



MID-HUDSON LIBRARY SYSTEM

Mobile Worklists

What it is, what it can do for you

Mobile Worklists

- ▶ Mobile Worklists makes material handling and management tasks more efficient and makes your staff more productive by making use of mobile technology to reduce the back and forth between the stacks and the desk and cut down on repetitive material handling.



Mobile Worklists

- ▶ **Mobile Work lists allows the user to do the following:**
 - ▶ Create a list of records in the app
 - ▶ Scan barcodes with the camera on their mobile device using integrated barcode scanning from Send a list of items to Sierra
 - ▶ Keep track of lists in My Lists
 - ▶ In Sierra, turn a list into a review file. Users can then update records in Sierra using Global or Rapid Update



Installing the Mobile Worklists App



Installing the Mobile Worklists App

- ▶ System requirements
- ▶ *Sierra 3.0 or higher*
 - ▶ *We are currently on 4.3*



Installing the Mobile Worklists App

- ▶ System requirements
- ▶ Mobile Worklists supports the following devices using iOS 7.0 or above:
- ▶ iPad 3 and up (including Mini and Air)
- ▶ iTouch 5G and up (Oct. 2012 and later)
- ▶ iPhone 4 and up



Installing the Mobile Worklists App

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- ▶ iPad 3 and up (including Mini and Air)
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- ▶ iPhone 4 and up

Mobile Worklists is only supported currently by iPhone. It is not currently supported on Android devices.



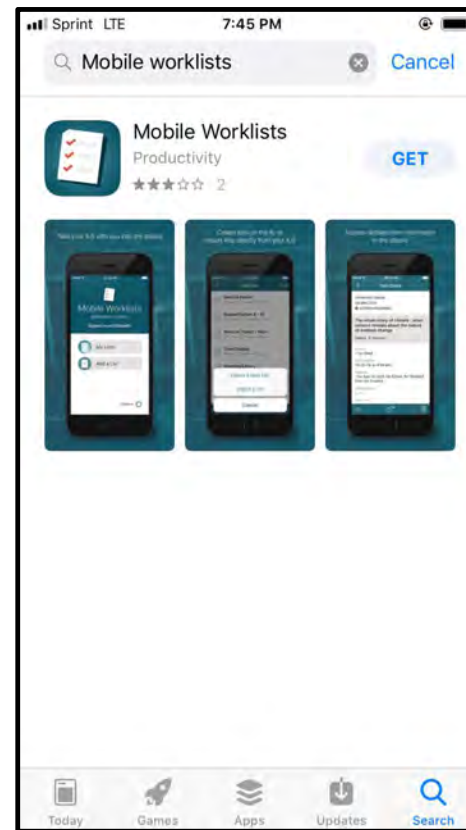
Installing the Mobile Worklists App

- ▶ Download Mobile Worklists Application from Apple App Store.



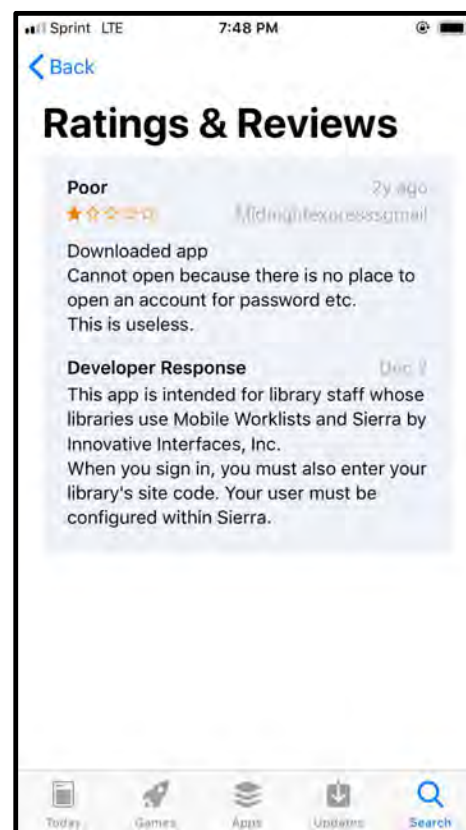
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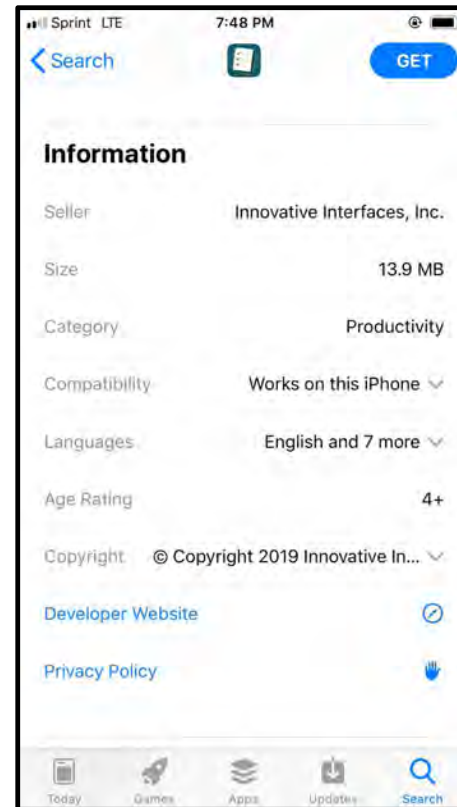
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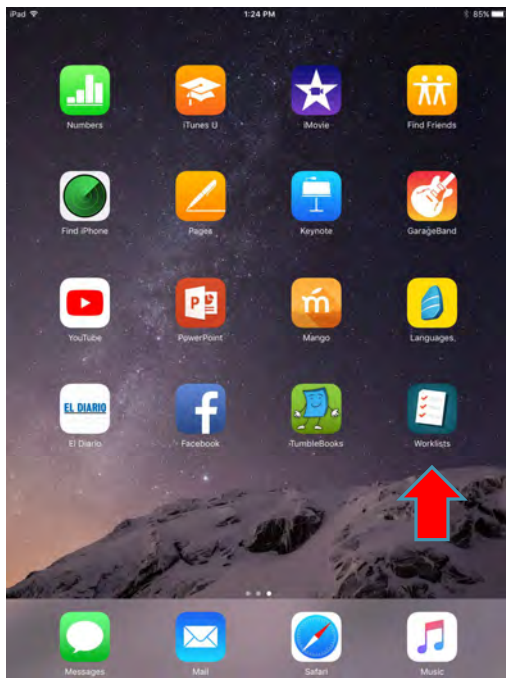


Installing the Mobile Worklists App

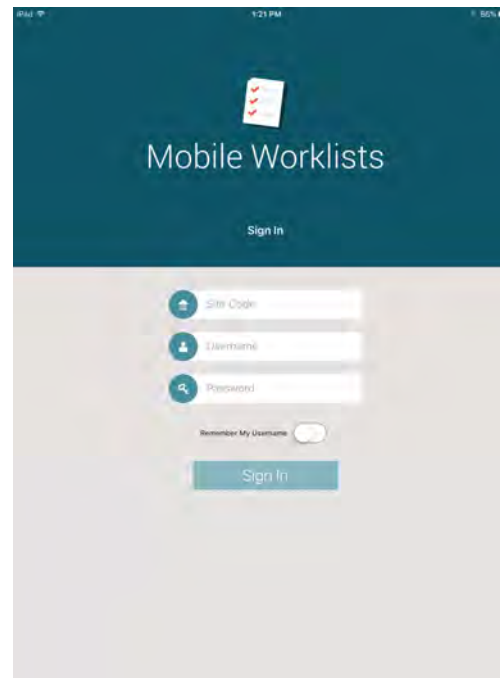
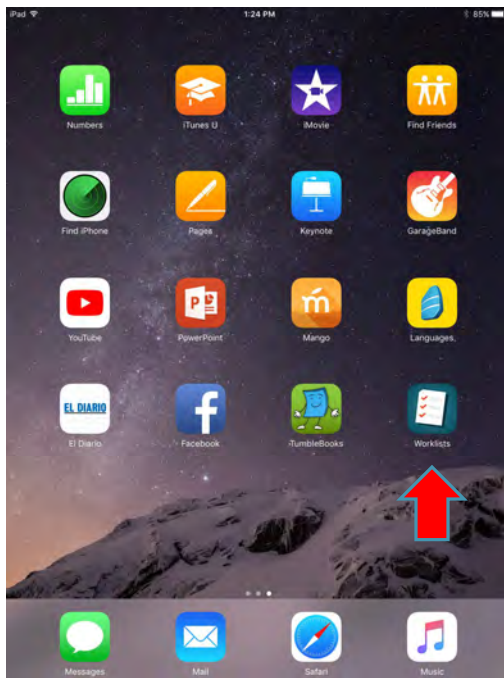
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Mobile Worklists - Logging in

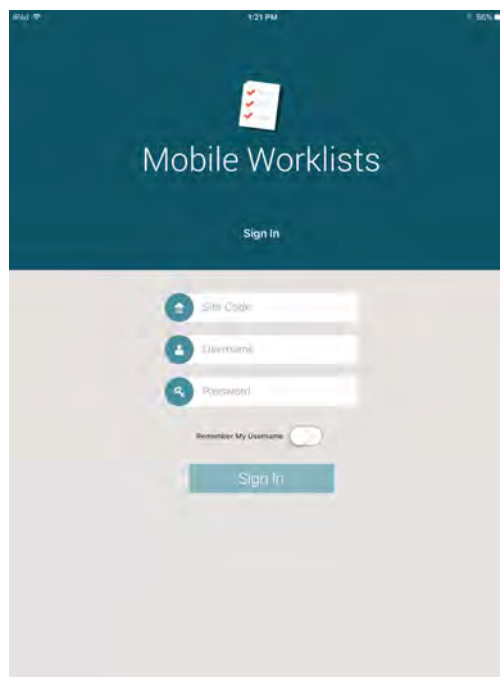


Mobile Worklists - Logging in



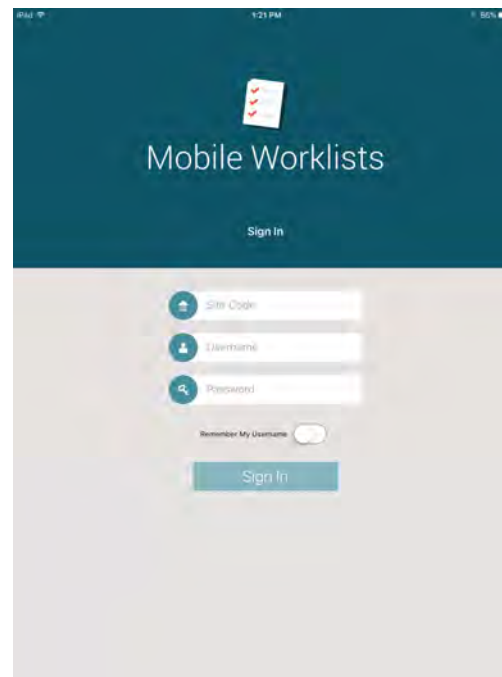
Mobile Worklists - Logging in

- ▶ **Enter the site code, which identifies you as part of Mid-Hudson Library System:**
 - ▶ **MHUD**

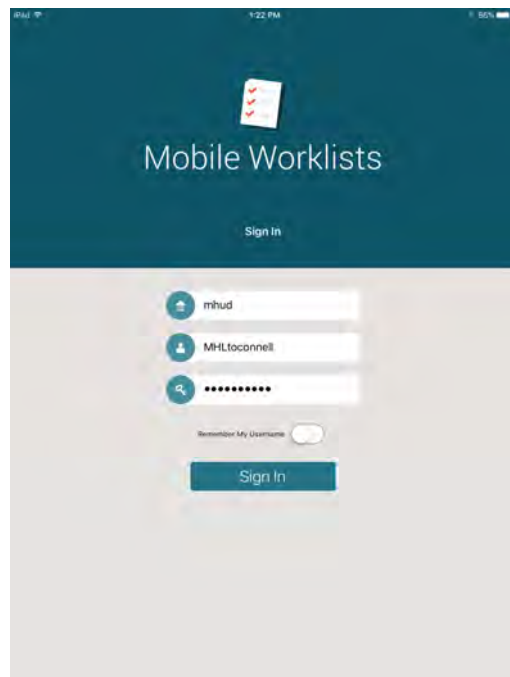
A screenshot of a mobile application login screen. The top half has a dark teal background with a small icon of a notepad with three red checkmarks. Below the icon, the text "Mobile Worklists" is displayed in white. Underneath that is a "Sign In" link in white. The bottom half of the screen has a light gray background and contains three input fields, each with a circular icon to its left: a house icon for "Site Code", a person icon for "Username", and a magnifying glass icon for "Password". Below these fields is a "Remember My Username" checkbox and a "Sign In" button.

