **Details** page. Click *Back to Results* to return to Loans.
- Rate: Hover over the stars to rate the title and click the desired number of stars. Five stars is the highest rating.
- Write Review: After rating an item, the option to write a review displays. Click the Would you like to write a review link. The review form displays.
- **Print Loans**: Click the **Print Loans** button. A new window opens with the list of items to print.
- Renew Loan: Click the Renew Loan button. A new due date displays. If the item could not be renewed, a message advises the issue.
- **Batch Renew**: Select the individual check boxes on the far right, or to select all of the items, click the check box located to the right of **Renew**. Click the **Renew** link. New due dates will display. If some titles could not be renewed, a message advises the issue for the individual title.
- **Download**: If an eResource was not automatically downloaded to the borrower's device, the **Download** button\* is available.

\*Note: The borrower will see the **Download** button for the associated eResource in their account only if your library has purchased **eIntegration for Borrower Services**.

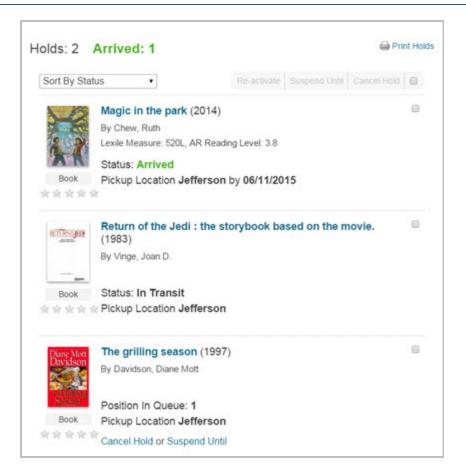


#### Holds

Under **Holds**, the number of holds and status are summarized. A list of items along with their status/position in queue and pickup location displays for each title.

- **Arrived** item available for pick up by the date and location shown
- In Transit item is being transferred from one library location to another library location
- Position In Queue represents the number of borrowers in front of them.

If **eIntegration for Borrower Services** has been purchased, the borrower can check out arrived eResources.



#### Available options:

- **Sort By**: Click the **Sort By** arrow to select a different sort by option. Options include: *Status, Queue Position, Title*, and *Author*.
- **Details**: Click the title to view more information on an individual item. The borrower will be redirected to the **Details** page.
- Rate: Hover over the stars and click the desired number of stars you want to give this item, five stars being the highest rating.
- Write Review: After rating an item, borrowers are offered the option to write a review. Click the Would you like to write a review link. The review form displays.
- Print Holds: Click the Print Holds button. A new window opens with the list of items. Click
   Print.
- Suspend Until: This allows the borrower to postpone an item(s) until a later date. Click Suspend Until for individual items, or to select all of the items, click the check box located to the right of Cancel Hold and then Suspend Until. A calendar opens allowing them to select a month and day.

**Suspended [along with the requested suspended date]** appears and the **Suspend Until** button changes to **Re-activate**. When the hold has reached the date the borrower has selected, their item is no longer suspended and placed back in the queue position. **Note**: Borrowers cannot suspend holds that have a status of *Arrived* or *In Transit*.

• **Re-activate**: If the borrower would like to get back in line sooner than the suspended date, click **Re-activate** for individual items, or to select all of the items, click the check box located to the right of **Cancel Hold** and then **Re-activate**.

 Cancel Hold: Click Cancel Hold for individual items, or to select all of the items, click the check box located to the right of Cancel Hold. Click the Cancel Hold link.

#### **Fines**

Under **Fines**, any outstanding fines due on the account is summarized. A list of items and comments, when applicable, are shown along with the date and fine amount. The last fine incurred displays first.



#### Available options:

- **Sort By**: Click the **Sort By** arrow to select a different sort by option. Options include: *Date*, *Title*, and *Author*.
- **Details**: If the fine is related to a book, click the title to view the **Details** page. Click *Back to Results* to return to **Fines**.
- Print Fines: Click Print Fines if you want to print out a list of the fines.
- Pay Fines: If your library is using Authorize.net or another eCommerce vendor, select the check box(es) for the fines the borrower wants to pay, or to select all fines select the check box located to the right of Pay Fines. Click the Pay Fines link.

