



# USER'S GUIDE

ODILOTK

15/12/2017



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# Introduction

# 1. Introduction

**OdiloTK** is a cutting edge library platform that enables the management and digital lending of eBooks, audio and videos anywhere, anytime and from any device. eBooks can be read on a computer, tablet or eBook reader.

## ***Basic requirements***

To get started with OdiloTK, you will need the following:

- Internet Access.
- Be a registered Library Borrower (Get a library account from your local library)
- Sign up for a free OdiloTK user account.
- Install [Adobe Digital Editions ebook reader](#) on your computer.

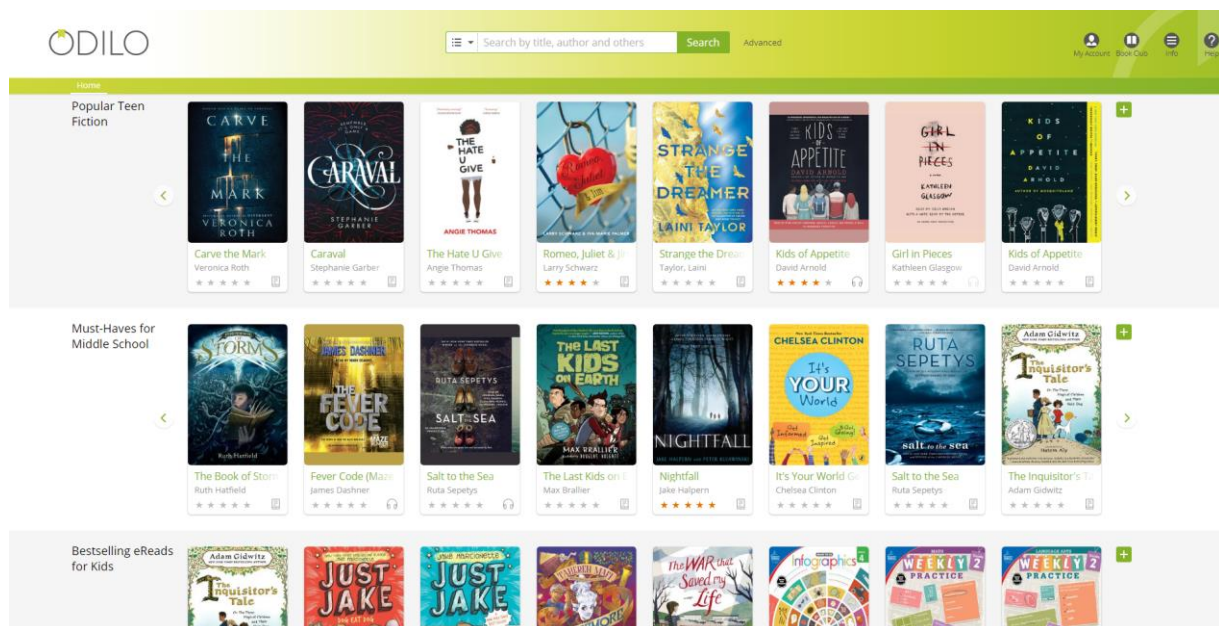


Figure 1. OPAC Main Page.

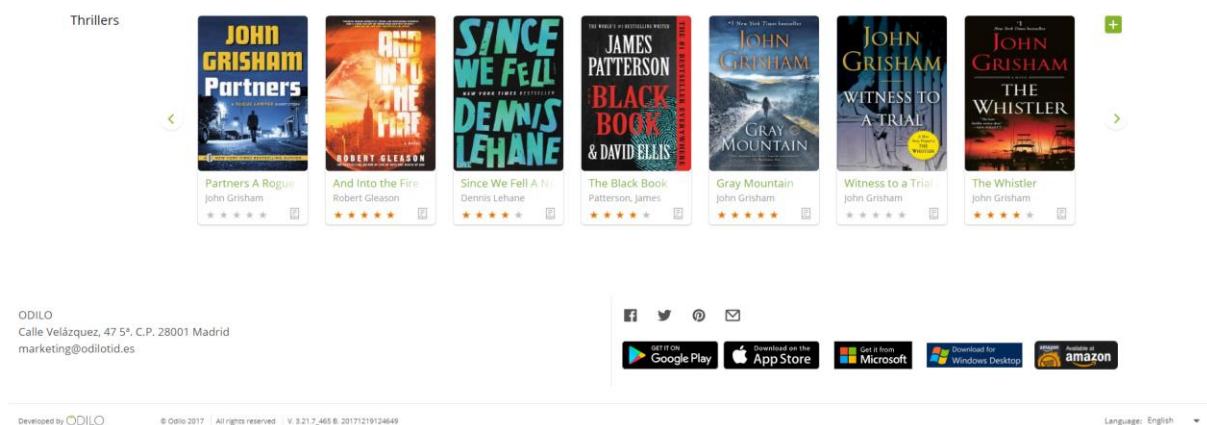


Figure 2. OPAC footer.





## 2. Access to OdiloTK: User Authentication

To access to the private platform of OdiloTK, the user needs to know his/her access data (user and password). Previously, the administrator of the platform through an email has facilitated this information.

Steps to login:

1. Open the web browser.
2. Enter the URL of your library.
3. Once you are on the platform access page, you have to go to "**My Account**" icon and introduce the access data in the corresponding text boxes.
4. Click the **Enter** button.

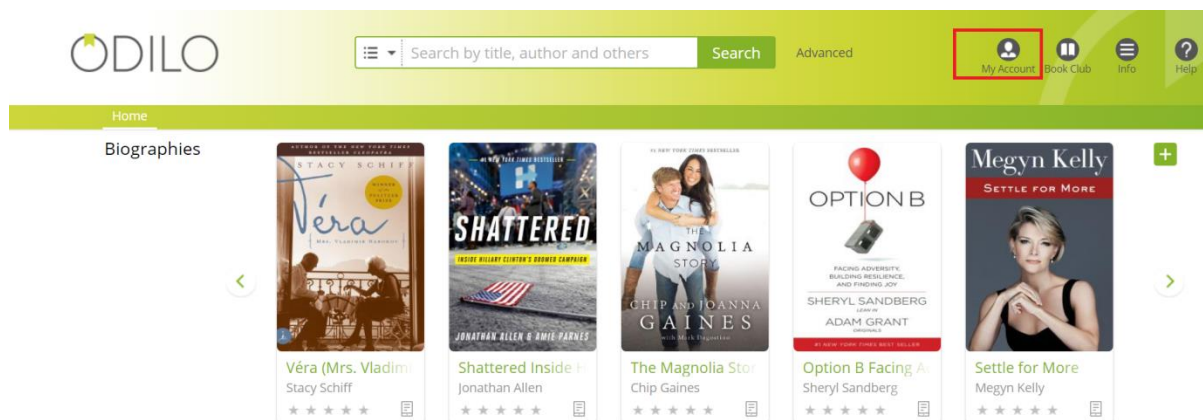


Figure 3. Access to the user's private platform.

The screenshot shows the 'My Account' page. The top navigation bar is the same as in Figure 3. Below it, the breadcrumb trail reads 'Home > My Account > Identification/Register'. The main content area contains a login form with two input fields: 'Library card number' and 'PIN'. Below these fields is a 'Remember me' checkbox and a green 'Login' button. At the bottom of the form, there is a link that says 'User Registration >'. The entire form is enclosed in a light gray border.

Figure 4. Screen to introduce the access data to the platform.



### 3. User's Guide.

After the login process, if you click on "**My Account**" icon, you will be redirected to the following screen:

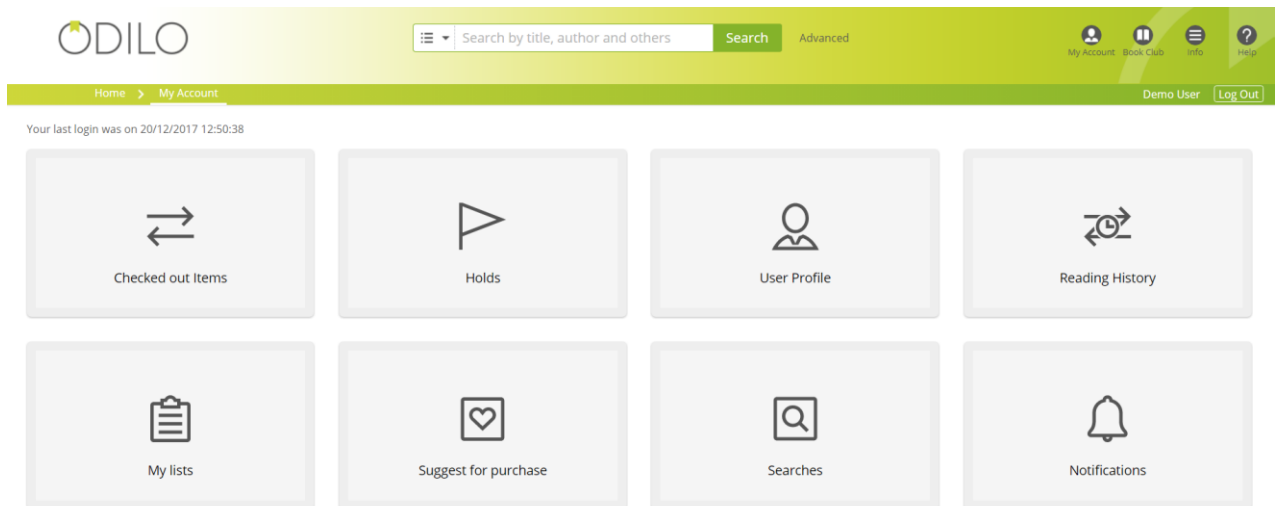


Figure 5. User's area screen

First of all, on the top left of the screen, the user can check his/her last login in the platform (date and time):

Your last login was on 15/12/2017 12:58:21

Figure 6. User's last login.

- **Checked out items:** displays the active user's checked out items.
- **Holds:** the user can use this menu option when he/she wants to have a resource but all the available items are taken. It allows users to request items and manage items they have requested. When the user requests the desired item, he/she will be added to a waiting queue automatically. After that, he/she will be notified by email when the title is available and how much time he/she has to borrow it.
- When the hold is available, an informative message will be sent to the **Notifications** section in the user's personal área, apart from send him an email.

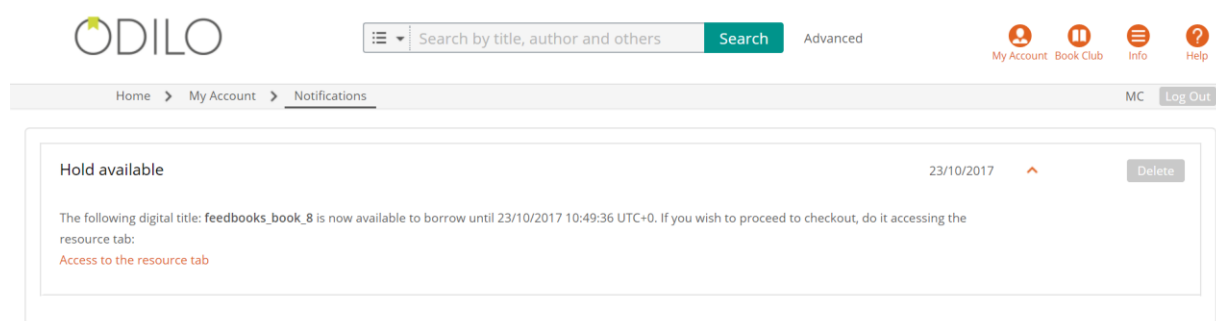


Figure 7. 'Available hold' notification.