Mobile Worklists - Logging in

- ▶ **Enter the site code**, which identifies you as part of Mid-Hudson Library System:
 - ▶ **MHUD**
 - ▶ (you only have to do this the first time you log in. The next time, Site Code will not appear)

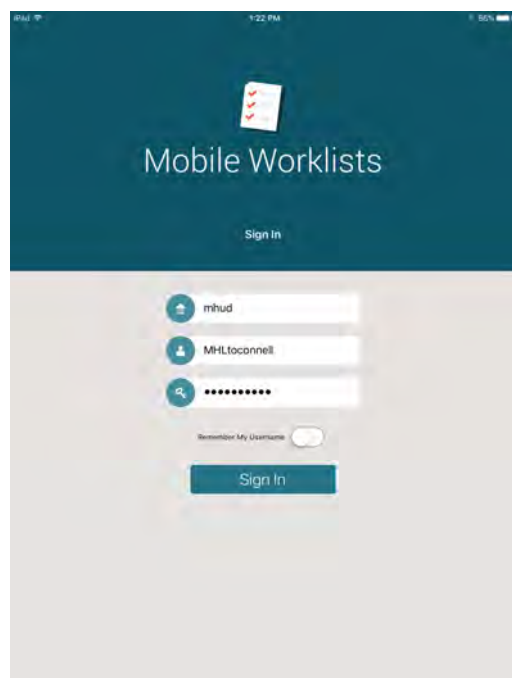


Mobile Worklists - Logging in



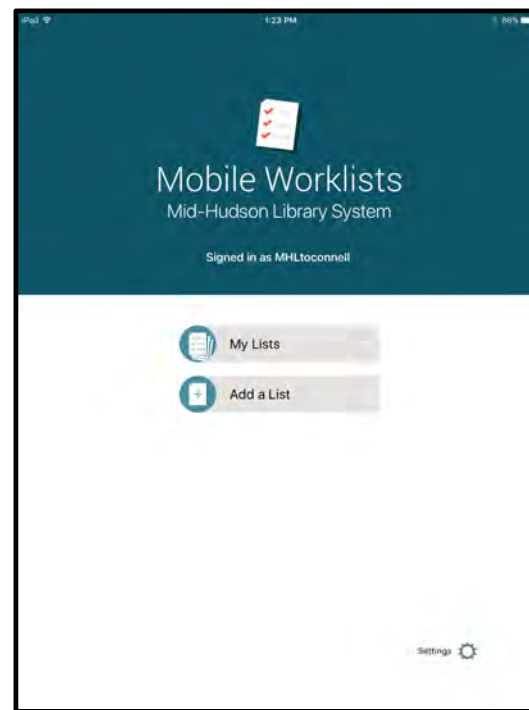
- ▶ Username and Password are your Sierra login -

Mobile Worklists - Logging in



- ▶ Username and Password are your Sierra login -
- ▶ *This does not use another Sierra license - not counted against library total*

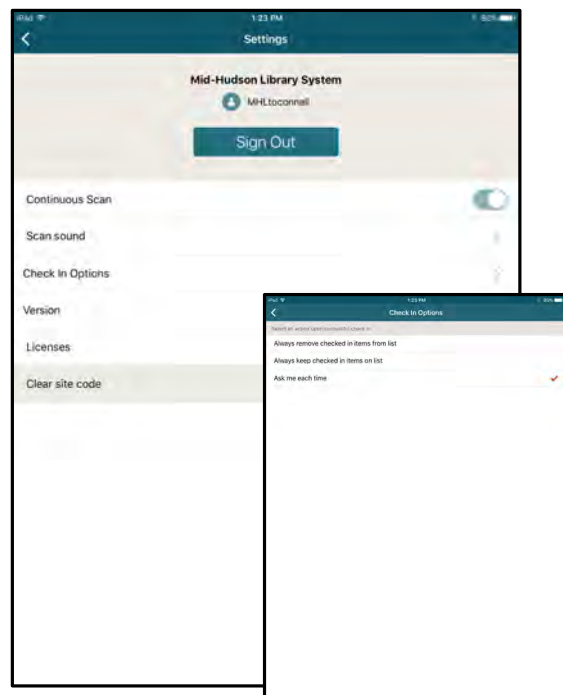
Mobile Worklists



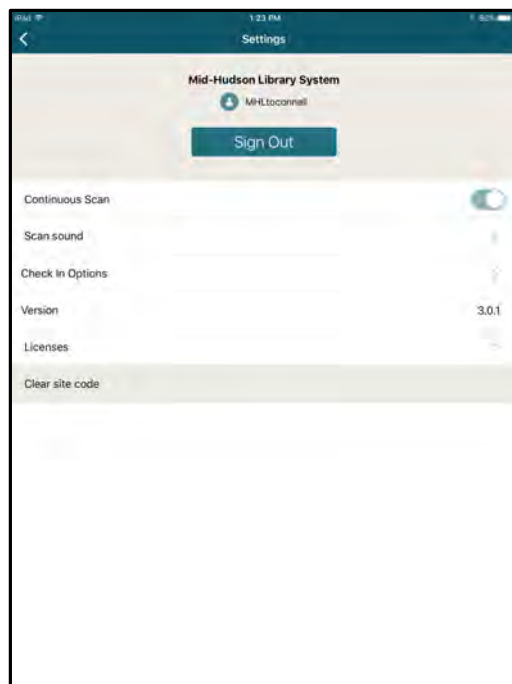
Mobile Worklists - Settings



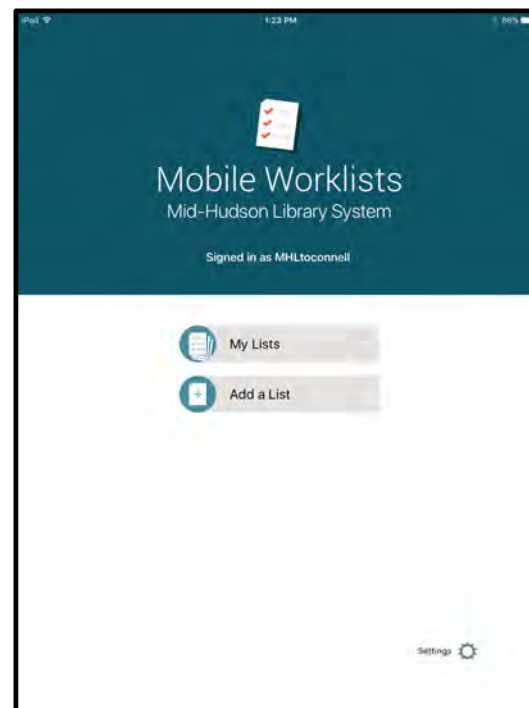
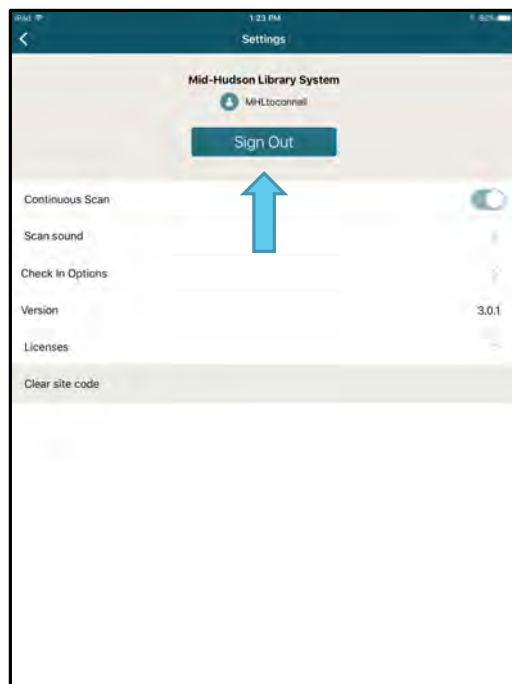
Mobile Worklists - Settings



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Mobile Worklists - Settings



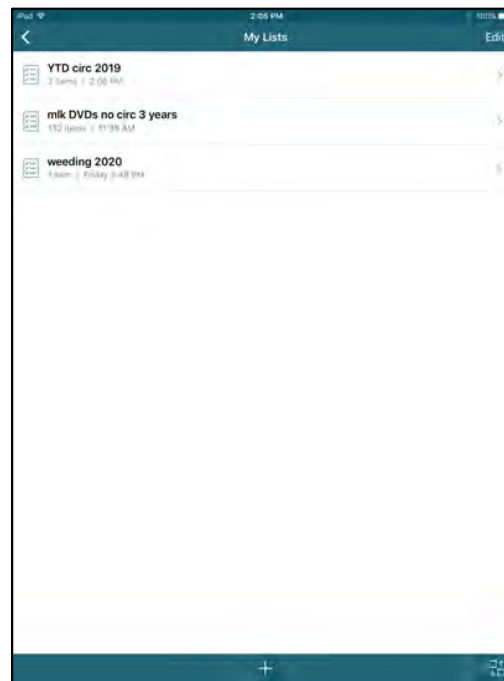
Mobile Worklists - My Lists

- ▶ The **My Lists** screen lists all the worklists you have created in Mobile Worklists or imported from Sierra.



Mobile Worklists - My Lists

- ▶ The **My Lists** screen lists all the worklists you have created in Mobile Worklists or imported from Sierra.
- ▶ From the My List screen, tap the row that identifies the list you want to view. The items in the list appear.



