Overview

SirsiDynix Portfolio 5.0.1 features the completed mobile layouts. This option allows you to enable any profile to be mobile-friendly. When a Portfolio administrator selects the “Enable mobile pages” option in the profile settings, the patron interface screen adjusts to the dimensions of the device. A mobile-friendly interface can improve the user experience because it makes it easier for the patron to complete their tasks on whichever screen size they use. This guide describes the differences between the desktop version of Portfolio and the new mobile layouts, including those previewed in 5.0.0. This guide also includes some general advice for working with the mobile feature, including custom CSS and JavaScript tips.

The following sections describe the features included in Portfolio 5.0.1.

Home Page

![Home Page Image]

Main Menu

To access the main menu on Mobile, select the Menu icon. To close the menu, select the X icon or select outside of the menu to return to the previous screen.
Select Language

The Select Language option has been moved from the home page to the main menu. A Globe icon displays next to the menu option. To change the language on mobile devices, select Menu (Ξ) on the home screen, select Select Language, and then select the desired language. The patron is taken back to the previous page with the selected language now being used.

Book River

The book river on the home page has been styled to adjust to the screen dimensions. To navigate the book river, patrons can select the left and right arrows. Gestures are not included in this release, so swiping the book river will not work. To view details of a title in the book river, patrons can select the title to expand its details.
**Most Popular Book list**

The **Most Popular** book list for SirsiDynix Symphony is already styled differently than the other book lists. This book list does not display as a book river and instead displays a list of popular titles, authors, and subjects. When a patron selects one of these links, SirsiDynix Portfolio will perform a search. The patron can select **More** and Portfolio will open a dialog box with more links. On mobile, this dialog box is a full screen page. In addition, there is a **More** option at the end of each category on the mobile version.
**Patron Login**

The Log In and Forgot PIN modals for the patron interface have been updated for mobile layouts. In addition, a title has been added to these modals.
Logo

Library administrators who want to customize the search interface with their library’s logo on mobile or desktop display should be aware that there are size and resolution considerations for doing so. Default CSS in Portfolio already handles the logo sizes in both mobile and desktop displays. This means that library administrators can use the same logo for mobile that they do for desktop. The following table specifies the defaults for the delivered formats:

<table>
<thead>
<tr>
<th>Format</th>
<th>Max height</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile</td>
<td>48px</td>
</tr>
<tr>
<td>Flat theme</td>
<td>80px</td>
</tr>
<tr>
<td>Open theme</td>
<td>70px</td>
</tr>
<tr>
<td>Boxed theme</td>
<td>75px</td>
</tr>
</tbody>
</table>

Library administrators can use custom CSS to change the size of their logo on mobile or desktop layouts.

Searching

Library patrons will have a different search experience on mobile layouts. The search results, facets, and advanced search have all been restyled to fit into mobile layouts so that library patrons can search the library catalog on any device or at any screen size.
Select an Action Menu

The Select an Action menu is now located under a dot menu icon on each result. Patrons can select the icon to open the slide menu with the configured actions.

To filter search results, select the **Filter Results** option on the search results page. However, if there is more than one action or widget configured, the **Filter Results** option is replaced with a Select an Action menu.

![Select an Action Menu](image)

Search Box

The search box is still located at the top of the screen on the home page and search results. To access additional search options on mobile devices, select **Search Options**. SirsiDynix Portfolio displays two drop-down lists: the Limits/Targets drop-down list and the Fields drop-down list. Portfolio also displays the **Quick Links** option and the **Advanced Search** option. To hide the Search Options, select **Search Options** again.

**Note:** The Search Options depend on configuration in the Portfolio Admin console.
Search Results
The search results page is simpler on the mobile layouts. The options on the right side of the results (Place Hold, Text this to Me, Preview, etc.) are all combined into the Select an Action menu accessible from the dot menu icon. The checkboxes are gone and the results are no longer numbered.

Discovery and Federated Tabs Drop-down List
After a patron performs a search on mobile layouts, a drop-down list displays below Search Options. This drop-down list is the mobile version of the search tabs that display on desktop, which feature each of the configured search targets. To switch targets, select the drop-down list and select the search target. If the
patron applies a search target prior to the search, the post-search drop-down list will not display. If a profile is configured to use interfiled EBSCO EDS results and ILS results, the mobile layout instead defaults to ILS results and displays a drop-down list option for each. Portfolio administrators who want to configure this drop-down list should be aware it is the same configuration as the search tabs on the desktop view. For more information, see the “Fields: Add/Edit/Copy Profile” topic in the Portfolio Admin console Help.

