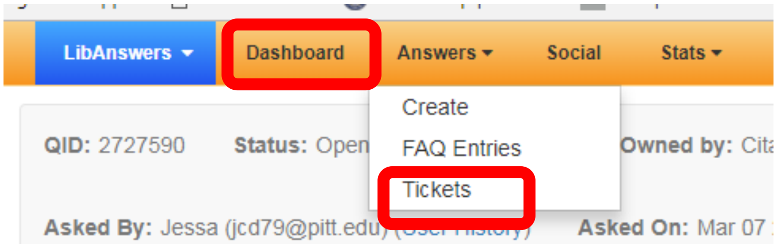
Navigating LibAnswers

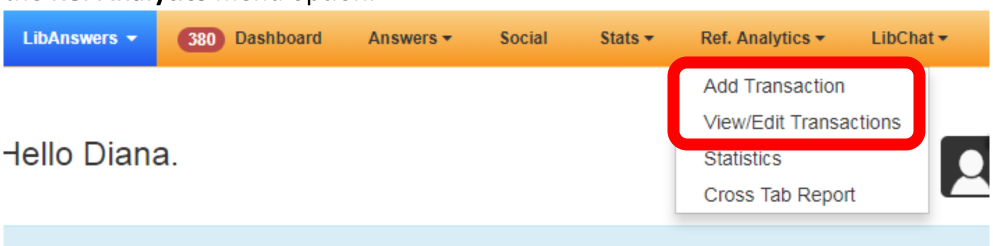
LibAnswers Environment

LibAnswers contains three areas that you will need to use.

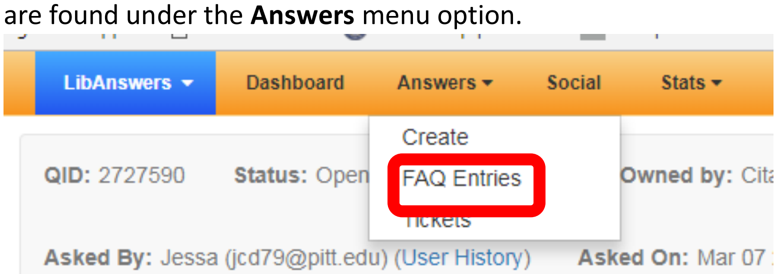
- Tickets
  New/unclosed tickets can be found in the **Dashboard**.
  Closed tickets are found under the **Answers** menu option.



- Transactions
  Transactions record the work you do. They form the reported statistics. They are found under the **Ref Analytics** menu option.



- FAQs
  If you want to communicate information, policy, or procedures, you can do so with FAQs. They are found under the **Answers** menu option.

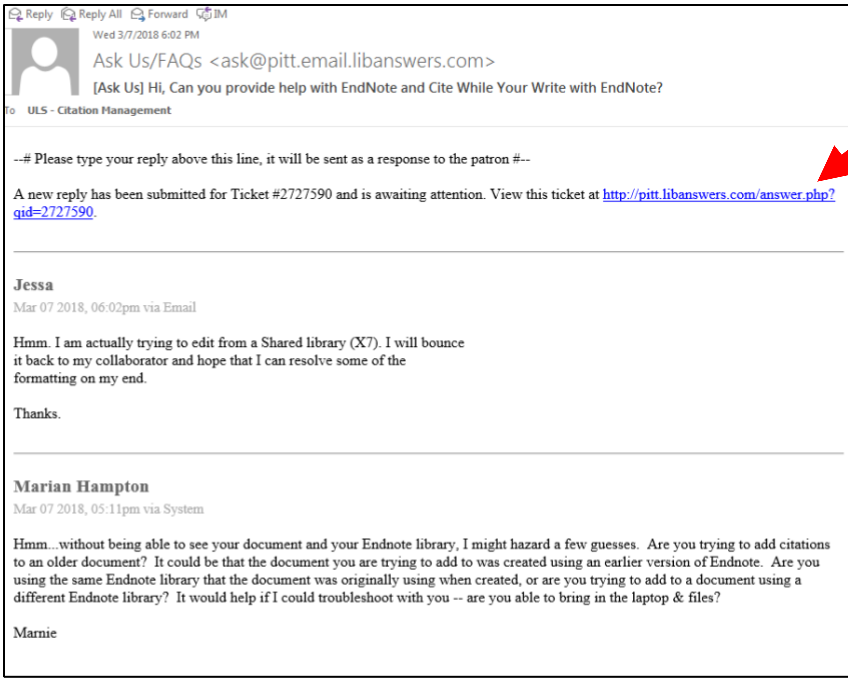


  ULS has two types of FAQs:
  - Pubic FAQs or **Ask Us FAQ**
  - Internal FAQs

Navigating LibAnswers

Tickets

1. When a ticket is assigned to you, you will receive an email.



Reply Reply All Forward IM

Wed 3/7/2018 6:02 PM

Ask Us/FAQs <ask@pitt.email.libanswers.com>

[Ask Us] Hi, Can you provide help with EndNote and Cite While Your Write with EndNote?

To ULS - Citation Management

--# Please type your reply above this line, it will be sent as a response to the patron #--

A new reply has been submitted for Ticket #2727590 and is awaiting attention. View this ticket at http://pitt.libanswers.com/answer.php?qid=2727590.

Jessa

Mar 07 2018, 06:02pm via Email

Hmm. I am actually trying to edit from a Shared library (X7). I will bounce it back to my collaborator and hope that I can resolve some of the formatting on my end.

Thanks.

Marian Hampton

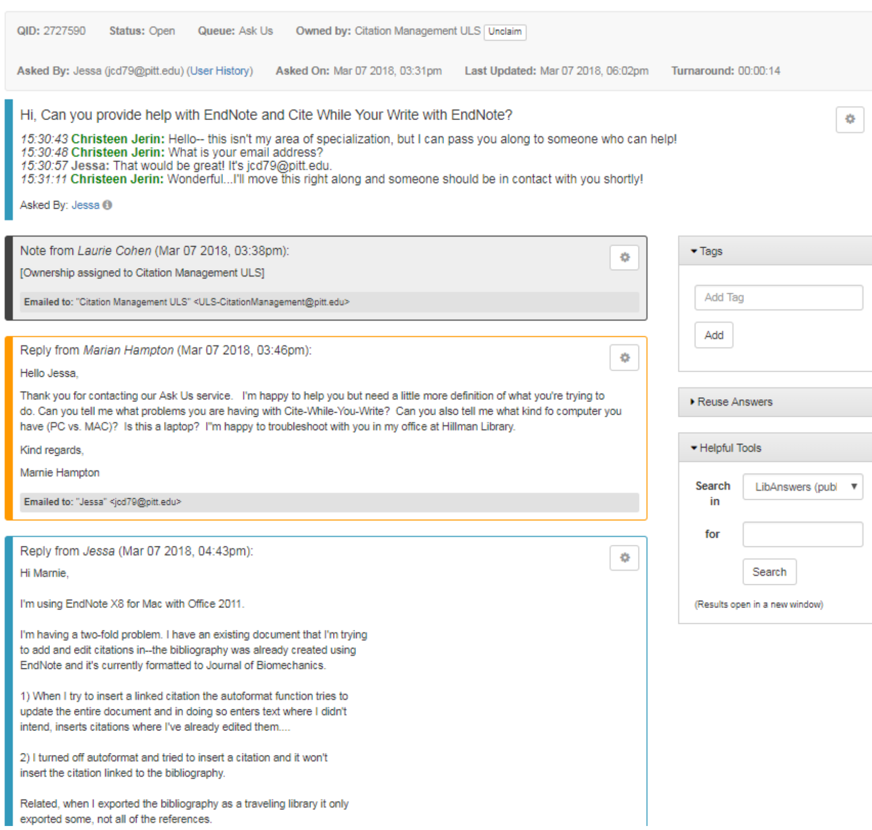
Mar 07 2018, 05:11pm via System

Hmm...without being able to see your document and your Endnote library, I might hazard a few guesses. Are you trying to add citations to an older document? It could be that the document you are trying to add to was created using an earlier version of Endnote. Are you using the same Endnote library that the document was originally using when created, or are you trying to add to a document using a different Endnote library? It would help if I could troubleshoot with you -- are you able to bring in the laptop & files?