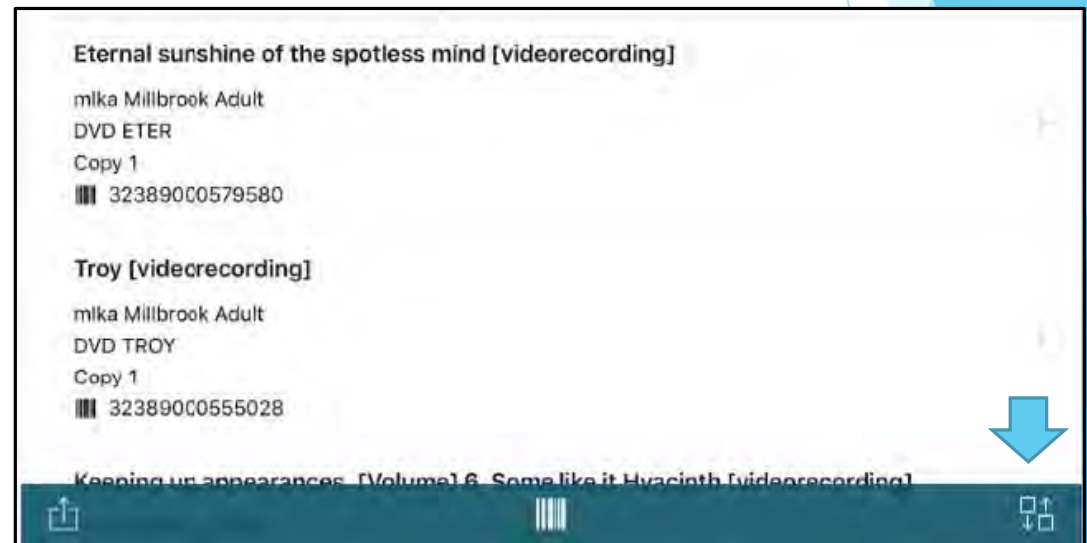
Mobile Worklists - My Lists



- ▶ Swipe up or down in the list to scroll through the items.
- ▶ To return to the top of the list, tap the time at the top of the screen.
- ▶ As you scroll through the list and view item entries, your place in the list is saved

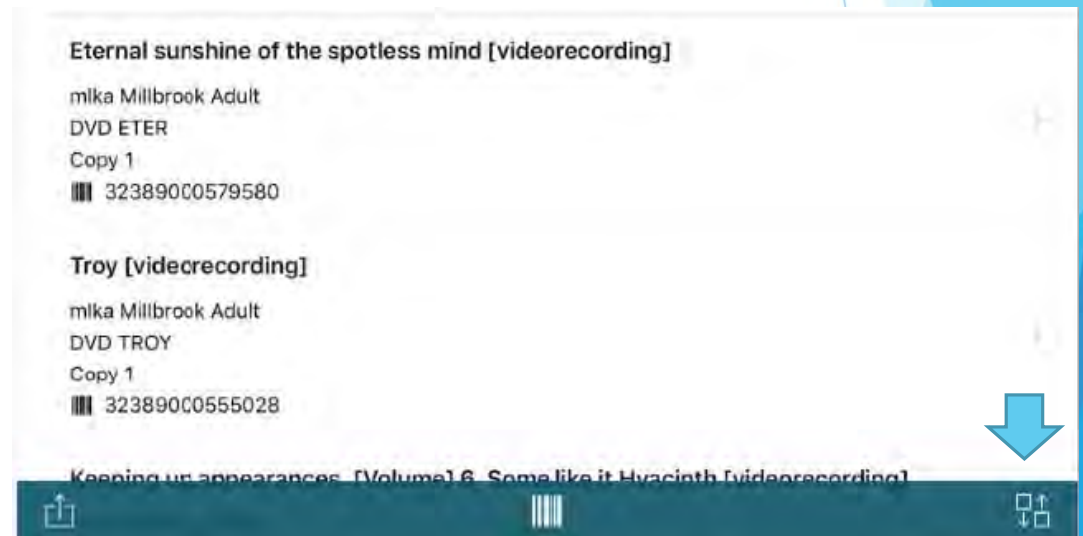
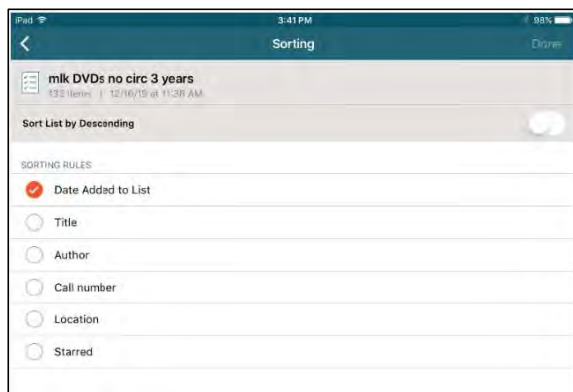
Mobile Worklists - Sorting

- ▶ From item entries view, you can go to the **Sorting Screen** to set the sort order for the items. Once you set a sort order for the items in a list, the sort order remains for that list whenever you sign into Mobile Worklists, even if you sign in on a different device



Mobile Worklists - Sorting

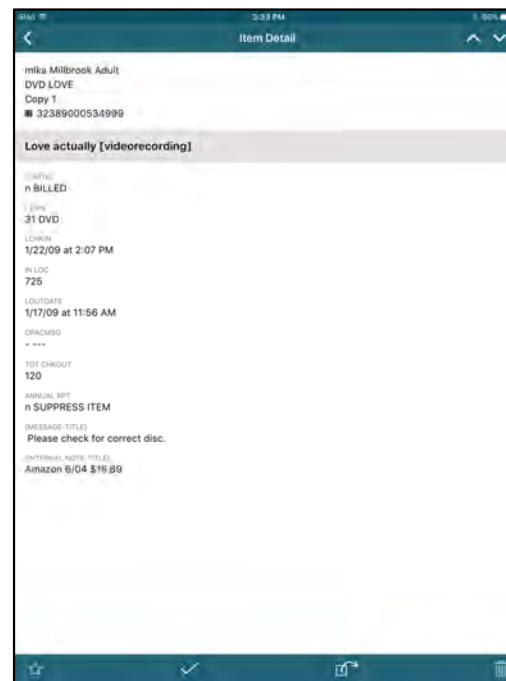
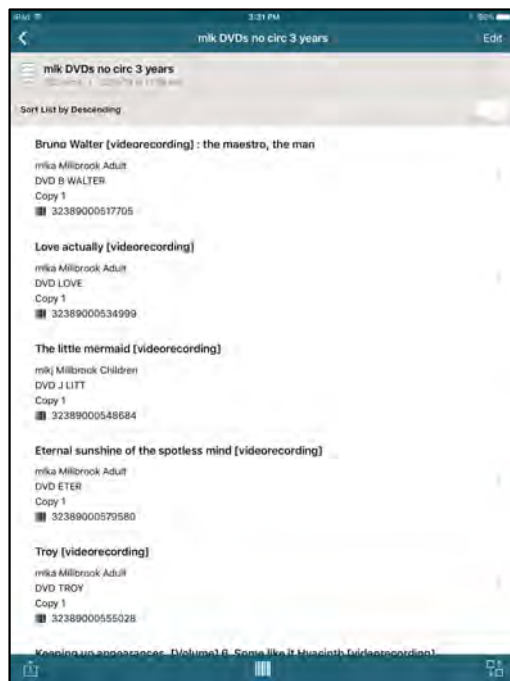
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Mobile Worklists - My Lists

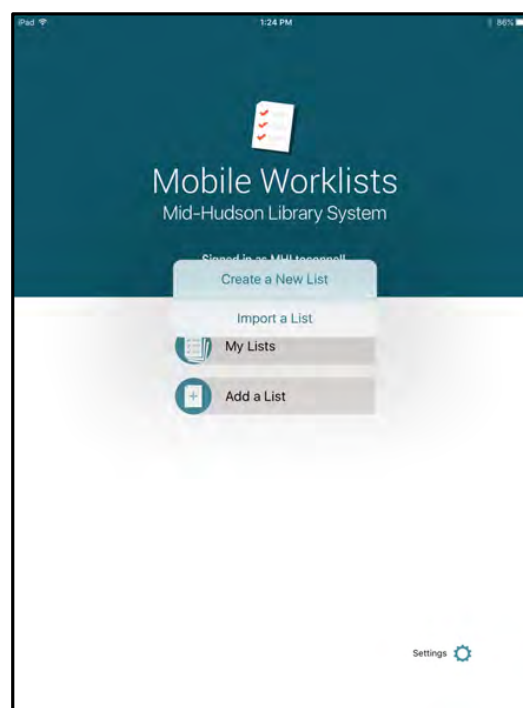


Mobile Worklists - My Lists



Mobile Worklists - Add a List

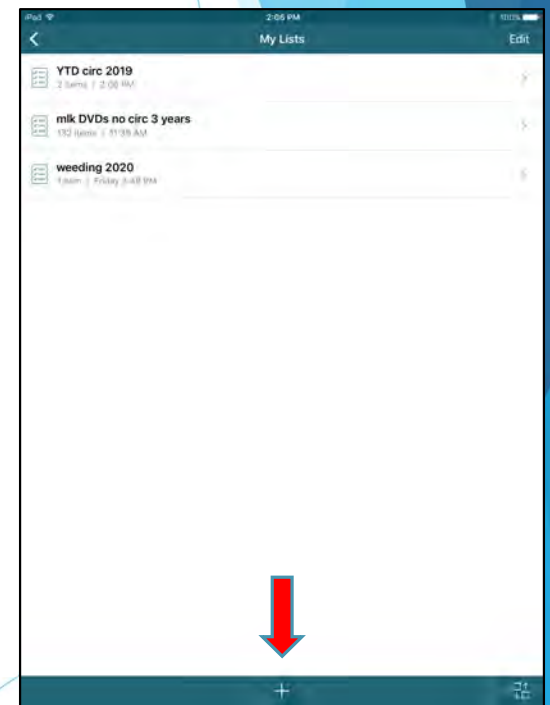
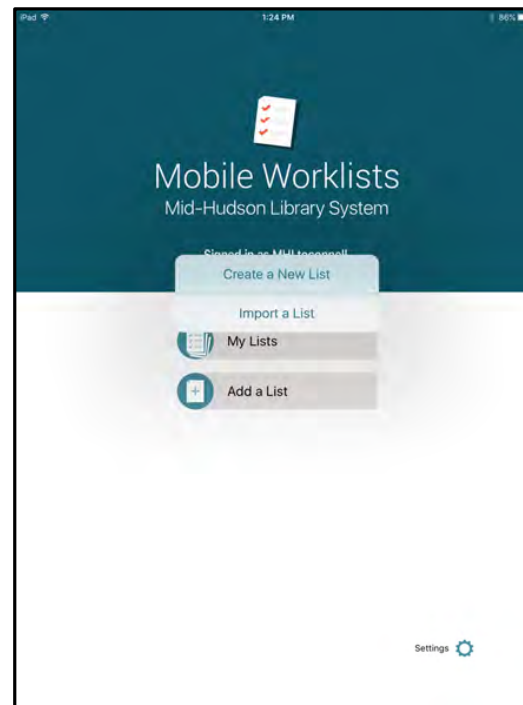
- ▶ **Add a list** allows you to
 - ▶ *Create a New List*
 - ▶ *Import a list*



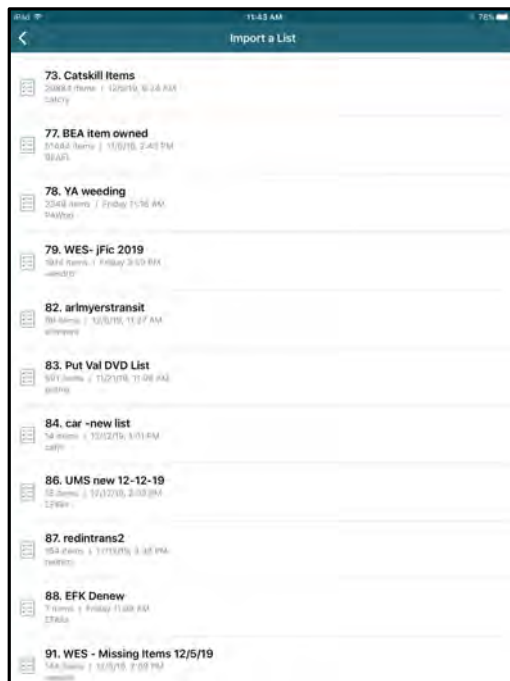
Mobile Worklists - Add a List

- ▶ **Add a list** allows you to
 - ▶ *Create a New List*
 - ▶ *Import a list*

Can also be initiated by tapping the + at the bottom of the My Lists page.