- **User profile:** basic user's data. Users can update their profile and change their passwords.
- **Reading history:** shows a history of all the titles borrowed by a user.

You have the option, using **Delete** button, to delete the title, which you do not want to keep in your history.

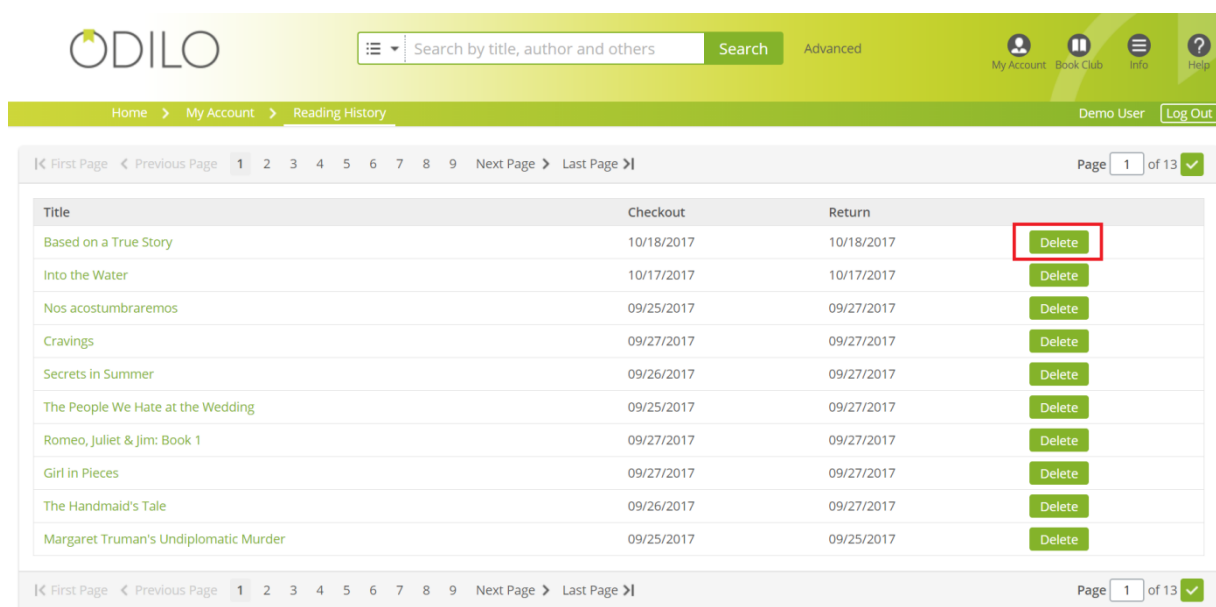


Figure 8. Delete button in Reading history section.

- **My lists:** shows all the public and private lists that the user has created.
- **Suggest for purchase:** allows users to formulate requests for the library in order to consider them when expanding their catalog. In argot it is known as *desiderata*.
- **Searches:** patrons can easily save their searches, along with share searches by email.

- **Notifications:** see the notifications that send the administrator.

## 3.1. Searches

On the OdiloTk platform, users have access to content in two different ways:

- Quick content search.
- Different carousels exist in the main page such as Best Sellers, Just Arrived, Most Popular, etc.

### **Quick content search**

To search the list of available titles, follow these steps:

- 1.- Go to the main page → **Search**
- 2.- Insert into the text area a **word** or **sentence** that identify the content that you want to look for.
- 3.- Click the **Search** button.

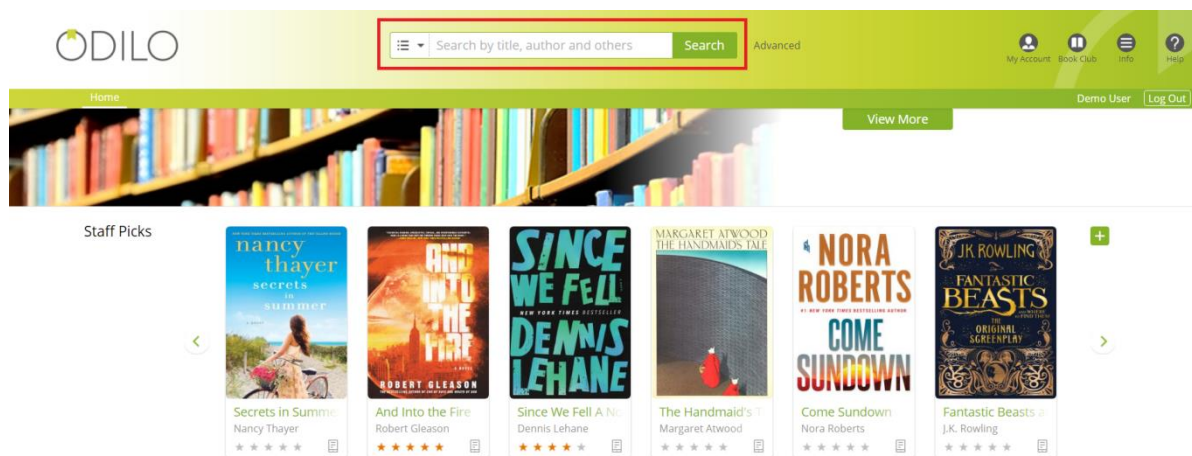


Figure 9. Search box on the main page.

Advanced search allows patrons to perform a search that includes all advanced search fields options.

An **Advanced Search** can be performed by filtering by specific fields (Author, Title, Publisher, Subject, ISBN, Publication Date) or by any field that contains information (All).

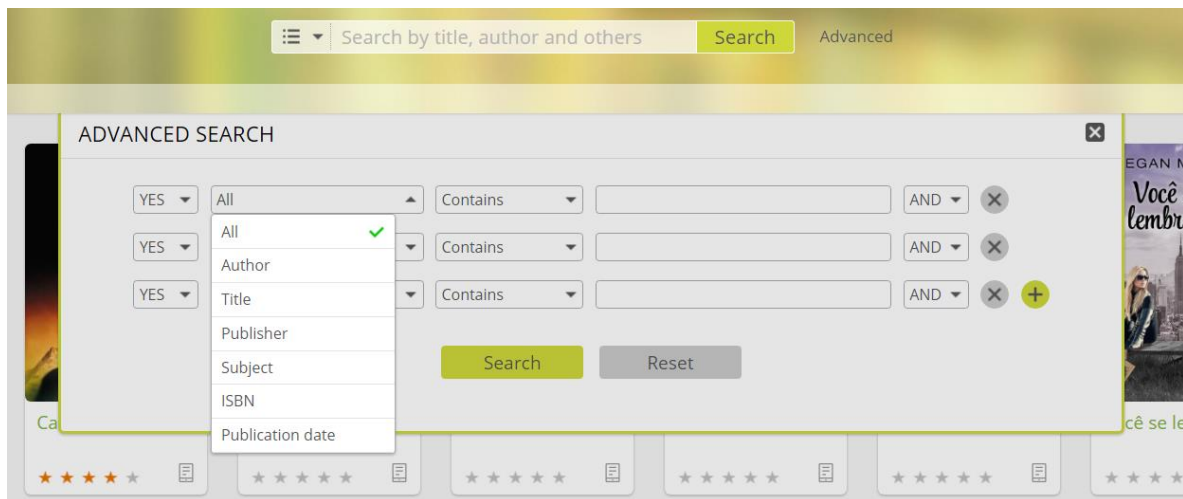


Figure 10. Advanced Search.

In addition, when the user is identified, he/she can save all the searches made using the **Save** button that will allow him/her to store all his/her searches on the platform in his/her personal area. Likewise, the user can share with other users these searches by email.

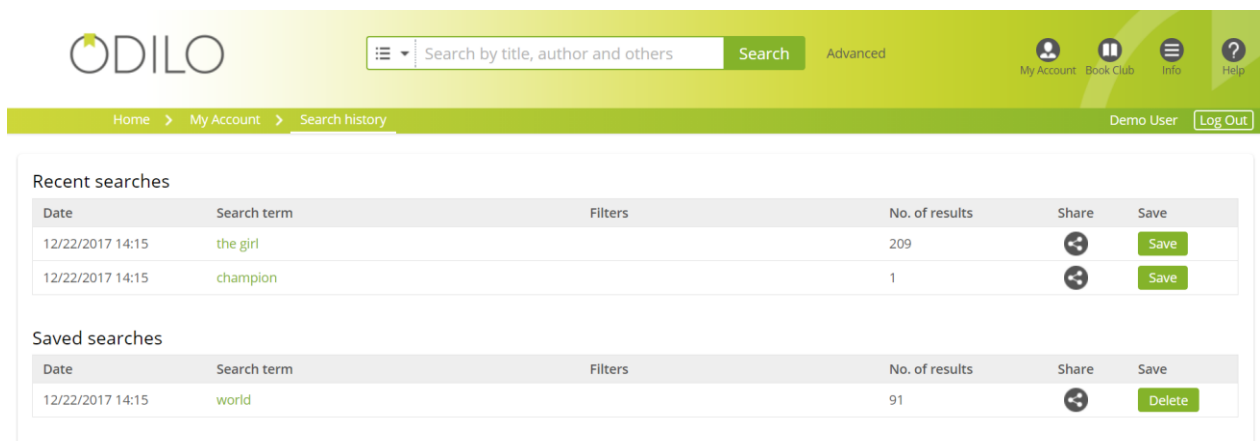


Figure 11. Save searches.

## 3.2. Filters

Filters or facets are used to narrow search results.

1. Make a search without any writing on the search box. For that, click the **Search** button.
2. On the left side of the page, filters/facets are displayed in order to narrow the search. Select the filter/filters that you want to apply for make a new search.