Reserve Search

To use the Course Reserves search option on mobile layouts, the patron can select a reserve search target from the Limits/Targets drop-down list under Search Options. The drop-down list changes to a reserve search drop-down list that offers three different options: Course Name, Course ID, or Instructor. When a patron selects Course Name or Course ID and then performs a search, a list of courses displays. When the patron selects a result, a list of instructors displays. Alternatively, if the patron selects Instructor first and performs a search, a list of instructors displays. The patron can select an instructor, and then a list of courses displays.
Browse Search

Any fields that you have selected as facets display in the list as “Keywords in [field name] headings”, which indicates that the field, when selected by a patron, allows a browse-type search. For example, searching for “Smith” in “Keyword in Author headings” produces a list of authors in which “Smith” appears anywhere in the author field, followed by the number of books listed for each author. Selecting the author’s name displays the list of books by that author.

The list of results displays in a mobile-friendly format and when a patron selects a result, they are directed to the list of results for the selected facet. To perform another browse search with the same field option, the patron can enter another search term into the search box.
Search Facets

If patrons want to narrow their search on mobile devices, they can use the slide menu containing the search facets. The functionality is the same as it is on desktop, while the workflow requires more steps to display all of the fields.

All facet categories for library results now include the option to sort the facets by either **Number of Results** or **A to Z** using a drop-down list at the top of the slide menu.
To limit search results

1. Select Filter Results.
   
   **Note:** On mobile layouts, if more than one action or widget is configured, the Filter Results option is replaced with a dot menu. Open the dot menu, then select **Filter Results**.
   
The search facets display in a slide menu from the right side of the search results.

2. Select the facet category to open the list of facet options in each category.
3. Select the checkbox next to each facet you want to include and select **Include**. Alternatively, if you want to exclude the category, select **Exclude**. The search results sort accordingly.
   
   **Note:** Once a patron selects a facet, either with **Include** or with **Exclude**, it cannot be reselected or reapplied to the search results. The particular facet will not display in the list of facets.

**Publication date facet**

The biggest change to the search results in the mobile theme is in the publication date category. Instead of the administrator having the option to configure the profile to show either a graph or a list of dates on the desktop version, all of the available publication dates display as a list on the mobile version. Simply select the checkbox next to each date you want to include or exclude, and select either **Include** or **Exclude**.

![Publication Date](image)

**EDS search results facets**

The EDS search facets have been similarly redesigned with a few key differences. The **Sort By** drop-down list is not available for EDS results and instead of a checkbox and **Include** or **Exclude** options, the facets are simply a link that automatically limits the search results when selected.
Pagination
To page through the search results on mobile layouts, patrons can use the forward or back arrows at the bottom of the search results.

Quicksearch Buttons
The Quicksearch buttons are now a link labeled Quick Links in mobile layouts, located under Search Options. When a patron selects Search Options, a slide menu opens over the page with the configured Quick Links. If there are no Quick Links enabled, the link will not show. Mobile Quick Links that go to a page
contained in an iFrame have a flexible height and fixed width (100%), so not all content will fit perfectly. If you select to frame one of your own pages or you have any existing pages framed, you may need to make modifications to them.

**EDS Publication Finder Exact Match Placard**

When performing an EBSCO/EDS search, if a patron enters a title that has an exact match on a journal title, the search results display an Exact Match Placard with a search box that has now been styled for mobile layouts. When a patron performs a search on the placard, SirsiDynix Portfolio displays the search results in mobile layouts for that search with the publication applied as a facet.
Result Tabs
The search result tabs are now located in a drop-down list in the mobile theme. This includes federated results.

Advanced Search
The advanced search page is styled to fit on mobile layouts and be user-friendly on devices, but there is no change in the workflow for the patron. The patron can scroll down to see the entire form while the Advanced
Search option stays visible at the bottom of the screen. Advanced Search is located under Search Options on the home page or the search results page.

Making Requests
The Make a Request page has been restyled, but no functionality has changed. Patrons can select a field to edit and then select Submit.
**Placing Holds**

The Place Hold(s) modal has been restyled into a Place Hold page, but no functionality has changed. Patrons select a pickup library from the provided drop-down list and then select **Place Hold.**

![Place Hold Modal](image)

**Assets**

The appearance of assets and the layout of asset details have been adjusted for the mobile version of Portfolio. There are also important considerations for libraries that use assets to stream content.