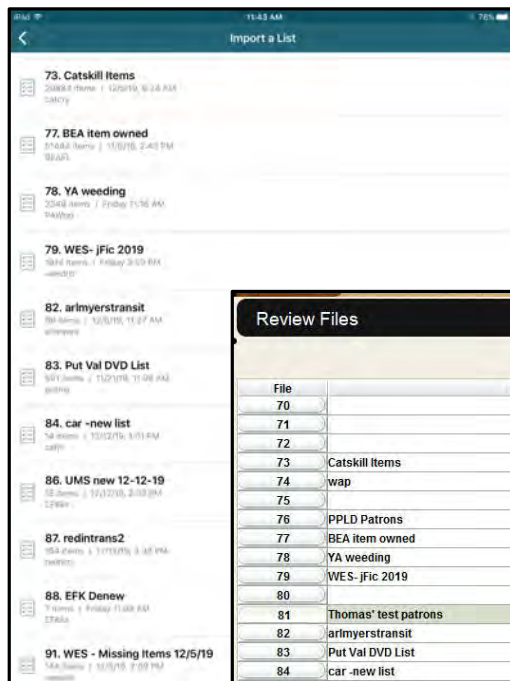


Mobile Worklists - Importing



- ▶ Importing accesses the Review files from Create Lists,

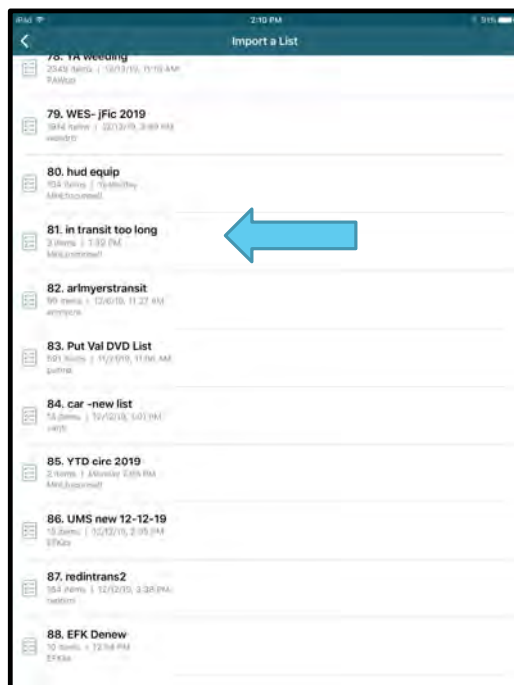
Mobile Worklists - Importing



- ▶ Importing accesses the Review files from Create Lists,
- ▶ But only for Item record reports - not Patron or Bib

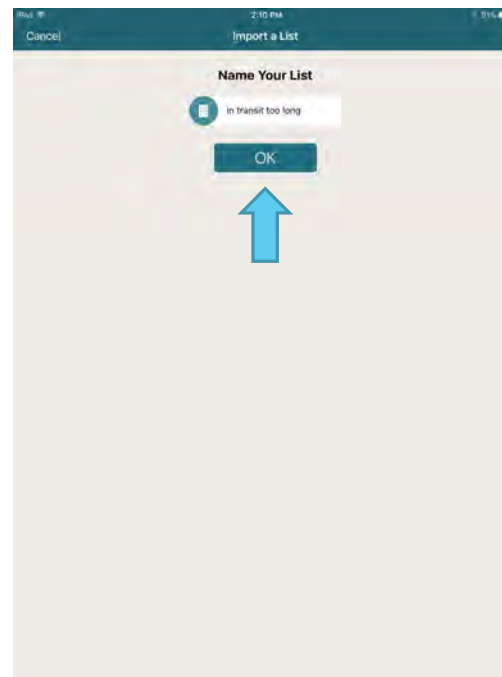
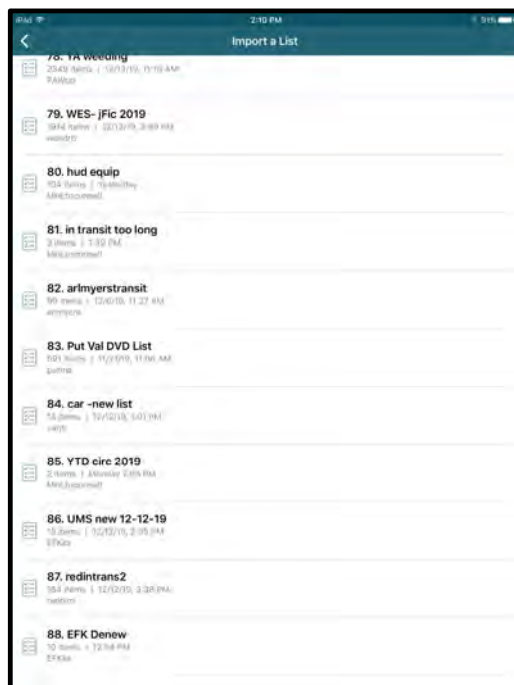
Review Files				
All Search Records Sort Records List Records Import Records Export Records				
File	Name	Current Records	Max Records	Type
70		0	40000	
71		0	40000	
72		0	40000	
73	Catskill Items	20884	60000	i
74	wap	1126	60000	p
75		0	60000	
76	PPLD Patrons	33178	60000	p
77	BEA item owned	51444	60000	i
78	YA weeding	2349	60000	i
79	WES- JFic 2019	1914	60000	i
80		0	200000	
81	Thomas' test patrons	4	5000	p
82	arlmyerstransit	99	5000	i
83	Put Val DVD List	591	5000	i
84	car -new list	14	5000	i

Mobile Worklists - Importing



- ▶ Locate your Review File,
 - ▶ Tap the file

Mobile Worklists - Importing

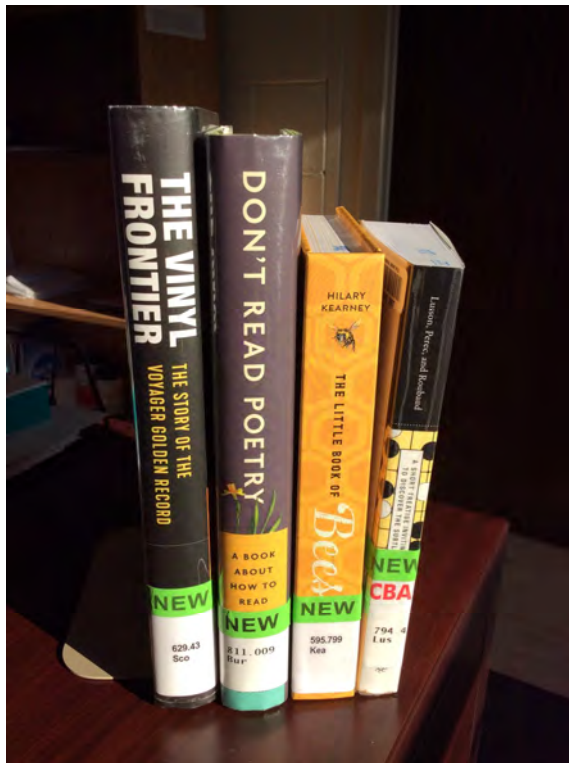


Mobile Worklists - Importing



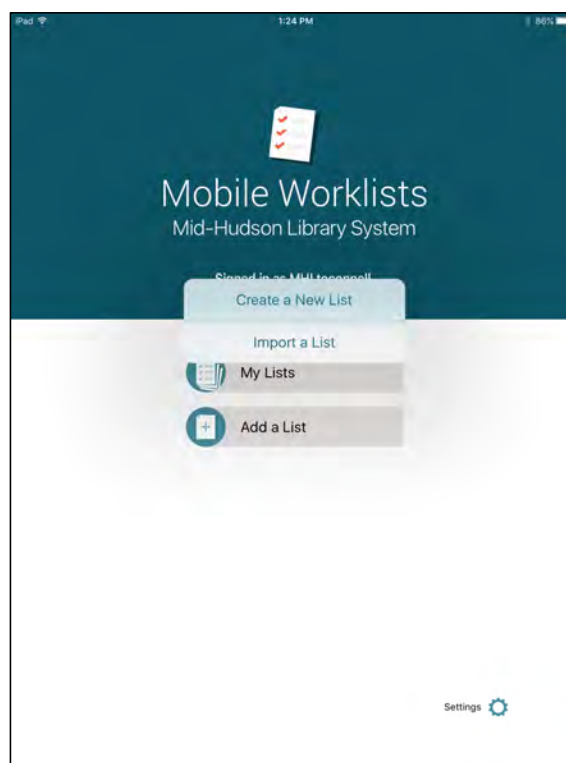
- ▶ The List is imported and added to your My Lists
- ▶ If no sort order is specified for the list, in either Sierra or Mobile Worklists, the items are sorted by the date they were added to the list.

Mobile Worklists - Creating Lists

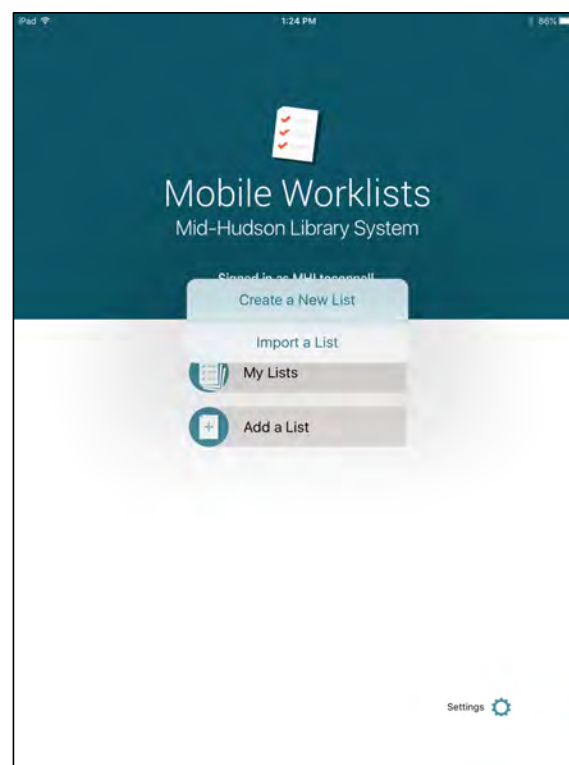


What if you have some books and you want to create a list?