#### **Loan History**

In **Loan History**, borrowers can view their entire loan history, if the feature is enabled. The total number of loans is summarized. A list of items previously checked out with the respective date displays. Borrowers can sort their loan history, view title details, rate, write a review, or even print a list of their loan history

#### Available options:

- **Sort By**: Click the **Sort By** arrow to select a different sort by option. Options include: *Check Out Date, Title,* and *Author.*
- **Details**: Click the title to view more information on an individual item on the **Details** page.
- Rate: Hover over the stars and click the desired number of stars you want to give this item with one star being the lowest and five stars being the highest rating.
- Write Your Review: Click the Write Your Review link to add a review. The review form displays.
- **Print Loan History**: Click the **Print Loan History** button. A new window opens with the list of items.

# **Saved Lists**

#### **Learning Objectives**

After completing this section, you will be able to:

- Save a list
- Understand Saved Lists options

#### **Getting Started**

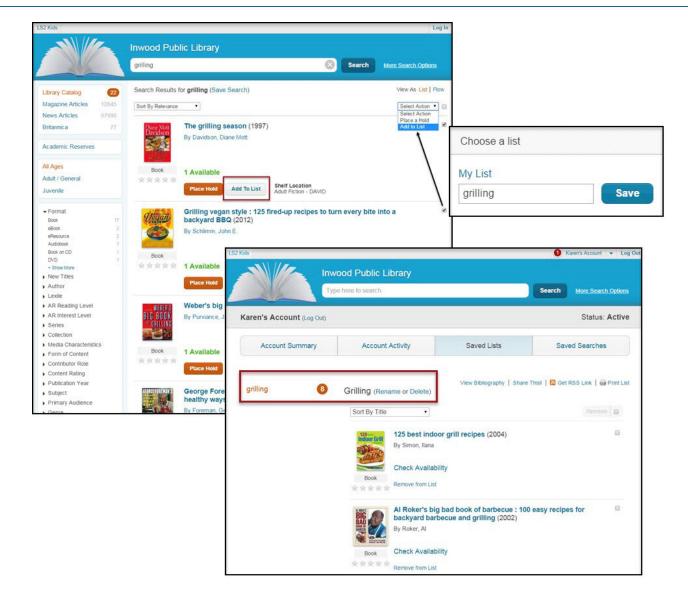
**LS2 PAC** provides an option for borrowers to save for selected titles for future reference, to email to others, or export the list into a Bibliography format. There is no limit on how many lists borrowers can save.

After performing a search if the borrower wants to save items from their search results, they can click **Add to List**. This button is found on each search result under the availability. Borrowers can save multiple items by selecting the individual check boxes located to the right of the title. To save all of the items listed on that page, select the check box next to the **Select Action** drop-down and then choose **Add to List** from the drop-down list.

If the borrower has not previously logged in to their account, they are prompted for their library credentials. A dialog box appears, allowing them to choose a list or create a new one.

A field box displays with the search term automatically pre-populated. Click **Save** to keep the pre-populated name, or type a new search name in the field box. After saving a message displays advising, *Your item(s) have been added.* 

Borrowers can view their saved list by clicking on the arrow next to their name in the upper-right corner of the screen and clicking **Saved Lists**. The **Saved Lists** page displays with their lists on the left and the results showing for the top list.



The name of the displayed list is shown in orange font. The number to the right of the list name indicates the number of items in the list. If multiple lists are saved, click the heading of the one you want to view.

Borrowers have the following options for saved lists:

- **Rename**: Click the **Rename** button to change the name of your list. A pop-up displays allowing the borrower to type a new name for their list. Type over the old name and then click **OK**. A message appears advising, *Your list has been renamed*.
- **Sort By**: Click the **Sort By** arrow to select a different sort by option. Options include: *Title*, *Author*, and *Publication Date*.
- **Details**: Click the title to view more information on an individual item in the saved list. The borrower is redirected to the **Details** page.
- Check Availability: Click Check Availability to view the All Copies page.
- Rate: Hover over the stars and click the desired number of stars you want to give as a rating. Five stars is the highest rating.