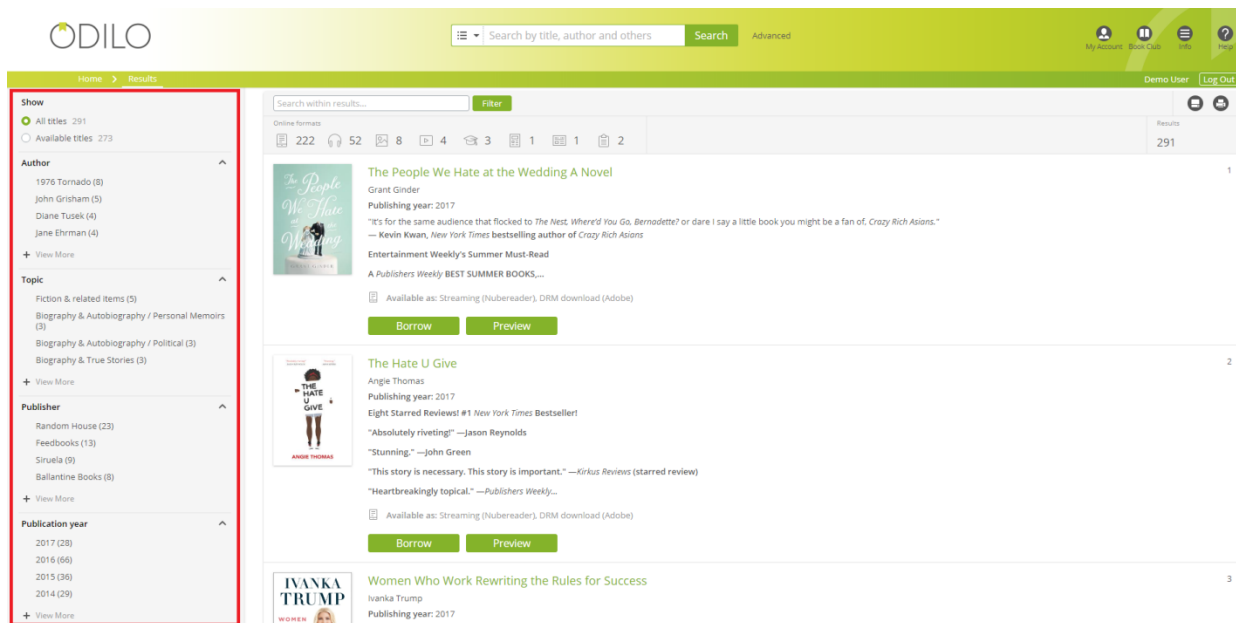


Figure 12. Screen with the different search filters.

You have the ability to add new filters by selecting Additional Filters in case you want to filter by other topics. Select the desired filters and click on **Add Filter** button.

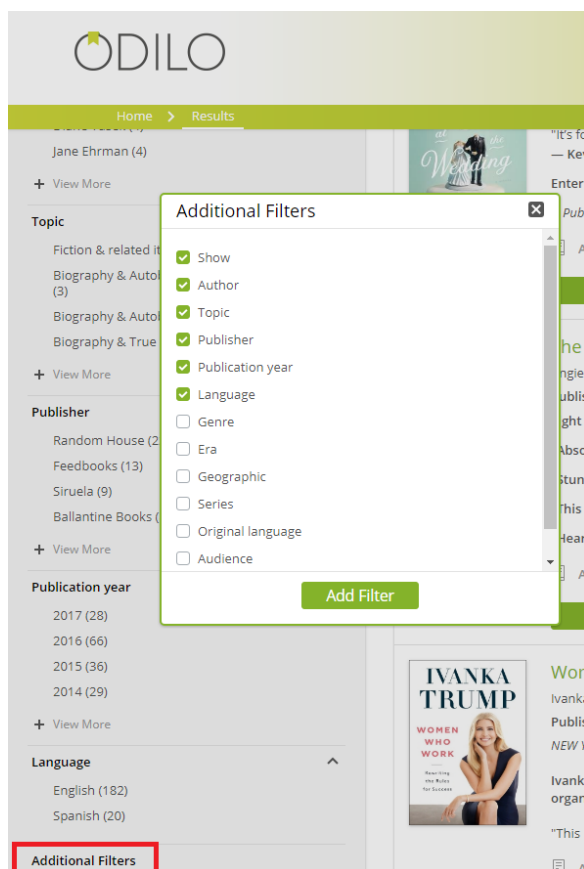


Figure 13. Additional Filters

The **Audience** facet filter shows the type of audience the content is targeted for.

3. Besides, for adding additional filters, the user can add new search fields to the faceted results by clicking on "**View More...**" and then "**View All ...**" of the desired filter and select the new fields to apply to the new search.

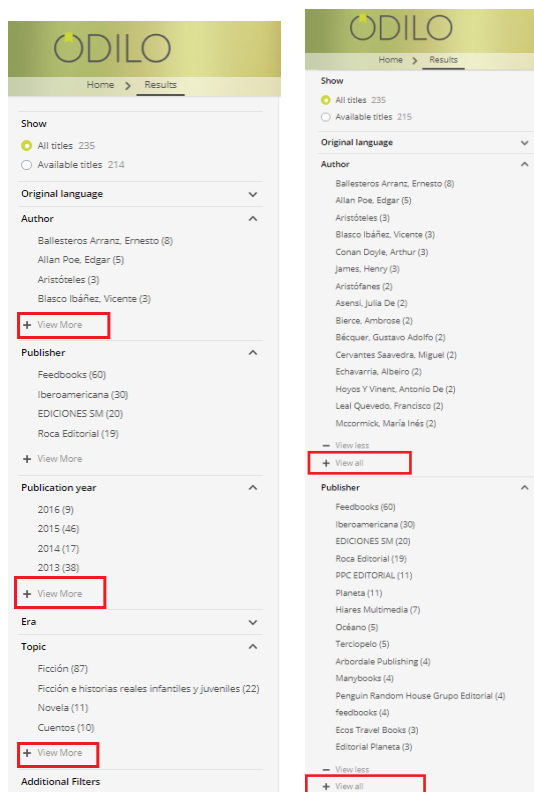


Figure 14. View more filters.

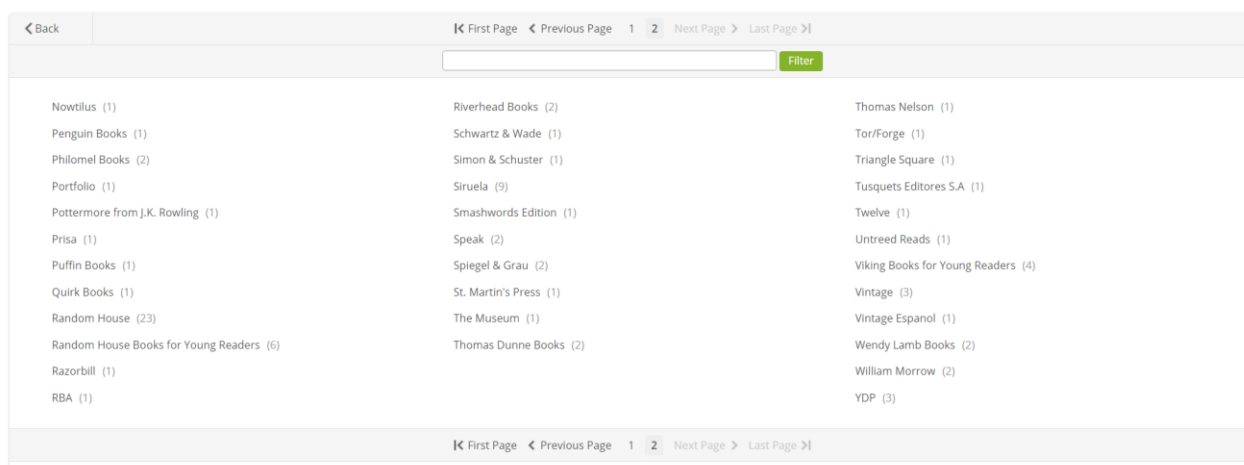


Figure 15. View All.

4. To select a search filter click on it. If the fields of the filters that appear by default or the ones that the user has added are not going to be useful to narrow the search, the user can remove them from the left panel, clicking on the **Additional Filters** option and deselecting those that the user does not want to see in the panel.



5. The icons contained in **Online Formats** area represent the different types of formats existing in the platform, letting patrons know when they have **filtered by format**.

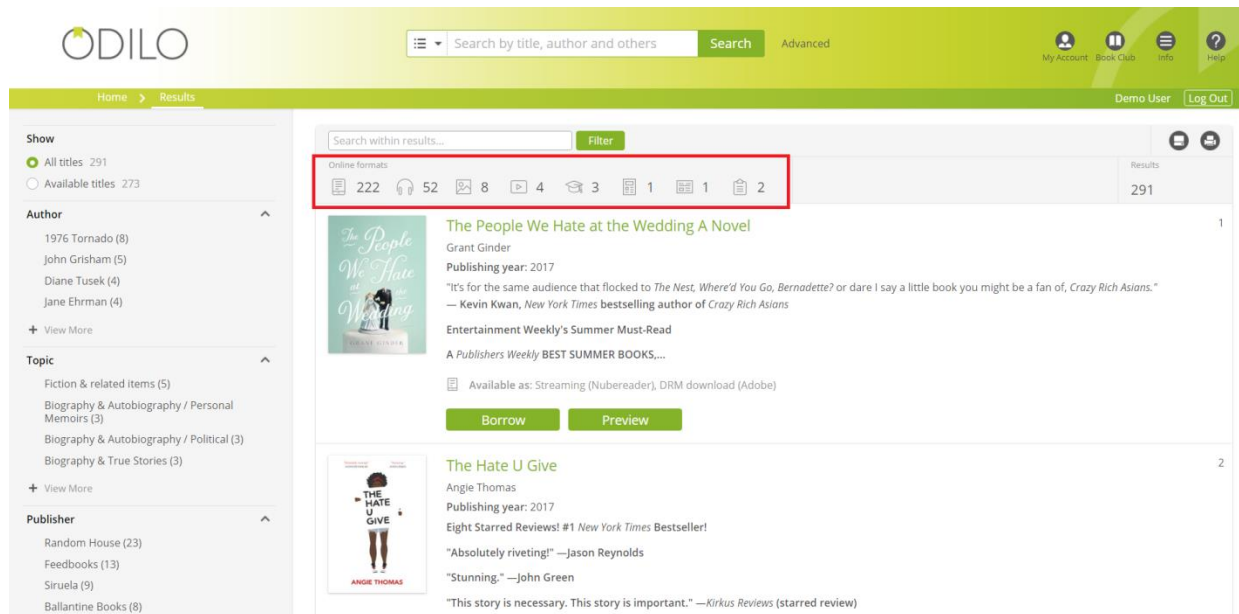
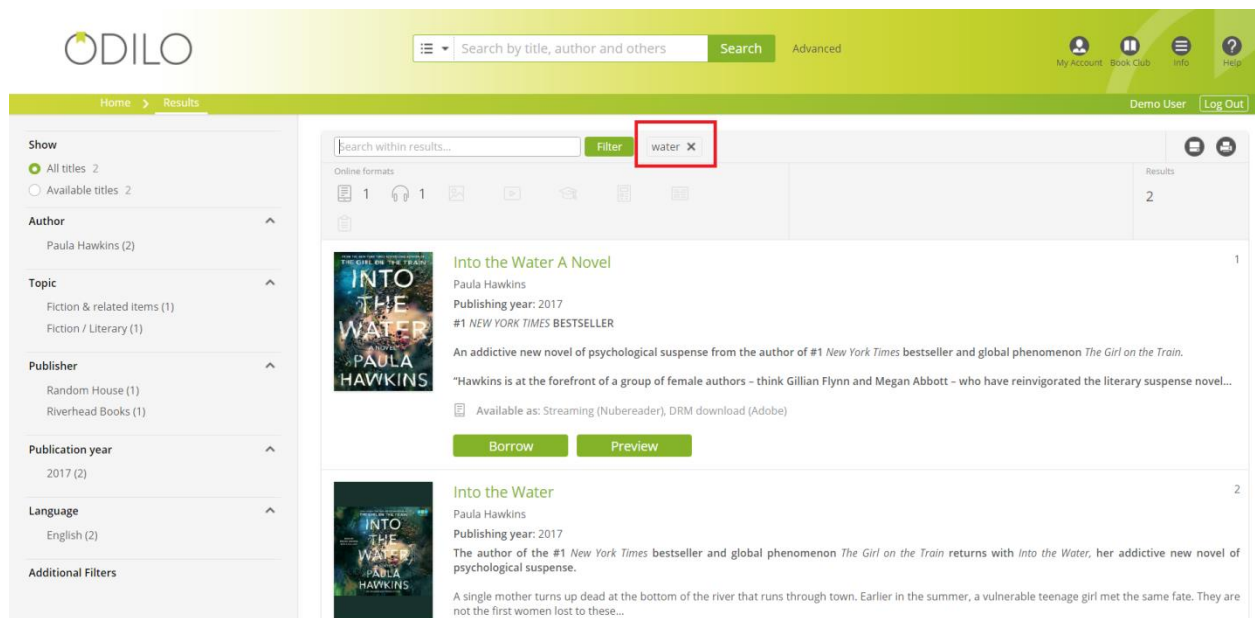


Figure 16. Different types of formats.