Mobile Worklists - Creating Lists



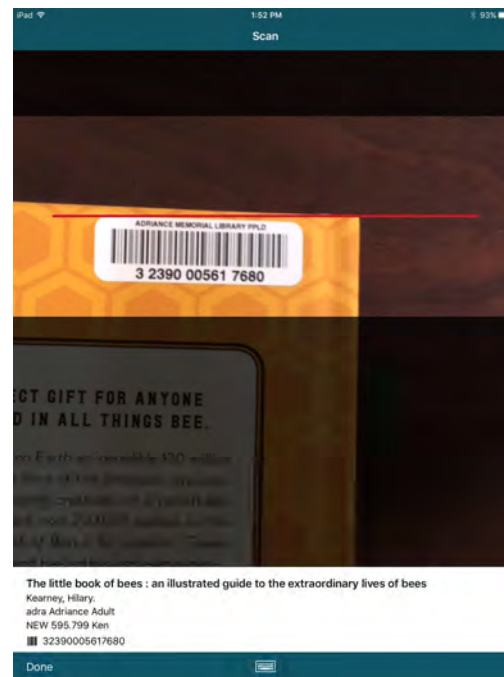
Mobile Worklists - Creating Lists



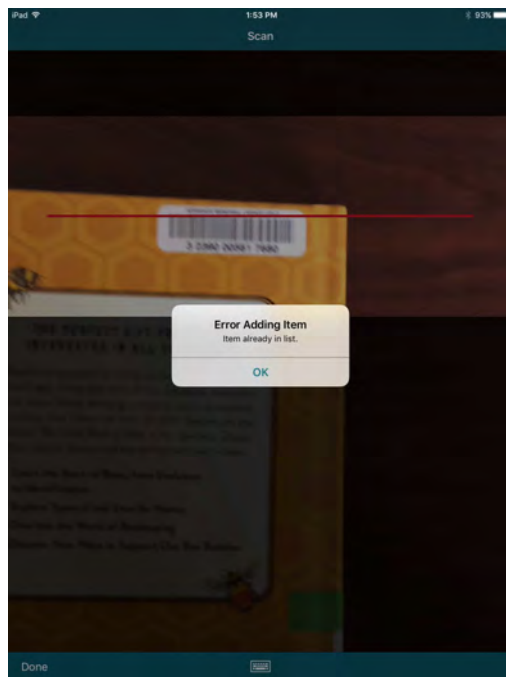
Mobile Worklists - Creating Lists



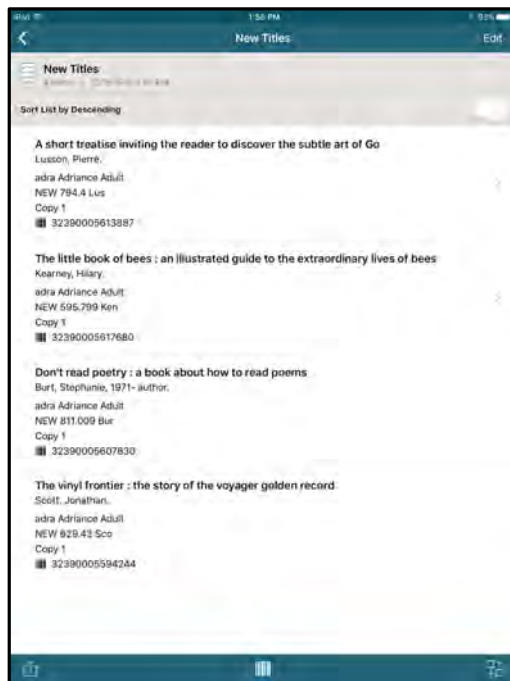
Mobile Worklists - Creating Lists



Mobile Worklists - Creating Lists



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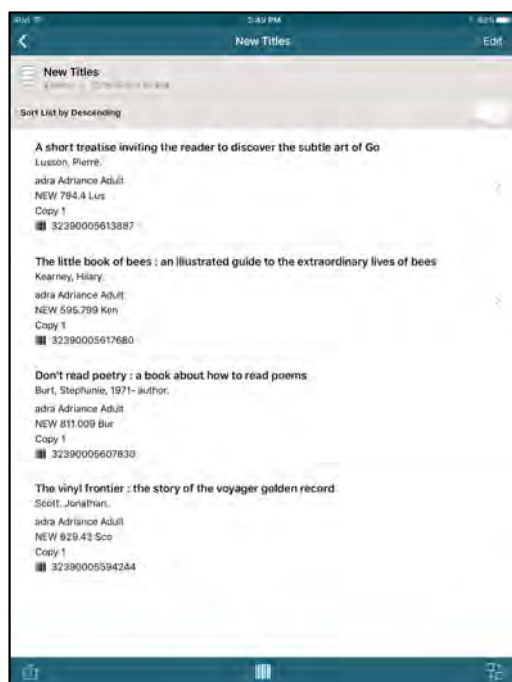


Mobile Worklists - working with records



- ▶ Viewing Item details - from your lists, select the list you want to work with

Mobile Worklists - working with records



- ▶ Viewing Item details - from your lists, select the list you want to work with -
- ▶ Then select the item to look at

Mobile Worklists - working with records



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Mobile Worklists - working with records



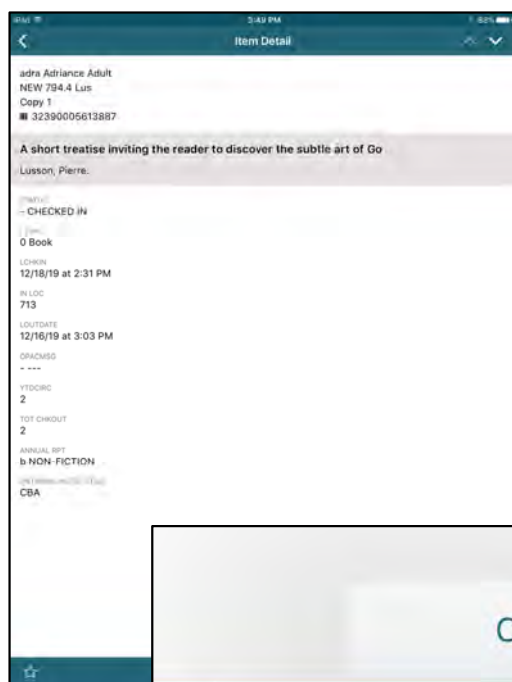
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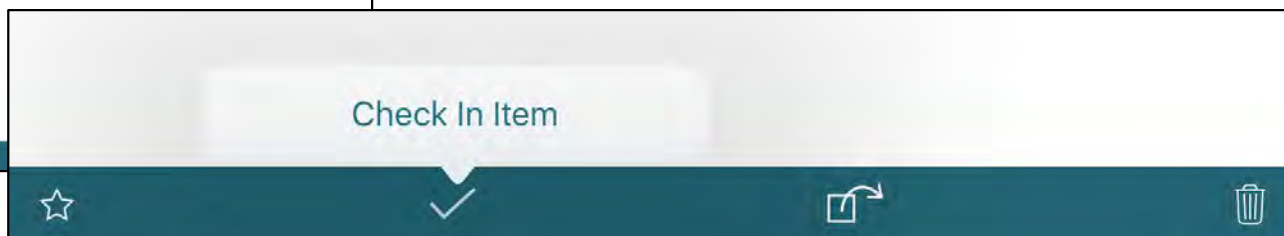


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Mobile Worklists - working with records



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Mobile Worklists - Checking in Items

Record			
Checked out on 12-19-2019 10:40AM to Duck, Rosie M. due on 12-27-2019			
i64406088 Last Updated: 12-19-2019 Created: 01-30-2019 Revisions: 74			
COPY #	1	INVDA	- -
ICODE1	0	IN LOC	724
LOCATION	mhl Mid-Hudson Library System		
ANNUAL RPT	n SUPPRESS ITEM	# RENEWALS	0
LOANRULE	151		
I TYPE	29 Videocassette	#OVDNOTICE	0
STATUS	- DUE 12-27-2019		
PRICE	\$20.00	ODUE DATE	- -
INTL USE	1		
OUT DATE	12-19-2019 10:40AM	IUSE3	0
COPY USE	0		
OUT LOC	724	RECAL DATE	- -
IMESSAGE			
DUE DATE	12-27-2019	TOT CHKOUT	12
OPACMSG			
PATRON#	1648131	LYRCIRC	0
YTD CIRC	12		
LPATRON	1648131	TOT RENEW	8
LYRCIRC	0		
LOUTDATE	08-27-2019 10:57AM		
AGENCY	0		
LCHKIN	08-27-2019 12:49PM		
CALL #	092	YorkVHS Goldenrod	
BARCODE	32380100049624		
MESSAGE	Please make sure that the video is rewind		
INT NOTE	Wed Jul 03 2019: Bill \$20.00, lost by .p16056577		
INT NOTE	Wed Jul 03 2019: Paid \$20.00 and lost by p16056577		
ENTERED BY	mhlstoc		

Mobile Worklists - Checking in Items

Item Detail

mhl Mid-Hudson Library System
YorkVHS Goldenrod
Copy 1
32380100049624

Goldenrod Taffy Documentary

2019-12-27
29 Videocassette
8/27/19 at 12:49 PM
724
8/27/19 at 10:57 AM
12
n SUPPRESS ITEM
Please make sure that the video is rewind
Wed Jul 03 2019: Bill \$20.00, lost by .p16056577

Check In Item

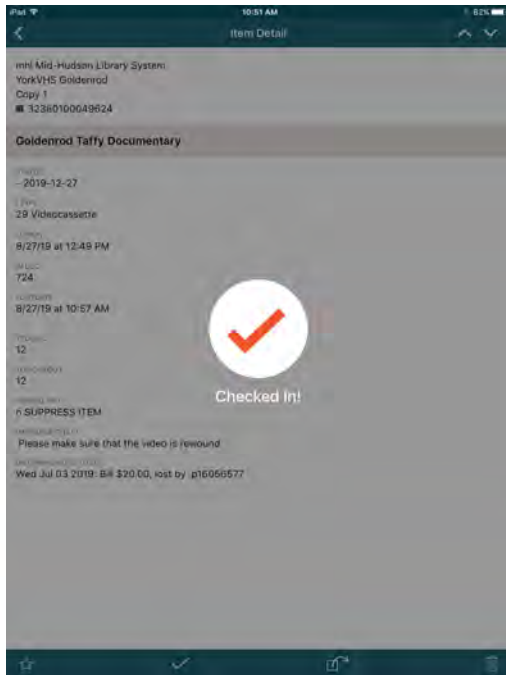
Record

Checked out on 12-19-2019 10:40AM to Duck, Rosie M. due on 12-27-2019
i64406088 Last Updated: 12-19-2019 Created: 01-30-2019 Revisions: 74

COPY #	1	INVDA	- -	LOCATION	mhl Mid-Hudson Library System
ICODE1	0	IN LOC	724	LOANRULE	151
ANNUAL RPT	n SUPPRESS ITEM	# RENEWALS	0	STATUS	- DUE 12-27-2019
I TYPE	29 Videocassette	#OVDNOTICE	0	INTL USE	1
PRICE	\$20.00	ODUE DATE	- -	COPY USE	0
OUT DATE	12-19-2019 10:40AM	IUSE3	0	IMESSAGE	
OUT LOC	724	RECAL DATE	- -	OPACMSG	
DUE DATE	12-27-2019	TOT CHKOUT	12	YTDIRC	12
PATRON#	1648131	TOT RENEW	8	LYRCIRC	0
LPATRON	1648131	LOUTDATE	08-27-2019 10:57AM	AGENCY	0
LCHKIN	08-27-2019 12:49PM				

CALL # 092 YorkVHS Goldenrod
BARCODE 32380100049624
MESSAGE Please make sure that the video is rewind
INT NOTE Wed Jul 03 2019: Bill \$20.00, lost by .p16056577
INT NOTE Wed Jul 03 2019: Paid \$20.00 and lost by p16056577
ENTERED BY mhlstoc

Mobile Worklists - Checking in Items



Record			
Not checked out			
i64406088 Last Updated: 12-19-2019 Created: 01-30-2019 Revisions: 75			
COPY #	1	INVDA	- -
ICODE1	0	IN LOC	724
ANNUAL RPT	n SUPPRESS ITEM	# RENEWALS	0
I TYPE	29 Videocassette	#OVDNOTICE	0
PRICE	\$20.00	ODUE DATE	- -
OUT DATE	- -	IUSE3	0
OUT LOC	724	RECAL DATE	- -
DUE DATE	- -	TOT CHKOUT	12
PATRON#	0	TOT RENEW	8
LPATRON	1648131	LOUTDATE	12-19-2019 10:40AM
LCHKIN	12-19-2019 10:51AM	LOCATION	mhl Mid-Hudson Library System
LOANRULE	0	STATUS	- CHECKED IN
INTL USE	1	COPY USE	0
IMESSAGE		OPACMSG	
YTDCIRC	12	LYRCIRC	0
AGENCY	0		
CALL #	092	YorkVHS Goldenrod	
BARCODE	32380100049624		
MESSAGE	Please make sure that the video is rewind		
INT NOTE	Wed Jul 03 2019: Bill \$20.00, lost by p16056577		
INT NOTE	Wed Jul 03 2019: Paid \$20.00 and lost by p16056577		
ENTERED BY	mhlstoc		