- Write Review: After rating an item, borrowers are offered the option to write a review. Click the Would you like to write a review link. The review form displays.
- Share This: Click the Share This link to share the list with others. Add the email address(es). Use a comma to separate more than one addresses. Type a message, if desired. Click Send. When your recipient(s) open the list, they can view details about the item(s), place a hold, or even add it to their own saved lists.
- **View Bibliography**: Click the **View Bibliography** link. A new window opens with the list converted into a MLA format. Print options are available.
- Get RSS Link: Click Get RSS Link to subscribe to the saved list.
- **Print List**: Click the **Print List** button. A new window opens with the list of items. The list will be automatically sorted by collection, followed by the call number in alphanumeric order.

**Note**: If a printing issue occurs, there could be a record in the user's **Saved Lists** that had been deleted in Library•**Solution**. If **Housekeeping** fails or did not complete can also cause issues.

- Place Hold: Click the Place Hold button. Select the Pickup Location from the drop-down list. Next, select an option, whether you want the first available copy or a specific copy. Click **Submit Hold**. A message will advise if your hold was placed successfully.
- **Batch Hold**: Select the individual check boxes, or to select all of the items, click the check box located to the right of **Hold**. Click the **Hold** link. A new window opens. Select the **Pickup Location** from the drop-down list. Click **Submit Hold**. A **Hold Feedback** message advises the items placed successfully.
- Remove from List: Click Remove from List to remove an individual item from the list. A
  message advises, (number) item(s) have been deleted.
- **Batch Remove**: Select the individual check boxes or to select all of the items, click the check box located to the left of **Hold**. Click the **Remove** link. A message advises, (number) item(s) have been deleted.
- Delete: Click Delete to remove the saved list. A message appears asking, Are You Sure?
   Click OK. A message advises, (number) list has been deleted.

# **Saved Searches**

#### **Learning Objectives**

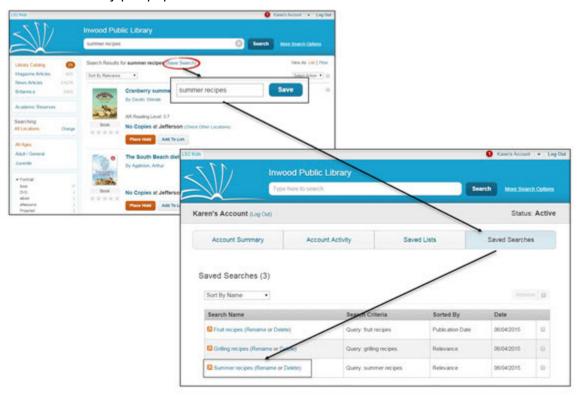
After completing this section, you will be able to:

- Save a search
- Understand Saved Searches options

#### **Getting Started**

**LS2 PAC** provides borrowers an option to save their searches for future reference. There is no limit to how many saved searches borrowers can save.

After performing a search, borrowers click **Save Search**, located at the top of the search results, next to *Search Results for [name of search]*. If the borrower is not logged in to their account, a log in dialog box prompts for their library credentials. A field box displays with the highlighted search term automatically pre-populated.



To keep the pre-populated name as is, click **Save**. If you want to rename the search, type the new search name over the highlighted search term in the field box. A message displays, *Your search has been saved*.

To view the saved search, click the arrow next to their login in the upper-right corner of the screen to display a drop-down list of Account options. Click **Saved Searches**.

Under **Saved Searches**, borrowers have the following options available.

- **Rename**: Click the **Rename** button to change the name of your saved search. A pop-up displays allowing the borrower to type a new name for their saved search. Type over the old name and then click **OK**. A message appears advising, *Saved Search renamed*.
- **Sort By**: Click the **Sort By** arrow to select a different sort by option. Options include: *Name*, *Date Created*, and *Last Update*.
- **Re-activate Search**: Click the name of your search to view the items from the saved search. The items display on the search results page.
- **Get RSS Link**: Click the RSS Link located to the left of your search name to subscribe to the saved search.
- **Delete**: Click **Delete** to remove the saved search. A messages appears asking, *Are You Sure?* After clicking **OK** a message advises, *(number) Saved searches deleted.*
- **Batch Remove**: Select the individual check boxes or to select all of the items, click the check box located to the right of **Remove**. Click the **Remove** link. A message advises, (number) Saved searches deleted.