Marnie

Go to the ticket through the link in the email.

2. Answer the user within the LibAnswers environment.



QID: 2727590 Status: Open Queue: Ask Us Owned by: Citation Management ULS Unclaim

Asked By: Jessa (jcd79@pitt.edu) (User History) Asked On: Mar 07 2018, 03:31pm Last Updated: Mar 07 2018, 06:02pm Turnaround: 00:00:14

Hi, Can you provide help with EndNote and Cite While Your Write with EndNote?

15:30:43 **Christeen Jerin:** Hello-- this isn't my area of specialization, but I can pass you along to someone who can help!
15:30:48 **Christeen Jerin:** What is your email address?
15:30:57 **Jessa:** That would be great! It's jcd79@pitt.edu.
15:31:11 **Christeen Jerin:** Wonderful...I'll move this right along and someone should be in contact with you shortly!

Asked By: Jessa

Note from *Laurie Cohen* (Mar 07 2018, 03:38pm):

[Ownership assigned to Citation Management ULS]

Emailed to: "Citation Management ULS" <ULS-CitationManagement@pitt.edu>

Reply from *Marian Hampton* (Mar 07 2018, 03:46pm):

Hello Jessa,

Thank you for contacting our Ask Us service. I'm happy to help you but need a little more definition of what you're trying to do. Can you tell me what problems you are having with Cite-While-You-Write? Can you also tell me what kind fo computer you have (PC vs. MAC)? Is this a laptop? I"m happy to troubleshoot with you in my office at Hillman Library.

Kind regards,

Marnie Hampton

Emailed to: "Jessa" <jcd79@pitt.edu>

Reply from *Jessa* (Mar 07 2018, 04:43pm):

Hi Marnie,

I'm using EndNote X8 for Mac with Office 2011.

I'm having a two-fold problem. I have an existing document that I'm trying to add and edit citations in--the bibliography was already created using EndNote and it's currently formatted to Journal of Biomechanics.

1) When I try to insert a linked citation the autoformat function tries to update the entire document and in doing so enters text where I didn't intend, inserts citations where I've already edited them....

2) I turned off autoformat and tried to insert a citation and it won't insert the citation linked to the bibliography.

Related, when I exported the bibliography as a traveling library it only exported some, not all of the references.

Tags

Add Tag

Add

Reuse Answers

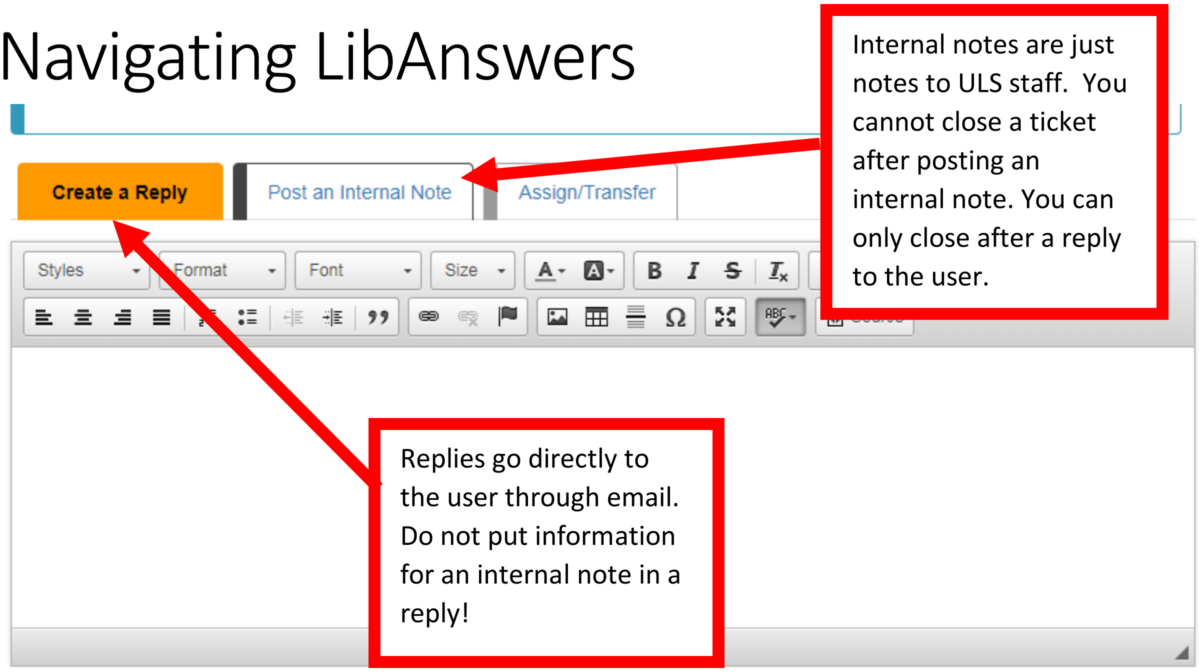
Helpful Tools

Search in LibAnswers (publ

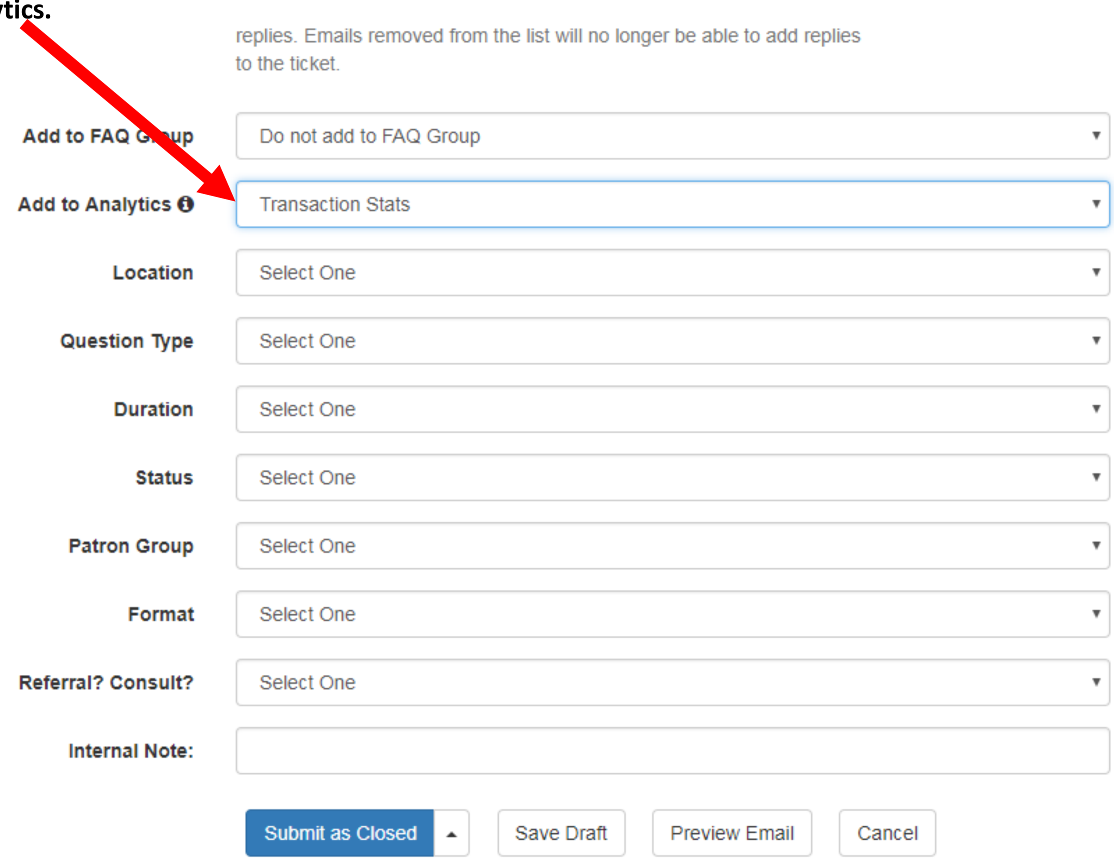
for

Search

(Results open in a new window)