Mobile Worklists - Checking in Items



Record			
Not checked out			
i64406088 Last Updated: 12-19-2019 Created: 01-30-2019 Revisions: 75			
COPY #	1	INVDA	- -
ICODE1	0	IN LOC	724
ANNUAL RPT	n SUPPRESS ITEM	# RENEWALS	0
I TYPE	29 Videocassette	#OVDNOTICE	0
PRICE	\$20.00	ODUE DATE	- -
OUT DATE	- -	IUSE3	0
OUT LOC	724	RECAL DATE	- -
DUE DATE	- -	TOT CHKOUT	12
PATRON#	0	TOT RENEW	8
LPATRON	1648131	LOUTDATE	12-19-2019 10:40AM
LCHKIN	12-19-2019 10:51AM		
LOCATION	mhl Mid-Hudson Library System		
LOANRULE	0		
STATUS	- CHECKED IN		
INTL USE	1		
COPY USE	0		
IMESSAGE			
OPACMSG			
YTD CIRC	12		
LYR CIRC	0		
AGENCY	0		
CALL #	092 YorkVHS Goldenrod		
BARCODE	32380100049624		
MESSAGE	Please make sure that the video is rewind		
INT NOTE	Wed Jul 03 2019: Bill \$20.00, lost by .p16056577		
INT NOTE	Wed Jul 03 2019: Paid \$20.00 and lost by p16056577		
ENTERED BY	mhlstoc		

Mobile Worklists - Checking in Items

Item Detail

mhl Mid-Hudson Library System
YorkVHS Goldenrod
Copy 1
32380100049624

Goldenrod Taffy Documentary

STATUS: - 2019-12-27
TYPE: 29 Videocassette
LOAN#: 8/27/19 at 12:49 PM
IN LOC: 724
LOAN DATE: 8/27/19 at 10:57 AM
YTD CIRC: 12
YTD CHECKOUT: 12
ANNUAL RPT: n SUPPRESS ITEM
MESSAGE: FYI: Please make sure that the video is rewind
Wed Jul 03 2019: Bill \$20.00, lost by p16056577

Always keep items on list
Ask me each time

Record

Not checked out
i64406088 Last Updated: 12-19-2019 Created: 01-30-2019 Revisions: 75

COPY #	1	INVDA	- -	LOCATION	mhl Mid-Hudson Library System
ICODE1	0	IN LOC	724	LOANRULE	0
ANNUAL RPT	n SUPPRESS ITEM	# RENEWALS	0	STATUS	- CHECKED IN
ITYPE	29 Videocassette	#OVDNOTICE	0	INTL USE	1
PRICE	\$20.00	ODUE DATE	- -	COPY USE	0
OUT DATE	- -	IUSE3	0	IMESSAGE	
OUT LOC	724	RECAL DATE	- -	OPACMSG	
DUE DATE	- -	TOT CHKOUT	12	YTD CIRC	12
PATRON#	0	TOT RENEW	8	LYRCIRC	0
LPATRON	1648131	LOUTDATE	12-19-2019 10:40AM	AGENCY	0
LCHKIN	12-19-2019 10:51AM				

CALL # 092 YorkVHS Goldenrod
BARCODE 32380100049624
MESSAGE Please make sure that the video is rewind
INT NOTE Wed Jul 03 2019: Bill \$20.00, lost by p16056577
INT NOTE Wed Jul 03 2019: Paid \$20.00 and lost by p16056577
ENTERED BY mhlstoc

Mobile Worklists - Checking in Items

10:51 AM 52%

Item Detail

mhl Mid-Hudson Library System
 York/VHS Goldenrod
 Copy 1
 # 32380100649824

Goldenrod Taffy Documentary

Created
 2019-12-27

Form
 29 Videocassette

Created
 8/27/19 at 12:49 PM

Id
 724

Updated
 8/27/19 at 10:57 AM

Genre
 12

Classification
 12

Barcode
 12345678901234

SUPPRESS ITEM

Suppressed by
 Please make sure that the video is /yround
 Last reviewed by 12345678901234

Wed Jul 03 2019: B# \$20.00, lost by p1606/677

You can always change this option in Settings.

OK

Record			
Not checked out			
i64406088 Last Updated: 12-19-2019 Created: 01-30-2019 Revisions: 75			
COPY #	1	INVDA	- -
ICODE1	0	IN LOC	724
ANNUAL RPT	n SUPPRESS ITEM	# RENEWALS	0
I TYPE	29 Videocassette	#OVDNOTICE	0
PRICE	\$20.00	ODUE DATE	- -
OUT DATE	- - ;	IUSE3	0
OUT LOC	724	RECAL DATE	- -
DUE DATE	- -	TOT CHKOUT	12
PATRON#	0	TOT RENEW	8
LPATRON	1648131	LOUTDATE	12-19-2019 10:40AM
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Mobile Worklists - Checking in Items



Record			
Not checked out			
i64406088 Last Updated: 12-19-2019 Created: 01-30-2019 Revisions: 75			
COPY #	1	INVDA	- -
ICODE1	0	IN LOC	724
ANNUAL RPT	n SUPPRESS ITEM	# RENEWALS	0
I TYPE	29 Videocassette	#OVDNOTICE	0
PRICE	\$20.00	ODUE DATE	- -
OUT DATE	- -	IUSE3	0
OUT LOC	724	RECAL DATE	- -
DUE DATE	- -	TOT CHKOUT	12
PATRON#	0	TOT RENEW	8
LPATRON	1648131	LOUTDATE	12-19-2019 10:40AM
LCHKIN	12-19-2019 10:51AM		
LOCATION	mhl Mid-Hudson Library System		
LOANRULE	0		
STATUS	- CHECKED IN		
INTL USE	1		
COPY USE	0		
IMESSAGE			
OPACMSG			
YTD CIRC	12		
LYR CIRC	0		
AGENCY	0		
CALL #	092	YorkVHS Goldenrod	
BARCODE	32380100049624		
MESSAGE	Please make sure that the video is rewound		
INT NOTE	Wed Jul 03 2019: Bill \$20.00, lost by p16056577		
INT NOTE	Wed Jul 03 2019: Paid \$20.00 and lost by p16056577		
ENTERED BY	mhlstoc		

Mobile Worklists - Checking in Items *with holds*...

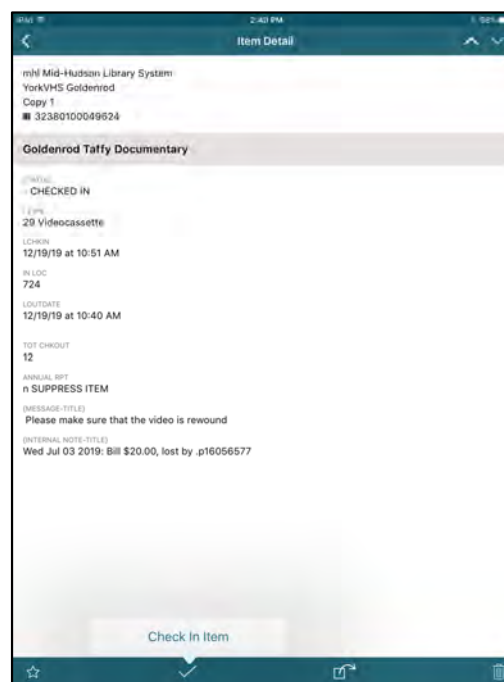
Summary		Summary					
Record	i64406088	View <input type="button" value="h"/> Hold <input type="button" value="v"/>					
Item-Level Holds	0	#	Recnum	Call Num	Barcode	Location	Due Date
Bib-Level Hold	1	1	i64406088	YorkVHS Goldenrod	32380100049624	mhl	CHECKED IN
		2	i65293381	YorkFilm Gold	32380100049756	mhl	BILLED



Mobile Worklists - Checking in Items *with holds...*



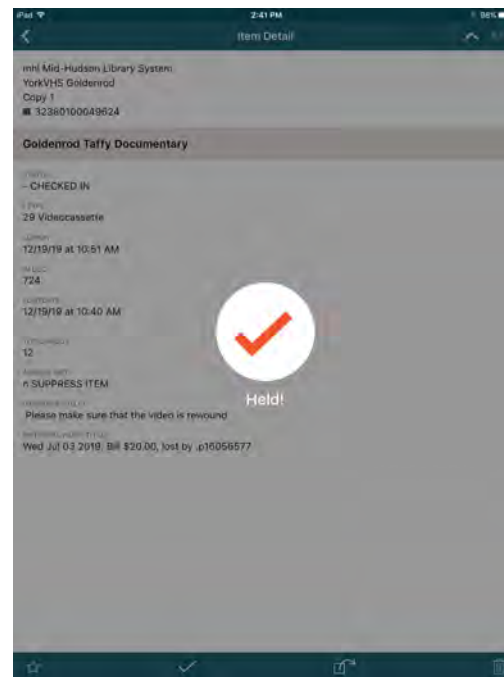
Mobile Worklists - Checking in Items *with holds...*



Mobile Worklists - Checking in Items *with holds*...



Mobile Worklists - Checking in Items *with holds*...



Mobile Worklists - Checking in Items *with holds...*



Mobile Worklists - Checking in Items *with holds...*



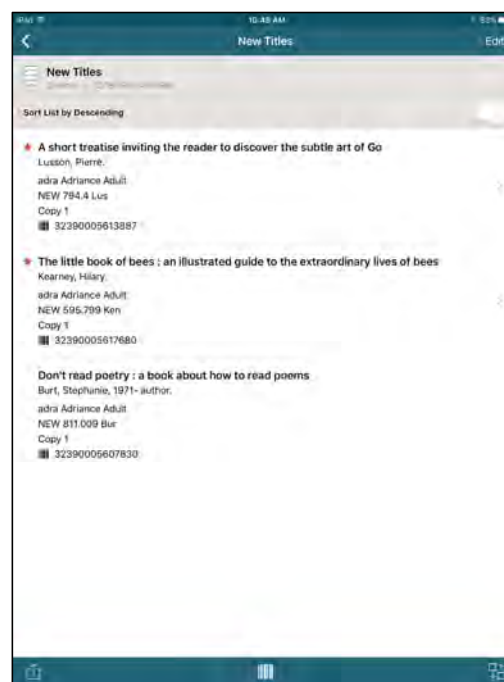
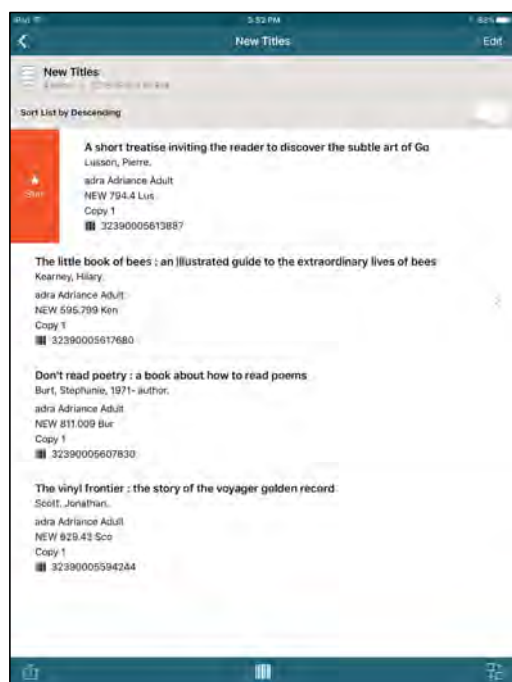
Mobile Worklists - Checking in Items *with holds...*