# **News Feeds**

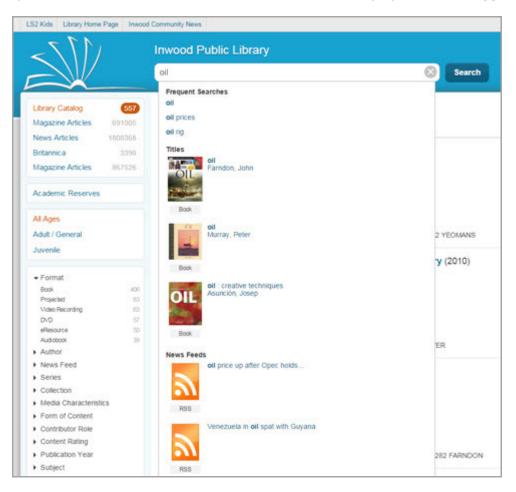
## **Learning Objectives**

After completing this section, you will be able to:

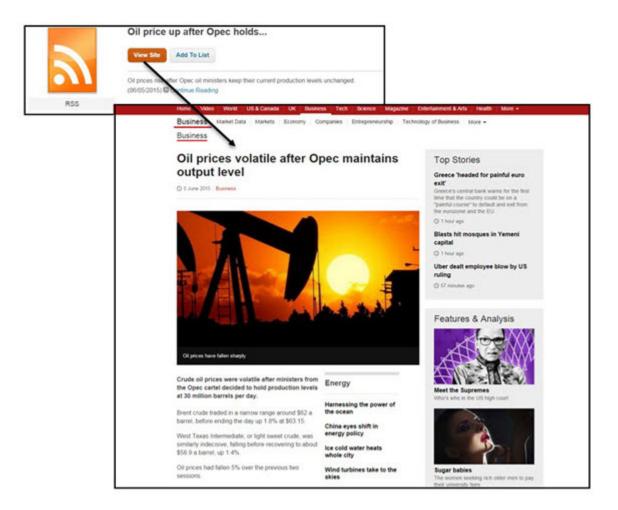
- View News Feeds
- Subscribe to a RSS link

#### **Getting Started**

**News Feeds** are feeds related to the borrower's search term, populated through Web sites set up by your library. News Feeds, also referred as *RSS Feeds*, often display in search suggestions.



By clicking a title that includes a News Feed symbol from the **Search Suggestions** drop-down list, or from a list of results, the associated News Feed page displays. The **News Feed** page includes the title and the posting date. Click **View Site** to go to the direct source on the internet.



Home users can subscribe to a RSS link under **Saved Searches**. A **News Feed** symbol appears next to the search name. Click the **News Feed** symbol to subscribe to that feed. Borrowers using their preferred Feed Reader can receive updates delivered directly to them.

Home users can also subscribe to a **News Feed** through their **Saved Lists**. Under **Saved Lists**, click the **Get RSS Link**. Borrowers using their preferred Feed Reader can receive updates delivered directly to them.

## **eResources**

#### **Learning Objectives**

After completing this section, you will be able to:

- Understand the eResources process
- Understand eIntegration for Borrower Services
- Place a hold for eResources

## **Getting Started**

OverDrive and Baker and Taylor Axis 360 are the eResource vendors available in LS2 PAC.

If you do not have an **OverDrive** or **Baker & Taylor Axis 360** subscription, but the eResource was flagged appropriately and contains an 856 link, the borrower sees the item as an eResource (eBook, eAudiobook, etc). Any eResource displays *Downloadable* in the search results with a **More Options** button. Clicking **More Options** redirects the borrower to the eResource vendor's site to check availability and processing of the eResource.



If this is the borrower's first time downloading an eResource, additional software needs to be installed based on the device. The vendor will provide instructions on what is needed. Once the eResource has been downloaded the borrower has the allotted time to read/listen their eResource according to your library's policy. Borrowers receive an expiration notice via email when their eResource is due. Once the eResource expiration date has passed, the borrowed copy will automatically be returned to the library.