3. Record your transaction statistics. This option is found at the bottom of the ticket under **Add to Analytics.**



Note:

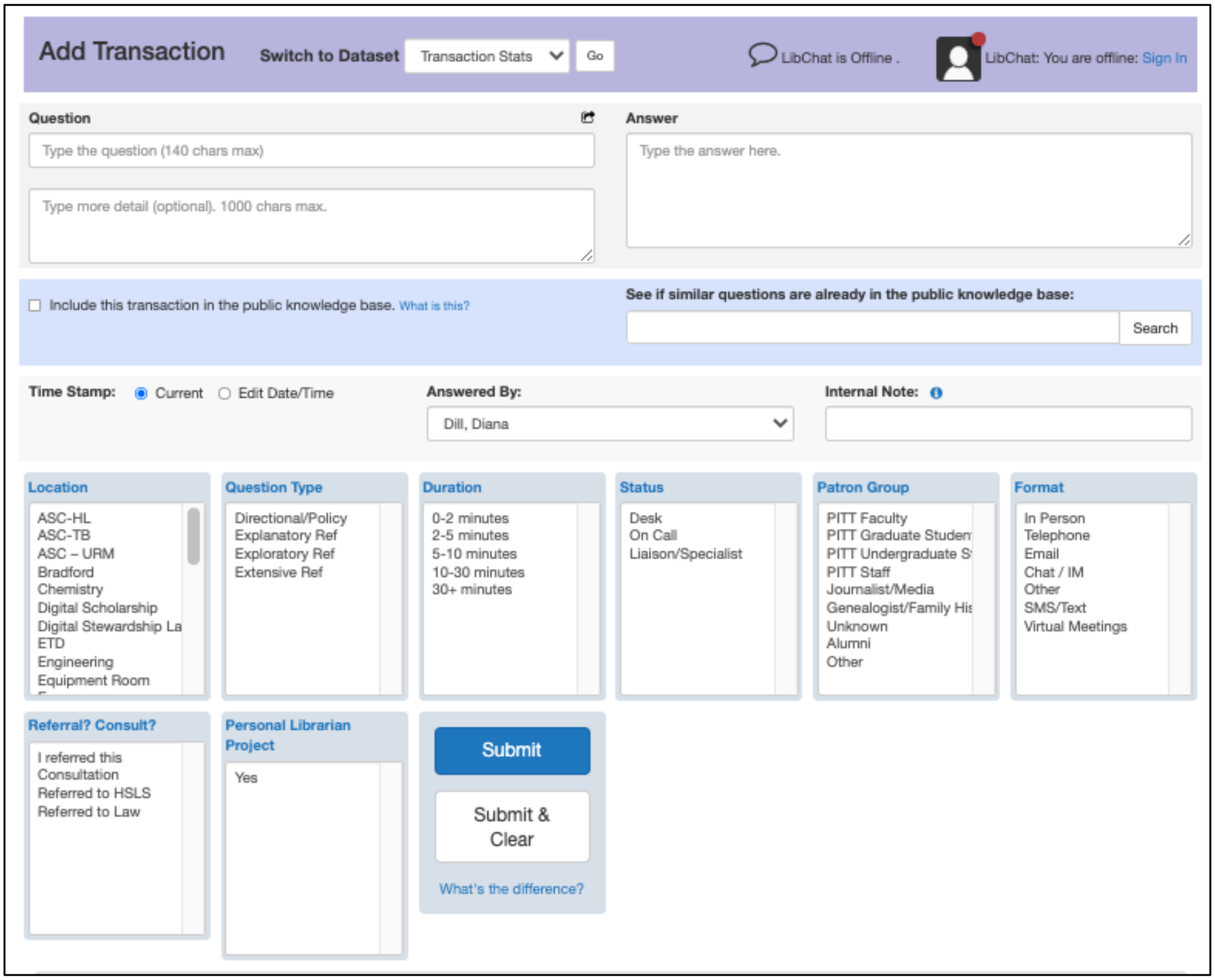
Make sure to close your tickets when the work is completed.

- If you are interacting with a patron, if they reply AFTER you closed the ticket, it will reopen the ticket.

Navigating LibAnswers

Transactions

Sometimes, you may want to record a transaction for work that did not have a ticket. Please put a description of the question in the **Question** text box. Also supply an **Answer** if it is important to record the information for future reference.



You should record all transactions because they are used to show managers and administration how our services and time are used.

Navigating LibAnswers

FAQs

FAQs are very useful in conveying information, policies, and procedures.

Best Practices

General FAQ Creation

- Create an FAQ for your specialization/s or for assignments (may point to a LibGuide)
- Identify content for new FAQs
- Review your content quarterly or as needed
- Keep all your FAQs public or move to “hidden” status as needed
- Submit each suggestion OR new entry to the FAQ Review Team

Content

- Use topics, tags, and keywords that drive discoverability
- Use clear concise language
- Use descriptive hyperlinks to LibGuides and websites
- Put step-by-step instructions in a numbered list
- Add a video, if it will help the explanation

Questions or Need Help?

Ask Diana (dmd78@pitt.edu)

Contents

Outlook Best Practices

- **Standardize your availability**- the general hours that you work (i.e. 8:30-5)
    - File
    - Options
    - Calendar
    - Change the work time to reflect your general scheduled hours
        - If you have one day a week that you work different hours- perhaps your evening shift is on Wednesdays from 12:30-9pm- set your general hours and mark yourself out of the office from 8:30 to 12:30
- **Don't set personal "reminder" appointments** as busy or out of the office. Reminders should be "shown as" free
- **Please accept/decline all meetings** (and send responses as appropriate) so your calendar isn't full with tentative appointments – and in a timely manner!
- If you are actually out of the office for the day, **mark it as Out of the Office** – not Busy.

- If you have a meeting outside of your building (e.g. Thomas Blvd), mark the event as Busy with travel time before and after. (Reviewing G&E books 1:30-2:30, mark the appointment as 1:00-3:00).
- **Don't** use "Working Elsewhere" yet. It does not work correctly currently.
- **Out of Office messages.** For purposes of referrals - If you have a vacation day or doctor's appointment all day you should set an Out of Office message. If you take a sick day, and are able to set an Out of Office message, you should do so- but you are not obligated if you are sick.

LibCal Appointments

Appointments, formerly called **MyScheduler**, allows students and faculty to directly book appointments with you. You have control over the hours that they can choose to book. Zoom integration has been added to LibCal Appointments, which will allow students to schedule online Zoom sessions with you.

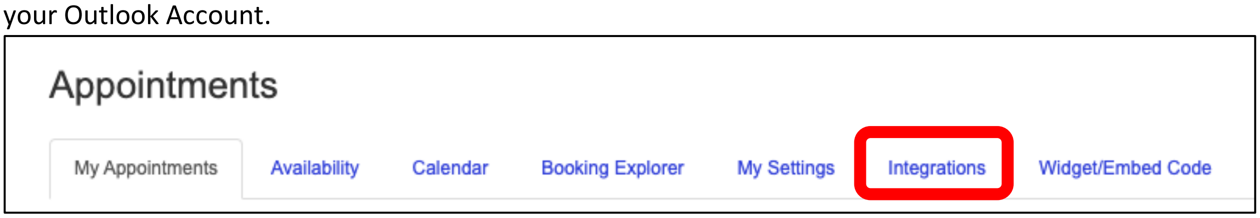
In general, you will be connecting appointments to your personal Outlook calendar. However, if you have a University of Pittsburgh sponsored account that you wish to use for group scheduling, you can configure the group account to use LibCal's Appointments. The group sponsored account will have to have a LibCal account. All emails and calendar appointments will be managed from the sponsored account's Outlook email and calendar.

Connecting to Your Outlook Calendar

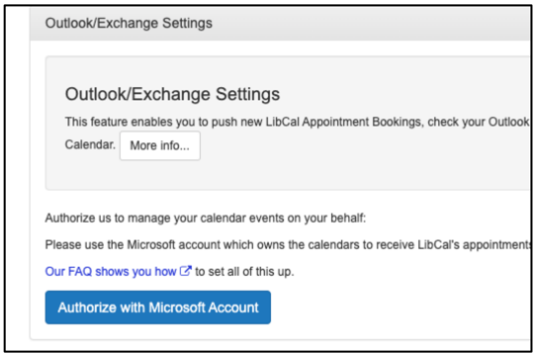
It is important for your Outlook Calendar to be integrated with your Appointments. When students schedule meetings with you, the meeting will go directly into your Outlook calendar, complete with Zoom link.