Not checked out and ON HOLDSHELF since 01-07-2020 02:41PM until 01-16-2020

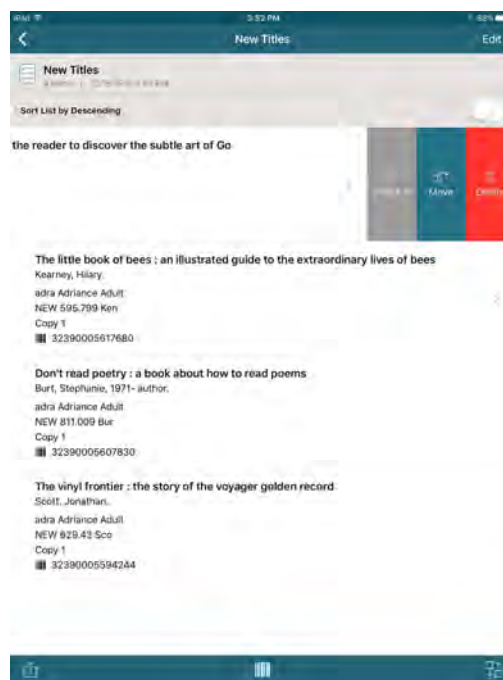
i64406088 Last Updated: 01-07-2020 Created: 01-30-2019 Revisions: 77

COPY #	1	INVDA	- -	LOCATION	mhl Mid-Hudson Library System
ICODE1	0	IN LOC	724	LOANRULE	0
ANNUAL RPT	n SUPPRESS ITEM	# RENEWALS	0	STATUS	! ON HOLDSHELF
I TYPE	29 Videocassette	#OVDNOTICE	0	INTL USE	1
PRICE	\$20.00	ODUE DATE	- -	COPY USE	0
OUT DATE	- - :	IUSE3	0	IMESSAGE	
OUT LOC	724	RECAL DATE	- -	OPACMSG	
DUE DATE	- -	TOT CHKOUT	12	YDCIRC	0
PATRON#	0	TOT RENEW	8	LYRCIRC	12
LPATRON	1648131	LOUTDATE	12-19-2019 10:40AM	AGENCY	0
LCHKIN	12-19-2019 10:51AM				

Mobile Worklists - working with records

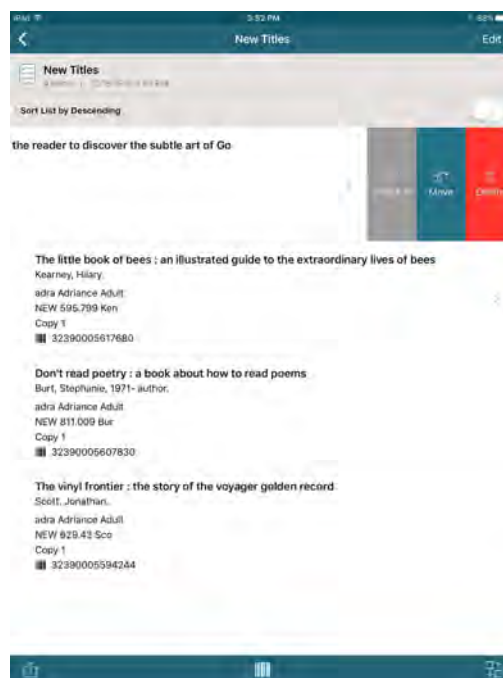


Mobile Worklists - working with records



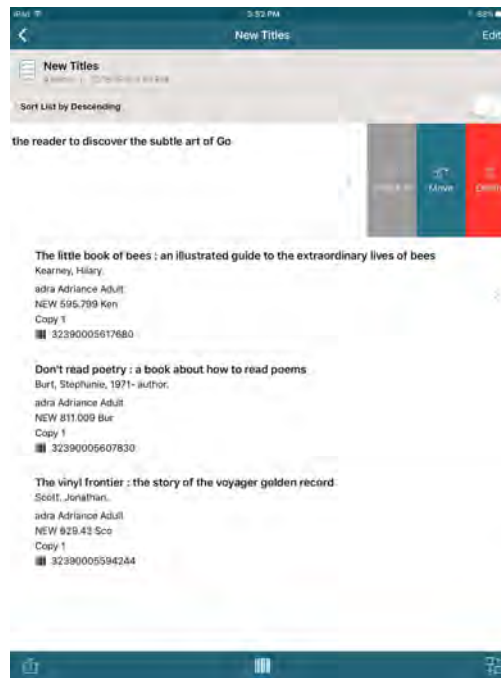
Mobile Worklists - working with records

- ▶ Check In
- ▶ Move
- ▶ Delete



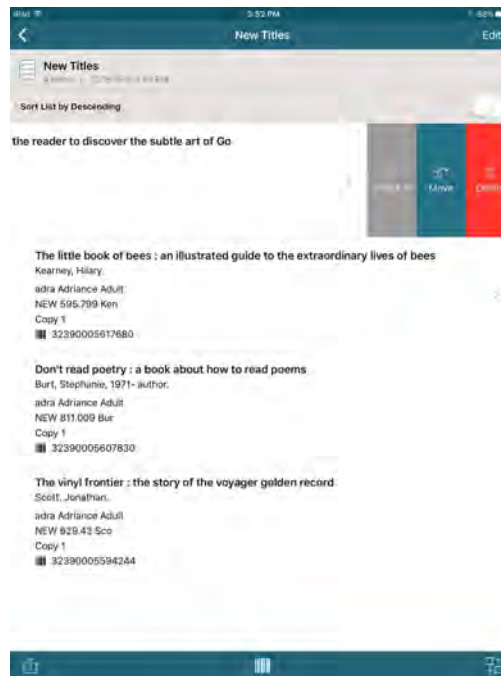
Mobile Worklists - working with records

- ▶ Check In
- ▶ Move
- ▶ Delete - *only deletes from the list, does not delete the item!*

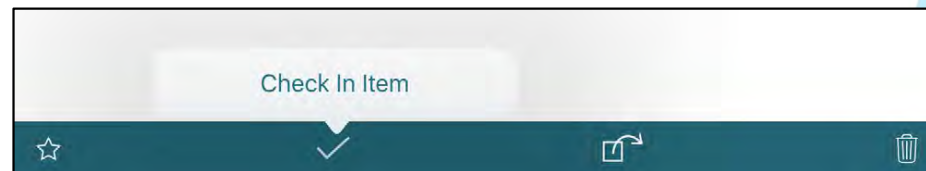
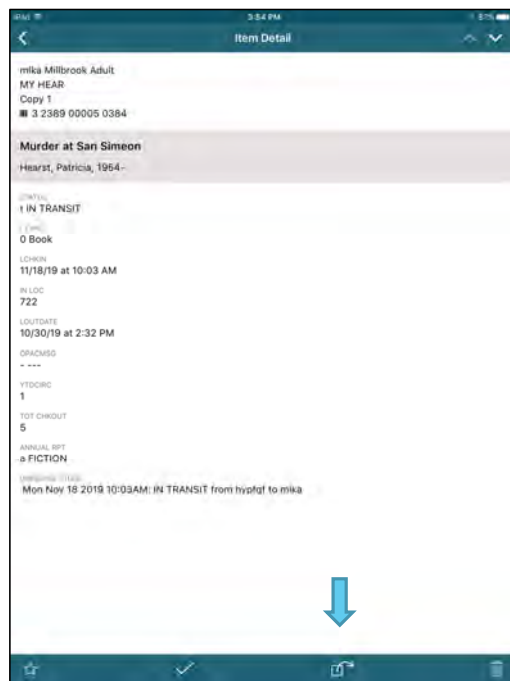


Mobile Worklists - working with records

- ▶ Check In
- ▶ Move
- ▶ Delete - *only deletes from the list, does not delete the item!*
 - ▶ *By the way, don't blink...*



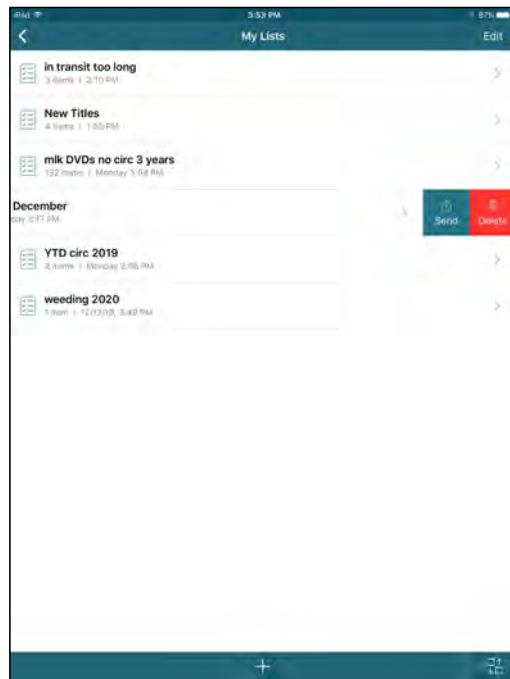
Mobile Worklists - Moving Records



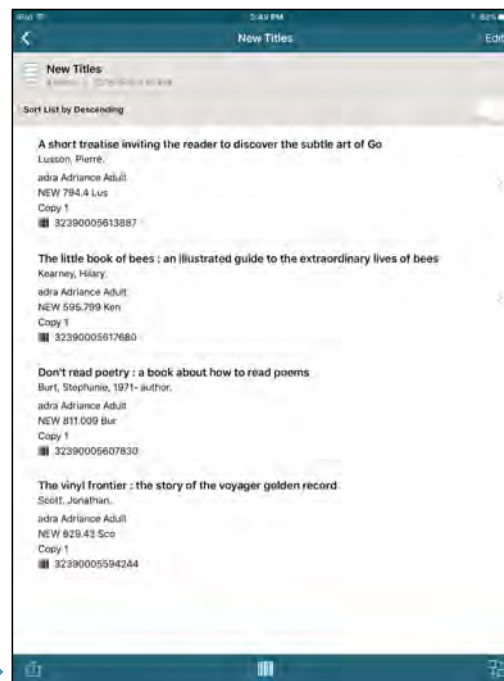
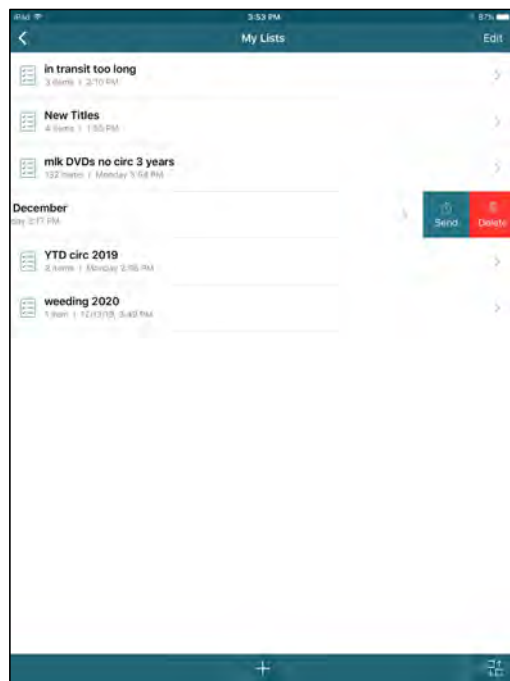
Mobile Worklists - Moving Records