**Metadata Display**

Patrons can find the metadata of an asset below the asset’s title. Patrons can find more information about a given file in the File Details section of the page. Any actions the library has configured for metadata are also displayed.

**File Actions**

The patron's options for using the file or files provided in the asset have been consolidated in a menu available on the right-hand side of the screen.

**File Carousel**

If an asset contains more than one file, the patron can select the file they want by swiping through a file carousel and selecting the desired file.

**Streaming**

The mobile format supports the use of HTML5 video and audio elements. These replace the use of embedded Silverlight and QuickTime media players, which are not supported in either the mobile or the non-mobile version of SirsiDynix Portfolio.
For more information on file type support in the HTML5 format across different browsers, visit https://developer.mozilla.org/en-US/docs/Web/HTML/Supported_media_formats.

My Account

Account Summary

When a patron selects My Account, their account status information displays at the top of the page. This includes their group status, if they are a part of a group. If their account privilege is going to expire soon, the patron will also have the option to renew their account privilege if they are allowed to do so.

This page contains the information from the My Account sidebar in the desktop version of SirsiDynix Portfolio.

Checkouts

The Checkouts tab of My Account has been updated to a page for mobile styles. The page includes mobile-friendly versions of the Library Checkouts, Digital Checkouts, Group Checkouts (SirsiDynix Symphony only), and Checkout History accordions. Patrons can expand each accordion to view their checkouts information. To perform further actions, patrons can select the dot menu and select an action from the slide menu.
**Holds**

The Holds tab of My Account has been updated to a page for mobile styles. The page includes mobile-friendly versions of the Library Holds, Digital Holds, and Group Holds (SirsiDynix Symphony only) accordions. Patrons can expand the Library Holds accordion to view and manage their holds. To perform further actions, patrons can select the dot menu and select an action from the slide menu.
**Suspend Hold**

To suspend a hold on mobile layouts, patrons now use drop-down lists to select the date. To open the End Date drop-down list, the patron can select the **End Date** checkbox. On desktop, there is still a date picker to select the Start and End dates.

![Suspend Hold](image)

- **Fines**

  The Fines tab of My Account has been updated to a page for mobile styles. The page includes the Current Fines/Blocks, Accruing Fines, Group Fines, Group Accruing Fines, and Payment History accordions. Patrons can expand each accordion to view information or make payments.
Payments
The mobile version of SirsiDynix Portfolio supports all payment types supported in the desktop version, including BLUEcloud Commerce.
Personal Information

The Personal Information tab of My Account has been updated to a page for mobile styles. The page includes the Contact Information, Change Pin, Preferences, SMS Notifications, and Group Info accordions. Patrons can expand each accordion to view or edit the information.
The Requests tab of My Account has been updated to a page for mobile styles. Patrons can now view and edit their requests on mobile layouts by selecting Requests to open the Requests page and selecting the dot menu next to the request they want to edit.
Patron Alerts (Horizon only)

The Patron Alerts tab of My Account has been updated to a page for mobile styles. Patrons can now review their alerts on mobile layouts by selecting **Patron Alerts** to open the **Patron Alerts** page.
General

Accordions
Accordions have been styled for mobile layouts. Spaces between the accordions and other elements on the page have been adjusted as well as the border both above the accordion section and between individual accordion headers and content. Administrators who have modified their pages around accordions will want to check that everything is still displaying correctly.

For mobile layouts, all detail display accordions are closed by default, no matter what the configuration is in the SirsiDynix Portfolio Admin console.

Advisory on Phone Numbers
Previously, the Safari browser was treating ISBNs as phone numbers in the patron interface, creating a link that a patron could click to start a phone call on a mobile phone. Because of this, Safari's automatic phone number processing has been disabled for the patron interface.

If administrators want their patrons who are using mobile layouts to be able to select a phone number to make a call, whether for Apple or Android, they will need to surround the phone number with the <a> tag with the "tel:" protocol in the "href" attribute. For example, the phone number 555-555-5555 needs to be entered as <a href="tel:555-555-5555">555-555-5555</a>.

Google Preview Limitations
The mobile version of SirsiDynix Portfolio includes an embedded Google Preview modal, but the ability to change the modal’s appearance is limited. As Google owns the embedded content, button and font sizes within the modal are not configurable.