#### Subscription with OverDrive and/or Baker & Taylor Axis 360

If you have a subscription with **OverDrive** and/or **Axis 360**, once enabled borrowers see availability for the eResource.

If the digital title's status reads **Not Available** in the search results, all of the library's copies are currently checked out. The borrower can see how many others are waiting for this title and how many copies your library owns. Select the **More options** link to go the provider's site to place a hold. If a hold is placed the borrower receives an email notice when the item becomes available. Follow the instructions in the email to download the item.



For pre-release items, the digital title's status reads **Not Available**, as well as when the title is scheduled to be released. Selecting the **More options** link redirects the borrower to the **OverDrive** or **Axis 360** site where they can see how many others are waiting for this title with an option to place a hold.

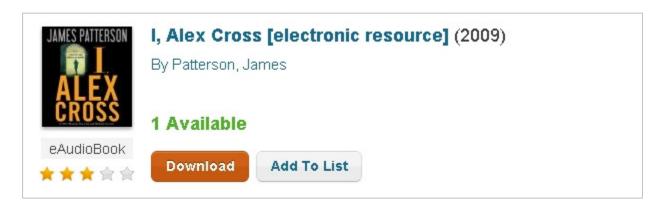


Once the eResource has been downloaded the borrower has the allotted time to read/listen their eResource according to library policy. Once the eResource expiration date has passed, the borrowed copy is automatically returned to the library.

#### <u>eIntegration for Borrower Services</u>

If your library subscribes to **elntegration for Borrower Services**, a paid subscription through TLC, borrowers see a *Download* button on eResources and are able to download immediately.

In addition, the service provides the borrower an opportunity to place a hold, cancel a hold, and view their holds and loans in *Account Activity* from inside **LS2 PAC**. The borrower is NOT taken to the **OverDrive/Axis 360** site. The borrower needs to already have established an account with Amazon for the Kindle (eBooks), an MP3 or WMA device (eAudiobooks), or Adobe Digital Editions (ePub) to immediately begin downloading



Once the *Download* button is clicked, the borrower is asked what format they want to use to download: eBook, eAudioBook, ePDF, ePub, among other formats. The *Check Out and Download* dialog displays with the *Begin Download /Download Later* buttons disabled, waiting on a format selection.



Once a format is selected the borrower will be able to start downloading to their device. The title will display in the borrower's *Loans* in **Account Activity** with the due date and number of days left on the loan. The *Synchronize eBook Info* link allows the borrower to sync their eResources to their account if the eResource they downloaded is not showing. If the borrower chooses *Download Later*, they can go to their **Account Activity** for the appropriate eResource and click the *Download* button.

# **Additional Links**

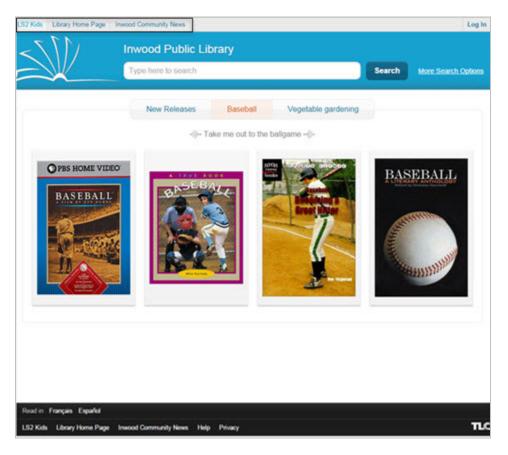
## **Learning Objectives**

After completing this section, you will be able to:

Understand additional links

### **Getting Started**

Five additional links can be setup to link to *YouSeeMore*, a Community page, *LS2 Kids*, etc. Links display on the left at the top and bottom of the screen.



Under **Read in**, **LS2 PAC** can be switched to French or Spanish, changing the wording in the interface to the selected language. Additional links show *Help* (connecting to Users Help) and *Privacy*, if your library has opted in to **TLC's Community Google Analytics**.

Last updated: 06/24/2015