Search filter also allows the user to know the filters that he/she has been adding using the filter button.



## 3.3. Checkouts

### 3.3.1. Borrow eBooks from a computer or eBook reader.

To take out a loan, the user must authenticate himself on the platform previously.

The steps are:

1. Find the resource you want or locate a resource using the available carousels.

The recently cataloged titles or most update titles will appear in first positions in carousels.

2. When you find the desired item, you have to click on it in order to display its details page, check the number of available copies and the formats in which you can read the resource.

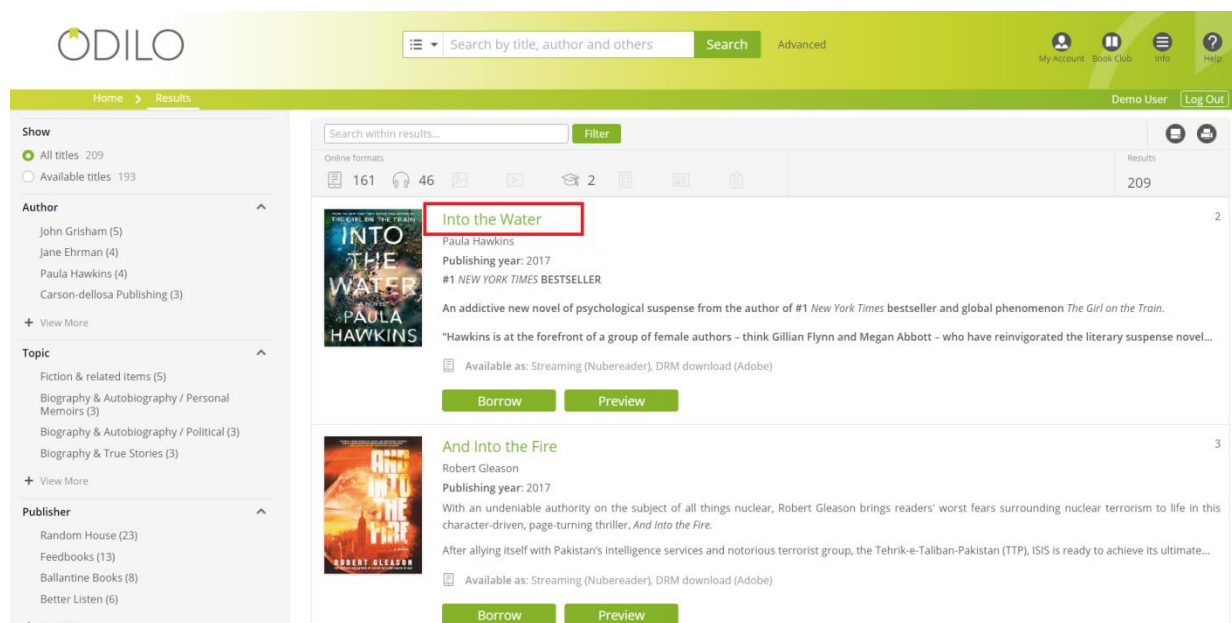


Figure 17. Find a title.

3. Once in the item details page, click on **Borrow** to get the title.

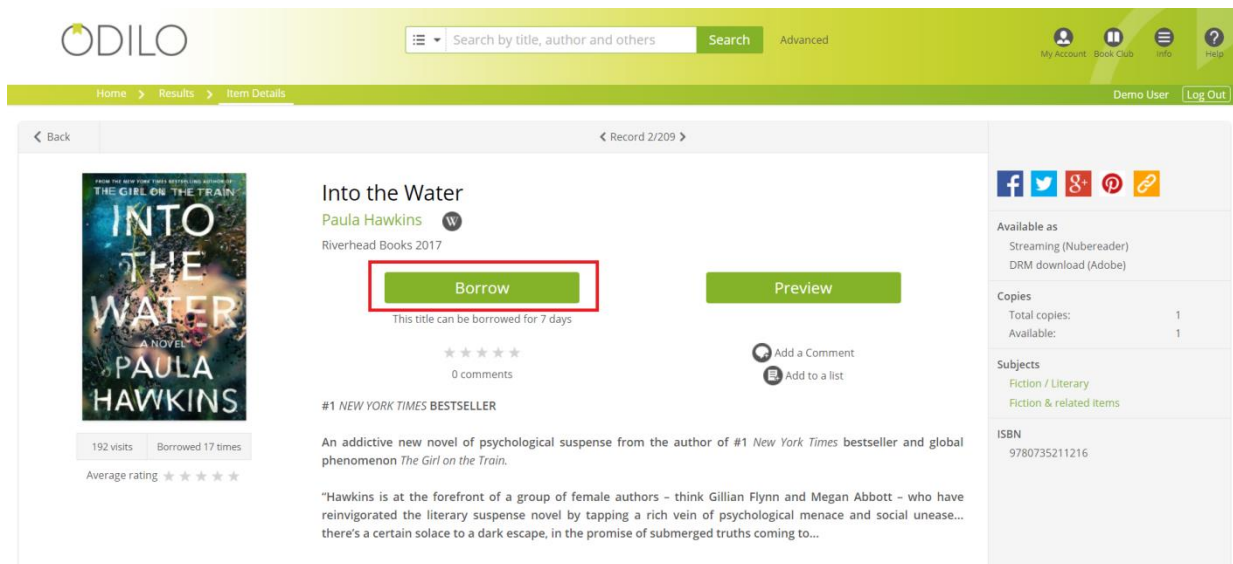


Figure 18. Borrow button.

4. After clicking on ***Borrow***, the ***Checked out items*** screen will show and you can choose how read the book.

By clicking on ***Display (in your browser)*** button, you can read the resource on ***Nubereader***. After this, Nubereader (an online reader developed by Odilo) should open.

If you click on ***Download (Adobe eBook)***, the item is going to be downloaded. Open the downloaded file with Adobe Content Editions and it will automatically appear on your Adobe Content Editions library.

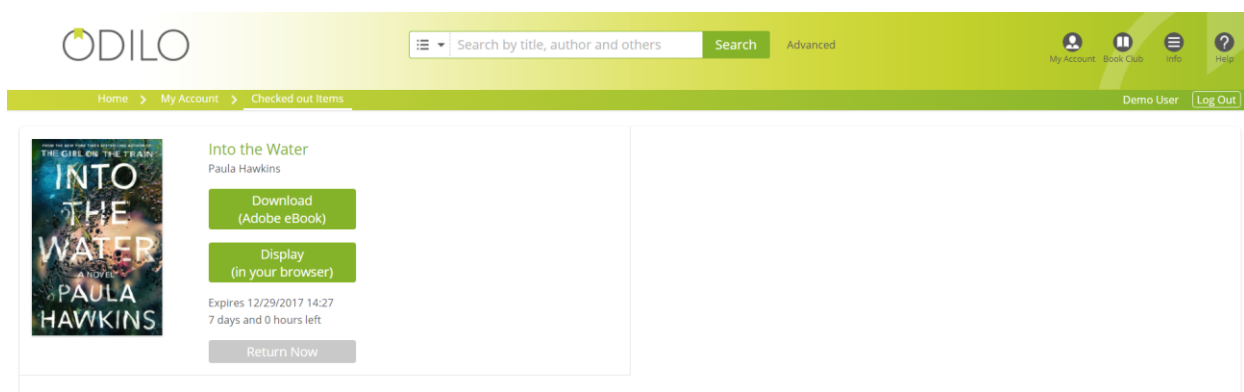


Figure 19. A borrowed resource.

When you choose ***'Download'*** the resource for reading, if it has been previously configured, the user will be shown a message indicating the programs or applications that he/she must have installed on his/her PC in order to open the file and enjoy its reading.

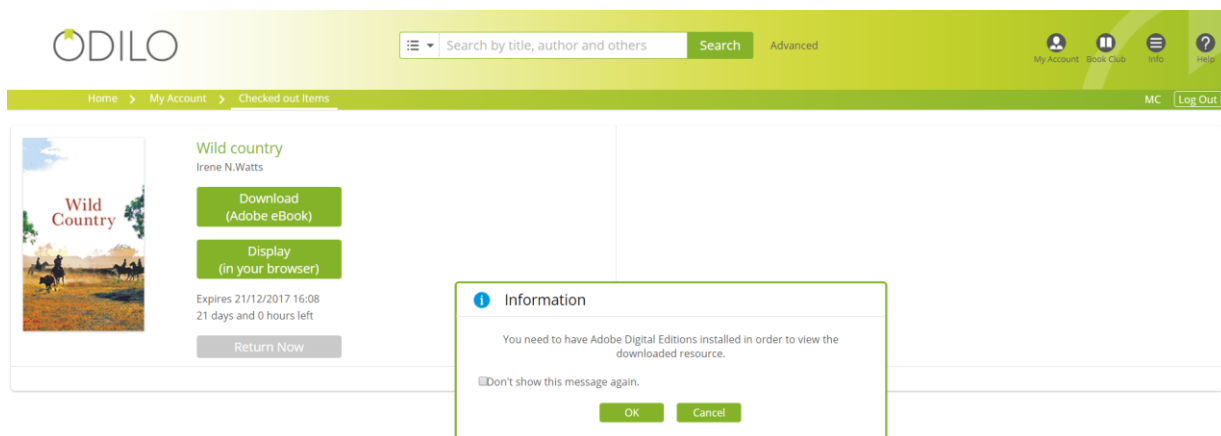


Figure 20. Informative message.

Books can be returned in two different ways: one, from OdiloTK OPAC (for books read on Nubereader) and the other way is from Adobe Digital Editions (ADE) in case the book has been downloaded on ADE.