To connect to your Outlook Calendar:

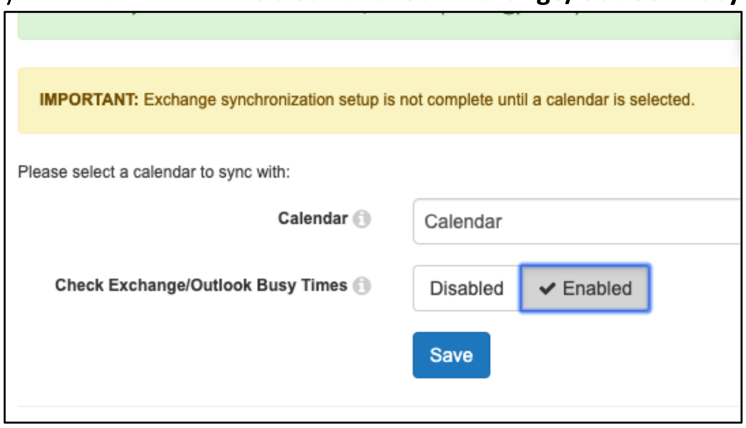
- Go to http://pitt.libapps.com.
- In the upper left corner, select **LibApps**, which will bring up a drop-down menu.
- Select **LibCal.**
- From the global menu at the top of the window, select **Appointments**.
- From the tabs, select **Integrations** – this is where you will setup Appointments to connect to your Outlook Account.



- Scroll down to **Outlook/Exchange Settings**. Select **Authorize with Microsoft Account**.



- LibCal is setup to connect to the University of Pittsburgh Microsoft instance. If you are not already logged into your Pitt account in the web browser, you will be prompted to sign in with multifactor authentication.
- You will have to select a calendar in order to complete the synchronization. Select **Calendar** as your calendar and **Enabled** for **Check Exchange/Outlook Busy Times**.



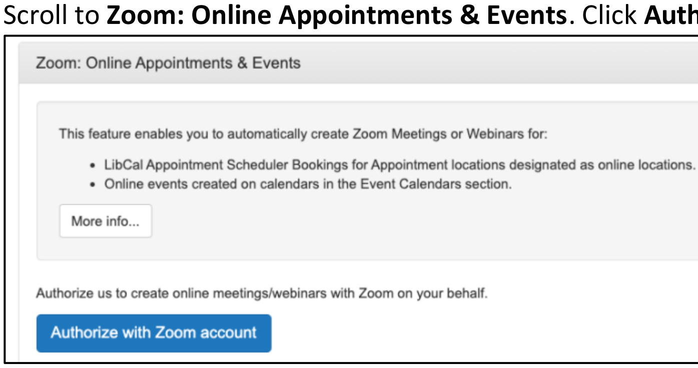
- Click **Save**.

Authorizing Zoom

In order to use the Zoom integration, you will have to authorize Zoom for your instance of LibCal.

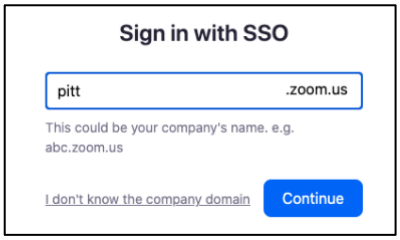
1. In the upper right-hand corner of the window, click the icon with your email address.

2. Select the **Integrations** tab.
3. Scroll to **Zoom: Online Appointments & Events**. Click **Authorize with Zoom account.**

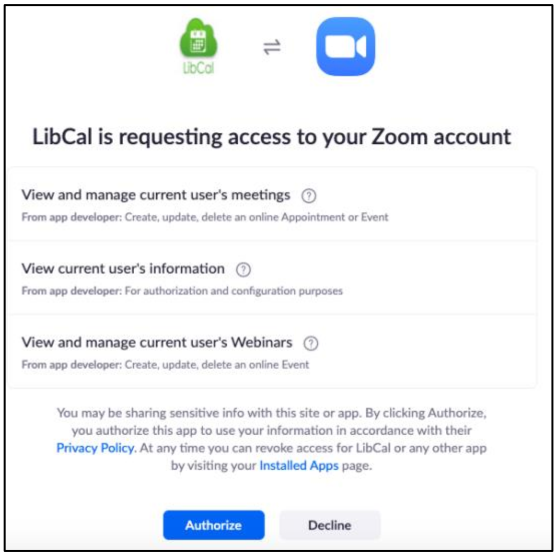


4. You will be taken to the Zoom website. Choose **Sign in with SSO**.

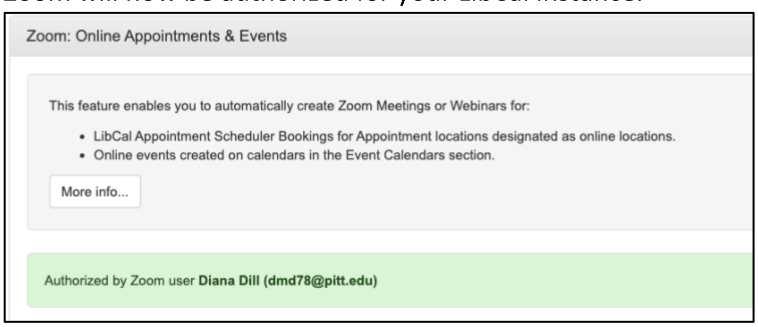
5. Enter **pitt** as the domain**.**



6. You will have to login and use multifactor to continue to the authorization section. You will have to click **Authorize** to complete the Zoom integration for your account.

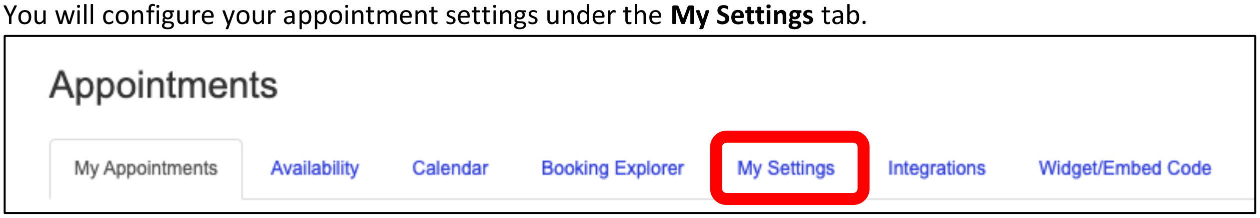


7. Zoom will now be authorized for your LibCal instance.



Configuring My Settings

You will configure your appointment settings under the **My Settings** tab.



Below are some suggestions. Feel free to customize as you see fit.

Appointment Settings

- **Appointment Duration** – default is 1 hour. Suggested is 30 min.

- **Padding** – default 0 minutes. Suggested is 0 minutes. The padding feature sounds good in theory, but ends up making your hours wonky.
- **Patron Must Book in Advance** – default 0 hours. Suggested is at least 1 hour. During busy times you may want 12-24 hours.
- **Patron Can Cancel Appointment** – default 0 hours prior. Otherwise, students won't cancel if they can't cancel online.
- **Patron Booking Window** – default 6 months. This is how far in advance a patron can schedule an appointment with you. You may want to limit to one month at a time.
- **Patron Reminder Email** – email sent to remind the patron of the appointment. Default is 1 hour.

Click **Save** after completing this section.

Appointment Instructions/Description

- Give your name and your liaison departments or ULS department.
- Describe where your office is (provide an address).
- Suggest that the student bring assignments, current research, or any other materials needed for to successfully receive assistance.

Click **Save** after completing this section.

Appointment Form Questions

These are the fields in the form that the student/faculty will see when scheduling with you.