Mobile Layout Uses Flat Theme
Mobile layouts are only supported on the Flat theme. For a profile on which you want to enable mobile layouts, you can still set whichever theme you prefer. However, all visits to a mobile-enabled profile by a user on mobile layouts display in the Flat theme. Users who visit the profile on a desktop system will continue to see the theme chosen for the profile and language combination as normal. For more information on themes, see the "Managing themes" topic in the Portfolio Admin console Help.

Mobile Widget Configuration
HTML widgets can be configured to display only on mobile, desktop, or both. This allows your library's administrator to customize the mobile experience in SirsiDynix Portfolio. For more information on widget configuration, see the “Fields: HTML Widgets” topic in the Portfolio Admin console Help.

All of the delivered HTML widgets are supported on both desktop and mobile except the widgets listed in the following table, which are only available on desktop:

<table>
<thead>
<tr>
<th>HTML Widget</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Buy it Now</td>
<td>The underlying JavaScript for this button has not yet been updated to handle mobile devices.</td>
</tr>
<tr>
<td>HTML Widget</td>
<td>Reason</td>
</tr>
<tr>
<td>-------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>COinS</td>
<td>Zotero does not have a mobile-friendly version. However, Zotero does offer third-party solutions for mobile. See <a href="https://www.zotero.org/support/mobile">Zotero for Mobile</a> for more information.</td>
</tr>
<tr>
<td>Children’s Literature Comprehensive Database (CLCD)</td>
<td>This widget adds data to the page within HTML tables, which can look bad on low-width screens since the tables do not stay inside container widths if the content is too big.</td>
</tr>
<tr>
<td>Digg</td>
<td>This widget inserts the Digg button on the results toolbar, which does not exist on mobile pages.</td>
</tr>
<tr>
<td>Novelist</td>
<td>This widget adds data to the page within HTML tables, which can look bad on low-width screens since the tables do not stay inside container widths if the content is too big.</td>
</tr>
<tr>
<td>Reddit</td>
<td>This widget inserts the Reddit button on the results toolbar, which does not exist on mobile pages.</td>
</tr>
</tbody>
</table>

**Custom JavaScript for widgets on mobile layouts**

Portfolio now uses the `addToToolbar` function for mobile layouts. `addToToolbar` specifies that the widget should be added to a tab and `tabId` specifies which tab. This means that Portfolio administrators who had custom widgets that were previously adding links to `.resultsToolbar_middle` or `.interfiledToolbar_top` should check `com.sirsient_page.isMobile`. If `isMobile` is true, they must call the new method, `addToToolbar`, and use `tabId` to specify where.

For My Lists, the `tabId` should be null. If you include the widget on My Lists, you should give your containing element an HTML id to ensure that it is not added to the menu more than once.

**Note:** The `addToToolbar` function is not supported for desktop layouts at this time.

**Navigation Paths Removed**

Due to display issues, navigation paths have been removed from child pages within the mobile version of SirsiDynix Portfolio.

**Print Option Disabled for Mobile Layouts**

The option to print an item's details has been disabled for mobile styles. If a patron wants to print, they must view the patron interface on desktop and be connected to a printer.

**Website Layout on Tablets Using Older Android Operating Systems**

Patrons using a tablet running Android 7.1 or older will not see the mobile layout of SirsiDynix Portfolio on their device. Portfolio will instead display in the desktop layout.

**Advisory on Custom CSS, JavaScript, and Mobile Layouts**

Important: We welcome any feedback you may have on custom CSS and mobile layouts in SirsiDynix Portfolio. If you want to submit your feedback, please contact SirsiDynix Customer Support.
**Custom CSS**
Changing colors or fonts in mobile layouts is much easier than in desktop. For an example of how to do this, use the default mobile-theme.css as a template. You can copy and paste it and replace the colors or fonts as desired, and then apply the updated CSS as a custom theme or as custom CSS on the profile.

If you want to limit the number of fields appearing on the mobile search results display, you can use custom CSS to hide specific fields based on the search field entry code. For example, if you want to hide the ISBN fields, you can add the following to your custom CSS file:

```css
.mobile .list .displayElementWrapper.ISBN, .mobile .list .thumb_hidden.ISBN {
  display: none;
}
```

**Mobile-specific Targeting**
The class `.mobile` (or `.nonmobile`, for desktop layouts) is added to the body of the page, so you can append `.mobile` to any CSS rule to target only the mobile layout.

The variable `com_sirsi_ent_page.isMobile` can be used in JavaScript to determine if a page is mobile.

Some mobile-only CSS is present in mobile-base.css and mobile.css within the project.