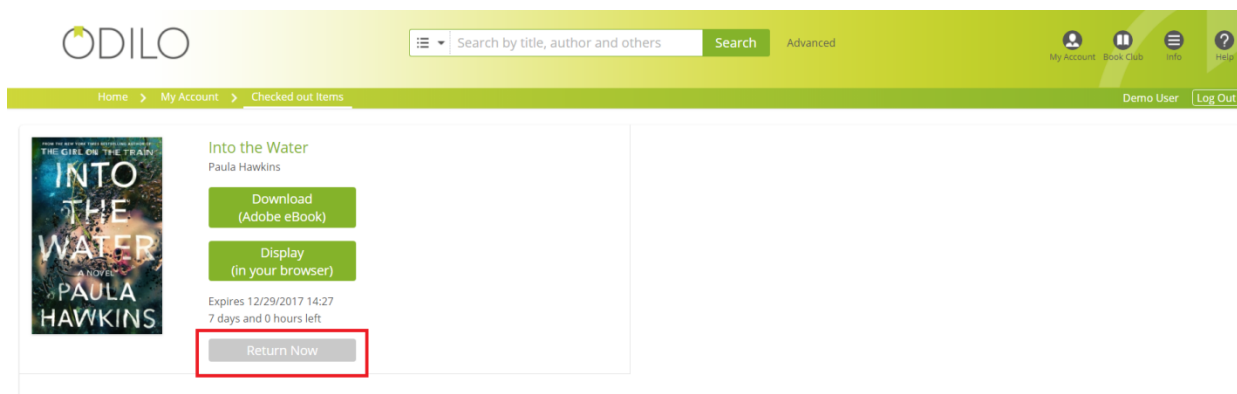


Figure 21. Return from OPAC.

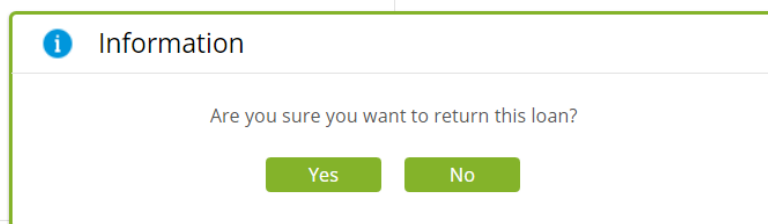


Figure 22. Pop-up message to confirm the return of a loan.

If you use this second way, you have to click with the right button on the book you want to return and select the "**Return borrowed item**" option.

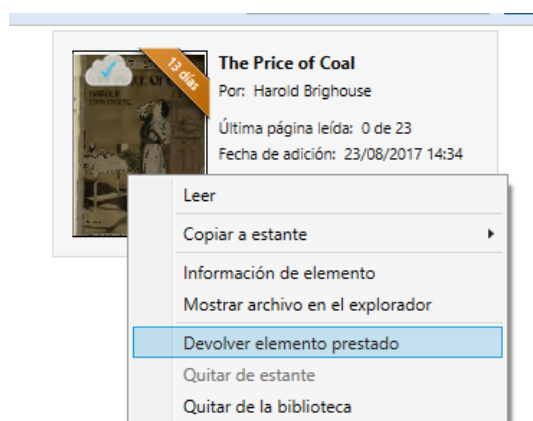


Figure 23. Return from Adobe Digital Editions.



## 4. Lists management

OdiloTK allows users to create their own “Wish List” where they can store all the resources they want or are interested in. The list creation lets users to visit these resources later without searching it within OPAC and/or share those items with others users.

These lists can be public or private. If the list is **public**, everybody can see it and the resources that it has, whereas if the list is **private**, only the user who created it can find it in **My Lists** section.

### 4.1. Add titles in a list

Users can create lists of books (desired items, already read, romance, ...) adding these elements to the list one by one. This can be done from the **Item Details Page**, clicking on **Add to List**.

The screenshot shows the OdiloTK interface for the book "Carve the Mark" by Veronica Roth. The page layout includes a header with the OdiloTK logo, a search bar, and navigation links. The main content area displays the book cover, title, author, and publisher. A red arrow points to the "Add to a list" button, which is located next to the "Add a Comment" button. The page also displays borrowing options, a preview button, and social media links.

Figure 24. Add to a list.

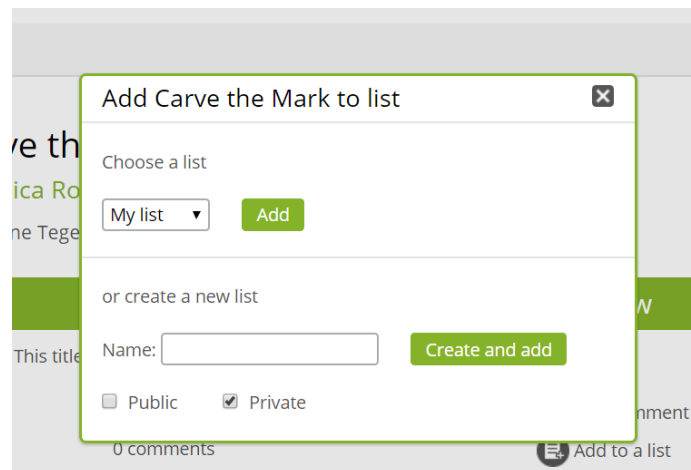


Figure 25. Pop up window to add resources to a list.

On the pop-up window, the user has to decide if the resource is added to a previously created list or to a new list.

Select the desired list from the drop-down menu, if the item is going to be added to a previously created list. Click the **Add** button and the resource is added to the list already created automatically.

If the user wants to add a resource to a new list, create that list:

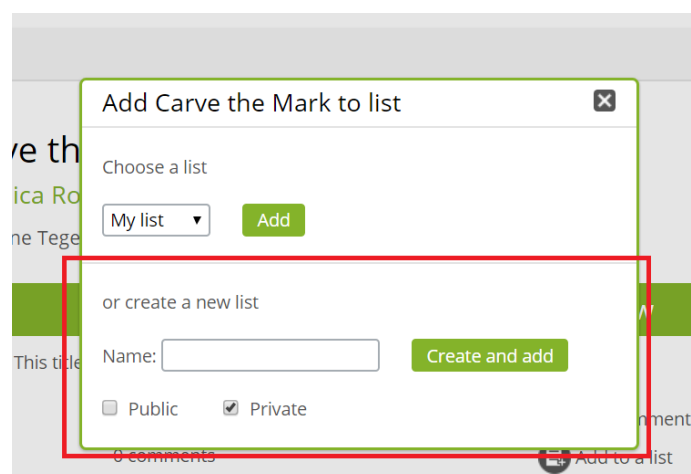


Figure 26. Create a new list and add an item.

1. Insert the **name** of the **list** in the text box called Name.
2. Choose if the list will be **public** or **private**.
3. Click **Create and Add** button.
4. In **My lists** section you can see all your lists.



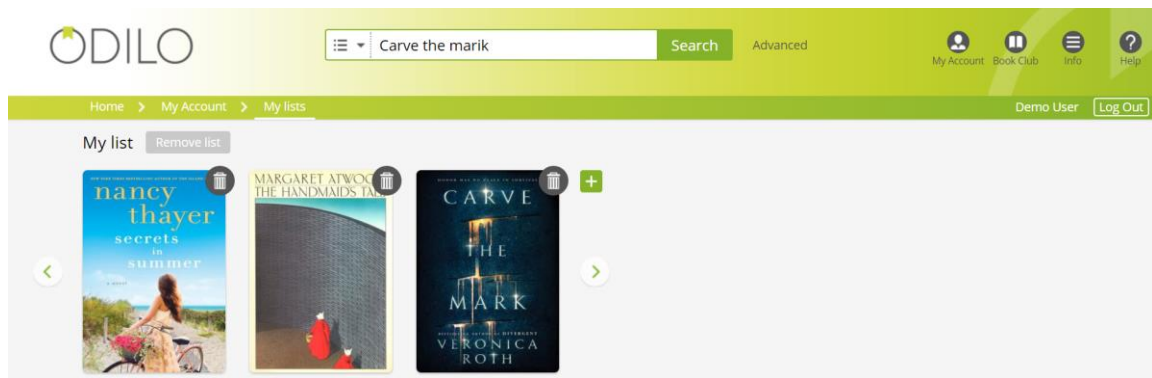


Figure 27. My lists.

## 4.2. Delete items from a list.

Items can be deleted from a list by clicking on the “**bin**” icon on top of the cover of the resource.

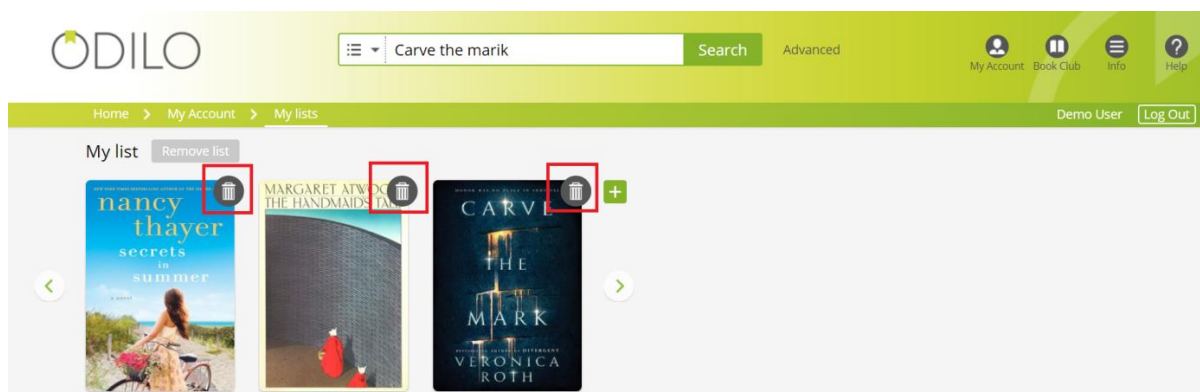


Figure 28. Delete a resource from a list.

## 4.3. Remove a list.

To delete a list, all we need to do is click on “***Remove List***”.

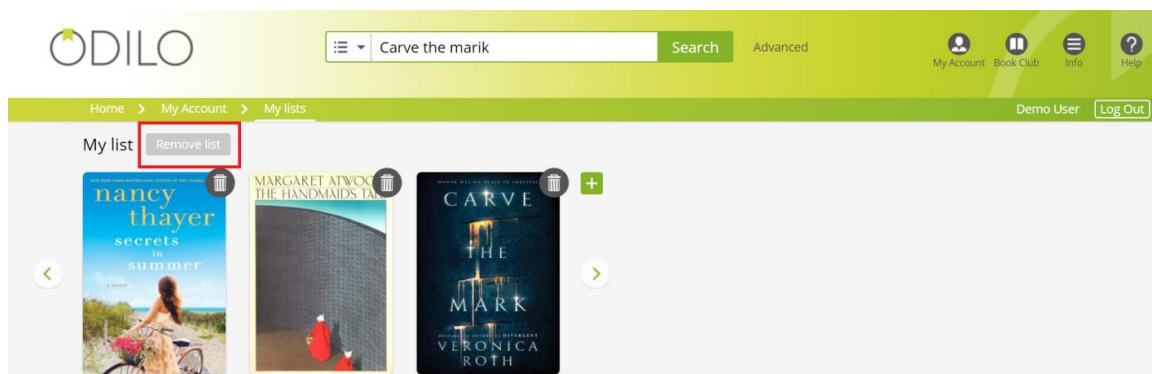


Figure 29. Remove list.