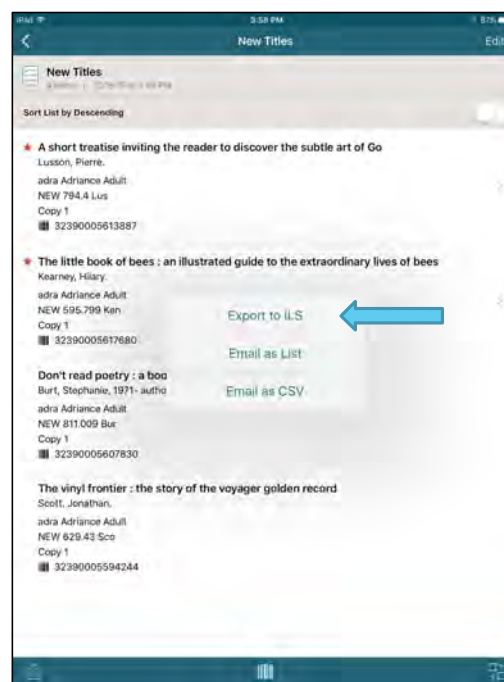
Mobile Worklists - Sending Lists



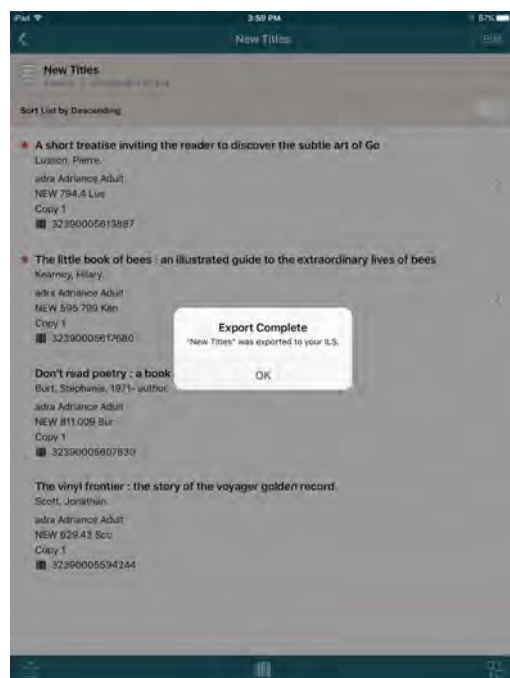
Mobile Worklists - Sending Lists



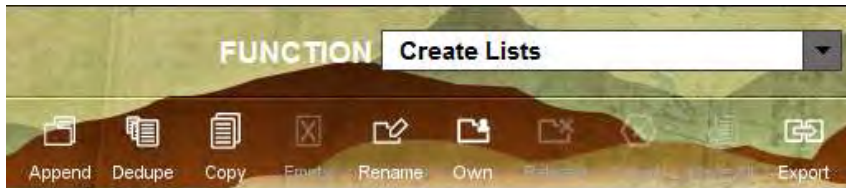
Mobile Worklists - Sending Lists



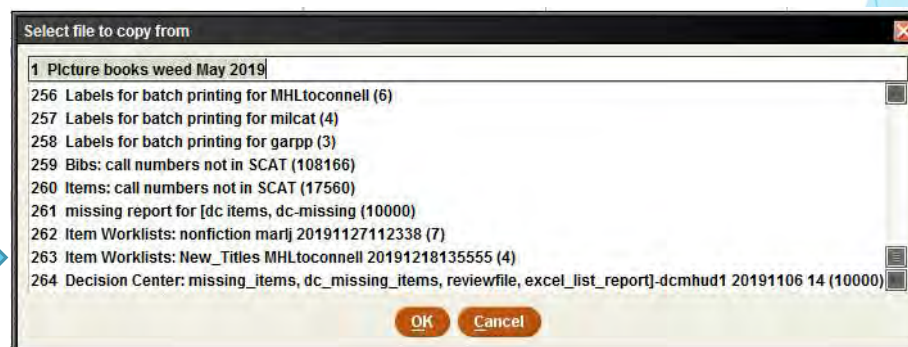
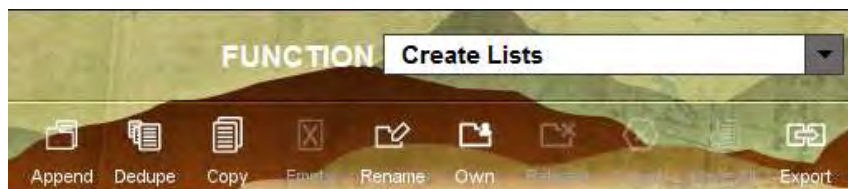
Mobile Worklists - Sending Lists



Mobile Worklists - Sending Lists



Mobile Worklists - Sending Lists



Mobile Worklists - Sending Lists

132	Item Worklists: New_Titles MHLtoconnell 20191218135555 (12-18-2019)	4	10000
133	weed 5 years	524	10000
134	BEA ne	134	10000
135	soon to	47	10000
136	BEA w	863	10000
137		0	10000
138	no long	118	10000
139		0	10000

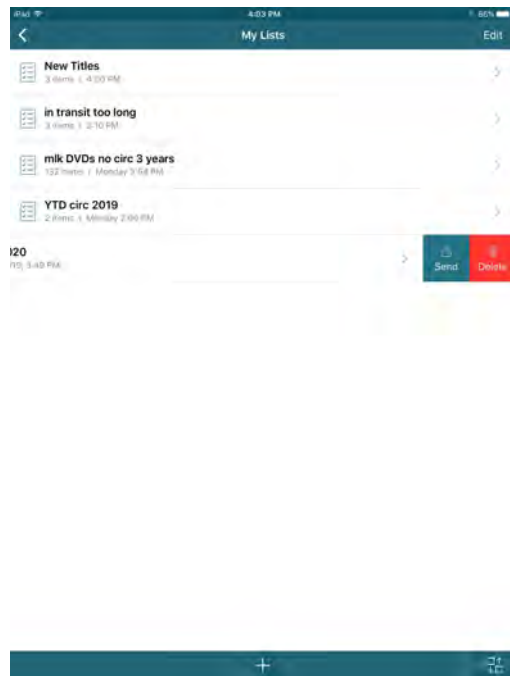
Warning

Do you want to remove the file being copied from?

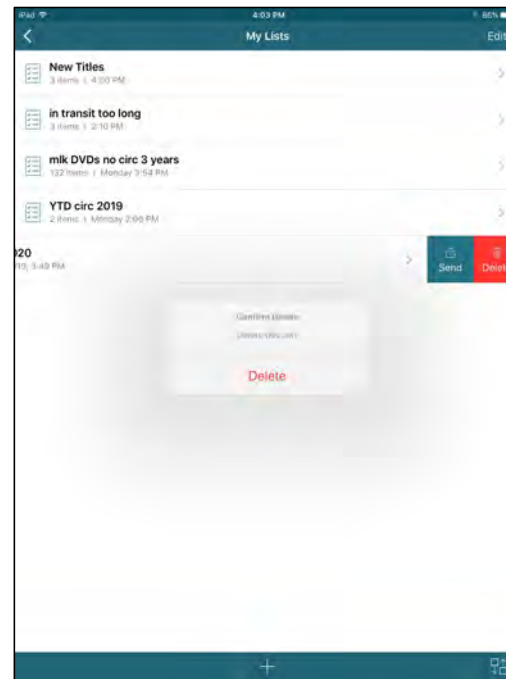
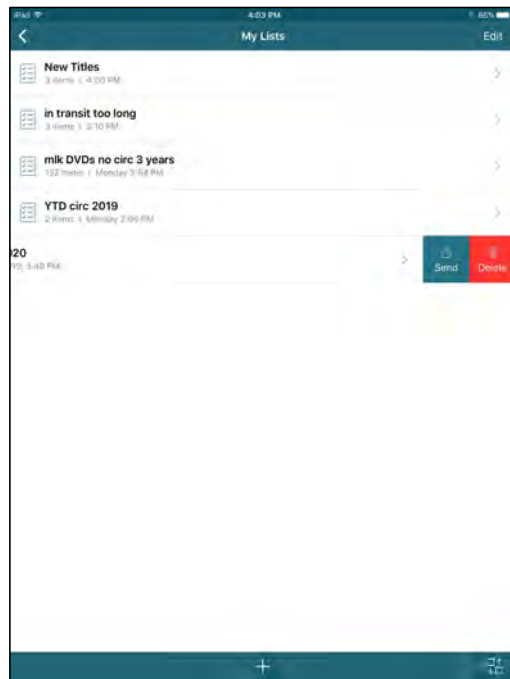
Yes

No

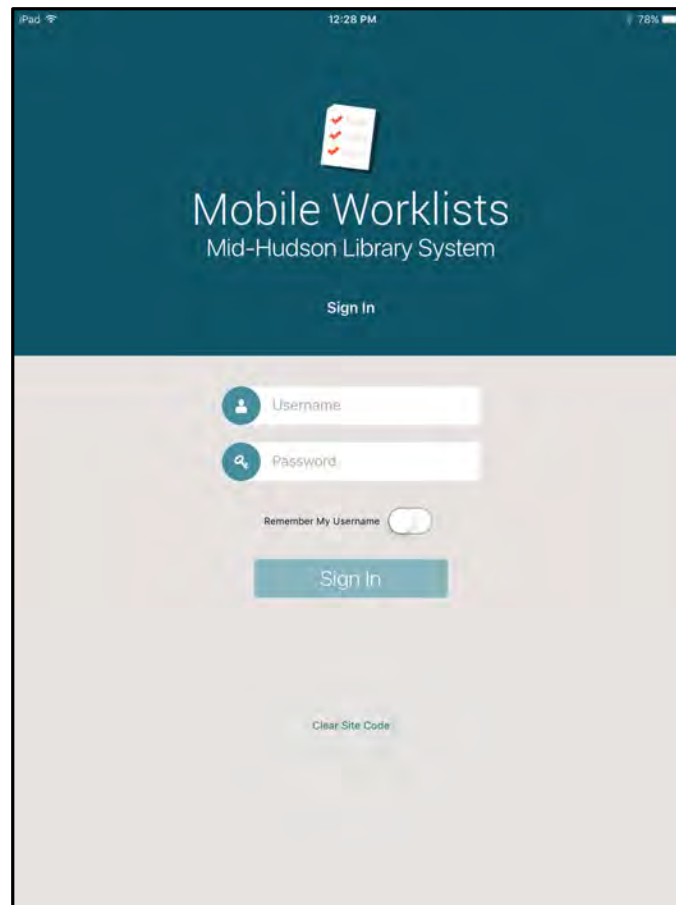
Mobile Worklists - Deleting Lists



Mobile Worklists - Deleting Lists




So, any questions..?




The screenshot shows the login interface for the Mobile Worklists application on an iPad. The status bar at the top indicates 'iPad', signal strength, time '12:28 PM', and battery level '78%'. The app's header is a dark teal color with a small icon of a notepad with red checkmarks. Below the icon, the text 'Mobile Worklists' is displayed in a large, white, sans-serif font, followed by 'Mid-Hudson Library System' in a smaller, white, sans-serif font. A 'Sign In' link is centered below the header. The main content area has a light gray background and contains a login form. The form includes a 'Username' field with a person icon, a 'Password' field with a magnifying glass icon, and a 'Remember My Username' toggle switch. A 'Sign In' button is positioned below the form. At the bottom of the screen, there is a 'Clear Site Code' link.


12:28 PM 78%



Mobile Worklists
Mid-Hudson Library System

Sign In

 Username

 Password

Remember My Username ☐

Sign In

Clear Site Code

So, any questions..?

Any time you have questions or comments,
Please feel free to send an email to:

toconnell@midhudson.org