- Default - First/Last Name, Email.
- Feel free to add questions that you think will be helpful. Some suggestions are:
    - Affiliation (Radio Button).
    - Why do you want to meet? / Subject? - (Multiline text)
    - Department (Single line text)
- Question Order - Organize how the questions will appear on the Booking form. (Name and Email are always first. This option only appears after adding 2 or more custom questions.)

Email Templates

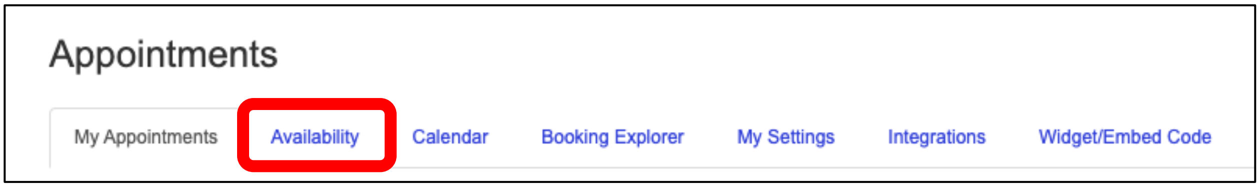
You will have several options to personalize the email message sent to confirm appointment, remind about appointments, and follow-up.

Remember to click **Save** after completing any of the sections you edit.

Configuring Availability

Add Availability

You can add and delete availability times under the **Availability** tab.

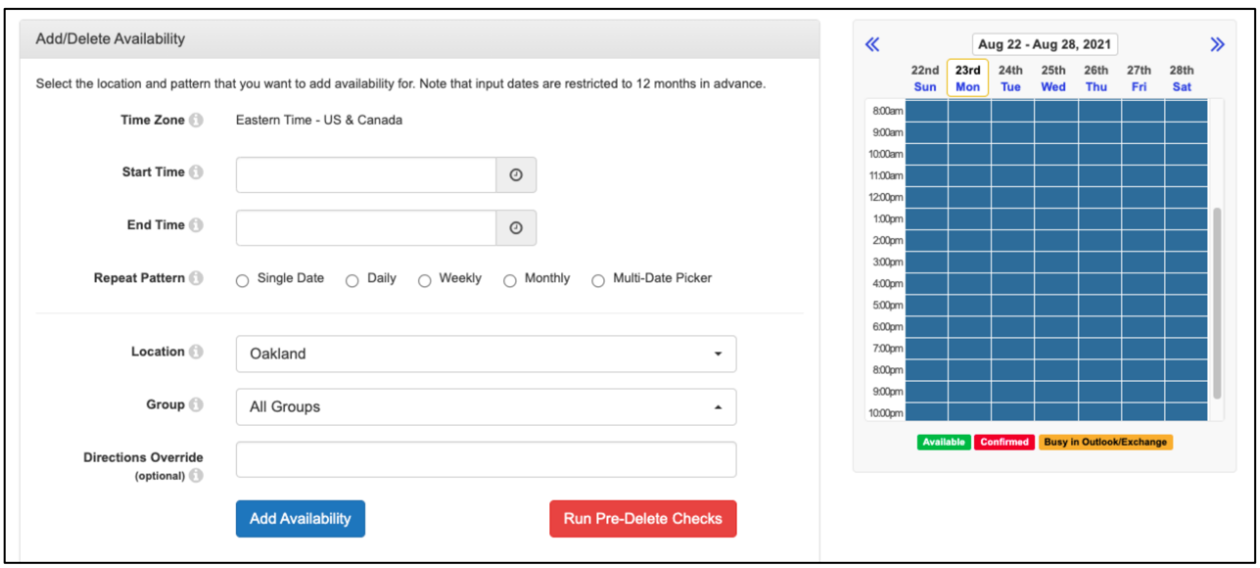


You will be able to schedule single dates, daily, weekly, monthly, and multi-dates. Multi-date allows you to select random dates that you may be available.

For **Location**, you can select locations for which you are a member. Location options include: Oakland, Online-University of Pittsburgh, Bradford, Greensburg, Johnstown, or Titusville. If you are on campus, but prefer online appointments, you can choose online as your location. You can also choose to have in-person visits when on campus and online when remote.

Groups are locations on the Oakland campus and include Hillman Library, Engineering, Thomas Blvd, Frick Fine Arts Library, Finney Music Library, and Archives & Special Collections.

> **NOTE:** If you are unable to access a location or group, contact Ula Lechtenberg.

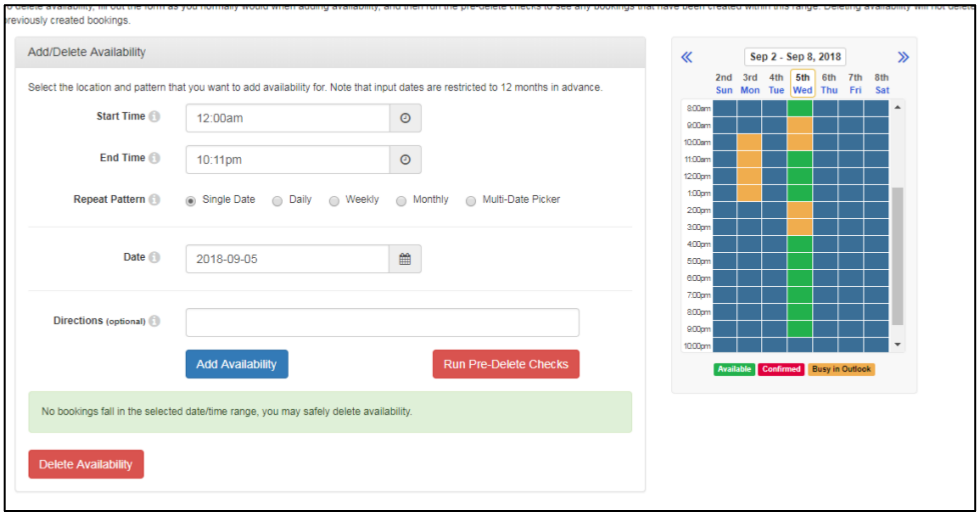


Note: The LibCal calendar displays free/busy time from your Outlook calendar only for the days which you have configured. It does not show your entire Outlook calendar.

Delete Availability

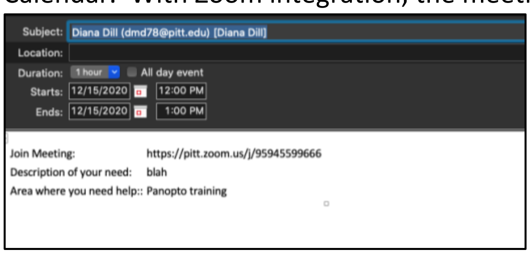
You may determine that you are not able to be available for a day that you have already scheduled though LibCal Appointments. For example, at the beginning of the term, you may add your availability as Monday, Wednesday, and Friday. However, by mid-term you may find that you no longer want to be available on Fridays.

To delete availability, you must first **Run Pre-Delete Checks** to confirm you don't have any appointments made through LibCal Appointments for that day. You will have to provide the start time, end time, repeat pattern, and date for the check. Once it is confirmed that you don't have conflicts, you can delete that occurrence.

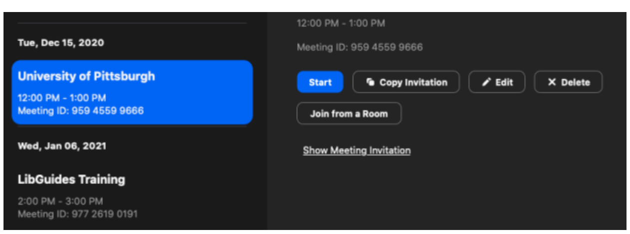


General Notes

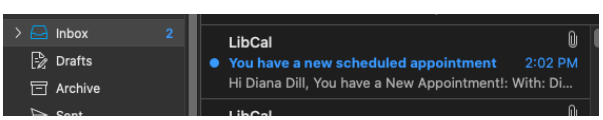
Free and tentative appointments/meetings in Outlook show as Available in LibCal Appointments. When a patron books a time with you, an appointment, marked as busy, will appear in your own Outlook Calendar. With Zoom integration, the meeting will contain the URL to join the Zoom meeting.



If you look in the Zoom application on your computer, you will see the meeting listed, and you may start it either from the link in the meeting description or from your Zoom application.