## 5. Suggest for purchase

It is a new functionality of OdiloTK, which allows the patrons to suggest the acquisition of titles that do not appear in the catalog of the digital library. The library staff will receive this request and will value the future acquisition of the resources.

The steps to follow to make a request are:

- 1) Access to the platform with your credentials and go to **"My Account"**.
- 2) Click on **"Suggest for purchase"**.

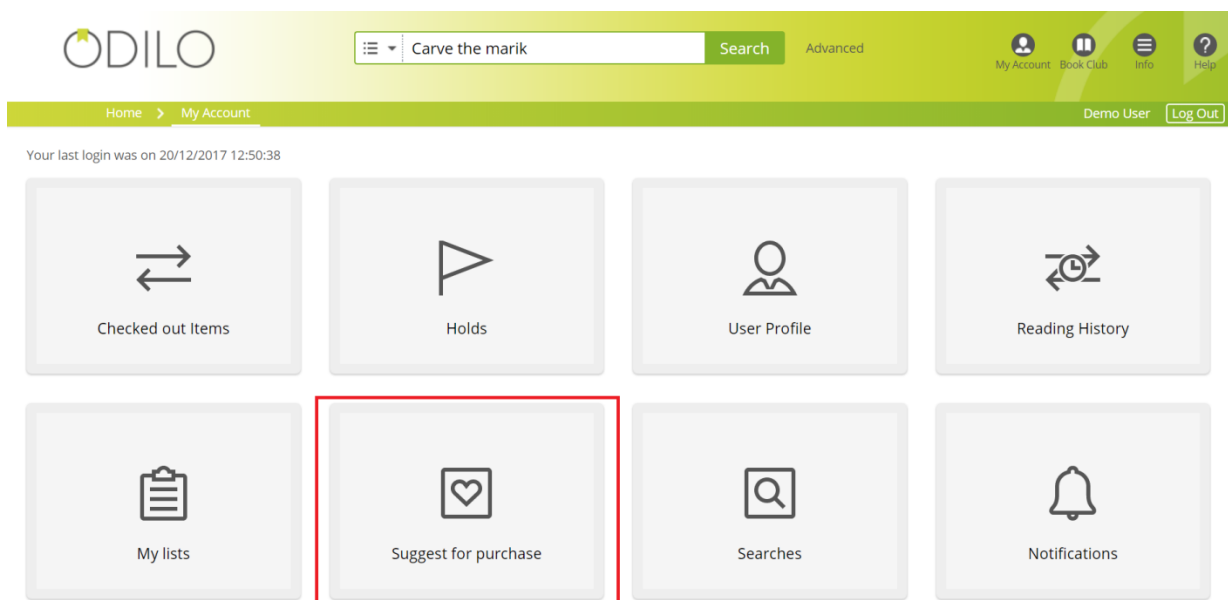


Figure 30. Suggest for purchase.

- 3) Click on **"Add a new suggest for purchase"**.

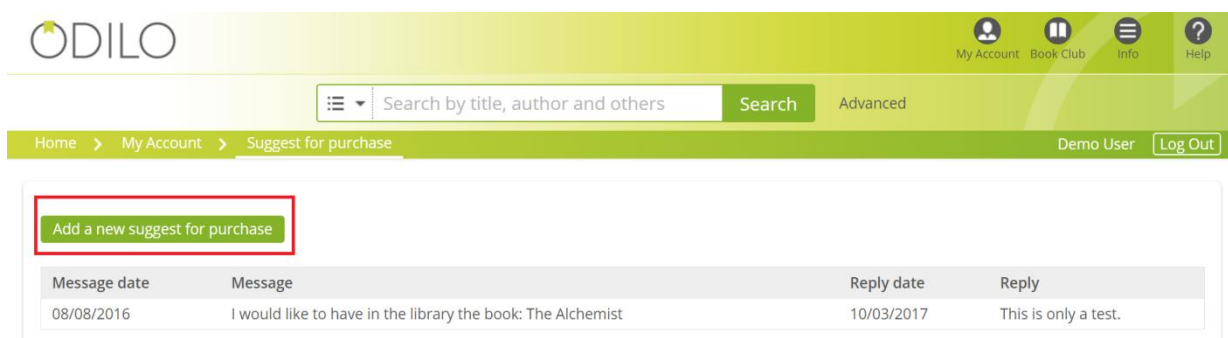
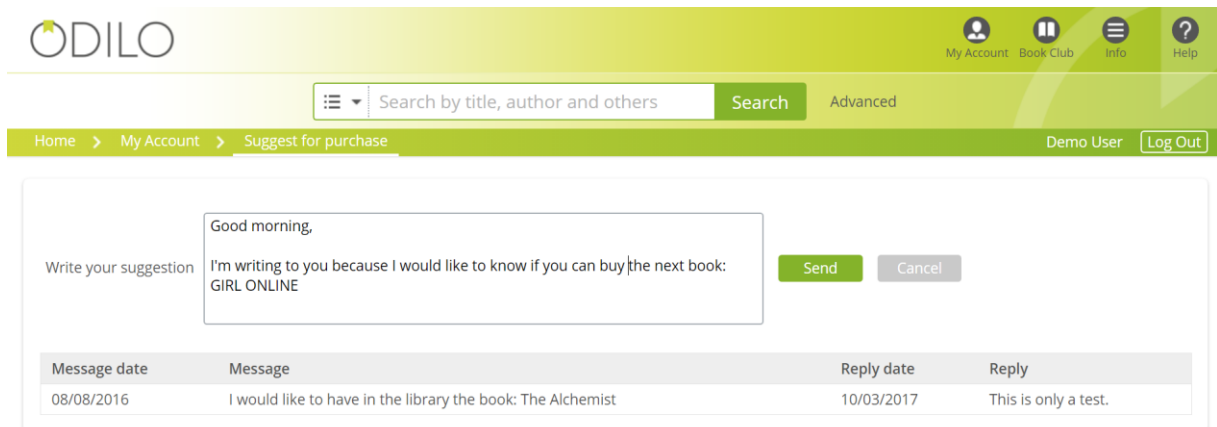


Figure 31. Create a new request.

- 4) Now, the next page will allow you to write your request and send it so that those administrators of the library collection value the possibility of acquiring the resource or not.

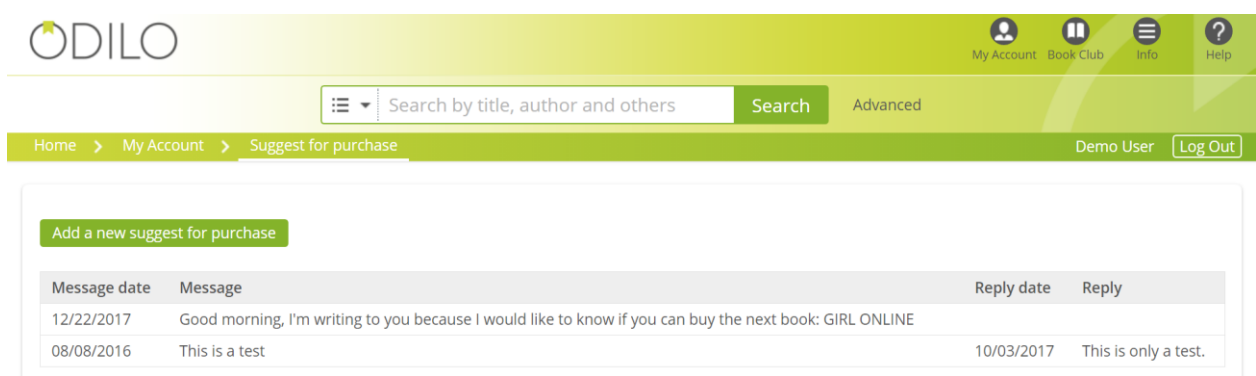


The screenshot shows the 'Suggest for purchase' page in the OdiloTK application. At the top, there's a navigation bar with the OdiloTK logo, user account links (My Account, Book Club, Info, Help), and a search bar. Below the navigation bar, there's a breadcrumb trail: Home > My Account > Suggest for purchase. The main content area has a form titled 'Write your suggestion' with a text input field containing 'Good morning, I'm writing to you because I would like to know if you can buy the next book: GIRL ONLINE'. There are 'Send' and 'Cancel' buttons next to the input field. Below the form is a table with columns: Message date, Message, Reply date, and Reply.

Message date	Message	Reply date	Reply
08/08/2016	I would like to have in the library the book: The Alchemist	10/03/2017	This is only a test.

Figure 32. Send a request.

- 5) Once you click on submit your application, it will be registered and you should only have to wait for the response from the library staff.



The screenshot shows the 'Suggest for purchase' page after a new suggestion has been submitted. At the top, there's a navigation bar with the OdiloTK logo, user account links (My Account, Book Club, Info, Help), and a search bar. Below the navigation bar, there's a breadcrumb trail: Home > My Account > Suggest for purchase. The main content area has a green button labeled 'Add a new suggest for purchase'. Below the button is a table with columns: Message date, Message, Reply date, and Reply.

Message date	Message	Reply date	Reply
12/22/2017	Good morning, I'm writing to you because I would like to know if you can buy the next book: GIRL ONLINE		
08/08/2016	This is a test	10/03/2017	This is only a test.

Figure 33. Request waiting for response.



## 6. Renew a loan

This is another new functionality of OdiloTK, which allows patrons to perform a renewal of a resource when the end of their loan period is approaching.

The user can renew a loan from his personal area when it expired in three days, as long as that title has no reserves and has not been previously renewed.

It should be highlighted that the platform ***enables a single loan renewal***, as long as the book has no reserves.

The steps to carry out a renewal are:

- 1) In order to make a renewal of a resource, it is necessary three days to the deadline for the completion of the loan. During the last three days of the loan period and no existing previous reservations of the resource by other users, the button with the option ***"Renew Loan"*** will appear.

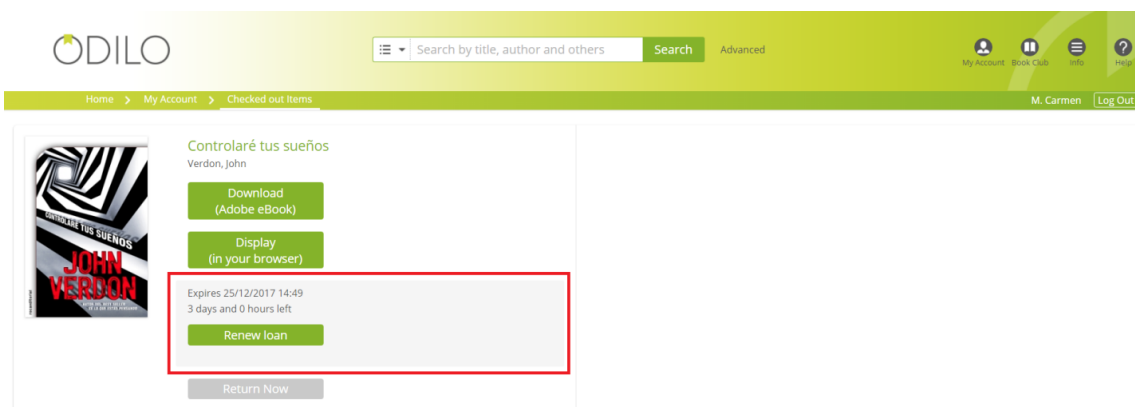


Figure 34. Renew loan.

