

WISCAT Tips & Tricks

1. Customize "labeled" brief title display

- ☆Easier to see
- ☆Add useful fields (MARC tags)
- ☆Saves staff time
- ☹ But uses more space

How?

Click Staff Menu then PAC Admin

On PAC Admin menu

Choose Record Display Profiles

- Select "Brief Record"
- Click the Submit button
- Add or Delete or Move tags to suit your needs

2. Set "My Preferences" for the "public" access

- ☆Put library catalogs into folders on Resources menu
- ☆Advanced Search offers more options
- ☆Alphabetically By Title sorting (common expectation)

How?

Click Staff Menu then User Admin

On User Admin menu

Choose Edit User Accounts

Click on Submit to view all user accounts

Open the Guest account

Click on "Edit Preferences" link (near bottom of form)

- Select "Collapsed" on Resource Headings menu
- Select "Alphabetically By Title" on Sort Results By menu
- Select "Advanced Search" on Select Default Search Method menu

3. (a) Configure a Scoping Level for your library

- ☆Easier to delete your holdings

(b) Configure a Display Group for your library

- ☆Puts your library holding info as first location on full record display

How?

Click Staff Menu then PAC Admin

On PAC Admin menu

Choose the Define/Maintain Scoping Levels

- Type the Label to be displayed; click the Submit button
- Select the Define/Maintain Display Groups on the PAC Admin menu
- Type the Display Group label to be displayed; click the Submit button
- Return to Define/Maintain Scoping Levels
- Click on the Configure button
- Choose the Selected Libraries option on the View menu
- Search by library system and/or enter your library name
- Click in radio box for your library and select display group label on pulldown menu
- Click Submit button

4. Patron Initiated Interlibrary Loan

- ☆ Patrons create their own requests on WISCAT
 - No paper
 - Saves staff time re-typing ILL request
- ☆ ILL staff mediates patron requests
- ☆ Email sent to patron when material arrives

5. Email Notification for ILL Staff

- ☆ Email is sent when ILL request needs attention in Status Browse (borrower or lender)
 - Email gives request #, title, and status (Shipped, Pending, etc.)
 - Saves staff time checking for ILL when not necessary
- ☆ Recommended for libraries with low ILL activity

How?

Click Staff menu then ILL Admin

On ILL Admin menu

Click on Maintain Participant Record

Click on URL Info button or scroll down to URL Information

Do you want e-mail notification?: Select "Yes"

Type the staff email address to receive notices

Click the Update button

6. Two easy ways to Update Holdings in WISCAT

1. Interactive
 - One record at a time using CAT Options—Add/Modify/Delete Locations
2. Batch
 - Email new files to us (wiscat@dpi.state.wi.us)
 - Snapshot file load to get back on track

7. **Don't keep logging in & out of WISCAT.** Timeout setting was increased to 8 hours to allow a staff workstation to keep it up without logging out and losing work.

8. **Search numbers in Advanced Search rather than in Browse Search.** When the number is *not* an exact match, the message "No Matches Found" will appear instead of just a list of alternative numbers.

9. In "My Preferences" **don't increase list length above 20-30;** it will slow down results.

10. **Don't try to download AG CAT,** you don't want it & you don't need it.

11. How to know if you are in PUBLIC Mode:

You see User Menu instead of Staff Menu tab below WISCAT banner

You don't see the left frame menu with options (the bib record takes up full screen)

You don't see the My Preferences link

12. **When in the Public Mode you can use the User Login screen to login to the Staff Mode.**