You will also receive an email with more detailed information on the appointment. This email will also contain an *.ics file that you can use to have a more detailed appointment in your calendar.

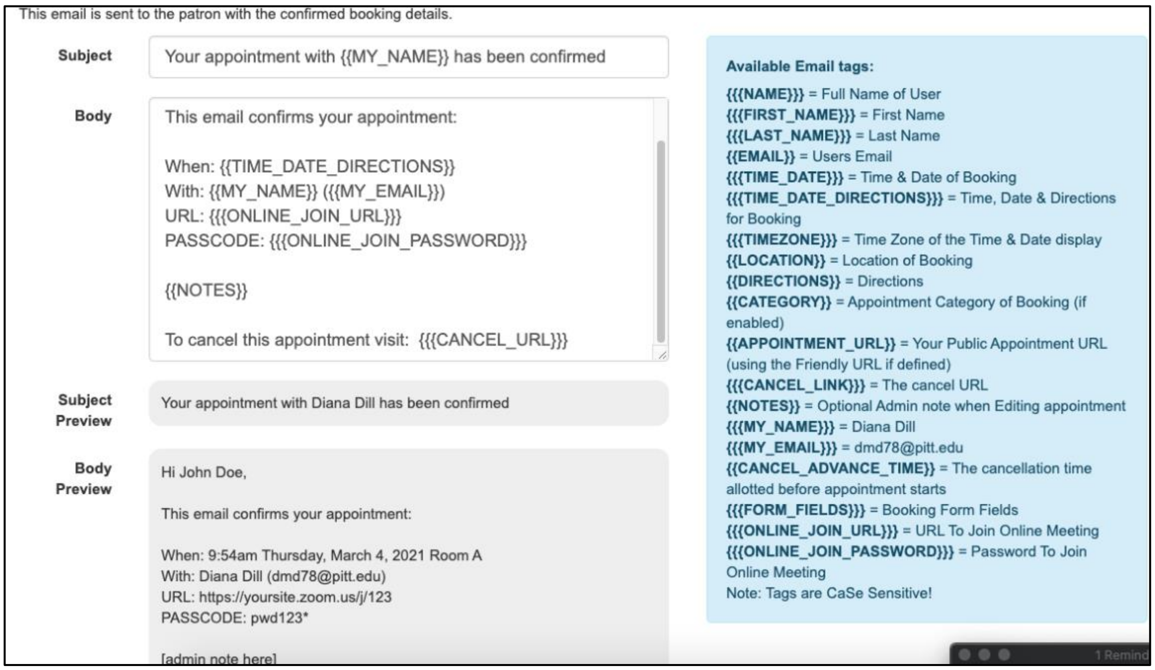


Confirmation Email to Patron

When a patron receives a confirmation email with Zoom, the email will have an *.ics file attached that the patron can use to update a calendar. However, some patrons may not use calendars and prefer the Zoom link in the confirmation email. The Zoom URL can be added to the confirmation email through your settings.

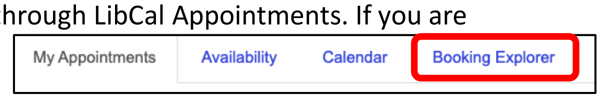
1. In **Appointments**, choose **My Settings**.
2. Scroll down until you reach the section titled: **Confirmation Email to Patron**.
3. When you expand the selection, you will see the **Body** where you will make the changes using the code listed under **Available Email tags**. You will see a preview of the email in the **Body Preview**.

The example below shows the body and body preview setup for Zoom meetings.



Using Booking Explorer

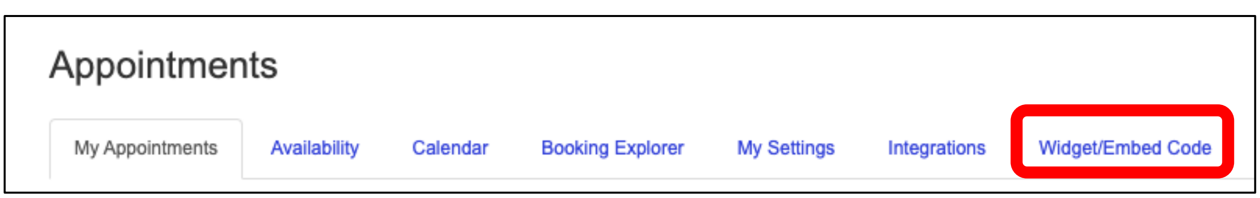
Booking Explorer allows you to view all appointments created through LibCal Appointments. If you are using a group account to schedule appointments, this will be a good location to review appointments made through LibCal.



LibGuide Schedule Box

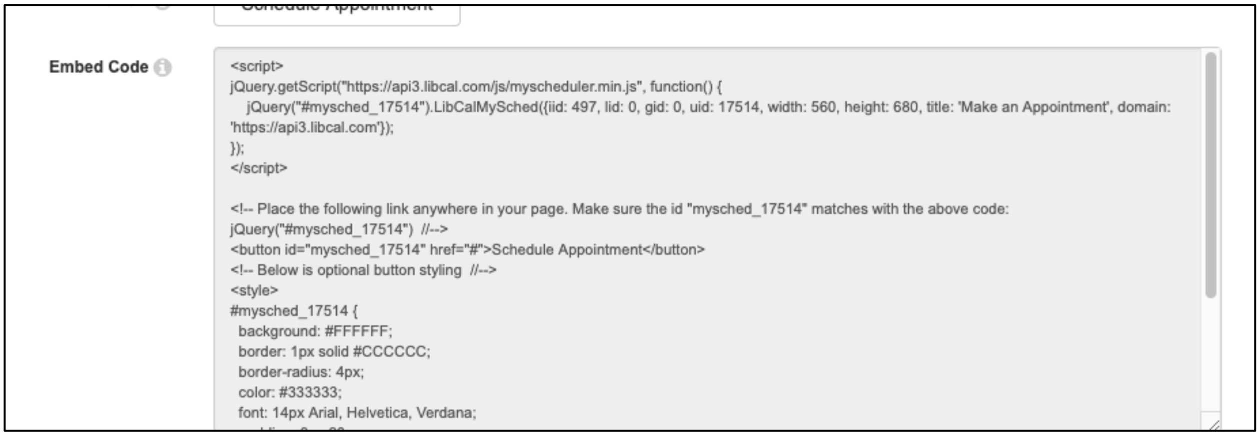
Getting the Widget/Embed Code

Select the **Widget/Embed Code** tab to access your widget code.



Scroll to **Embed the Appointments Widget in external websites.** You can make changes to the code from the available options. For ADA compliance, **please make sure that the text color is visible on the button.**

Copy the **Embed Code** when done. Make sure to copy all of the code in the box.