- 2) Click on the ***"Renew Loan"*** button and verify on the pop-up window that you want to renew the book.

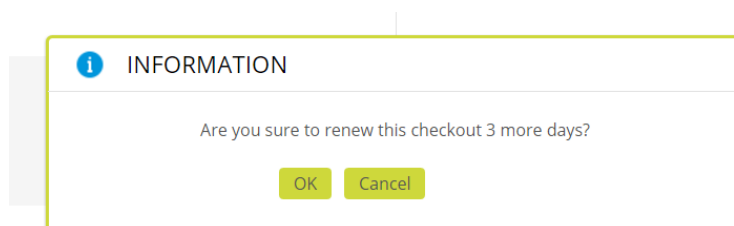


Figure 35. Pop-up window to renew a loan.

- 3) Once you accept the renewal, a message that says "***Your loan has been renewed***" will be shown. This means that the renewal of your loan has been correct and that you will be able to enjoy the resource during a new loan period.

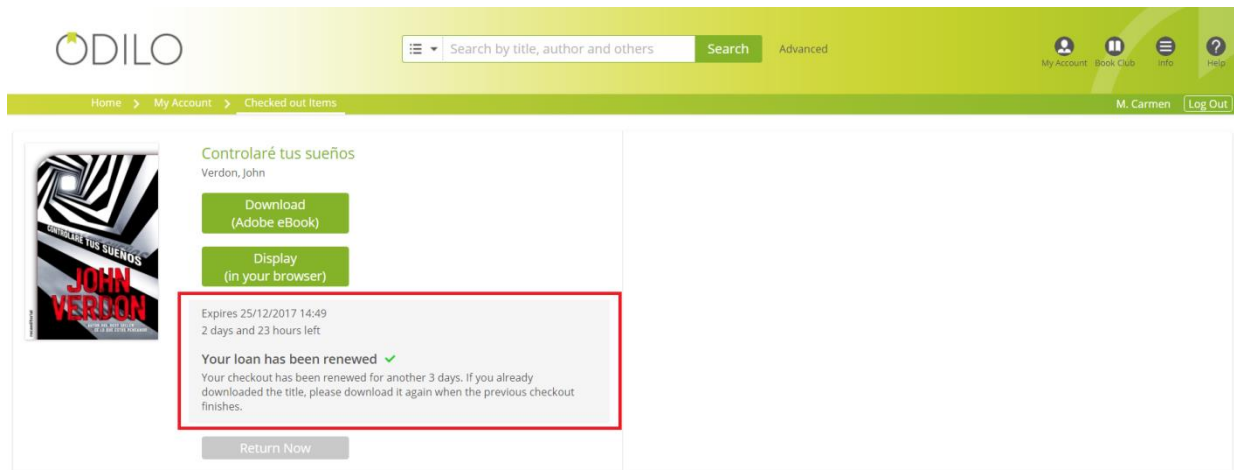


Figure 36. Loan renewed.





## 7. User Services

### 7.1. Password Change

When a user is join to an OdiloTK, he/she automatically receives an email where his/her login details are specified.

To be able to change the password, the steps to follow are:

1. Identify yourself with the access data.
2. Go to **User's Area → User profile**.

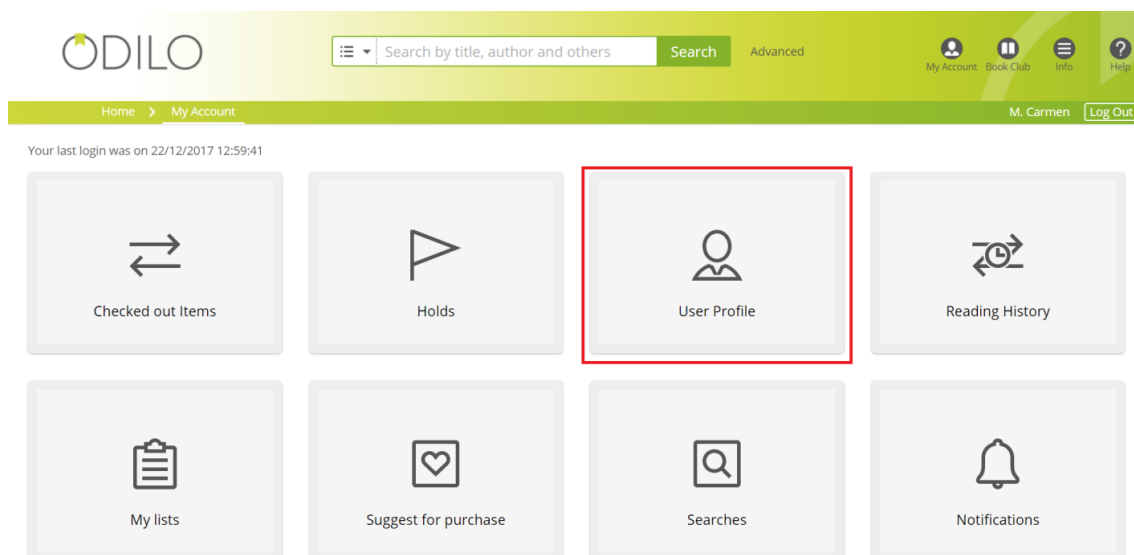


Figure 37. Access to patron's data.

1. In the **Password section**, enter your current password and new password.
2. With the fields filled in, click the **"Save"** button.

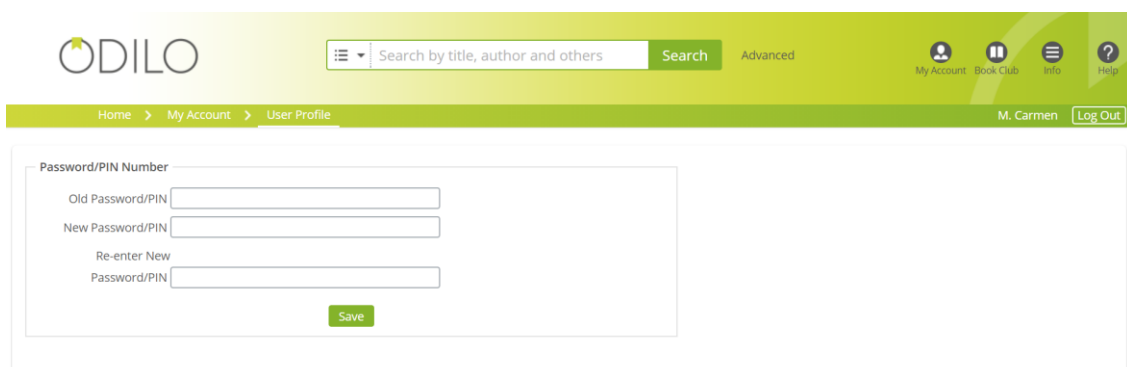


Figure 38. Change of password.

## 7.2. Vote

Indicate your degree of satisfaction with the resources of the platform. For that:

1. **Look for the resource** you want to value.
2. **Click** on the **title** to open the details page of the book with all the information.
3. Scroll through the window until you find the **Vote** section.
4. **Click** on the **star** that indicates your vote, with 1 being the lowest score and 5 being the highest score.
5. Once you vote, it will be computed with the other users' ratings, in the **"Average rating"**, which is below the title page.

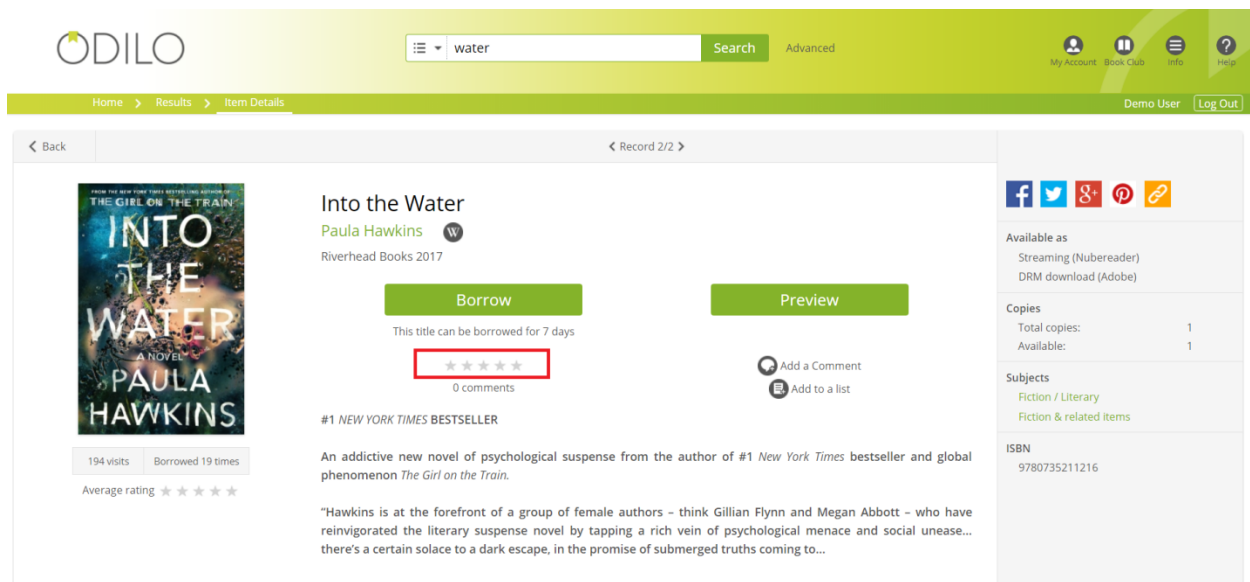


Figure 39. Vote a resource.

## 7.3. Comments

To leave a comment about any of the resources previously borrowed:

1. **Login** on the platform.
2. Look for the resource on which you want to comment.
3. Click on the desired resource.
4. Once in the resource details page, scroll through the window until you find the **"Add a comment"** section.

5. Fill in **the text box**.
6. Select **"I accept the Terms of Use"** and click the **"Send"** button for the comment to be published.