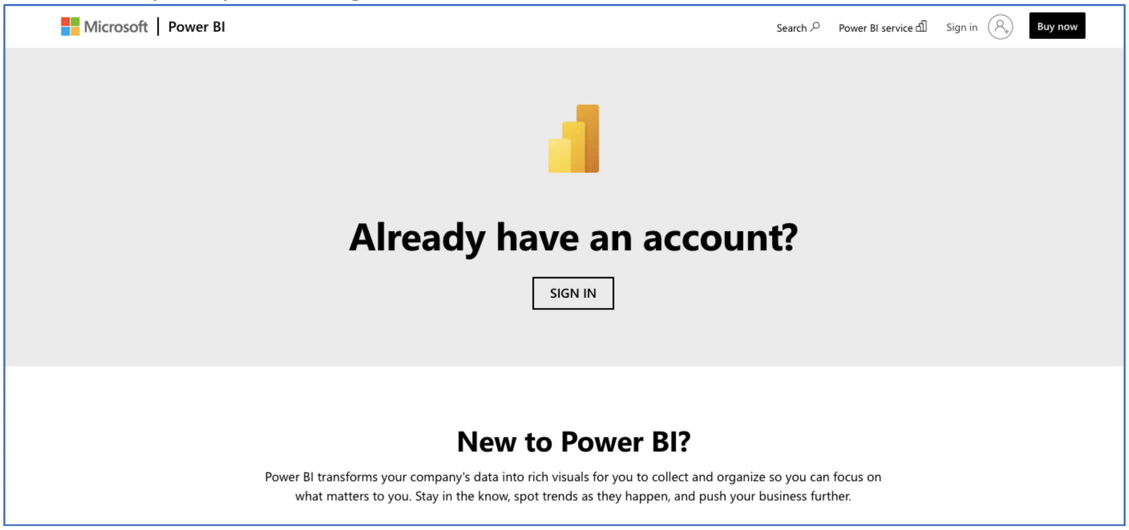


Adding to Widget to Your Profile Widget

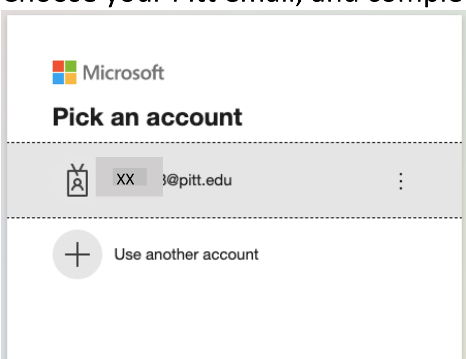
- Go to **LibApps.**
- From the global menu at the top of the window, select **My Profile**.
- Scroll to **Widgets**.
- In the section titled **LibCal Widget Code**, paste the copied code.
- Click the blue check box to save.

Using the ULS Clarivate InCites Tool

1. Access the [ULS tool](https://pi.tt/selectMyResearchers) (URL: https://pi.tt/selectMyResearchers).
2. You will be prompted to login to a Microsoft account. In the middle of the screen, click **SIGN IN.**

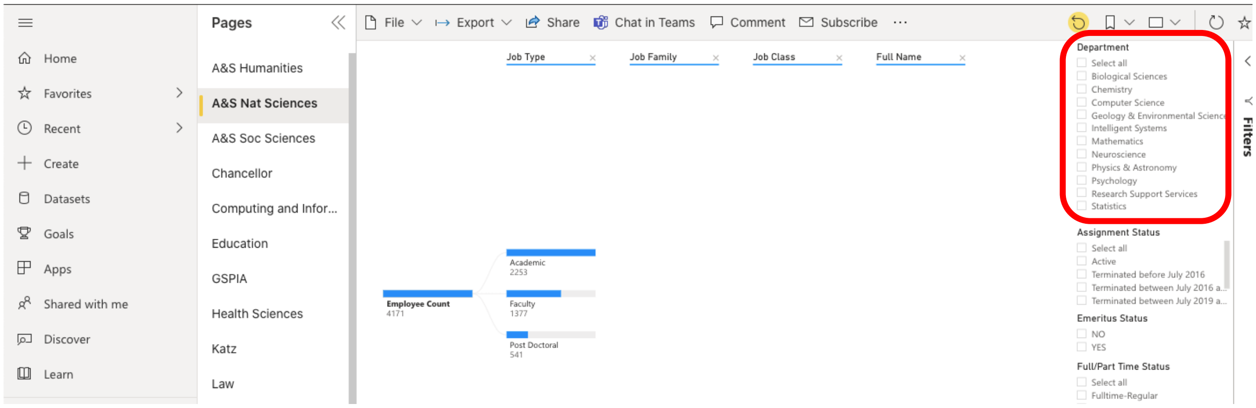


3. Choose your Pitt email, and complete the login process.

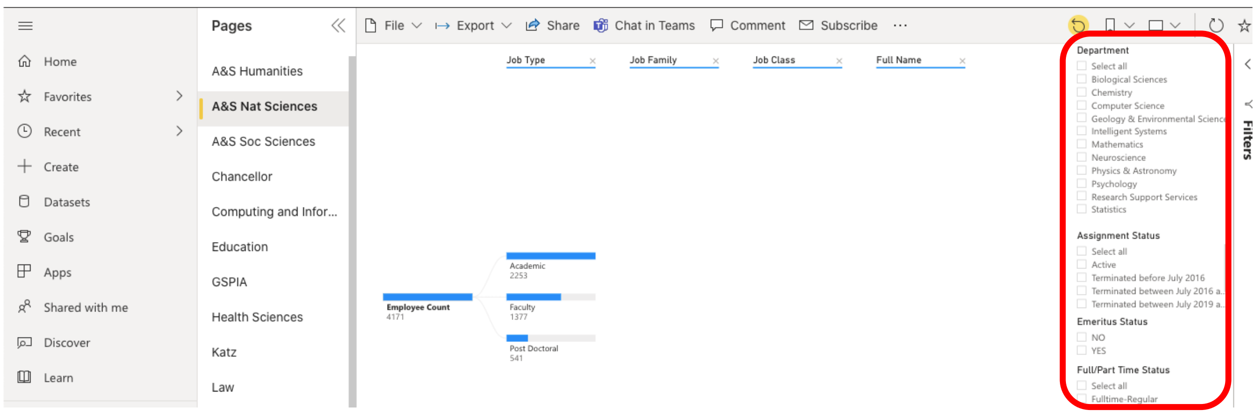


4. You will see the initial form on the screen, as shown below.
5. Go to the **Pages** section and select the responsibility center for which you are making selections.

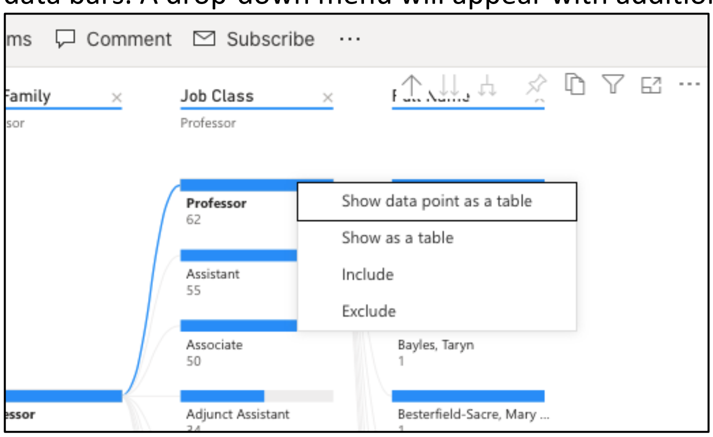
6. From the navigation pane with filters on the right side of the screen, choose department(s), for which you are making your selections.



7. Apply additional filters to refine your selections.
EXAMPLE: If you want to exclude former employees, under **Assignment Status**, select all except for **Terminated**.



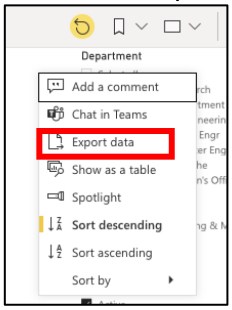
8. You can include or exclude entire job types, families, and classes by right-clicking on any of the blue data bars. A drop-down menu will appear with additional options.



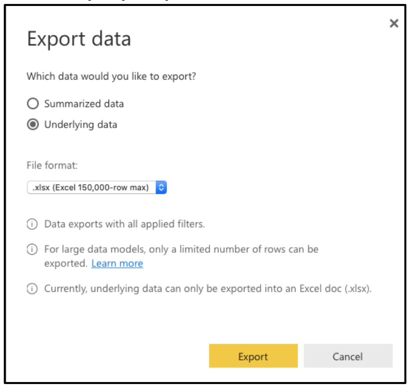
Selecting **Include** here has the effect of excluding all job categories other than the one selected.
To help you see the individuals who display with the selected filters, right-click on a blue data bar, and choose **Show data point as a table**.

9. You can also view the data in Excel.
    a. To download an Excel file, from the icons to the left of the word **Department**, select the ellipsis (…).

b. From the drop-down menu, select **Export Data**.

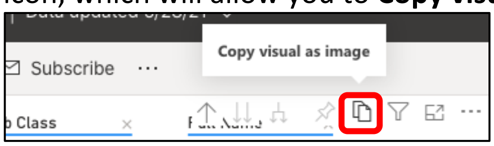


c. In the pop-up box, select **Underlying data**. Click **Export** to save the file.

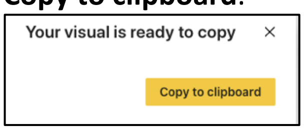


10. After you complete your selection, send us a copy of your selections.

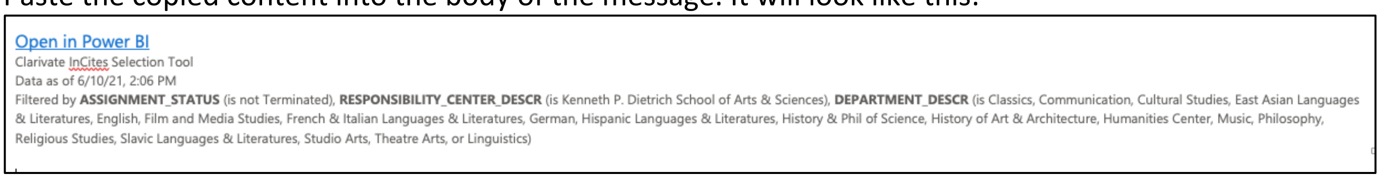
a. From the icons at the top of the display next to the word **Department**, choose the double page icon, which will allow you to **Copy visual as image**.



b. When you click the icon, a pop-up box will appear saying that the visual is ready to copy. Click **Copy to clipboard**.



11. Start an email message to the ULS - InCites Coordination group.
12. Paste the copied content into the body of the message. It will look like this:

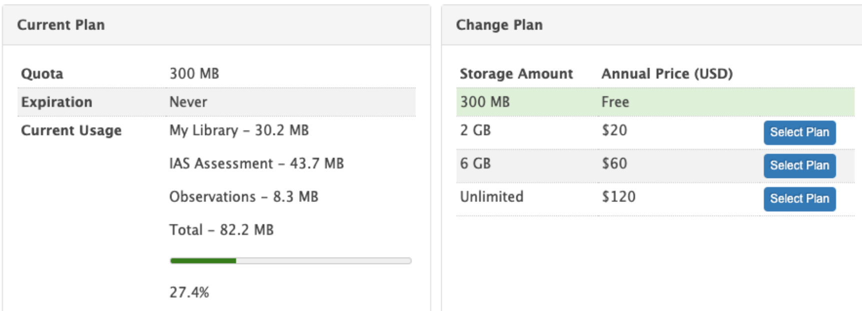

Open in Power BI
Clarivate InCites Selection Tool
Data as of 6/10/21, 2:06 PM
Filtered by **ASSIGNMENT_STATUS** (is not Terminated), **RESPONSIBILITY_CENTER_DESCR** (is Kenneth P. Dietrich School of Arts & Sciences), **DEPARTMENT_DESCR** (is Classics, Communication, Cultural Studies, East Asian Languages & Literatures, English, Film and Media Studies, French & Italian Languages & Literatures, German, Hispanic Languages & Literatures, History & Phil of Science, History of Art & Architecture, Humanities Center, Music, Philosophy, Religious Studies, Slavic Languages & Literatures, Studio Arts, Theatre Arts, or Linguistics)

13. Send the message.

Zotero Quick Reference

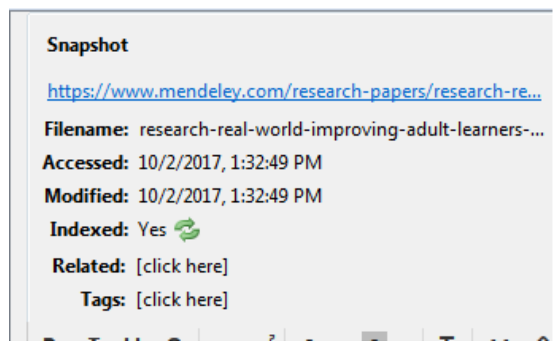
General

1. Install Zotero
    1. Download Zotero and Zotero Connector for Chrome: https://www.zotero.org/download/
       Other web browsers supported: Firefox, Safari, Opera
    2. Zotero works in Windows and Mac environments
2. Your space: https://www.zotero.org/settings/storage?ref=usb



Exploring Zotero Desktop

- Library
    1. Instead of folders, Zotero has collections and subcollections
       File -> New Collection to create a "folder"
    2. **My Library**, **My Publications** is the location where you can create a list of your own works and share via your profile page on Zotero.org—can include PDFs if there are no licensing issues.
- Item
    1. Each item contains information on the reference, attached PDF, and a snapshot (available when creating an item from a website—has the website URL)



- Search
    1. Will search tags, notes, and content

Adding References

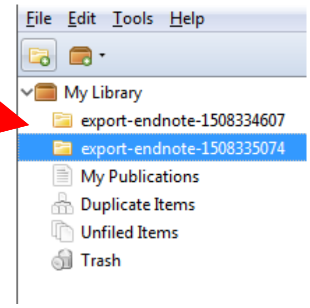
1. Manual entry
    1. **File -> New Item**
        a. Select type
        b. Complete information on right panel
        c. Can add **Notes** and **Tags**
        d. **Related** links the entry to another entry in your library

Import from Pittcat

1. Perform search in Pittcat
2. **EndNote/Zotero**
3. In Zotero:
    1. **File**
    2. **Import**

Updated: 6/2/2021

   a. Choose your file
   b. Import results are placed in a folder.



2. Drag and drop
   1. Drag in file. It creates an entry just for the file based on file name.
   2. Right click file, and choose **Retrieve Metadata for PDF**
   3. Because Zotero opens PDFs in a PDF reader installed on your computer, if you already created notes and highlights in the PDF, they will remain in Zotero. You will just need to make sure that future annotations to the PDF are done through the Zotero PDF link.
3. Zotero Browser Connector (found through **Tools -> Install Browser Connector** or go to https://www.zotero.org/download/)
   1. Google scholar
      a. Will save the search results as a web page—not the references on the page
      b. If you open a link, will save that as a web page—not the reference
      c. Best option may be to open the PDF in the browser. (Zotero connector turns to PDF icon, and saves PDF to library)

Editing References

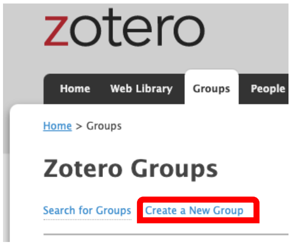
- Tags
- Notes: unlike Mendeley and EndNote, you can create a note with formatting, lists, and hyperlinks

Writing with Zotero

1. The Word plug-in should be installed automatically with the Zotero install.
   You can disable and enable it from **Tools -> Add-Ons**.
2. Choose a citation style
   1. In Zotero Desktop—**Edit -> Preferences -> Cite -> Styles**
      (for Mac: **Zotero -> Preferences -> Cite -> Styles**)
   2. Install the Word Add on **Edit -> Preferences -> Cite -> Word Processors**
      (for Mac: **Zotero -> Preferences -> Cite -> Word Processors**)
      In Word—**Zotero** tab -> **Document Preferences**
3. Insert a citation and bibliography
   1. In Word—**Zotero** tab
      a. **Add/Edit Citation**
      b. Will need to select or view the Document Preferences
      c. Search for item
      d. Have to hit enter key to get the references add as in-text.
      e. Go to end of document to add bibliography **Add/Edit Bibliography**
4. Edit a citation
   1. Go to in-text citation
   2. **Zotero** Tab
      a. **Add/Edit Citation**
   3. Delete a citation, and it will automatically delete from the bibliography

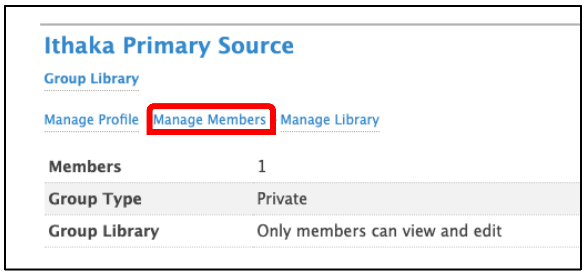
Working with Groups

- Create a group with Zotero online: https://www.zotero.org/groups/



Public, Open Membership / Public, Closed Membership / Private Membership

- Add members



- Add imports to group folder
  1. Select the group
  2. **File -> Import**

     You can also drag items from other collections (folders) into the group folder.