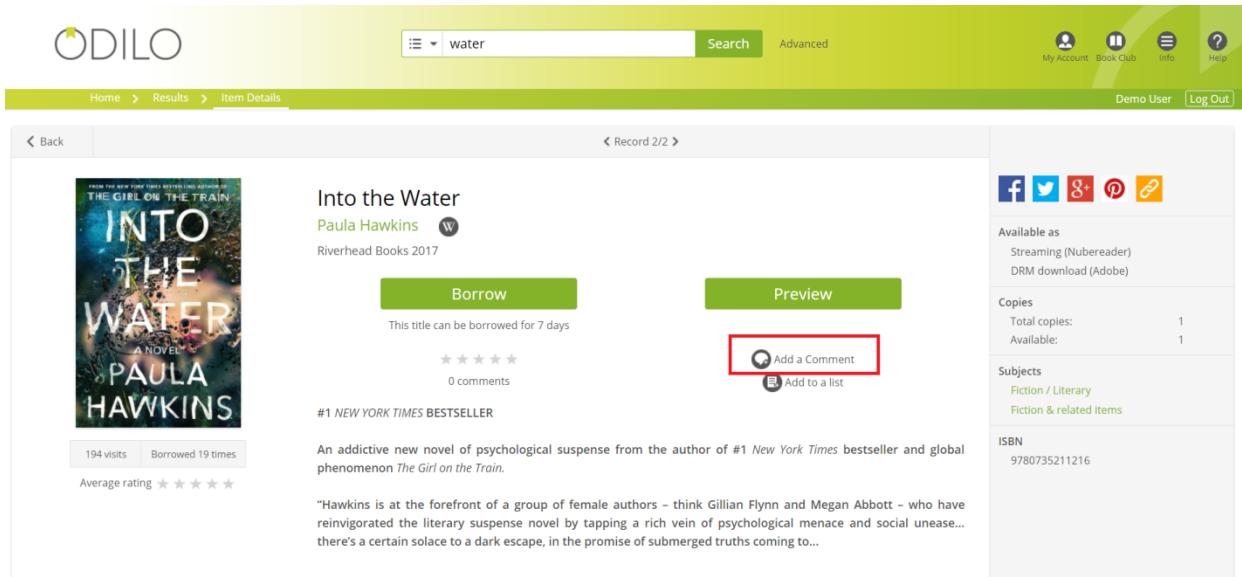


Figure 40. Add a comment.

## 7.4. Drop-down menu

If the administrator wishes and configures it, library members will find in the top right part of the screen, a **drop-down menu** with **additional information** related to the library or links to external web pages of interest to the user.

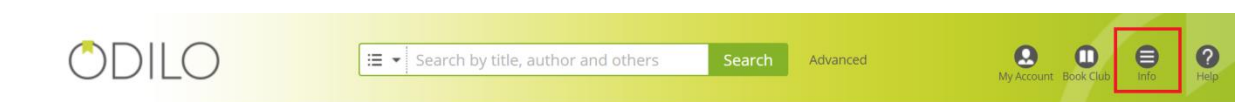


Figure 41. Drop-down menu on OPAC main page.

To unfold this menu, **click "Info" menu**.



Figure 42. Drop-down menu.

## 7.5. Recommendations

Users, who visit any OPAC resource of their library, will obtain a series of recommendations about different resources that are in the catalog to visit. These recommendations will depend on whether a user is inside the platform after login with his/her user and password or not.

1. **If the user is identified**, the recommendations he/she will get will be classified as follows:

- *Recommended for you.*
- *Other users also viewed.*
- *Other users also read.*

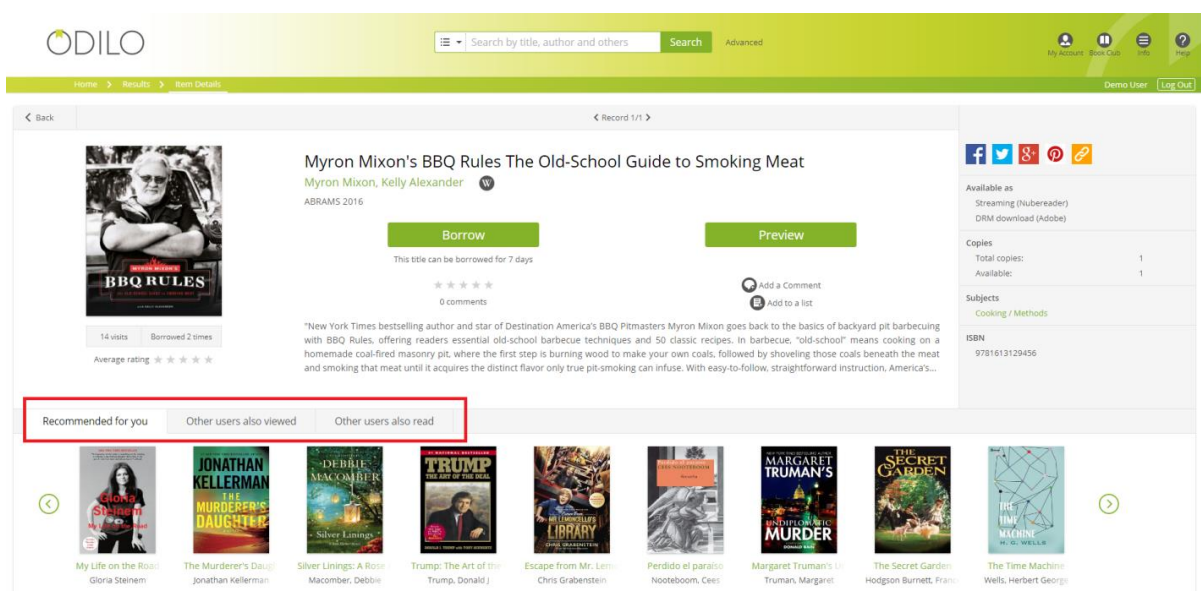


Figure 43. Recommendations.

The user can navigate through the different tabs in order to discover the resources, which are recommended.

2. If the **user** is **not login** in the platform, the recommendations will be classified as follows:

- *Other users also viewed.*
- *Other users also read.*
- *Similar titles.*

## 7.6. News Banner

At the top of the OPAC homepage, users can read news or interesting information selected by the platform administrator for their enjoyment.

In this way, the readers and the Administrator obtain a new way of interaction.



Figure 44. News in the banner aligned to the left.



Figure 45. News in the banner aligned to the right.

## 7.7. "Recommended for you" Carousel

When the user accesses the platform and the following conditions are met:

- It is not the first time the user accesses the platform.
- The administrator of the platform has enabled the option.

A *carousel* called **"Recommended for you"** will be shown, in which according to the activity that the user performs on the platform, new titles will be suggested to him/her to borrow.

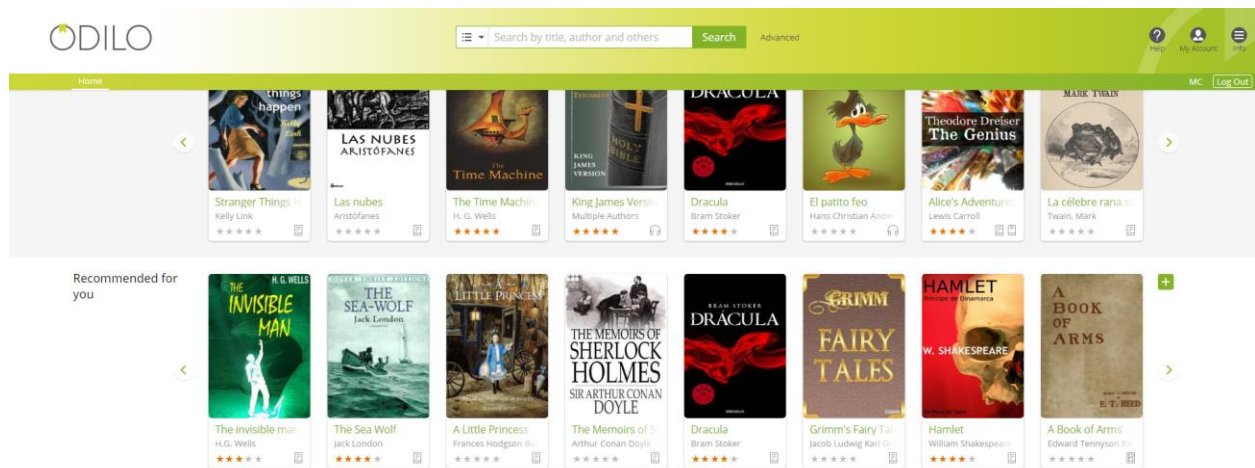


Figure 46. 'Recommended for you' carousel



## 8. Help menu

To facilitate the use of the platform, there is a **Help menu** in the top right of the main page of the OPAC, where you can find information about how to borrow a title, how the search filters work, etc.

1. Go to the top right of the screen.
2. **Click** the **Help** button.

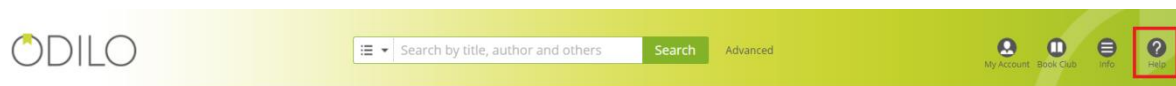


Figure 47. Help menu.

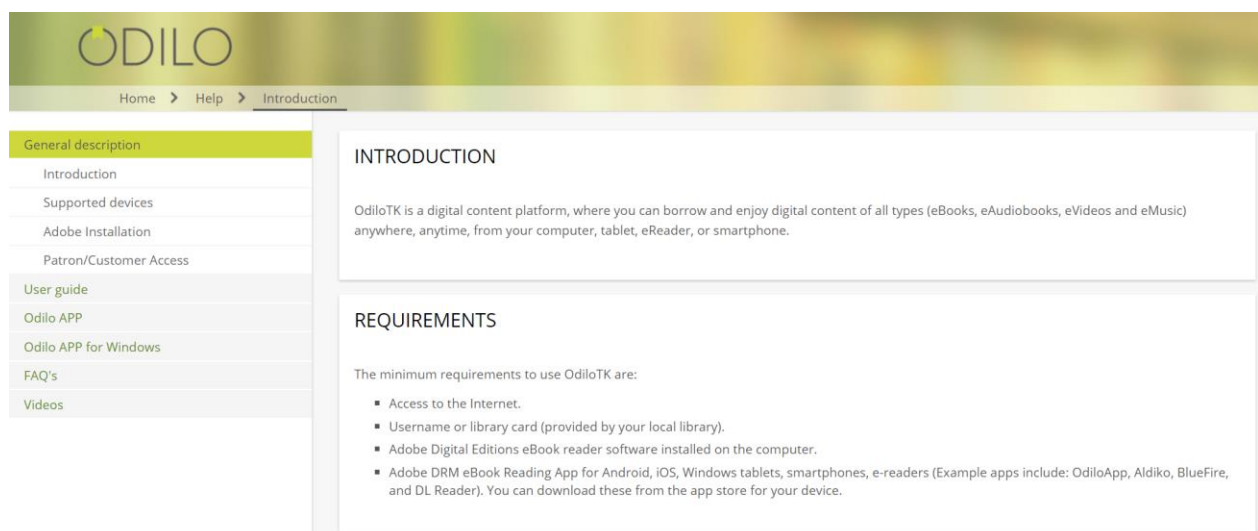


Figure 48. 'Help' section.